

END-USER DOCUMENTATION · POWER BI VISUAL

ChartKitchen byDatenWG

IBCS-inspired chart deck: 13 chart modes in one visual — import, mode gallery, features and the complete settings reference.

13

chart modes in one
visual

84

documented settings

15

field roles

Contents

01 · What is ChartKitchen?	2
02 · Quick start	3
03 · The 13 modes	5
04 · ChartKitchen in action	17
05 · Features in detail	20
06 · Settings reference	29
07 · FAQ & troubleshooting	42

01 · What is ChartKitchen?

ChartKitchen byDatenWG is a single Power BI custom visual that unifies 13 chart modes — from columns, bars and lines through waterfall and bridge layouts to an IBCS table, a matrix, KPI cards and a full P&L statement. Instead of picking a different visual for every question, you switch the orientation and keep the same notation, colours and scaling logic.

The design is inspired by the **IBCS® principles** (International Business Communication Standards): one consistent scenario notation — **AC** (actual) filled, **PY** (prior year) grey, **PL** (plan) outlined, **FC** (forecast) hatched — and variances that are always present: absolute and relative variance panels appear automatically next to or above the base chart. Every chart reads by the same rules, whichever mode you choose.

This guide describes the state of version **1.38.0.0**.

02 · Quick start

1 · Import the visual

1. Get the **ChartKitchen byDatenWG** file (extension **.pbviz**).
2. In Power BI Desktop: in the **Visualizations** pane click **... (More options)** → **Import a visual from a file** and select the **.pbviz**.
3. The ChartKitchen icon appears in the Visualizations pane. Drag it onto the report page.

2 · Minimal setup

1. Assign your axis to the **Category** role — a time axis (months, quarters) or a structure (regions, products, accounts).
2. Assign your main measure to the **Actual (AC)** role. With just these two fields the visual already draws labelled columns with a title and a Σ header.
3. While fields are missing, ChartKitchen shows a landing page with tile previews of every mode and the fields each one needs — clicking a tile picks the matching orientation.

Field roles

Field role	Type	What for
Category	Grouping	Time axis (months) or structure (e.g. countries, products). Required; a second category forms a hierarchy in the table.
Actual (AC)	Measure	The actual value — the main measure, drawn filled. Required.
Previous Year (PY)	Measure	Prior-year value, drawn grey. Basis for the Δ PY variance panels.
Plan / Budget (PL)	Measure	Plan or budget value, drawn as an outline. Basis for the Δ PL variance panels.
Forecast (FC)	Measure	Forecast value — drawn hatched automatically.
Benchmark (BM)	Measure	Reference value per category (e.g. market average, target) — shown as a tick marker; basis for the KPI-card status light and the bullet.
Prior-month FC (revision)	Measure	Forecast from the previous cycle — selectable as a variance basis (FC revision: what has shifted since the last forecast?).
Line (combo)	Measure	Second measure as a line over the columns (e.g. margin %) with its own axis on the right. Columns mode only.
Stack series (Stacked)	Grouping	When filled, columns/bars stack by this series (AC per series, with a legend and a total label).
Columns (matrix)	Grouping	Table only: pivots the values into column groups (e.g. quarter → month, max. 2 levels) — with a collapsible column hierarchy like the Power BI matrix.
Filter info (footer)	Measure	Text measure with the current filter context (e.g. via CONCATENATEX/SELECTEDVALUE) — shown as a second footer when the filter footer is on.
Comments	Measure	Text measure: categories with a comment get a numbered marker, the text appears in the tooltip and the comment list.
Small Multiples	Grouping	Splits the chart into small tiles per group — with identical scaling (IBCS small multiples).

Field role	Type	What for
Waterfall type (sum/delta)	Grouping	Waterfall/P&L only: “sum” = absolute subtotal, “delta” = movement (P&L waterfall).
Forecast flag (0=actual · 1=FC · 2=preliminary)	Grouping	Alternative to the FC measure: a 1/0 column — rows flagged 1 are drawn as forecast (hatched), the AC measure runs through.

ChartKitchen byDatenWG
Sample data — add Category and Actual (AC) · Click a preview to pick the chart mode

Columns (Time)
Monthly/quarterly series vs. plan & prior year
Fields: Category (time), AC, PY/PL/FC

Bars (Structure)
Compare regions, products, accounts
Fields: Category, AC, PY/PL

Line
Long series (weeks/days), trend view
Fields: Category (time), AC, PY

Waterfall / Bridge
P&L waterfall or basis → AC bridge
Fields: Category, AC (+ type sum/delta)

Integrated Bridge
Year bridge: PY → AC/FC across the months
Fields: Category (months), AC, PY/PL, FC

Category Bridge
Driver bridge across categories + reconciliat...
Fields: Category, AC, PY/PL

Table (IBCS)
KPI table: bars, hierarchy, Σ, matrix columns
Fields: Category(ies), AC, PY/PL (+ columns)

P&L Statement
P&L rows with cascade columns and levels
Fields: Category, AC, PY, type (sum/delta)

KPI Cards
KPI tiles for monitoring: status, bullet
Fields: Category, AC, PY/PL/BM

Pareto
ABC analysis: top drivers + cumulative %
Fields: Category, AC

Dumbbell
Before/after per category as dot pairs
Fields: Category, AC, PY/PL

Slope
Rank shifts between two points in time
Fields: Category, AC, PY/PL

Aa **Compact** Full HD Presentation
made by Daten-WG

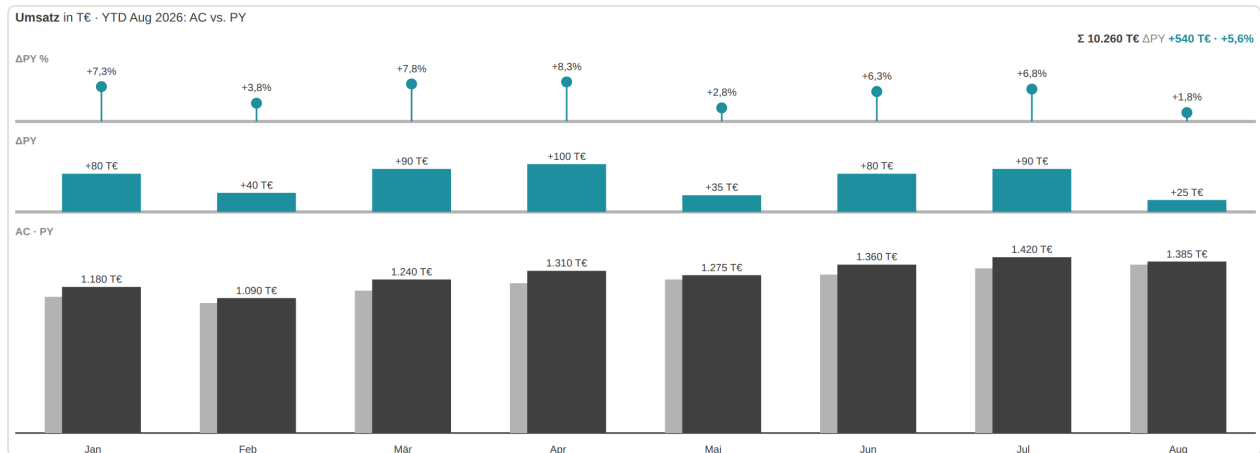
Landing page with empty field wells: a tile overview of every mode with the fields each one needs.

3 · First comparison with PY

1. Add the matching measure to the **Previous Year (PY)** role. The variance panels **ΔPY absolute** and **ΔPY %** appear above the base chart immediately — green when better, red when worse.
2. For a plan comparison also bind **Plan / Budget (PL)**; under **Chart → Layout → Variance basis** you choose what the panels compute against (Auto uses PL, otherwise PY).
3. From here you change the mode under **Chart → Layout → Orientation** — everything that follows builds on that.

03 · The 13 modes

01 Columns



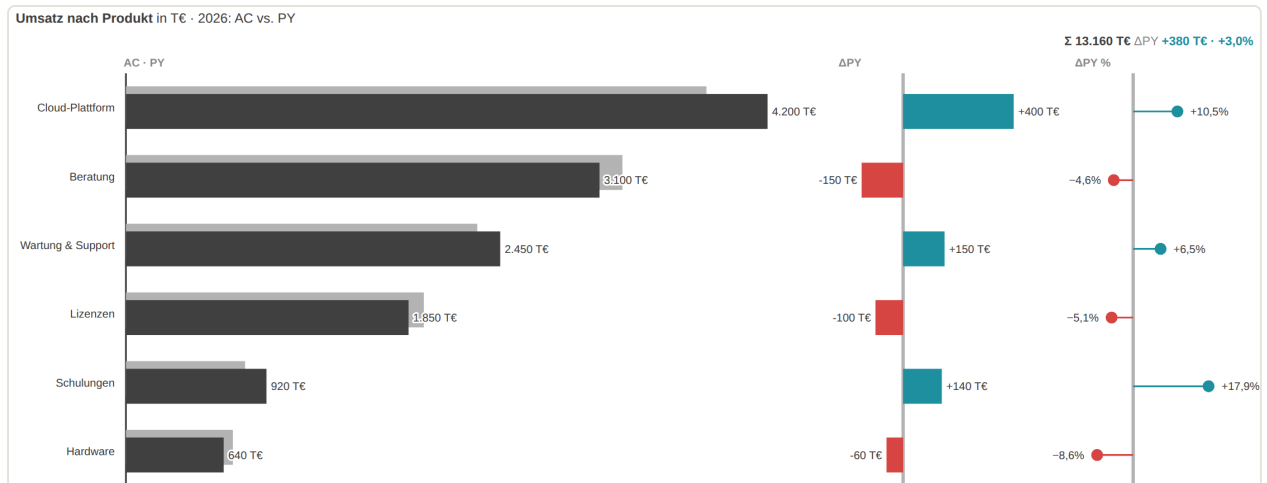
Columns (time series): AC against PY as overlaid columns, topped by the variance panels ΔPY absolute and ΔPY in percent.



AS IT LOOKS IN POWER BI DESKTOP Columns mode with four stacked variance panels — ΔPL %, ΔPL, ΔPY % and ΔPY — above the AC columns; the forecast months from July on are hatched.

The default for time series: months or quarters as columns, AC filled, PY grey (or a triangle when PL is also bound). The variance panels ΔPY absolute and in percent sit above the columns. Use this mode when the time axis is manageable (up to about 24 points) and the deviation per period matters.

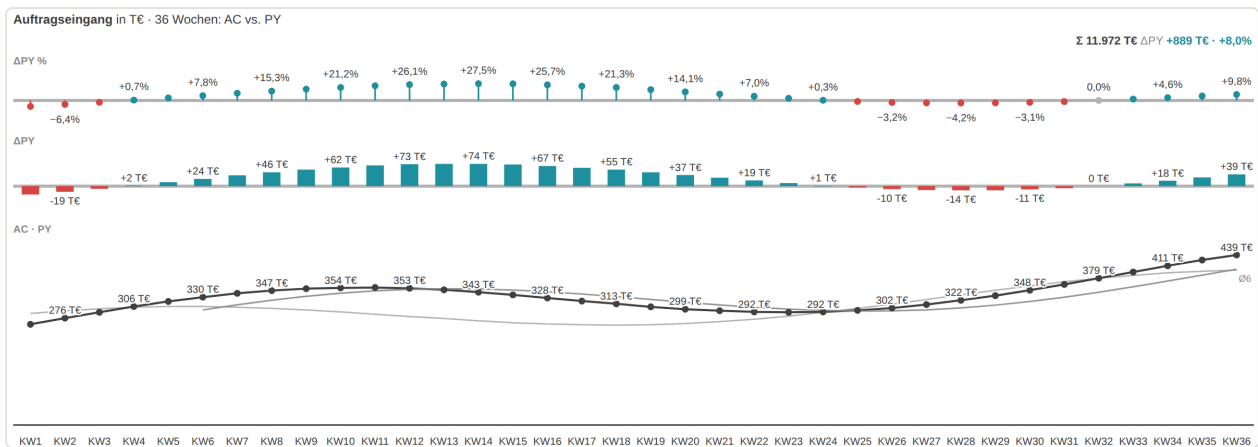
02 Bars



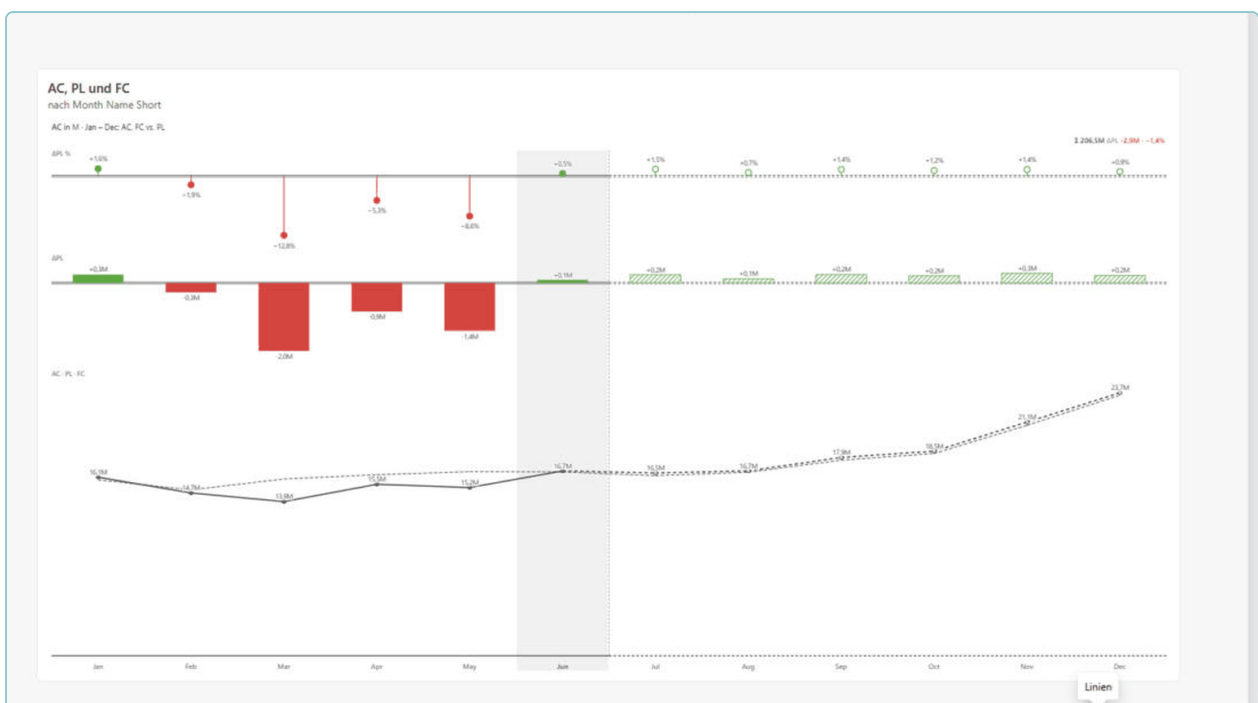
Bars (structure): products ranked by AC descending, with side ΔPY and $\Delta PY\%$ panels for reading the deviations.

