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Chart FX 7 Quick Start Guide

Table of Contents		
About this Guide	4	
Installating & Integrating Chart FX into Visual Studio		
Chart FX 7 Default Charts		
The Chart FX Smart Tag Wizard	<i>e</i>	
Setting the Chart's Gallery	8	
Setting the Chart's Data Source	8	
Setting the Chart's Visual Attributes	8	
Configuring Axes and Panes	9	
Configuring Legend, Titles and Point Labels	9	
The Chart FX Data Wizard		
Chart FX 7 At A Glance	1	
The Chart FX API & Properties List		
The Chart FX End User Tools		
The Chart FX 7 Highlight Feature	15	
Chart FX 7 Supported Rendering Methods	16	
Chart FX DHTML Rendering Engine	17	
Extending your Chart FX Applications	18	
ClickOnce Deployment	19	
Multilingual Support	19	
Migrating to Chart FX 7	20	
Converting your Charts at Design-time		
Using the Chart FX 7 Wrapper	2 ⁻	
Getting Help & Assistance	22	
Technical Support	22	
Requirements, Pricing and Licensing	23	

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About this Guide

This Quick Start Guide will introduce Chart FX 7 and its basic features and integration into Visual Studio. It is geared to provide you with quick information about its most prominent features. If you want additional product information or want to access the product's full resources, including API documentation and samples, please visit the Chart FX Resource Center from the Windows Start menu or by simply using the Chart Smart Tag and selecting the 'Launch Resource Center' option.

Installing & Integrating Chart FX into Visual Studio

The Chart FX 7 custom installer takes advantage of the Visual Studio automation model to adequately setup your development environment so you can quickly integrate charts and other graphical displays in your application.

As soon as you start Visual Studio, you will notice a 'Chart FX' tab in your toolbox. This tab will not only display the appropriate Chart FX assembly for your project but will also highlight other Chart FX extensions you may have installed.

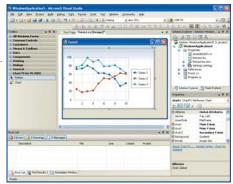


Chart FX 7 Default Charts

The Chart FX default chart has been optimized according to the platform for which you are writing. Carefully selected cosmetics such as gradients and color palettes as well as other important chart elements such as toolbars, legends and output format will be customized automatically based on the chart size and platform selection.

This feature allows developers to focus their attention on the functional aspect of the application rather than visuals or other platform specific issues.

To integrate a chart in your form, simply select the chart icon and drop or drag a chart in your form. As soon as this is done, Chart FX will expose the Chart FX Smart Tag Wizard, which is introduced and described later in this guide.

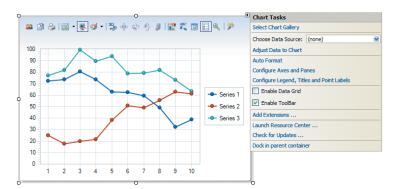


The Chart FX Smart Tag Wizard (patent pending)

When you drop a control into a Visual Studio form a Smart Tag appears in the upper-right hand corner of the control. The Smart Tag is a drop down menu that contains a list of actions that allow developers to quickly access commonly used options and functionality.

Chart FX not only makes full use of Visual Studio Smart Tags, but it has complemented this infrastructure with a fully-functional Wizard that allows developers to quickly and easily access most, if not all, of its main features. With the Chart FX Smart Tag Wizard, developers can:

- Access the Chart FX features in a well organized and structured way. We have ensured that all actions displayed in the Chart FX Smart Tag Wizard are sequential and structured. This allowed us to filter functionality according to chart galleries selected or the data source properties of the chart.
- 2. Access Chart FX's complex functionality in an easy to use interface. The Chart FX Smart Tag Wizard does not simply list basic or trivial actions; with this wizard you can perform complex data and visuals manipulation in the chart.
- 3. Access product features without the need of obtrusive dialogs that alienate the development experience within Visual Studio. The Chart FX Smart Tag Wizard does not display or popup additional modal dialogs; all steps are presented within the smart tag itself adhering to Visual Studio standards and providing a familiar, yet powerful, editing interface.
- 4. Access a real-time design-time preview of the chart. As developers interact with the Smart Tag Wizard, changes are being previewed in the chart at design time. This prevents developers from needing to run the application just to check how those changes are affecting the real chart or apply changes in a modal dialog and later check the results at design time.
- Access additional on-line services and products from Software FX. From the Chart FX Smart Tag Wizard, you can gain access to product patches and updates as well as available product extensions and documentation quickly and easily.

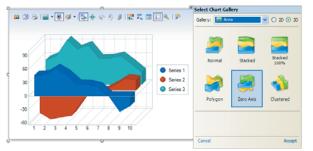


Like any other Visual Studio-compliant control, Chart FX allows developers to access a set of design time actions through the use of smart tags. In addition, Chart FX embeds an entire wizard infrastructure into every action displayed in the smart tag wizard.

It is important to note, the Chart FX Smart Tag Wizard is a Chart FX design-time feature. It does not have a presence in any of the Chart FX run-time components which means this powerful interface will not compromise in any way security, performance or scalability of your application.

Setting the Chart's Gallery

The first step in configuring a chart through the smart tag wizard is to select a gallery type from the wealth of chart types available. From basic chart types like Bars and Lines to more complex charts like Polar and Surface, Chart FX allows you to deal with any data visualization need. To choose a chart gallery, click on the 'Select Chart Gallery' verb in the smart tag wizard and you will enter the Gallery option displayed below:



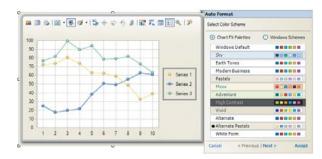
Please note upon selection of a chart type, Chart FX will automatically preview changes made on the form.

Setting the Chart's Data Source

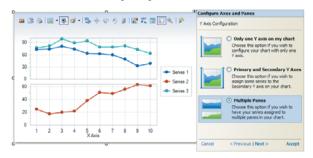
Just like any other Visual Studio data aware control, Chart FX allows you to connect the chart to any table in the project's Data Source. In addition, Chart FX exposes the 'adjust data to chart' option that encapsulates a full Data Wizard that allows a developer to map fields in the query statement to the chart and instruct Chart FX how to process and use this information to plot series and assign legends and other labels in the chart. Please refer to the following section in this guide for more information on the Chart FX Data Wizard.

Setting the Chart's Visual Attributes

Just like a grid control, Chart FX supports a variety of environmental settings like colors, borders and backgrounds. The AutoFormat verb in the Chart FX Smart Tag Wizard, allows you to select the chart's color palette, borders and customize the chart's background with images, gradients and other interesting visual effects.



In ASP.NET 2.0, Themes are a new tool for providing a common look and feel to all of the visual controls on a page (or across your Web Site). At the page level, to manage the look and feel of visual controls, you set the Theme property of a visual control to the name of a theme. The theme is applied to all visual controls on the page. In addition, Chart FX palettes have been designed and named consistently with other Visual Studio controls. This means, making a chart look like your DataGrid is a matter of changing a Chart FX Palette. The palette will apply the same color scheme to all elements in the chart, including background, axes and markers.

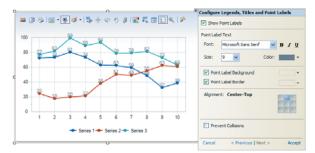


Configuring Axes and Panes

Axes and Panes are among the most complex elements in the chart. Setting gridlines, fonts, tickmarks and creating additional axes and panes is as easy as a few clicks in the Chart FX Smart Tag Wizard. The following screen helps developers determine the number of axes and panes and their location in the chart:

Configuring Legend, Titles and Point Labels

Labeling chart elements can be easily achieved with this option in the Smart Tag Wizard.



Just like these, the Chart FX Smart Tag Wizard allows developers to easily customize other chart settings and run-time behavior. In addition, the Smart Tag Wizard allows you to access the Chart FX Resource Center and other on-line resources like Support and Updates.