For structural comparisons without a time axis — products, regions, accounts. Categories appear as horizontal bars stacked top to bottom, sorted by AC descending by default, with ΔPY and $\Delta PY\%$ panels on the side. Ideal when category names are long or there are many of them.

03 Line



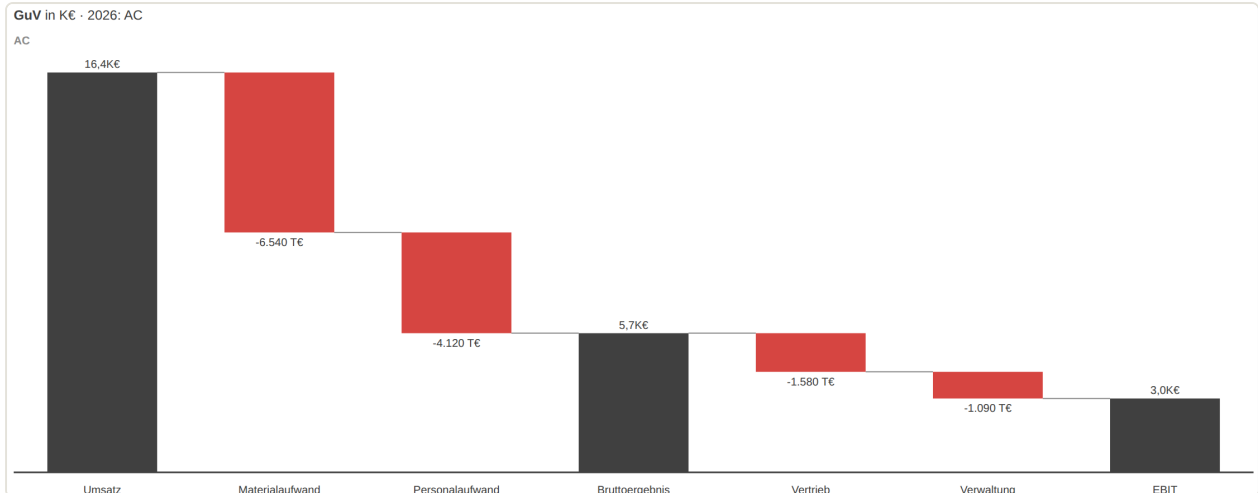
Line (many data points): AC solid, PY thin and grey, plus a 6-period moving average for the trend.



AS IT LOOKS IN POWER BI DESKTOP Line mode across the fiscal year: AC solid, PL dashed and the forecast section set apart, topped by the ΔPL and ΔPL % panels per month.

For long time series with many data points (weeks, days) where columns would get too dense. AC as a solid line, PY thin and grey; optionally a moving average over N periods for the trend. The focus is on the trajectory and turning points, not the single period.

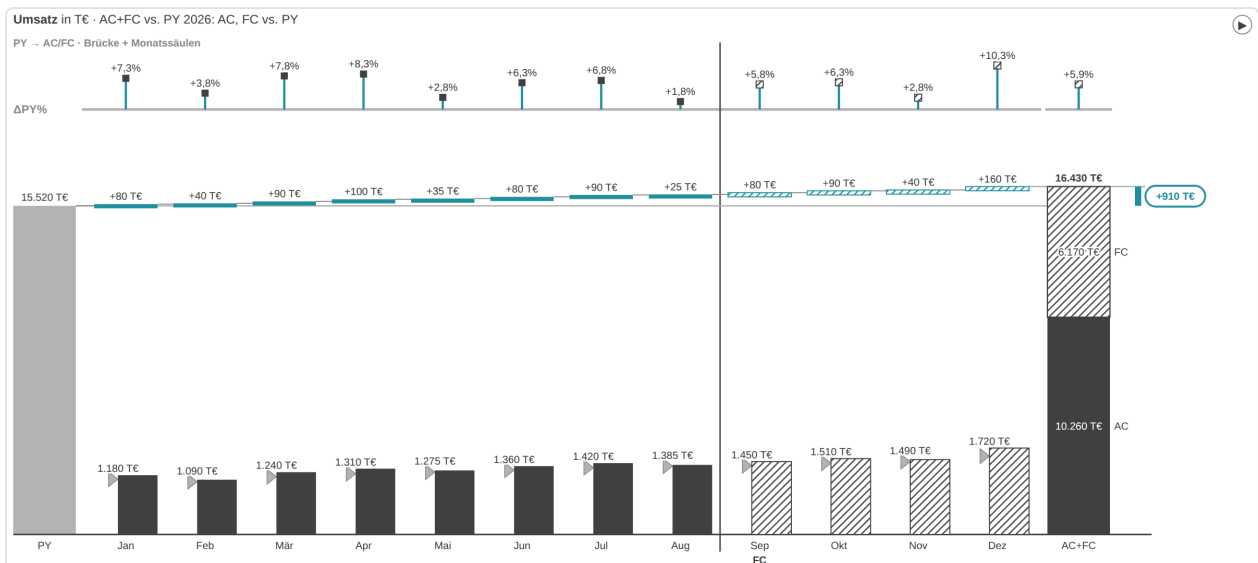
04 Waterfall



Waterfall: P&L cascade from revenue to EBIT, subtotal rows as solid columns, delta rows as floating bridge segments.

The classic P&L cascade: via the “Waterfall type” role (sum/delta), subtotals are drawn as solid columns and movements as floating bridge segments — from revenue to EBIT. Also usable as a plain basis→AC bridge. Use it when a result is built additively from contributions.

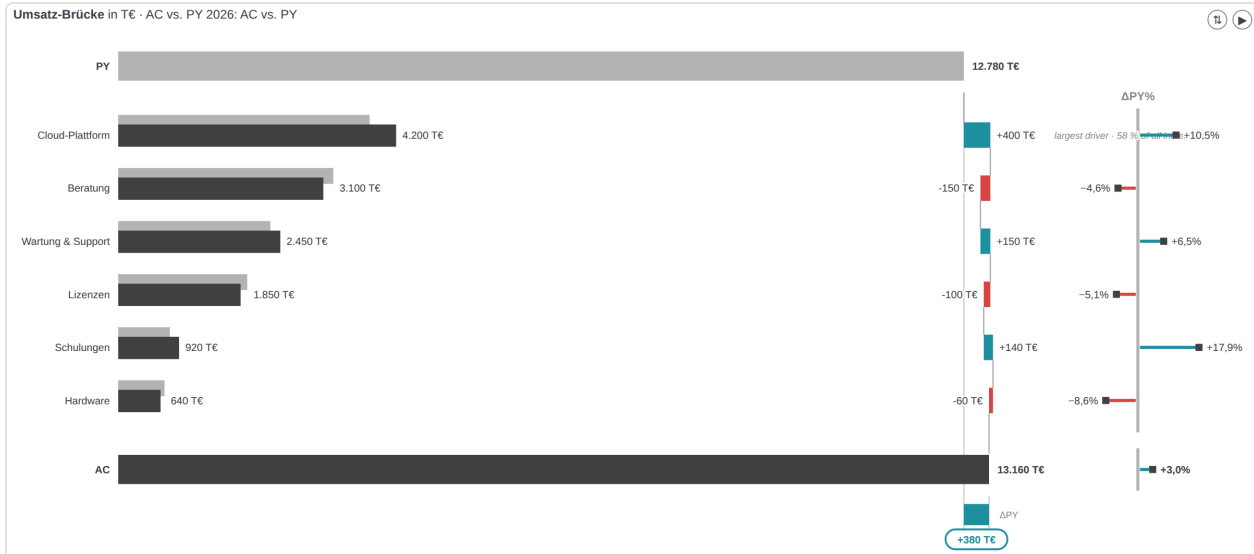
05 Integrated bridge



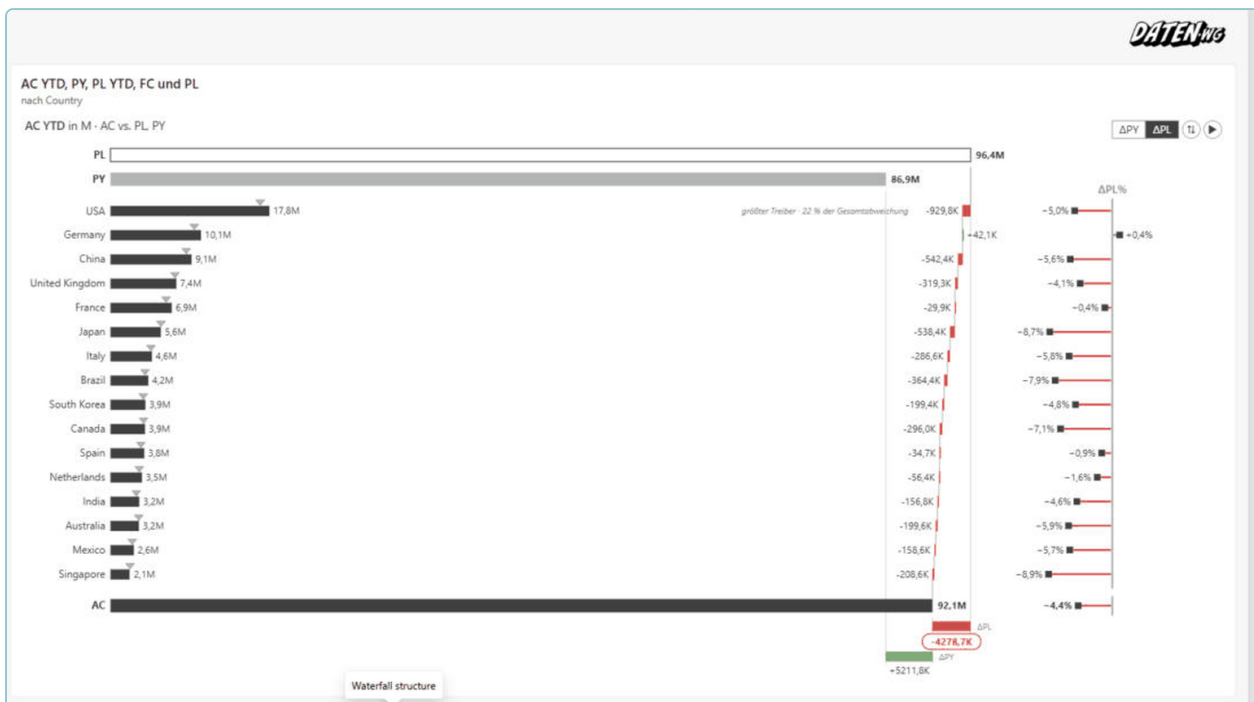
Integrated bridge: PY total column on the left, ΔPY cascade with monthly columns, stacked AC+FC total column on the right.

The year bridge: the PY total column on the left, the ΔPY cascade across the months in the middle, the stacked AC+FC total column on the right. It answers “how do we get from last year to today?” over time. It needs PY or PL as a basis and does not support all-negative values.

06 Category bridge



Category bridge: PY row on top, each driver as an AC-PY bar plus cascade segment and $\Delta PY\%$ pin, AC row as reconciliation at the bottom.



AS IT LOOKS IN POWER BI DESKTOP Structure bridge by country: PL and PY reference rows on top, an AC bar per country, the ΔPL cascade with $\Delta PL\%$ pins on the right and the AC total at the bottom.

The driver bridge across categories: a PY row on top, each driver as an AC-PY bar plus a cascade segment and a $\Delta PY\%$ pin, an AC reconciliation row at the bottom. You see at a glance which category drives the total variance. The biggest driver is flagged automatically with a note.

07 Table

Umsatz nach Region in T€ · 2026: AC vs. PL, PY

	AC	AC · PY · PL	ΔPL	ΔPL %
DACH	5.240 T€		+140 T€	+2,7%
West	3.980 T€		-70 T€	-1,7%
Süd	3.120 T€		+120 T€	+4,0%
Nord	2.410 T€		-40 T€	-1,6%
Ost	1.680 T€		+80 T€	+5,0%
Σ Total	16.430 T€		+230 T€	+1,4%

Table (IBCS): flat value table with AC-PY bars, a ΔPL bar column, ΔPL% pins and a Σ total row.

AC, PY, PL und FC
nach Country, Category und Product

AC in M · AC vs. PL, PY

	AC	AC · PY · PL	ΔPL	ΔPL %
USA	17,8M		-929,8K	-5,0%
Germany	10,1M		+42,1K	+0,4%
China	9,1M		-542,4K	-5,6%
United Kingdom	7,4M		-319,3K	-4,1%
France	6,9M		-29,9K	-0,4%
Japan	5,6M		-538,4K	-8,7%
Italy	4,6M		-286,6K	-5,8%
Brazil	4,2M		-364,4K	-7,9%
Canada	3,9M		-296,0K	-7,1%
Spain	3,8M		-34,7K	-0,9%
South Korea	3,9M		-199,4K	-4,8%
Netherlands	3,5M		-56,4K	-1,6%
Australia	3,2M		-199,6K	-5,9%
India	3,2M		-156,8K	-4,6%
Mexico	2,6M		-158,6K	-5,7%
Singapore	2,1M		-208,6K	-8,9%
Σ Gesamt	92,1M		-4278,7K	-4,4%

AS IT LOOKS IN POWER BI DESKTOP Table by country: AC-PY-PL bars per row, a dedicated ΔPL bar column, ΔPL % pins and the Σ total row at the bottom.

The flat IBCS value table: an AC-PY bar per row, a Δbasis bar column, Δbasis% pins and a Σ total row. It combines numeric precision with in-cell IBCS graphics and is the basis for hierarchies, result/skip rows and the matrix. Ideal for board- and print-ready KPI sheets.

08 Matrix

Umsatz in T€ - AC vs. PY

	Q1		Q2				
	Σ	ΔPY	Σ	ΔPY	Σ	ΔPY	ΔPY %
DACH	3.735 T€	+105 T€	4.125 T€	+195 T€	7.860 T€	+300 T€	+4,0%
West	4.575 T€	+135 T€	4.965 T€	+225 T€	9.540 T€	+360 T€	+3,9%
Süd	5.415 T€	+165 T€	5.805 T€	+255 T€	11.220 T€	+420 T€	+3,9%
Nord	6.255 T€	+195 T€	6.645 T€	+285 T€	12.900 T€	+480 T€	+3,9%
Σ Total	19.980 T€	+600 T€	21.540 T€	+960 T€	41.520 T€	+1.560 T€	+3,9%

Matrix: row categories against the Quarter→Month column hierarchy, collapsed to quarter blocks with Σ, ΔPY and ΔPY% on the right.