The Chart FX Data Wizard (patent pending)

The Chart FX Smart Tag Wizard provides the basic datasource configuration option available to other controls in Visual Studio, so you can quickly create and/or connect to an existing database or dataset in your project.



The first step is to properly create the project's Data Source and connect the chart to it. Like any other data aware control, Chart FX exposes the '**Choose Data Source**' option that provides access to Visual Studio's database wizard.

If you are not familiar with typed datasets, please refer to the Visual Studio documentation for more information on how to properly create and configure database objects in your project.

It is also important to mention, Chart FX provides additional methods to populate charts, these

include, among others: XML files and API calls. For more information about these chart population methods please refer to later sections in this guide.

Although Visual Studio makes it simple to connect to data sources, there is still a lot of processing that needs to be done in order to make a dataset functional to a chart component. For example, if you are creating a scatter chart, you must specify and map which fields represent the x and y values or if you are charting financial data you must then map the Hi, Low and Close values to fields in your SQL statement so Chart FX can display the data appropriately.

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nce you have selected a typed dataset and a query, nply select the 'Adjust Data to chart' verb in the Smart g Wizard to properly instruct Chart FX how process fields in the query.

e first screen in the Data Wizard allows you to filter fields that will be actually plotted in the chart. With this screen you can actually reuse existing queries in your data source and simply select the fields you want to plot in the chart.

All numeric fields will be considered series in the chart and all text or date/time fields will be considered as x-axis labels.

The Data Wizard also allows you to set series labels and their paint order (z-order) in the chart.

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The Chart FX Data Wizard also provides a powerful error detection mechanism that alerts you of any potential problems or conflicts between your query and how Chart FX will attempt to plot at run time. The following screen is alerting the developer that too many text fields exists in the query:

The Data Wizard error detection mechanism is also interconnected with other sections of the Smart Tag Wizard. For example, if you decide to change the chart type to another gallery after setting up the Data Wizard settings, Chart FX will automatically alert you of potential problems with your application.

The most basic method of passing data to a chart using Chart FX 7 is to use a typed dataset in conjunction with the Chart FX Smart Tag Wizard at design-time. The Data Wizard provides a graphical way to extract and configure data from your project's data source and database objects. However, sometimes this is not possible due to the nature of the data to be integrated and plotted in the chart. Some of these data sources include databases, text files, Crosstab, OLAP, XML, arrays, collections, and many others.

Passing data from databases and text files is supported by Chart FX's core, however, all the code required to read data from XML, array and collection sources has been isolated in an additional assembly (ChartFX.Data.DLL) allowing Software FX to easily build additional 'Chart FX Data Providers.'

By providing an additional assembly exclusively used for data, the programmer can decide when to include or exclude the assembly, thus giving control of what is to be deployed. Although data functionality requires an additional assembly to be deployed as part of your application, it allows Chart FX to provide easy integration of new data sources, e.g. Active Directory, Grids, OLAP, etc.

For internal data structures like collections and arrays there is no need to loop through data points to populate the charts. If you have a previously filled data array, just pass it to Chart FX and have the chart filled with data with as little as one line of code.

For more information, please refer to the Chart FX 7 API and electronic documentation.



Chart FX 7 is a completely re-engineered data visualization solution. By taking full advantage of Visual Studio and the ASP.NET 2.0, Chart FX again raises the bar to a level that other charting components won't be able to reach.

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Smart Tag Wizards: ★

The Chart FX Smart Tag Wizard does not display modal dialogs which alienate the development experience; all steps are presented within the smart tag itself adhering to Visual Studio standards and providing a familiar interface.

Data Wizard: ★

Chart FX encapsulates a full Data Wizard that allows a developer to map fields in a database or business object to a chart and instruct Chart FX how to process and use this information.

New Powerful API:

The Chart FX API was created with the Visual Studio object model in mind. Now it's easier to access complex functionality and quicker to integrate into your C# or VB.NET applications as objects and classes are more recognizable and easier to code.

DHTML Rendering Engine: ★

Chart FX takes advantage of Visual Studio's out of band callbacks and combines a powerful DHTML engine that uses the AJAX (Asynchronous JavaScript & XML) technique to produce chart images that allow fully secure interactivity and support state in web apps.