Test Matrix YTD for Quarter and further Visuals | 2026

All Values in k for Revenue

DATENWG

AC YTD, PY YTD und PL YTD
nach Category und Product

AC YTD in M - AC vs. PL PY

	AC	AC - PY - PL	ΔPL	ΔPL %	ΔPY	ΔPY %
• Electronics	7,2M		-14,7K	-0,2%	+394,4K	+5,8%
Laptop Pro	3,3M		+45,6K	+1,4%	+176,0K	+5,7%
Smartphone X	2,0M		-16,8K	-0,8%	+184,9K	+9,9%
Wireless Earbuds	1,1M		+63,8K	+6,4%	+97,6K	+10,2%
Smart Watch	0,9M		-107,3K	-11,1%	-64,1K	-7,0%
• Home Appliances	2,9M		+56,8K	+2,0%	+361,6K	+14,3%
Robot Vacuum	1,5M		+13,9K	+0,9%	+181,2K	+13,6%
Coffee Machine	0,9M		+22,7K	+2,7%	+100,3K	+13,2%
Air Purifier	0,5M		+20,2K	+4,0%	+80,1K	+17,9%
Σ Gesamt	10,1M		+42,1K	+0,4%	+756,0K	+8,1%

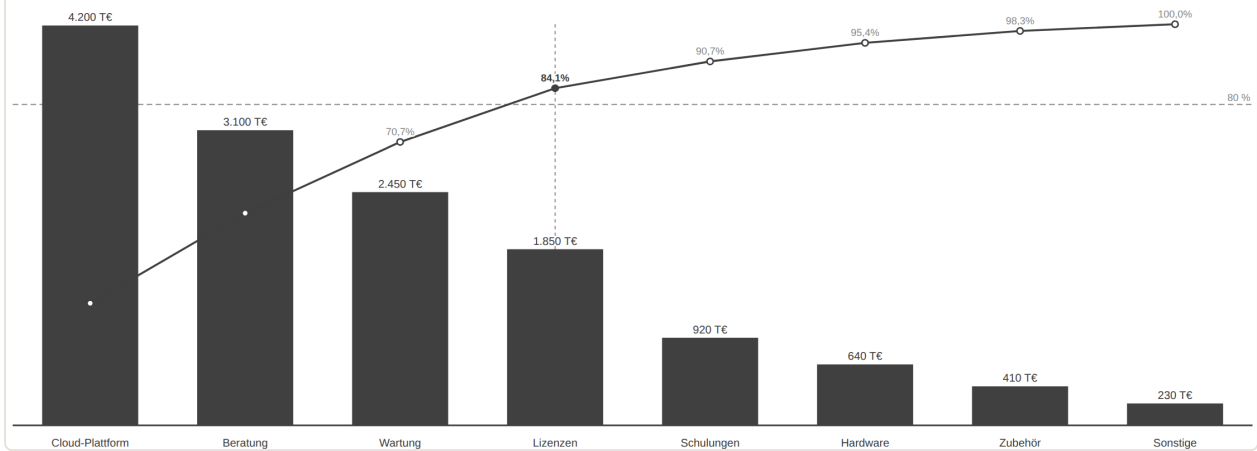
AS IT LOOKS IN POWER BI DESKTOP Matrix with the Category→Product hierarchy and four deviation columns at once — ΔPL, ΔPL %, ΔPY and ΔPY % — each with bars or pins, plus a Σ total.

The table with the column role filled: row categories against a column hierarchy (e.g. quarter → month, max. 2 levels), value and Δbasis per block, a frozen Σ block on the right. Column groups collapse and expand, wide matrices scroll horizontally. For KPIs across two dimensions at once.

09 Pareto

Umsatz-Pareto in T€ · 2026: AC

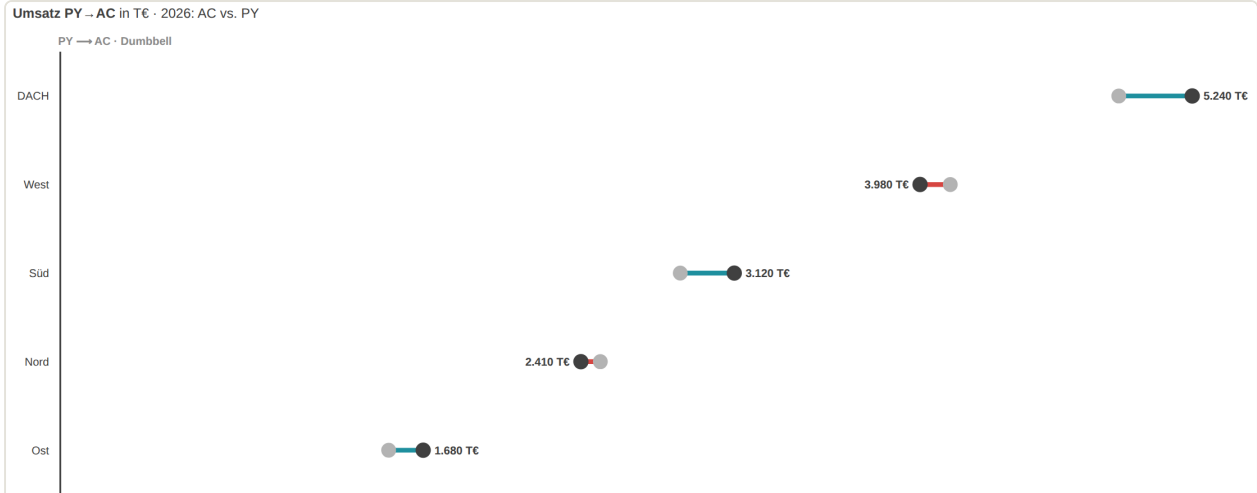
Pareto · AC · cumulative share



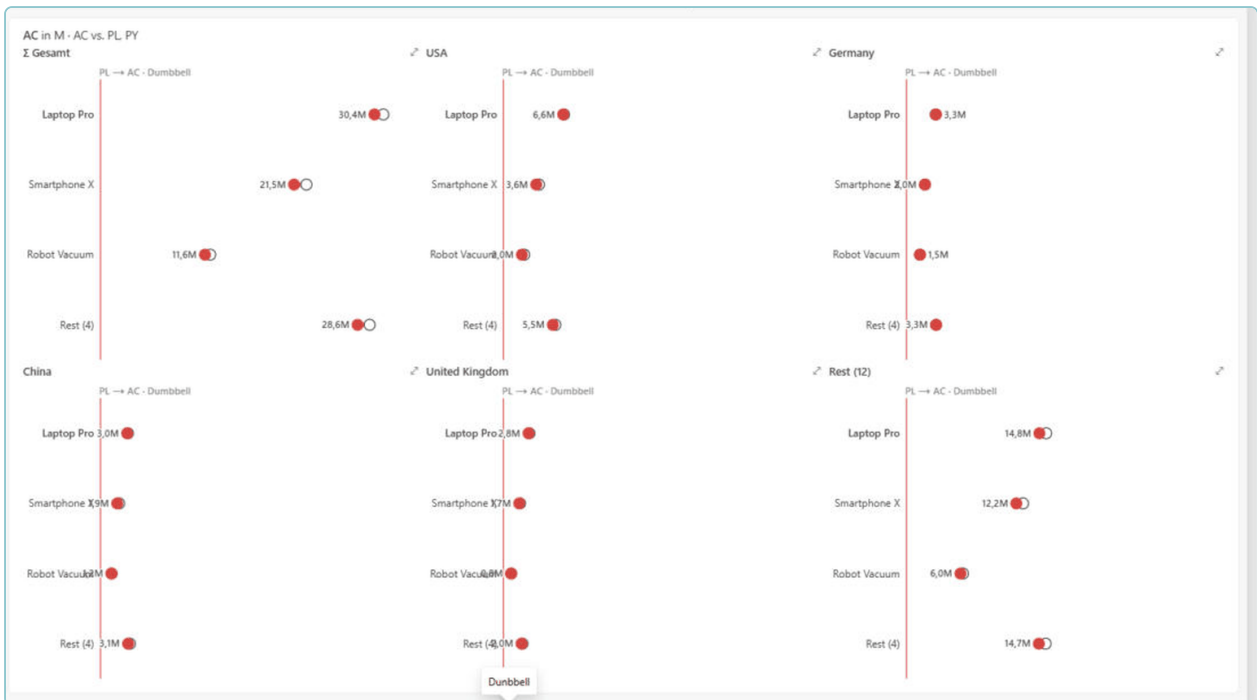
Pareto: AC columns descending with a cumulative percentage line and an 80% reference marker for ABC analysis.

The ABC analysis: AC columns descending with a cumulative percentage line and an 80% reference marker. You immediately see which few categories make up the bulk. Use it for assortment, customer or root-cause analyses.

10 Dumbbell



Dumbbell: a PY and an AC dot per category, the coloured connector shows the direction and size of the change.

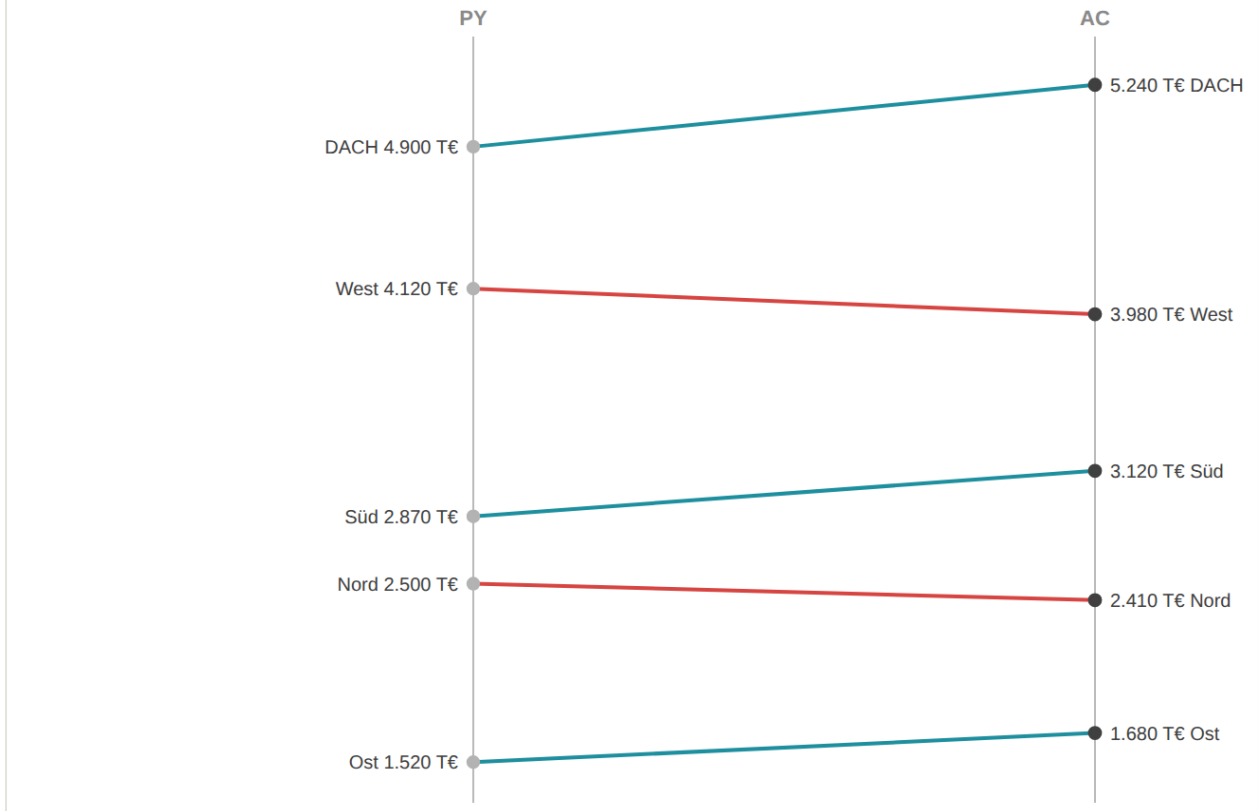


AS IT LOOKS IN POWER BI DESKTOP *Dumbbell as small multiples per country: a PL and an AC dot per product, the connector showing the PL→AC change.*

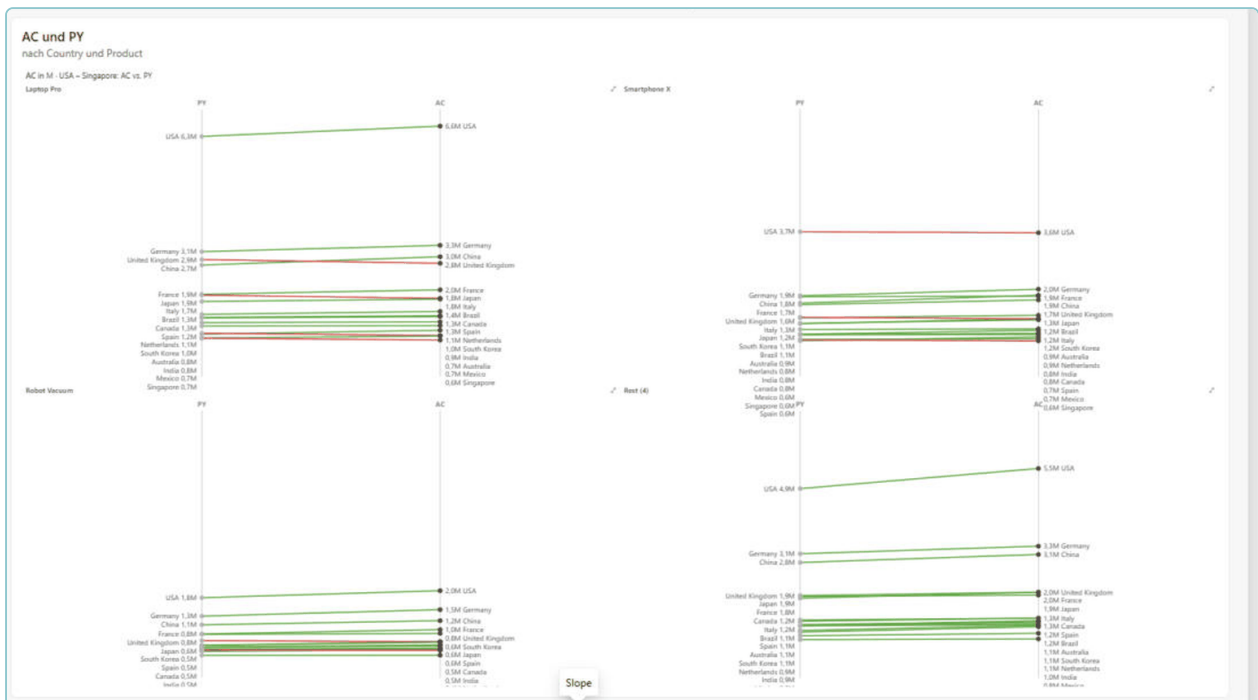
Before/after per category as a dot pair: a PY and an AC dot, the coloured connector shows the direction and size of the change. Calmer than two bar series when only two scenarios are compared. Needs AC and PY/PL per category.

11 Slope

Umsatz in T€ · PY → AC: AC vs. PY



Slope: rank shifts between two points in time, PY on the left and AC on the right, slope and colour per category.



AS IT LOOKS IN POWER BI DESKTOP Slope mode per product: PY on the left, AC on the right, each line a country — slope and colour reveal risers and fallers at a glance.

Rank shifts between two points in time: PY on the left, AC on the right, one line per category — slope and colour show risers and fallers. Ideal for telling the story of position changes in a ranking. Needs AC and PY/PL per category.

12 KPI cards



KPI cards: one tile per metric with the AC value, Δ PL and Δ PY rows plus a mini bridge PL→ Δ →AC.

KPI tiles for monitoring: one card per metric with a large AC value, Δ PL and Δ PY rows and a mini bridge PL→ Δ →AC. Optionally with a status light, background tint and a bullet against the benchmark. For overview pages and control-room walls.

13 P&L statement

GuV in K€ - 2026: AC vs. PL, PY									
	PY			AC			ΔPY		
= Umsatzerlöse	15,1K€			16,4K€			+1.250,0 T€	+8%	
- Materialaufwand	6,0K€			6,5K€		-500,0 T€	-8%		
= Bruttoergebnis	9,1K€			9,8K€			+750,0 T€	+8%	
Brutto-Marge %	60,0 %			60,0 %			+0,0Pp		
- Personalaufwand	2,9K€			3,1K€		-180,0 T€	-6%		
- Sonstige Opex	1,6K€			1,8K€		-130,0 T€	-8%		
= EBITDA	4,5K€			5,0K€			+440,0 T€	+10%	
EBITDA-Marge %	30,1 %			30,5 %			+0,4Pp		
- Abschreibungen	0,6K€			0,6K€		-30,0 T€	-5%		
= EBIT	3,9K€			4,3K€			+410,0 T€	+10%	
EBIT-Marge %	26,0 %			26,5 %			+0,5Pp		

P&L statement: income statement with subtotal, delta and margin rows, PY/AC cascade columns and ΔPY plus ΔPY% pins.

P&L inklusiv Switch for Senario and Small multipls

DATENWG

Summe von AC, Summe von PY, Summe von PL und Summe von PY
nach Position, Company und Typ

Summe von AC in K - AC vs. PL, PY
Daten-WG

Knowledgekitchen

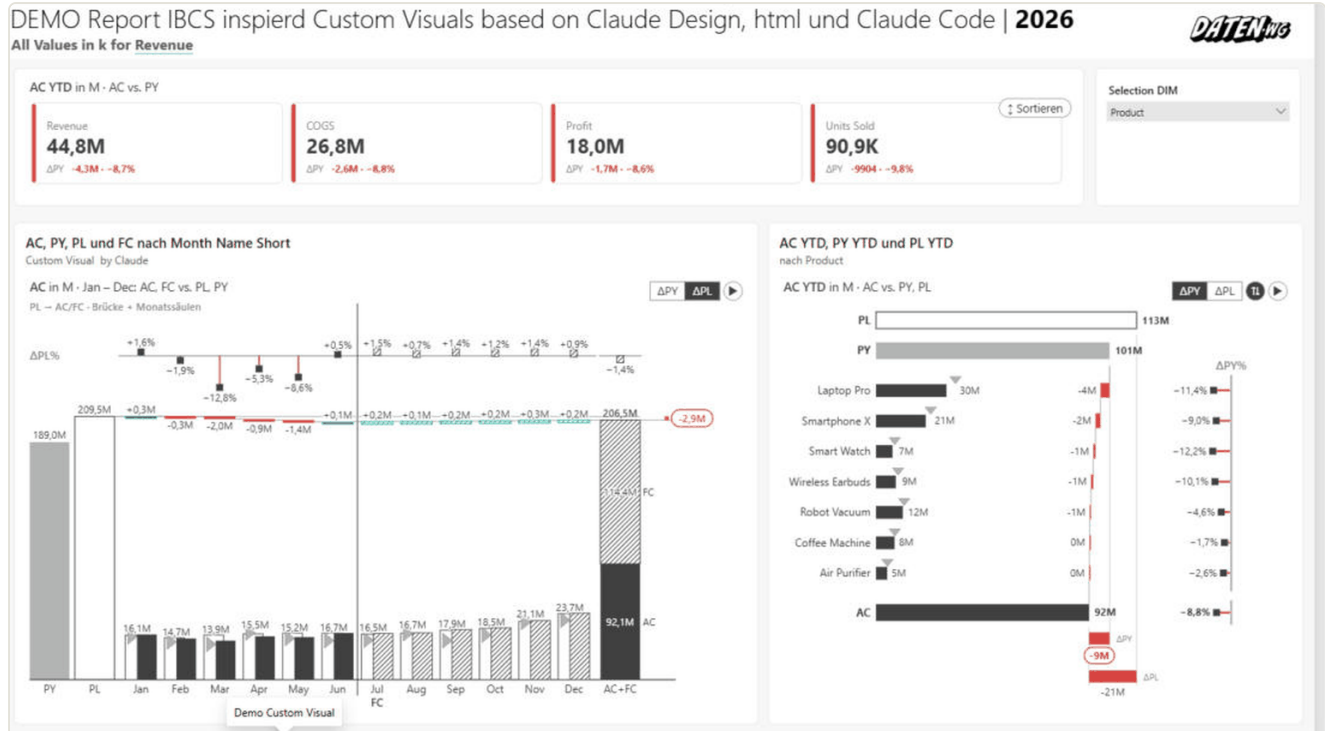
	PY			AC&FC			ΔPY		
= Umsatzerlöse	11,3K			24,5K			+13151,6	+116%	
- Materialaufwa...	4,8K			10,5K		-5636,4	-116%	-2	
= Bruttoergebnis	6,5K			14,0K			+7515,2	+116%	
Brutto-Marge %	71,0 %			147,6 %			+76,6Pp		
- Personalaufwa...	2,2K			4,6K		-2482,7	-115%	-2	
- Sonstige Opex	1,2K			2,6K		-1409,1	-118%	-2	
= EBITDA	3,1K			6,7K			+3623,4	+117%	
EBITDA-Marge %	34,2 %			71,2 %			+37,0Pp		
- Abschreibung...	0,4K			1,0K		-510,0	-114%	-2	
= EBIT	2,7K			5,8K			+3113,4	+117%	
EBIT-Marge %	29,2 %			61,0 %			+31,8Pp		
- Finanzergebnis	0,1K			0,3K		-127,5	-93%	-2	
= EBT	2,5K			5,5K			+2986,0	+118%	

AS IT LOOKS IN POWER BI DESKTOP P&L statement for two entities side by side: subtotal, delta and margin (pp) row types, the AC&FC cascade column plus ΔPY and ΔPY %.

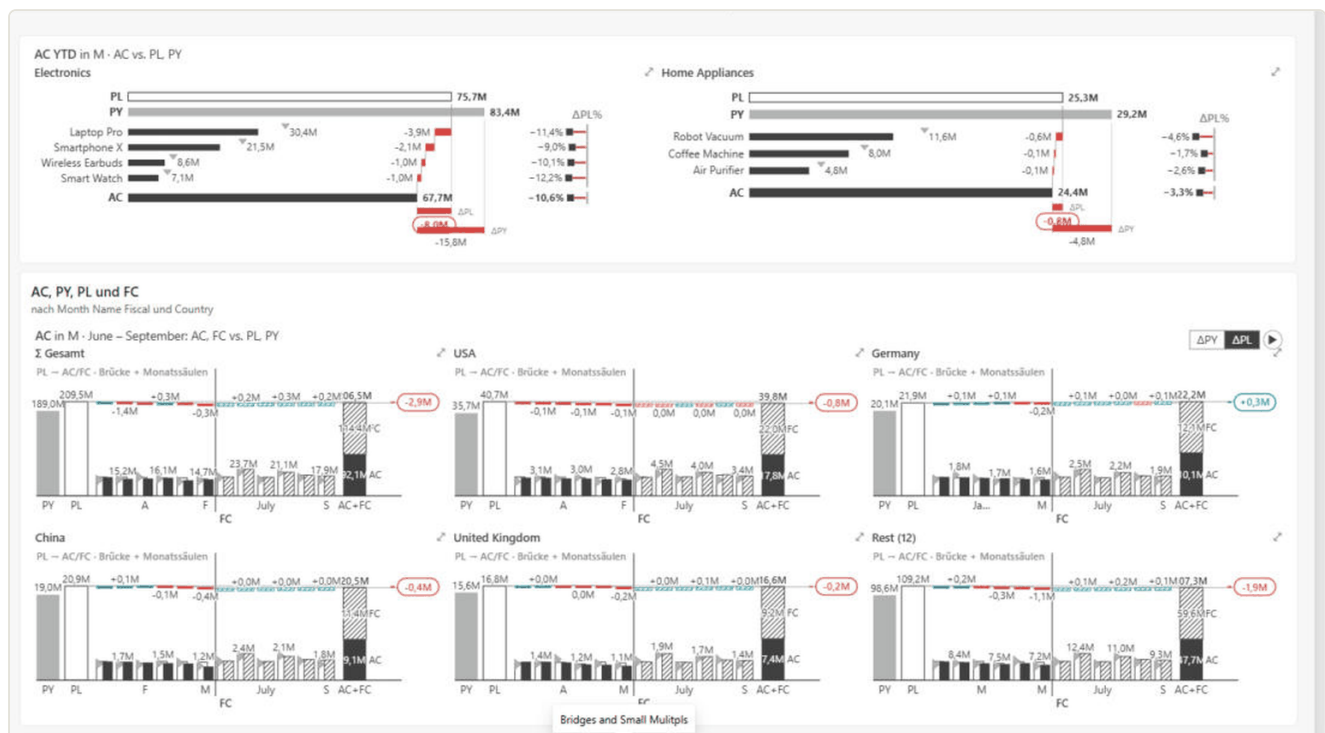
The full P&L statement: an income statement with subtotal, delta and margin rows, PY/AC cascade columns and ΔPY plus ΔPY% pins. Levels (subtotals only / all line items) and views (AC / AC+FC / PL) toggle via buttons. The closing mode for formal reporting. Needs PY (or PL) as a reference.

04 · ChartKitchen in action

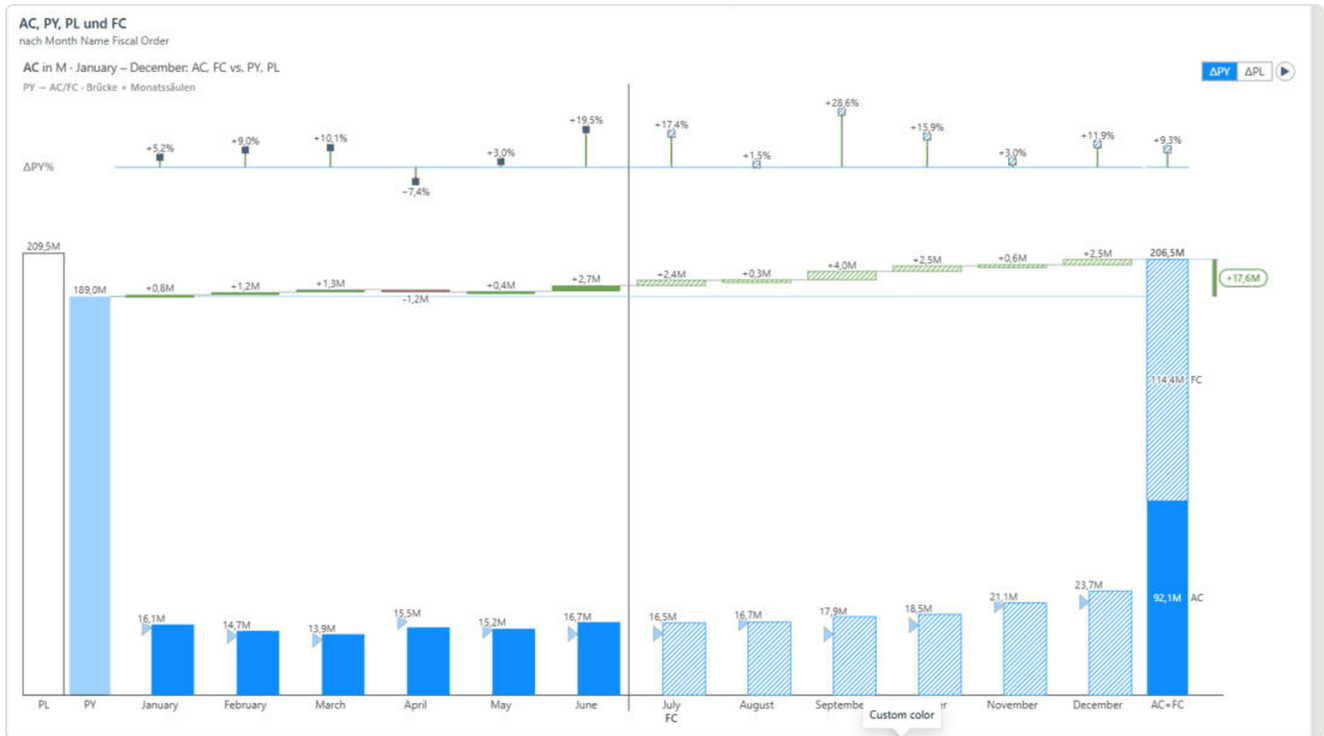
The following captures come straight from Power BI Desktop, with sample data from a real report. The other figures in this documentation are produced by the same renderer — here you see the visual as it works together in day-to-day reporting.



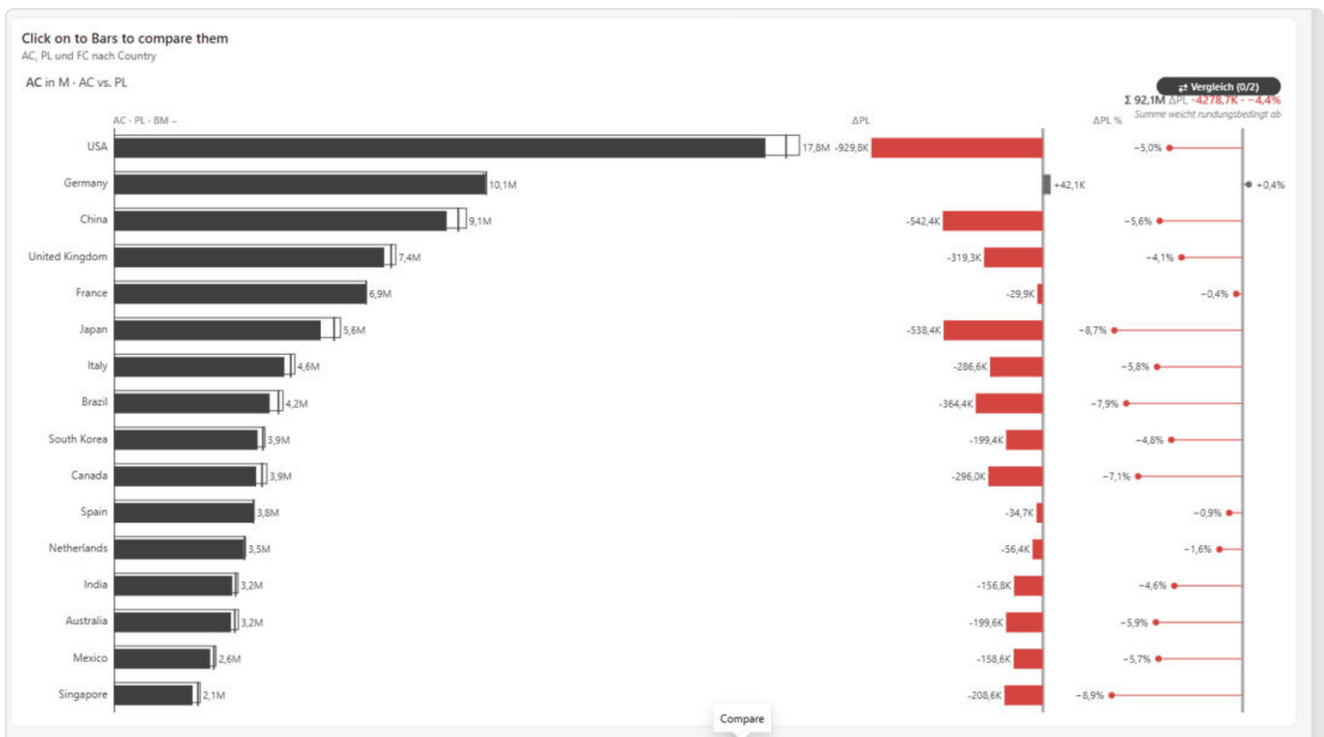
A complete report page: KPI cards, an AC/FC monthly bridge and a YTD bridge by product — every tile from the same visual, sharing one scenario notation.