Redesigned Resource Center:

The Resource Center provides a wealth of documentation and samples that will help you attain the most benefit from Chart FX in Visual Studio.

Installer:

Chart FX is compatible with Visual Studio Themes. Any changes that you make to a Theme are extended to all Chart FX controls on the page.

★ Chart FX Extension Manager: Chart FX standardizes our

extensibility infrastructure which allows Chart FX to adapt quickly and effectively to verticals like real-time, financial, statistical, maps and OLAP, among others.

🖈 Patent Pending.

The Chart FX API & Properties List

Chart FX features a new powerful API, with the Visual Studio object model in mind. It is now much easier to access complex functionality and integrate complex charts to your C# or VB.NET applications as objects and classes are more recognizable and easier to code.

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If you have already used the Chart FX Smart Tag Wizard and you still have not achieved the desired results you can still use to the chart Properties list which provides a more granular and detailed access to the control's API at design time. For your convenience, the Chart FX 7 properties list has been completely redesigned according to the different elements and features that is supports.

Chart FX makes use of complex properties to reduce the amount of properties available in the properties list and to allow developers to easily locate and configure the properties for a particular chart object.

For example, Configuring gridlines in the chart's Y Axis is as simple as opening the AxisY property in the Properties list and setting the properties inside the Grids property located in that object. From here, you can configure the many settings available to a gridline like color, thickness and style.

Also, for those chart elements that are even more complex, Chart FX provides additional dialogs

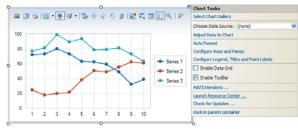
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Finally, Chart FX 7 features dynamic properties that accommodate certain chart settings. For example, if you select the Pie/Doughnut types, Chart FX will dynamically display only the properties that apply to such chart types in the Gallery property, making it simpler for developers to locate and set the appropriate properties.

The Chart FX End User Tools (patent pending)

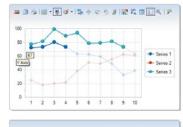
Among the most useful end user features in Chart FX 7 is the Toolbar, which has been fully redesigned so end users have access to most data analysis features. From the Toolbar, end users can save, export, configure, zoom and perform other interesting data analysis functions without additional coding efforts. You can easily enable the toolbar from the Chart FX Smart Tag Wizard:



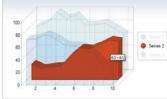
In addition to the Toolbar, Chart FX provides powerful run-time user interface with data analysis tools; these include drilldowns, tooltips, drag & drop axis configuration, special zoom features and highlighting, among others. Among all these tools, highlighting and the magnifying ruler are features that allow end users to better analyze and interpret data displayed in the chart.

The Chart FX 7 Highlight Feature

The Chart FX Highlight feature lets end users position the mouse in any chart element allowing it to instantly dim out other elements in the chart. This feature allows end users to quickly detect trends and other important elements in the chart.



For example, when an end user positions the mouse over a chart axis, Chart FX will activate a dynamic filter that highlights the value and the chart points that plot above that specific value. As the user continues to move the mouse along the axis, Chart FX will reapply that filter, highlighting the appropriate data. Similarly, Chart FX applies highlighting over markers, legend boxes and the data grid.



Highlight also applies when end users position the mouse over a marker. The Highlight feature will automatically dim other series allowing the selected series to be visible in the chart area.

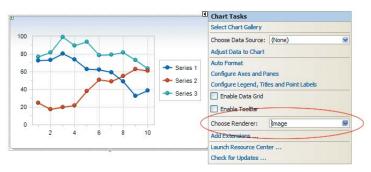
Note: Highlighting is only available for Smart Client applications and ASP.NET 2.0 applications that render .NET and ActiveX client components.

Chart FX 7 Supported Rendering Methods

For web-based applications, most charting components generate universally accessible images like PNG and JPEG which are static and do not require the browser to do round trips to the server. Other data visualizations solutions, including Chart FX, generate other types of output including Flash, SVG, and PDF that are still supported by most browsers and provide quality output for printing and limited interactivity like drilldown and tooltips.