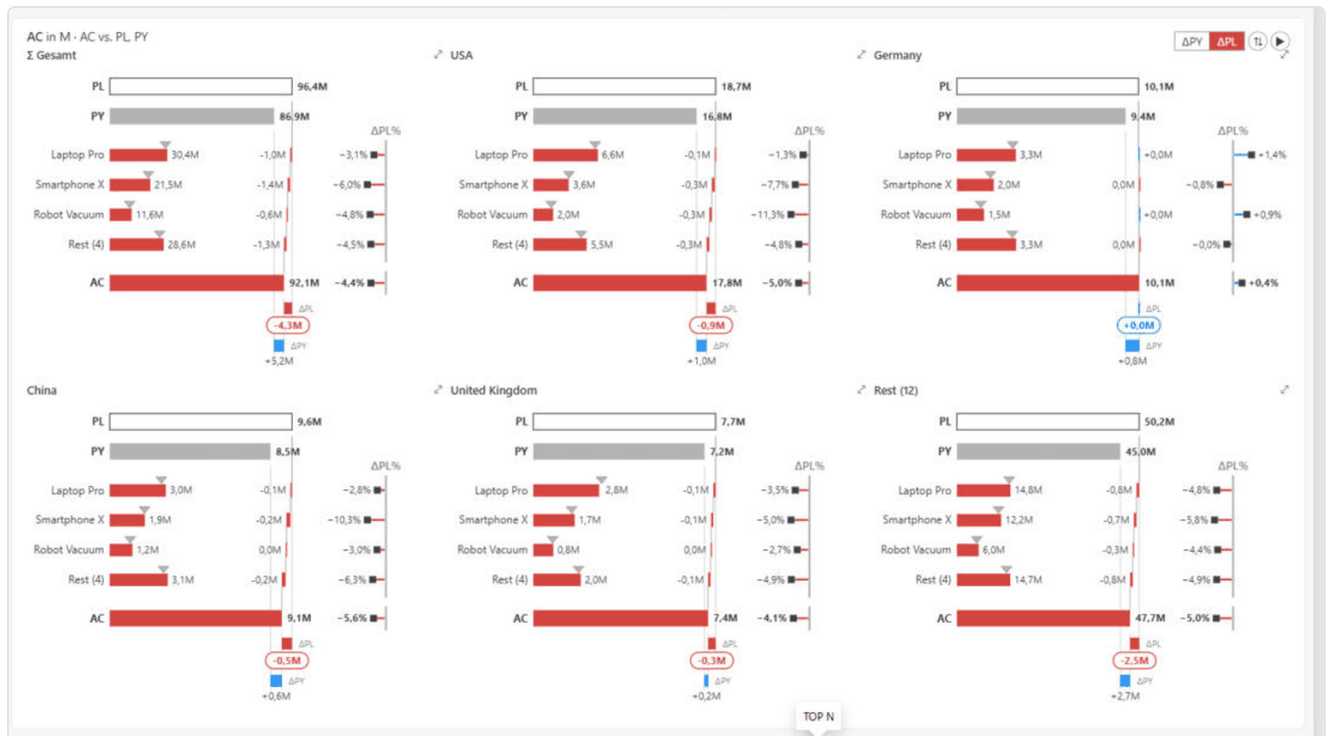
Integrated bridges per category on top, the same bridge as small multiples per country below — making each region's contribution to the total deviation comparable.



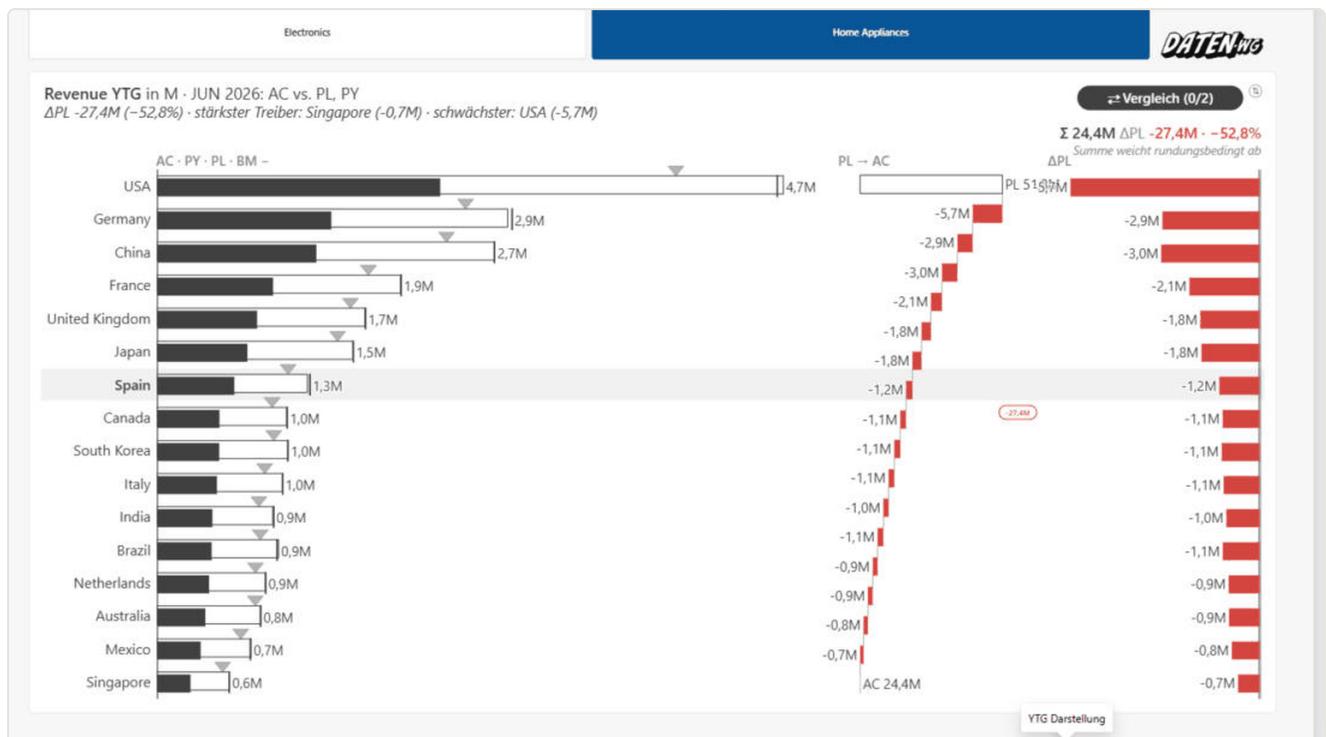
A freely chosen colour palette: the same integrated bridge with monthly columns in blue instead of the IBCS greys – scenario logic and the forecast hatching stay intact.



Bar comparison: a click marks and directly contrasts two countries, while the ΔPL and ΔPL % panels on the right keep the deviation in view.



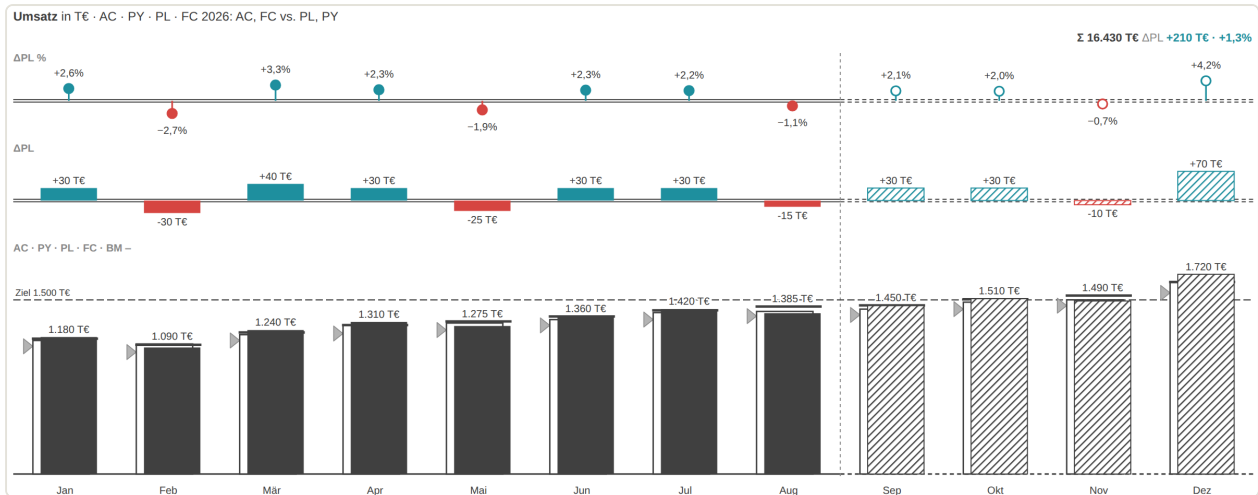
Top N with a catch-all: a KPI-card bridge per country, the smaller drivers grouped into “Rest (4)” — the total stays complete.



Year-to-go view: the remaining-year requirement per country against plan and benchmark, with the PL→AC cascade on the right and the strongest and weakest driver in the message line.

05 · Features in detail

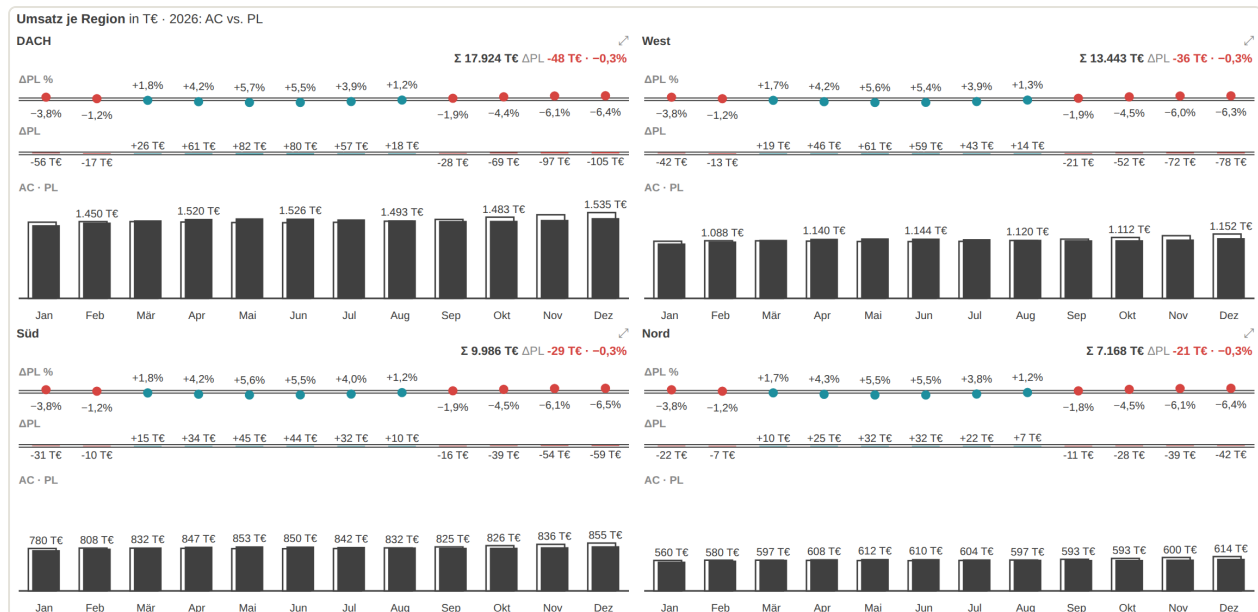
Scenarios, forecast hatching & benchmark



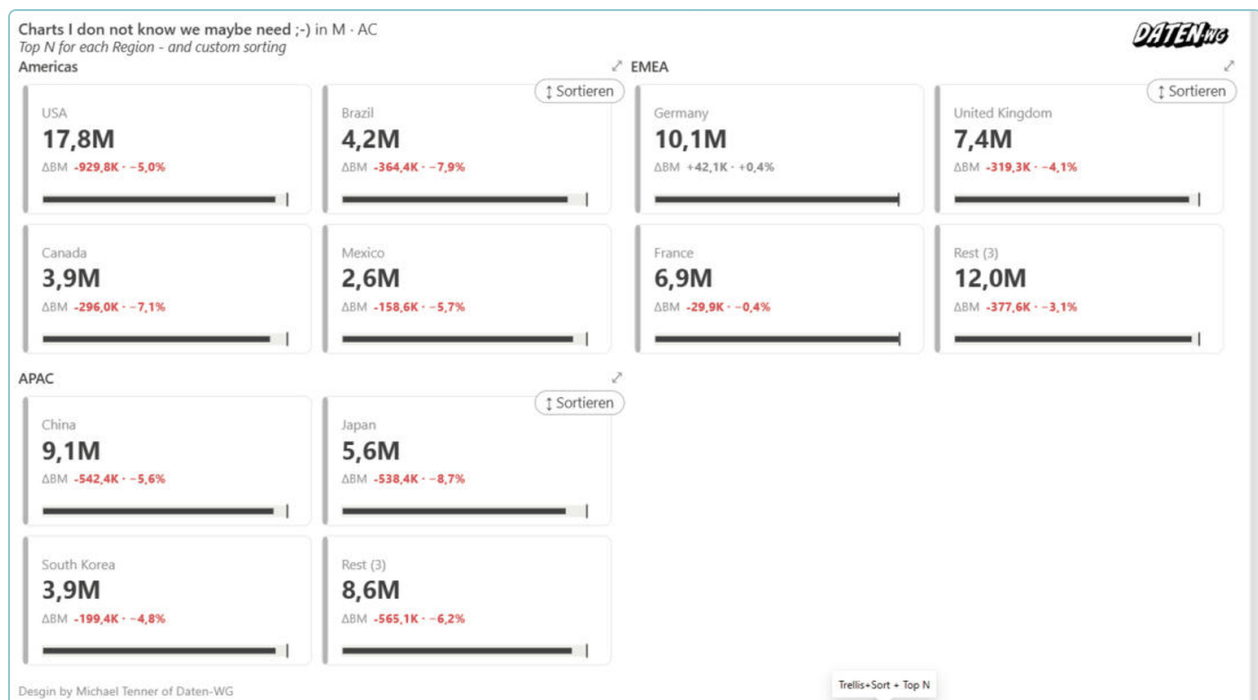
Four scenarios: AC, PY, PL and FC in one chart, forecast hatched, benchmark markers as triangles and a target reference line.

1. Bind AC, PY, PL and FC to their field roles — all four appear in one chart.
2. FC is drawn hatched automatically. As an alternative to the FC measure you can bind a 1/0 column to the “Forecast flag” role.
3. With three scenarios (AC + PY + PL) IBCS shows PY as a grey triangle on the column. Turn it off under Chart → Layout → “PY as triangle”.
4. For a target value per category fill the Benchmark role — it appears as a tick marker (triangle).
5. For a fixed target or threshold line use Scale → Reference line (value + label) instead.

Small multiples



Small multiples: one tile per region on a shared axis, each with its own variance panels and a zoom icon.



AS IT LOOKS IN POWER BI DESKTOP Trellis by region (Americas · EMEA · APAC): the top countries per region as KPI cards with bullet bars, the remainder bundled into “Rest (N)”, each group independently sortable.

1. Drag a grouping field (e.g. region) into the “Small Multiples” role. The visual splits into one tile per group on a shared scale (IBCS).
2. Under Chart → Small Multiples you control a leading “Σ Total” tile, Top-N tiles (the rest is aggregated into “Other”) and a larger first tile.
3. For the bridge modes (integrated/category bridge) force an identical scale with “Bridges: same scale for all tiles”; columns, bars and waterfall share it anyway.
4. Clicking a tile’s zoom icon enlarges it temporarily.

Umsatz in T€ · AC vs. PY

Wide matrix in a narrow visual: the block strip becomes horizontally scrollable while the name column on the left and the Σ block on the right stay frozen.

AC

nach Month Name Fiscal, Category und Country

AC in M · AC

日	Electronics														Home Appliances														Σ	
	USAGerma...	China Unite...	France	Japan	Italy	Brazil	CanadaSouth ...	SpainNethe...	IndiaAustra...	Mexico	Singa...	USAGerma...	China	France	Unite...	Japan	SpainSouth ...	Italy	Canada	Nethe...	India	Brazil								
June	2,5M	1,4M	1,2M	1,1M	1,0M	0,8M	0,8M	0,6M	0,6M	0,5M	0,5M	0,5M	0,5M	0,3M	0,3M	0,6M	0,5M	0,4M	0,3M	0,3M	0,3M	0,2M	0,2M	0,2M	0,2M	0,1M	0,2M	0,1M	16,7M	
May	2,3M	1,1M	1,1M	0,9M	0,8M	0,7M	0,6M	0,5M	0,5M	0,4M	0,5M	0,4M	0,4M	0,3M	0,3M	0,8M	0,5M	0,4M	0,3M	0,2M	0,2M	0,2M	0,2M	0,2M	0,2M	0,1M	0,2M	0,2M	15,2M	
April	2,2M	1,3M	1,1M	1,0M	0,8M	0,6M	0,6M	0,6M	0,5M	0,5M	0,4M	0,5M	0,4M	0,4M	0,3M	0,2M	0,8M	0,5M	0,4M	0,3M	0,3M	0,2M	0,2M	0,2M	0,2M	0,1M	0,1M	0,1M	15,5M	
January	2,1M	1,2M	1,2M	1,0M	0,8M	0,8M	0,6M	0,6M	0,5M	0,5M	0,5M	0,5M	0,4M	0,4M	0,3M	0,3M	0,8M	0,6M	0,5M	0,4M	0,3M	0,3M	0,2M	0,2M	0,2M	0,2M	0,2M	0,1M	16,1M	
February	2,0M	1,2M	1,1M	0,9M	0,8M	0,7M	0,5M	0,5M	0,4M	0,5M	0,4M	0,4M	0,4M	0,4M	0,3M	0,2M	0,8M	0,5M	0,5M	0,3M	0,3M	0,2M	0,2M	0,2M	0,2M	0,2M	0,2M	0,2M	14,7M	
March	2,0M	1,1M	0,8M	0,8M	0,7M	0,6M	0,5M	0,6M	0,5M	0,4M	0,4M	0,4M	0,3M	0,4M	0,3M	0,2M	0,9M	0,5M	0,4M	0,3M	0,3M	0,2M	0,2M	0,2M	0,1M	0,2M	0,1M	0,1M	13,9M	
Σ Gesamt	13,1M	7,2M	6,4M	5,7M	4,9M	4,1M	3,7M	3,3M	2,8M	2,9M	2,5M	2,7M	2,3M	2,4M	1,9M	1,6M	4,7M	2,9M	2,7M	1,9M	1,7M	1,5M	1,3M	1,0M	1,0M	1,0M	0,9M	0,9M	0,9M	92,1M

AS IT LOOKS IN POWER BI DESKTOP *Wide matrix in action: AC by month against the Category→Country column groups; the name column on the left and the Σ column on the right stay frozen while the block strip scrolls horizontally.*

1. In addition to the category, fill the “Columns (matrix)” role with up to two levels (e.g. quarter, month).
2. Collapse and expand column groups by clicking the header; the  button in the header opens or closes all column groups at once, the double chevron all rows.
3. When the matrix gets wider than the tile, the block strip becomes horizontally scrollable (Shift + mouse wheel or the scrollbar at the bottom). The name column on the left and the Σ block on the right stay frozen.
4. Drag column widths at the handle on the right edge; a double-click fits the column to the longest visible content (auto-fit). The widths are stored in the report.
5. On export/print the “... +n” hint remains, because a still image cannot scroll.

Two-row compact mode

Umsatz in T€ · AC vs. PY									
	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Σ
DACH	1.200 T€ +30 T€	1.290 T€ +40 T€	1.380 T€ +50 T€	1.470 T€ +60 T€	1.560 T€ +70 T€	1.650 T€ +80 T€	1.740 T€ +90 T€	1.830 T€ +100 T€	12.120 T€ +520 T€ (+4,5%)
West	1.500 T€ +40 T€	1.590 T€ +50 T€	1.680 T€ +60 T€	1.770 T€ +70 T€	1.860 T€ +80 T€	1.950 T€ +90 T€	2.040 T€ +100 T€	2.130 T€ +110 T€	14.520 T€ +600 T€ (+4,3%)
Süd	1.800 T€ +50 T€	1.890 T€ +60 T€	1.980 T€ +70 T€	2.070 T€ +80 T€	2.160 T€ +90 T€	2.250 T€ +100 T€	2.340 T€ +110 T€	2.430 T€ +120 T€	16.920 T€ +680 T€ (+4,2%)
Nord	2.100 T€ +60 T€	2.190 T€ +70 T€	2.280 T€ +80 T€	2.370 T€ +90 T€	2.460 T€ +100 T€	2.550 T€ +110 T€	2.640 T€ +120 T€	2.730 T€ +130 T€	19.320 T€ +760 T€ (+4,1%)
Σ Total	6.600 T€ +180 T€	6.960 T€ +220 T€	7.320 T€ +260 T€	7.680 T€ +300 T€	8.040 T€ +340 T€	8.400 T€ +380 T€	8.760 T€ +420 T€	9.120 T€ +460 T€	62.880 T€ +2.560 T€ (+4,2%)

Two-row compact mode (cellLayout stacked): value on top, small ΔPY below — this fits more columns without scrolling.

1. Under Chart → Table → “Cell layout (matrix)” choose “Two rows”: the value sits large on top, the smaller Δ number directly below it in the same cell.
2. This makes the matrix roughly half as wide and it often fits without horizontal scrolling.
3. The Δ mini-bar is dropped in this layout; value columns (AC · PY · PL) stay as their own columns next to the value.

Value columns

Umsatz in T€ · AC vs. PL, PY													
	Q1	PY	PL	ΔPL	Q2	PY	PL	ΔPL	Q3	PY	PL	ΔPL	Σ
DACH	1.200 T€	1.170 T€	1.230 T€	-30 T€	1.310 T€	1.280 T€	1.330 T€	-20 T€	1.420 T€	1.350 T€	1.430 T€	-10 T€	3.990 T€
West	1.500 T€	1.460 T€	1.540 T€	-40 T€	1.610 T€	1.550 T€	1.640 T€	-30 T€	1.720 T€	1.640 T€	1.740 T€	-20 T€	4.830 T€
Süd	1.800 T€	1.750 T€	1.850 T€	-50 T€	1.910 T€	1.840 T€	1.950 T€	-40 T€	2.020 T€	1.930 T€	2.050 T€	-30 T€	5.730 T€
Σ Total	4.500 T€	4.380 T€	4.620 T€	-120 T€	4.830 T€	4.650 T€	4.920 T€	-90 T€	5.160 T€	4.920 T€	5.220 T€	-60 T€	14.490 T€

Value columns “all”: each block shows the numeric reference values AC · PY · PL next to the ΔPL bar column and the Σ block.

1. Under Chart → Table → “Value columns” switch between “AC only”, “AC + variance basis” and “AC · PY · PL”.
2. The numeric reference values then sit next to the Δbasis bar column and the Σ block — for print- and board-ready tables without bar interpretation.

Σ row position

Umsatz in T€ · AC vs. PY						
	Q1	ΔPY	Q2	ΔPY	Σ	ΔPY ΔPY %
Σ Total	19.980 T€	+600 T€	21.540 T€	+960 T€	41.520 T€	+1.560 T€ +3,9%
DACH	3.735 T€	+105 T€	4.125 T€	+195 T€	7.860 T€	+300 T€ +4,0%
West	4.575 T€	+135 T€	4.965 T€	+225 T€	9.540 T€	+360 T€ +3,9%
Süd	5.415 T€	+165 T€	5.805 T€	+255 T€	11.220 T€	+420 T€ +3,9%
Nord	6.255 T€	+195 T€	6.645 T€	+285 T€	12.900 T€	+480 T€ +3,9%

Σ row on top (totalRowPosition top): the total sits directly under the header, the detail rows follow below.

1. Under Chart → Table → “Total (Σ) row position” choose “Top” (right under the header, IBCS) or “Bottom” (default, German P&L reading).
2. In both cases the Σ row stays frozen while scrolling vertically.

Table comfort: zebra, grid, density, search, sorting

Umsatz nach Region in T€ · 2026: AC vs. PY

▼	AC	AC · PY	ΔPY	ΔPY %
▼ DACH	5.540 T€		+210 T€	+3,9%
Deutschland	3.400 T€		+200 T€	+6,3%
Österreich	1.250 T€		-50 T€	-3,8%
Schweiz	890 T€		+60 T€	+7,2%
▼ West	3.280 T€		-70 T€	-2,1%
Frankreich	2.100 T€		-150 T€	-6,7%
Benelux	1.180 T€		+80 T€	+7,3%
▼ Süd	2.600 T€		+190 T€	+7,9%
Italien	1.620 T€		+120 T€	+8,0%
Spanien	980 T€		+70 T€	+7,7%
Σ Total	11.420 T€		+330 T€	+3,0%

Reading comfort: zebra stripes and grid lines plus an expanded Region→Country hierarchy with indentation and chevrons.

1. Under Chart → Table set zebra stripes, row height (compact/normal/airy) and grid lines (horizontal/none/both).
2. A second category field creates a hierarchy (e.g. region → country): expand single rows with the chevron, all of them with the double chevron ⇅ in the header.
3. Use the magnifier icon to search the row names; clicking a column header sorts by that column (click again: ascending / off).

P&L statement & row types

1. In the “P&L statement” mode (or waterfall) the “Waterfall type” role sets each row: “sum” = subtotal, “delta” = movement.
2. Without that role you structure via lists under Chart → Table: result rows (bold anchor), exclude rows from totals, hide, indent (“of which”), chart only listed rows.
3. Formula rows (e.g. “Margin = EBIT / Revenue”) and per-row number formats (e.g. “Margin = 0.0 %”) add calculated or mixed €/%/unit rows.
4. Structure mode (Chart → Table → “Edit row structure”) sets these properties by clicking a row; the choice is persisted in the lists.

Comments



Comments: numbered markers ① ② on the affected columns and the matching comment list to the right of the chart.



AS IT LOOKS IN POWER BI DESKTOP Comment mode: numbered markers ①-④ sit on the affected bars, the matching notes appear as a list to the right of the chart.

1. Bind a text measure to the “Comments” role — categories with text get a numbered marker ① ②, the list sits to the right of the chart and stays visible on export.
2. Alternatively enable comment under Comments → “Capture comments in chart”: clicking a category opens an input field, the text is stored in the report (bookmark-capable, travels with the PBIX).
3. Show/hide the comment list and set its font size in the same “Comments” card.

Finance format

GuV in K€ · 2026: AC vs. PY

	AC	AC · PY	ΔPY	ΔPY %
Umsatzerlöse	16,4K€		+1.250,0 T€	+8,3%
Materialaufwand	(6,5K€)		(500,0 T€)	(8,3%)
Rohhertrag	9,8K€		+750,0 T€	+8,3%
Rohmarge %	60,0 %		0,0Pp	
Personalaufwand	(3,1K€)		(180,0 T€)	(6,2%)
Sonstige Opex	(1,8K€)		(130,0 T€)	(8,0%)
EBIT	5,0K€		+440,0 T€	+9,7%
EBIT-Marge %	30,5 %		+0,4Pp	

Finance format: negative values in parentheses instead of a minus sign, combined with the P&L row types subtotal, delta and margin.

1. Under Data labels → “Finance format (parentheses)” negative values are shown in parentheses instead of a minus sign — (1,234) — and zero as “-”.
2. This applies to value and Δ labels including Δ % and matches the P&L row types subtotal, delta and margin.

IBCS title, footers & labels

Umsatz in T€ · YTD Aug 2026: AC vs. PL, PY
Umsatz liegt YTD +5,2 % über Vorjahr — DACH trägt den Zuwachs.