In addition, Chart FX provides client server components, ActiveX and .NET, which allow Internet Explorer browsers to automatically download secured code and let end users enjoy the same rich interfaces they are accustomed in smart client applications. Because intranet applications are not faced with the same constraints as internet web sites (security, dependence, etc), they can quickly realize the benefit of client controls and make their applications and Chart FX client components an essential front-end analysis and reporting tool for the end users.

To select the Chart FX rendering method, simply use the Smart Tag Wizard or the Properties list:



As a way to meet the increasing needs for image interactivity on the browser while still maintaining browser independence, Chart FX 7 adds a powerful DHTML rendering engine that allows end users to fully interact with charts in a fully secured environment.

Chart FX DHTML Rendering Engine (patent pending)

Developers face important challenges when building truly interactive web applications because of the stateless nature of the web. For one, round trips to the server impact end user experience and negatively affect the application's performance, but most importantly, with every page refresh the application ends up losing the focus of its input controls like edit and combo boxes.

To alleviate this situation, Visual Studio incorporates out of band callbacks that allow developers to build web applications that can actually make a call back to the server and fetch new data without having to refresh the entire page.

Chart FX 7 takes advantage of the out of band callbacks capability and combines it with a powerful DHTML engine to produce chart images that allow full interactivity and support state in web applications.

Among other things, the Chart FX DHTML rendering engine allows developers to:

- Prevent downloading, configuration and use of ActiveX or .NET components making the application platform agnostic and maintenance free.
- Deploy charts that are fully secured as no binary files are needed in the browser.
- Access a fully interactive toolbar with drop-down menus that support most Chart FX end user functionality, including zooming and scrolling providing a much smoother client experience, while still maintaining the full flexibility of deploying to any browser client in the enterprise.

While the user is interacting with the chart, the Chart FX DHTML rendering engine will automatically update the chart with the new data. While this takes place, end users don't lose any of their chart settings, they don't get the appearance of a complete page refresh, and Internet Explorer didn't need to download the entire page content again; it only updated the one portion of the chart that changed.

Extending your Chart FX Applications.

Chart FX 7 also standardized its extensibility infrastructure. This means better integration and easier deployment of Chart FX Extensions. The Chart FX Extensions are .NET assemblies that allow Chart FX to adapt to verticals like financial, statistical, maps and OLAP, among others.

To access the Extension Manager, simply click on the chart Smart Tag Wizard and select the 'Add Extensions...' option.



The Chart FX Extension Manager uses web services to retrieve all installed and available extensions from Software FX. You can then simply download a trial version and test the functionality before you make any purchase decision. For additional information on Chart FX Extensions, visit http://www.softwarefx.com/extensions.

The following extensions are available for Chart FX 7:

Chart FX Annotation (included with Chart FX 7) allows developers to create, display and manipulate floating objects like pictures, text and arrows to highlight elements in the chart. Developers can create and place objects by code, or simply activate the extension and let end users create and manipulate objects from a toolbar.

Chart FX Gauges provides fully customizable dial controls and numerical displays to display data that is quick and easy for end users to understand, and an alternative to displaying such data in a text box or progress bar.

Chart FX OLAP seamlessly integrates into Visual Studio and provides the most advanced and intuitive user interface specifically built for OLAP pivoting, slicing and drilldown. Chart FX OLAP supports ADO-MD and XML for Analysis for integration with major leading OLAP server vendors like Microsoft SQL Server. Chart FX Maps allows developers to create and integrate dynamic data-driven display into any image map, including geographic maps, seating charts, component diagrams, etc. Hundreds of pre-built geographical maps are included or, if custom maps are required, they can be created using standard SVG editors from vendors like Adobe⁻⁻.

Chart FX Statistical provides developers with an effortless way to integrate mathematical operations and algorithms to calculate and display statistical studies including Standard Deviation, Variance, Regression Line, Normal Distribution and F-Test, to name a few.