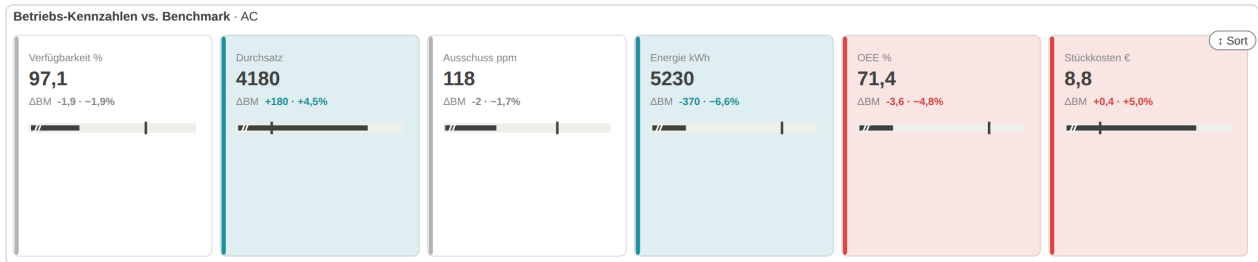
	AC	AC · PY · PL	ΔPL	ΔPL %
DACH	5.240 T€		+140 T€	+2,7%
West	3.980 T€		-70 T€	-1,7%
Süd	3.120 T€		+120 T€	+4,0%
Nord	2.410 T€		-40 T€	-1,6%
Ost	1.680 T€		+80 T€	+5,0%
Σ Total	16.430 T€		+230 T€	+1,4%

Filter: Region: alle · Jahr: 2026 · Kanal: Direct
Ist per Aug 2026 · Stand 05.09. · Quelle: SAP FI

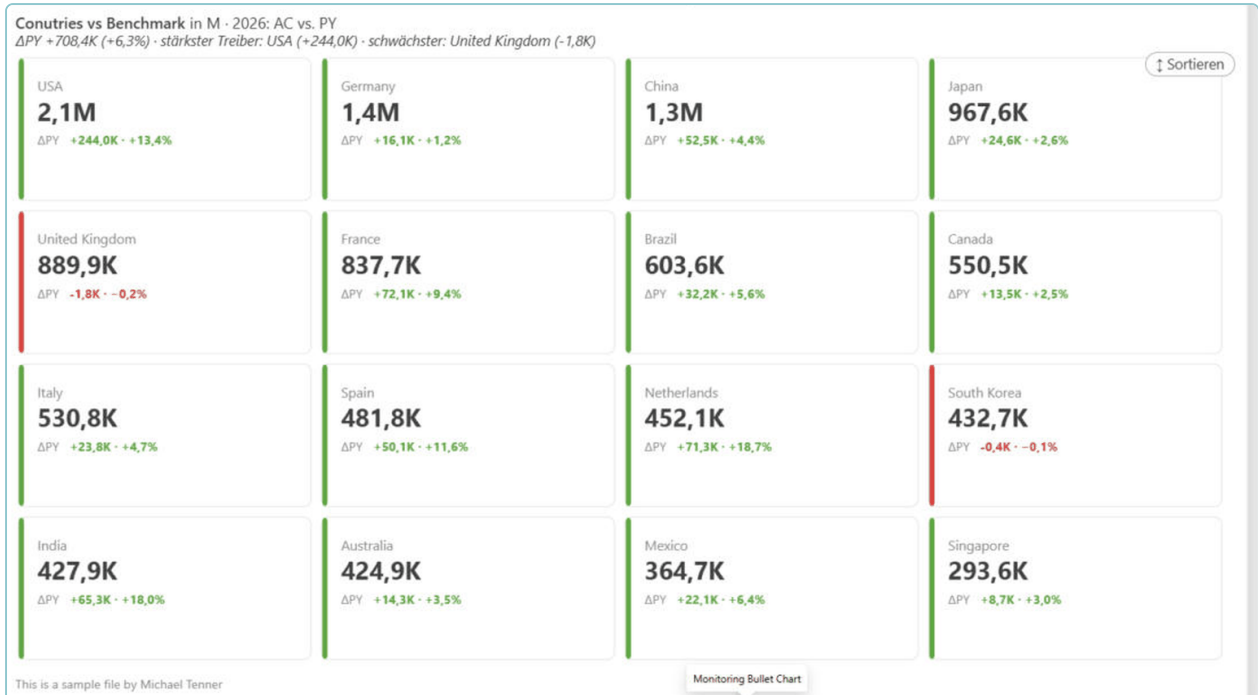
IBCS title and footers: “KPI · unit · period: scenarios” with a message line on top, filter context and data status as footers at the bottom.

1. The IBCS title (“KPI · unit · period: scenarios”) is built automatically; override the KPI name and period in the “IBCS title” card.
2. Enter a message line (IBCS: SAY) at the top or let “Auto message” build it from the total variance and the biggest drivers.
3. Two footers are available: “Footer (data status · source)” at the bottom left and the filter footer with the bound filter-info measure plus the display state (YTD, Top-N, sorting ...).
4. Scale all fonts centrally via Data labels → Size preset (Compact/Full HD/Presentation) and the “Scale all labels %” factor; label density controls the thinning.

Monitoring cards (status light & bullet)



Monitoring cards: status stripe and background traffic light judge AC against the benchmark, with a ΔBM row and a bullet micro-chart per tile.



AS IT LOOKS IN POWER BI DESKTOP Monitoring cards per country: the coloured status stripe on the left judges AC against the benchmark, with the ΔPY value in absolute and percentage terms below.

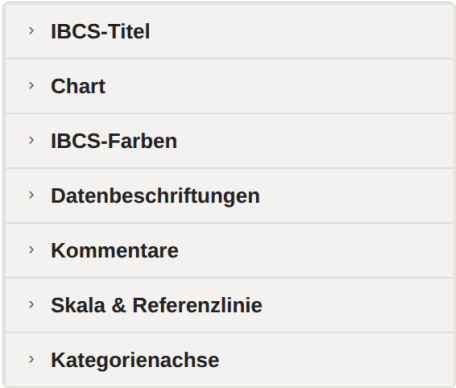
1. In KPI-card mode, under Chart → KPI cards, set the status basis: against the variance basis ($\Delta PL/\Delta PY$) or against the bound benchmark measure.
2. The background tint (traffic light) with its intensity and the highlight direction (both / only bad / only good) rate AC against that basis.
3. Show the bullet against the benchmark (optionally zoomed to the target range) and the mini bridge as needed; you can sort by deviation (biggest top-left).
4. The benchmark role must be filled for the benchmark rating.

Cross-filter, tooltips & bookmarks

1. Clicking a category filters the other visuals on the page (cross-filter). Exceptions: while comment, compare or structure mode is active, clicks do not cross-filter.
2. On hover, default and canvas tooltips show values, variances, series and comment; canvas tooltips (report-page tooltips) are supported.
3. Interactive states are bookmark-capable: the variance basis, the YTD view, in-chart sorting, expanded rows/columns, captured comments and column widths travel with the report or the bookmark.

06 · Settings reference

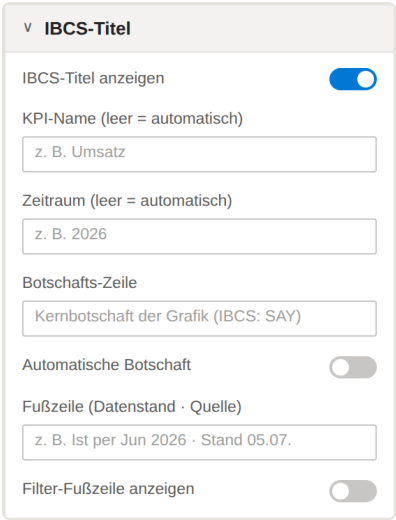
The following schematics show the structure and order of the format pane (naming as in Power BI). Each card and subgroup appears as a schematic sketch next to its settings table, so you can locate every toggle and dropdown in the pane itself. The German format pane is shown; the English pane is laid out identically.



Schematic: Format pane: the visual's seven cards in pane order (collapsed) – IBCS title, Chart, IBCS colors, Data labels, Comments, Scale & reference line, Category axis. German format pane shown; the English pane has the identical structure.

The tables below list every setting in the format pane, grouped by cards and groups — in exactly the order and with the names as they appear in the Power BI format pane. The “Chart” card bundles most settings; many apply only in certain modes (e.g. the “Table”, “Small Multiples”, “Bridge” and “KPI cards” groups).

IBCS Title



Schematic: Format pane → IBCS title: title toggle, KPI name, period, message line, auto message, footer and filter footer. German format pane shown; the English pane has the identical structure.

Setting	Description	Options / default
Show labels	—	On / Off · default On
KPI name (auto if empty)	—	Free text · z. B. Umsatz

Setting	Description	Options / default
Period (auto if empty)	—	Free text · z. B. 2026
Message line	—	Free text · Kernbotschaft der Grafik (IBCS: SAY)
Auto message	Automatically builds the message line (driver text) from the total variance and the biggest drivers when no custom message is entered. Off by default.	On / Off · default Off
Footer (data status · source)	Footer at the bottom left — e.g. data status and source: "Actuals as of Jun 2026 · status 05.07. · source: SAP FI".	Free text · z. B. Ist per Jun 2026 · Stand 05.07.
Show filter footer	Second footer with the filter context: shows the bound "Filter info" text measure (report filters are not exposed to custom visuals via API) plus the visual's own display state — YTD, Top-N, in-chart sorting, Σ exclusions, comparison.	On / Off · default Off

Chart

LAYOUT

Chart

Layout

Ausrichtung

Columns (Zeit)

Abweichungsbasis

Auto

Absolute Abweichung (ΔAC)

Relative Abweichung (ΔAC %)

Doppelte Abweichung (PL + PY)

PY als Dreieck (bei AC + PY + PL)

Summen-Kopfzeile (Σ)

Trennlinie alle N Kategorien

0

Analyse

Small Multiples

Brücke

Tabelle

KPI-Karten

Schematic: Format pane → Chart → Layout: orientation, variance basis and the deviation options. German format pane shown; the English pane has the identical structure.

Setting	Description	Options / default
Orientation	—	Options: Columns (Time) Bars (Structure) Line (Time, many points) Waterfall / Bridge Integrated Bridge (Time) Category Bridge (Structure) Table (IBCS) Pareto (Structure) Dumbbell (Structure) Slope · Before/After KPI Cards (Tiles) P&L Statement (IBCS) · default „Columns (Time)“

Setting	Description	Options / default
Variance basis	Basis for the variance panels. Auto: PL if available, otherwise PY.	Options: Auto Previous Year (PY) Plan (PL) Prior-month FC (revision) · default „Auto“
Absolute variance (ΔAC)	—	On / Off · default On
Relative variance (ΔAC %)	—	On / Off · default On
Dual variance (PL + PY)	Additionally shows the variance panels for the second basis — ΔPL and ΔPY at the same time (requires PY and PL).	On / Off · default Off
PY as triangle (AC + PY + PL)	IBCS notation with three scenarios: when AC, PY and PL are bound, the previous year is shown as a grey triangle (►) at the column/bar edge at PY height instead of as a third column — less cluttered. Off = PY shown as a grey column again.	On / Off · default On
Total (Σ) header	Shows the total and the total variance as a header row.	On / Off · default On
Group separator every N categories	Draws a thin separator line after every N categories, across all panels — for structural comparisons with natural subgroups (e.g. regions). 0 = off.	0–50 · default 0

ANALYSIS

Chart

Layout

Analyse

Kumuliert (YTD)

Kumulierungs-Art

YTD (Jahr kumuliert)

Fiskaljahr beginnt im Monat

1

YTD-Button im Chart

Gleitender Durchschnitt (Perioden)

0

Top N (Balken)

0

Kategorien hervorheben

z. B. Jul, Aug

Invertieren (mehr ist schlecht)

Invertieren je Kategorie

z. B. Opex, Materialaufwand

Vergleich per Klick

Wesentlichkeit ab (absolut)

0

Wesentlichkeit ab (%)

0

Δ%-Pin-Form

Automatisch (je Modus)

Trend-Icons

Small Multiples

Brücke

Tabelle

KPI-Karten

Schematic: Format pane → Chart → Analysis: cumulation (YTD), moving average, Top N, highlighting, inversion, materiality and pin shape. German format pane shown; the English pane has the identical structure.

Setting	Description	Options / default
Cumulative (YTD)	Switches all panels to a cumulative view: columns, Δbasis and Δbasis % show year-to-date values.	On / Off · default Off
Cumulation kind	YTD resets at the start of the fiscal year, QTD at each quarter start, R12 sums the last 12 periods on a rolling basis. Month detection uses the category labels (Jan...Dec, 01...12).	Options: YTD (year to date) QTD (quarter to date) R12 (rolling 12 periods) · default „YTD (year to date)“
Fiscal year starts in month	1 = January ... 12 = December. Determines where YTD/QTD reset (e.g. 4 for a fiscal year starting in April).	1–12 · default 1
YTD button in chart	Shows a clickable "YTD" button at the top right of the chart (Columns/Line) — the end user toggles the cumulative view directly in the report; the choice is persisted. Off by default.	On / Off · default Off
Moving average (periods)	Thin overlay line with a moving average over N periods (Columns/Line). 0 = off.	0–24 · default 0
Top N (bars)	Structure modes (Bars, Category bridge, Table, Dumbbell, KPI cards): shows the N largest categories, the rest is aggregated. 0 = all.	0–50 · default 0
Highlight categories	Comma-separated category names to emphasize (IBCS EMPHASIZE), e.g. the current month.	Free text · z. B. Jul, Aug

Setting	Description	Options / default
Invert (higher is bad)	For cost KPIs: a higher value is bad (red), a lower value is good (green).	On / Off · default Off
Invert per category	Comma-separated categories whose rating is reversed (e.g. cost rows next to revenue rows in KPI cards or the P&L table). Applies in addition to the global invert switch.	Free text · z. B. Opex, Materialaufwand
Compare on click	Columns/Bars only: clicking two columns/bars shows the difference (absolute + %) as an overlay — clicks then no longer cross-filter. Clicking empty space resets. Off by default.	On / Off · default Off
Materiality from (absolute)	Materiality threshold: variances below this absolute amount are shown in grey instead of red/green (panels, waterfall steps, table). 0 = off.	from 0 · default 0
Materiality from (%)	Materiality threshold in percent: variances below this Δ % are shown in grey. If both thresholds are set, a variance must exceed both to be colored. 0 = off.	0–100 · default 0
Δ%-pin shape	Shape of the lollipop head of the Δ % pins. "Automatic" keeps the previous style per mode (Columns/Bars/Waterfall round, bridges and table square); "Round" or "Square" unify all modes.	Options: Automatic (per mode) Round Square · default „Automatic (per mode)“
Trend icons ▲▼●	Prefixes the Δ values in the table and KPI cards with direction arrows: ▲ increase, ▼ decrease, ● immaterial (below the materiality threshold). Also readable in black-and-white print and for color-blind users — color still rates good/bad.	On / Off · default Off

SMALL MULTIPLES

▼ Chart

> Layout

> Analyse

▼ Small Multiples

Gesamt-Kachel (Σ) ☐

Top N Kacheln

0

Erste Kachel groß ☐

Brücken: gleiche Skala für alle Kacheln ☐

> Brücke

> Tabelle

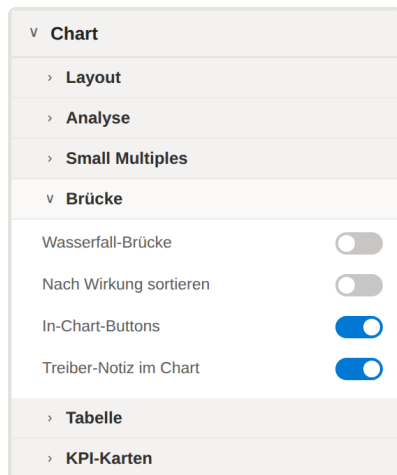
> KPI-Karten

Schematic: Format pane → Chart → Small Multiples: total tile, Top N tiles, first tile large and shared bridge scale. German format pane shown; the English pane has the identical structure.

Setting	Description	Options / default
Total tile (Σ)	Prepends a "Σ Total" tile — the sum across all groups, on the same scale (IBCS).	On / Off · default Off
Top N tiles	Shows only the N largest groups (by total AC) as tiles — the rest are aggregated into a "Remainder" tile. 0 = all.	0–24 · default 0

Setting	Description	Options / default
First tile large	Gives the first tile (e.g. "Σ Total" or the largest group) more room — all tiles keep the same scale (IBCS CT 13).	On / Off · default Off
Bridges: same scale for all tiles	Also scales the bridge modes (Integrated bridge, Category bridge) identically across all tiles (IBCS). Default: off — each bridge tile scales on its own. Columns, bars and waterfall always share the scale.	On / Off · default Off

BRIDGE



Schematic: Format pane → Chart → Bridge: waterfall bridge, sort by impact, in-chart buttons and driver note. German format pane shown; the English pane has the identical structure.

Setting	Description	Options / default
Waterfall bridge	Columns/Bars only: shows the categories as a waterfall bridge from the basis (PY/PL) to AC with connecting lines instead of individual bars. Optional — off by default.	On / Off · default Off
Sort by impact	Waterfall bridge only: sorts the categories by variance size (biggest driver first). A Top-N remainder row stays at the end. Also toggleable by clicking the ↕ symbol in the chart.	On / Off · default Off
In-chart buttons	Integrated/Category bridge: shows clickable buttons at the top right of the chart — ΔPY/ΔPL reference toggle, ↕ sorting and ► build-up animation. The end user can switch the variance basis directly in the report; the choice is persisted.	On / Off · default On
Driver note in chart	Category bridge: italic note at the biggest driver ("biggest driver · n % of the total variance") — overlays the row area, can be turned off here.	On / Off · default On

TABLE

Chart

Layout

Analyse

Small Multiples

Brücke

Tabelle

Werte-Spalten

Nur AC

Zeilen-Struktur bearbeiten (Klick)

Ergebniszellen

z. B. EBIT, Rohertrag

Zeilen aus Summen ausnehmen

z. B. Davon-Positionen

Zeilen ausblenden

z. B. Sonstige, Intern

Grafik nur für diese Zeilen

z. B. Umsatz, EBIT

Zeilen einrücken (davon)

z. B. davon Export

Zahlenformat pro Zeile

z. B. Marge = 0.0 %

Matrix: Spaltenvergleich

Aus (Δ zur Basis)

Formelzeilen

z. B. Marge = EBIT / Umsatz

Position der Σ-Zeile

Unten (unter den Zeilen)

Zebra-Streifen

Zeilenhöhe

Normal

Gitterlinien

Horizontal

Zeilen-Layout (Matrix)

Spalten (Wert - Δ nebeneinander)

KPI-Karten

Schematic: Format pane → Chart → Table: value columns, structure lists (result, skip, hide, chart, indent rows), formula rows plus cell layout, Σ position, zebra, row density and grid lines. German format pane shown; the English pane has the identical structure.

Setting	Description	Options / default
Value columns	Extra number columns next to AC: the variance basis (PY or PL, depending on the comparison basis) or both reference scenarios — for print- and board-ready tables without bar interpretation.	Options: AC only AC + variance basis AC · PY · PL · default „AC only“
Edit row structure (click)	Edit mode: clicking a row opens a small menu with "Invert", "Result row" and "Exclude from totals" — the one-click P&L without changing the data model. The choice is persisted in the lists below; turn off again to report.	On / Off · default Off
Result rows	Comma-separated row names that are formatted as result rows (bold, separator line, excluded from Σ; anchors in the waterfall) — an alternative to the waterfall type role.	Free text · z. B. EBIT, Rohertrag
Skip rows (exclude from totals)	Comma-separated row names that do not flow into the Σ row, the scales and the waterfall cascade (e.g. memo items). The row stays visible but is shown subtly.	Free text · z. B. Davon-Positionen
Hide rows	Comma-separated row names that are only hidden — the Σ row, scales and formulas still compute with them (unlike "Exclude from totals"). Can also be set by clicking in structure mode.	Free text · z. B. Sonstige, Intern

Setting	Description	Options / default
Chart only these rows	Comma-separated row names: when filled, only these rows show the bar/pin graphics — all others stay pure number rows. Empty = graphics everywhere. The Σ row always keeps its graphic.	Free text · z. B. Umsatz, EBIT
Indent rows (davon)	Comma-separated row names shown indented and subtly as "of which:" items — without a hierarchy field. Usually combined with "Exclude from totals".	Free text · z. B. davon Export
Row number formats	Number format per row, semicolon-separated: "Margin = 0.0 %; Quantity = #,0". Percent multiplies by 100; values appear unscaled (no k€ division) — for mixed €, % and unit rows.	Free text · z. B. Marge = 0.0 %
Matrix: column comparison	Comparison within the matrix columns: " Δ vs. previous column" replaces the Δ basis per block with the change to the previous column (period comparison Q2 vs. Q1, Mar vs. Feb ...).	Options: Off (Δ vs. basis) Δ vs. previous column · default „Off (Δ vs. basis)“
Formula rows	Calculated rows, semicolon-separated: "EBIT = Revenue - Costs" adds a subtotal row, "Margin = EBIT / Revenue" a % row. Operands are row names; please surround operators with spaces. Formula rows do not flow into the Σ row.	Free text · z. B. Marge = EBIT / Umsatz
Total (Σ) row position	Where the Σ total row sits: "Bottom" (default, German P&L reading) below all rows, "Top" right under the header (IBCS). Stays frozen while scrolling.	Options: Bottom (below rows) Top (below header) · default „Bottom (below rows)“
Zebra stripes	Shades every second data row with a very subtle background — easier row tracking in wide tables. Off in high-contrast mode. Off by default.	On / Off · default Off
Row density	Row height: "Compact" for dense tables, "Normal" (default) as before, "Airy" for more whitespace. Scales only the cap; very tall visuals stay bounded.	Options: Compact Normal Airy · default „Compact“
Grid lines	Separator style: "Horizontal" (default) row lines only, "None" for a calm look, "Horizontal + vertical" adds subtle column/block dividers.	Options: Horizontal None Horizontal + vertical · default „Horizontal“
Cell layout (matrix)	Matrix only: "Columns" (default) shows the value and Δ basis side by side. "Two rows" puts the value large on top and the smaller Δ number directly below it in the same cell — the matrix becomes roughly half as wide. The Δ mini-bar is dropped; reference (value) columns stay as their own columns next to the value.	Options: Columns (value · Δ side by side) Two rows: value on top, Δ below · default „Columns (value · Δ side by side)“

KPI CARDS

Chart

Layout

Analyse

Small Multiples

Brücke

Tabelle

KPI-Karten

Status-Basis (Streifen & Hintergrund)

Abweichungsbasis (Δ PL/ Δ PY) v

Highlight-Status

Gut & schlecht v

Nach Abweichung sortieren

Datenreihenfolge v

Mini-Brücke zeigen (AC/PY-Balken)

☒

Hintergrund einfärben (Ampel)

☐

Färbe-Intensität %

12

▲ ▼

Bullet vs. Benchmark

☐

Bullet: Zoom auf Zielbereich

☐

Schematic: Format pane → Chart → KPI cards: status basis, highlight status, sorting, mini bridge, background tint and bullet options. German format pane shown; the English pane has the identical structure.

Setting	Description	Options / default
Status basis (stripe & background)	What the stripe and background traffic light rate against: the comparison basis (Δ PL or Δ PY) or the bound benchmark measure — for monitoring against targets/thresholds.	Options: Variance basis (Δ PL/ Δ PY) Benchmark (BM) · default „Variance basis (Δ PL/ Δ PY)“
Highlight status	Which direction is highlighted in color: both (traffic light), only bad (problem monitoring — positives stay neutral) or only good (success board). Applies to stripes, background, Δ rows and bullet.	Options: Good & bad Only bad Only good · default „Good & bad“
Sort by deviation	Orders the cards by the color-relevant variance (benchmark or Δ PL/ Δ PY, depending on the status basis): biggest variance top-left — for maximum focus. "Data order" leaves them as in the model.	Options: Data order Biggest deviation first Worst first (bad on top) Best first (good on top) · default „Data order“
Show mini bridge (AC/PY bars)	Shows the small bar bridge basis → Δ → AC at the bottom of the card. Off: pure number card (large value + Δ rows), calmer for dense KPI walls.	On / Off · default On
Tint card background	Subtly tints the card background: slightly green when better, slightly red when worse than the status basis — neutral (below materiality) stays uncolored. For monitoring walls; off in high-contrast mode.	On / Off · default Off
Tint intensity %	Opacity of the background tint in percent (4–40). Default 12 — stronger for control-room monitors, subtler for board reports.	4–40 · default 12

Data Labels

▼ Datenbeschriftungen

Beschriftungen anzeigen

Beschriftungs-Dichte

Automatisch (ausdünnen)

▼

Größen-Preset

Kompakt (Dashboard-Kachel)

▼

Alle Beschriftungen skalieren %

100

▲▼

Textgröße

10

▲▼

Dezimalstellen

1

▲▼

Einheiten

Auto

▼

Finance-Format (Klammern)

Σ-treue Rundung der Beschriftungen

Schematic: Format pane → Data labels: display, density, size preset, scaling, text size, decimals, units, finance format and sum-safe rounding. German format pane shown; the English pane has the identical structure.

Setting	Description	Options / default
Show labels	—	On / Off · default On
Label density	Controls the thinning of value labels: "Automatic" hides them when space is tight (previous behavior), "All" labels every point (may overlap), "First · last · extremes" shows only the first/last value plus minimum and maximum.	Options: Automatic (thin out) All First · last · extremes · default „Automatic (thin out)“
Size preset	Scales all fonts in the visual at once: Compact ×1 (default) · Full HD ×1.5 (recommended for 1080p reports) · Presentation ×2.	Options: Compact (dashboard tile) Full HD (1080p) Presentation (4K / projector) · default „Compact (dashboard tile)“
Scale all labels %	Enlarges or shrinks ALL labels on top of the preset by a free factor (50–300 %). 100 = neutral. Preset × factor gives the effective font size.	50–300 · default 100
Font size	—	6–24 · default 10
Decimal places	—	0–3 · default 1
Display units	—	Options: Auto None Thousands (k) Millions (M) Billions (B) · default „Auto“
Finance format (parentheses)	Finance convention for numbers: negative values in parentheses instead of a minus sign — (1,234) — and zero as "-". Applies to value and Δ labels including Δ %.	On / Off · default Off

Setting	Description	Options / default
Sum-safe label rounding	Rounds the value labels using the largest-remainder method so they add up exactly to the Σ header — no more rounding-difference questions. Off = mathematically exact individual rounding, but a rounding note appears below the Σ row when there is a discrepancy.	On / Off · default Off

Comments

▼

Kommentare

Kommentarliste anzeigen

☒

Kommentar-Schriftgröße

10

▲▼

Kommentare im Chart erfassen

☐

Schematic: Format pane → Comments: show comment list, comment font size and capturing comments in the chart. German format pane shown; the English pane has the identical structure.

Setting	Description	Options / default
Show comment list	Shows the comments as a numbered list to the right of the chart — stays visible in PDF/PowerPoint export too.	On / Off · default On
Comment font size	Font size of the comment list in pt (8–24). Also multiplied by the font preset and the scaling factor, so it scales with the rest of the visual.	8–24 · default 10
Capture comments in chart	Comment mode: clicking a category opens an input field — the comment is stored in the report (bookmark-capable, travels with the PBIX). While the mode is on, clicks do not cross-filter. Off by default.	On / Off · default Off

Scale & Reference Line

SCALE SYNC

▼

Skala & Referenzlinie

▼

Skalen-Sync

Skalen-Mindest-Maximum

0

▲▼

Abweichungs-Mindest-Maximum

0

▲▼

Ausreißer am Maximum kappen

☐

▼

Referenzlinie

Referenzlinie (Wert)

z. B. 1200000

Referenzlinie (Beschriftung)

z. B. Ziel

Schematic: Format pane → Scale & reference line: Scale-sync subgroup (minimum maxima, cap outliers) and Reference-line subgroup (value & label). German format pane shown; the English pane has the identical structure.

Setting	Description	Options / default
Scale minimum maximum	Scales the base chart at least up to this value — for identical scales across multiple visuals (IBCS). 0 = automatic. Larger data values still extend the scale.	from 0 · default 0
Variance minimum maximum	As above, for the absolute variance panel (symmetric $\pm$). 0 = automatic.	from 0 · default 0
Cap outliers at maximum	Makes the scale maximum hard: larger values are capped and marked with a double stroke (the label shows the real value).	On / Off · default Off

REFERENCE LINE

Setting	Description	Options / default
Reference line (value)	Draws a target/threshold line at this value across the base chart. Empty = off.	Free text · z. B. 1200000
Reference line (label)	—	Free text · z. B. Ziel

Category Axis

v
Kategorienachse

Textgröße

10

▲▼

Schematic: Format pane → Category axis: text size of the axis labels. German format pane shown; the English pane has the identical structure.

Setting	Description	Options / default
Font size	—	6–24 · default 10

07 · FAQ & troubleshooting

The visual only shows a hint like “requires PY or PL”.

The integrated bridge, category bridge, P&L statement, dumbbell and slope modes need a comparison basis. Bind a measure to the Previous Year (PY) or Plan (PL) role. For all-negative totals, switch to waterfall or columns with the waterfall bridge.

Why is there no running total (YTD) in the matrix?

Cumulation is deliberately disabled in the matrix: it would cumulate over the flat row list and double-count the column groups (e.g. quarters). Use YTD in columns or line mode, or compute the running total as a measure in the data model.

The bridge breaks on negative totals.

The integrated and category bridge do not support all-negative totals — the visual shows a hint instead of a broken graphic. Use the waterfall mode or columns/bars with the waterfall bridge enabled.

Numbers appear in k€ instead of thousands as expected.

The display units are set to Auto or Thousands (k). Set Data labels → Display units to the level you want; the unit appears in the title. For mixed €/%/unit rows use “Row number formats” in the table.

Horizontal scrolling of the matrix is missing in the PDF/PowerPoint export.

A still image cannot scroll, so the “... +n” hint applies on export. Narrow the matrix beforehand: two-row compact mode, fewer value columns, adjusted column widths or collapsed column groups.

PY appears as a triangle instead of a column.

With three bound scenarios (AC + PY + PL) the visual shows PY as a grey triangle per IBCS so as not to clutter the column. Turn it off under Chart → Layout → “PY as triangle”.

The good/bad colours don’t match my KPI (e.g. costs).

For costs a higher value is bad. Enable Chart → Analysis → “Invert” globally or “Invert per category” for individual rows (e.g. expense items next to revenue).

The filter context is not shown in the footer.

Report filters are not exposed to custom visuals via API. Bind a text measure (e.g. via `SELECTEDVALUE(CONCATENATEX)`) to the “Filter info” role and enable the filter footer in the “IBCS title” card.

A rounding note appears below the Σ row.

Enable Data labels → “Sum-safe label rounding”. The individual labels are then rounded with the largest-remainder method so they add up exactly to the Σ header.

Contact & notes

ChartKitchen byDatenWG · Version 1.38.0.0

Contact: Michael Tenner · michael.tenner84@gmail.com

A changelog ships with the visual package.

IBCS® is a registered trademark of the IBCS Association. This visual is inspired by the IBCS principles and is not affiliated with the IBCS Association.