Chart FX Financial allows developers to provision their client server and web applications with a variety of predefined financial indicators and special chart types to perform Technical Analysis on stock market data and information.

ClickOnce Deployment

Chart FX 7 now supports ClickOnce deployment. ClickOnce deployment allows easy installation and updates for Windows applications that are published to a website.

The following core scenarios describe how ClickOnce deployment is supported:

- On the development machine, the Windows application is published to a website.
- On the client machine, the published website provides the option to install the Windows application.
- The client automatically receives updates to the Windows application.

Smart Client applications that use Chart FX reports are not only publishable to websites, but also FTP servers, shared network servers (through File Share), and disk drives. To deploy the application, the Chart FX runtime components and the .NET Framework version 2.0 must be installed on the client machines.

Multilingual Support

Chart FX can be localized to any language or culture. Software FX provides all the required resources, tools, commands, and special versions of Chart FX 7 assemblies needed for translation. All the files needed to complete this process can be found in the installation files (localization package). After completion, you should send the translated files to Software FX via email to support@softwarefx.com so they may be compiled using a Software FX strong name. Once completed, Software FX will return the assembly required to begin working with the localized version.

Before commencing translation you may want to check with Software FX as there are many existing translated resources available from Software FX, including but not limited to Spanish, Korean, Japanese and Portuguese. For additional information please contact our support department at support@softwarefx.com.

Migrating to Chart FX 7

If you are currently using Chart FX for .NET 6.2 and you would like to use Visual Studio for future developments, you will be much better upgrading to Chart FX 7 as it was built specifically for Visual Studio and the .NET Framework 2.0.

The Chart FX API was completely redesigned with the Visual Studio object model in mind. With Chart FX, it will be easier to access complex functionality and quicker to integrate into your C# or VB.NET applications, as objects and classes are more recognizable and easier to code.

For those of you who are using previous versions of Chart FX in Visual Studio 2003, this means you will be confronted with many API incompatibilities that will force you to rewrite your previous Chart FX code. If this code is not extensive, we strongly suggest you write the Chart FX code again as it will allow you to take advantage of the newest, most powerful, Chart FX API. If this is not possible, then we provide a wrapper that will allow you to take advantage of Chart FX 7 without rewriting code.

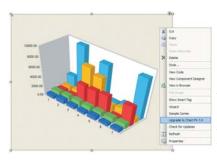
To properly use this wrapper in your project you will need the following:

• Chart FX for .NET 6.2 latest service pack

• Chart FX 7

Converting your Charts at Design-time

After loading your project in Visual Studio containing a Chart FX for .NET 6.2 chart, you can simply right-click the chart and select the **'Upgrade to version 7.0'** verb (please note this option will not appear if you have not yet applied the latest Chart FX for .NET 6.2 Service Pack) Selecting this option will convert the 6.2 chart into a 7.0 chart, copying all design-time properties.



Upgrading using this option will change the name of the chart to <chartname>_new. For example, if the original chart was called chart1, the upgraded chart will be called chart1_new.

The reason for this is to avoid a large number of compilation errors, due to the Chart FX API changes. The only error the compiler will throw is 'The name chart1 is not defined in the current context'.

Once the Chart FX for .NET 6.2 chart object has been converted at design time, you must make changes in your code to use the Chart FX wrapper, as described next.

Using the Chart FX 7 Wrapper

Chart FX provides a wrapper that supports all Chart FX for .NET 6.2 members and applies the corresponding functionality in Chart FX 7. To use the wrapper, the developer must define a variable <chartname> (e.g. chart1) of type SoftwareFX.ChartFX.Wrapper.Chart and initialize it, passing the upgraded chart as a variable, as follows:

WinForms:

SoftwareFX.ChartFX.Wrapper.Chart chart1 = new SoftwareFX.ChartFX.Wrapper.Chart(chart1_new);

WebForms:

SoftwareFX.ChartFX.Wrapper.Internet.Server.Chart chart1 = new SoftwareFX.ChartFX.Wrapper.Internet.Server.Chart(chart1_new);

Also, the developer must replace the original 'using' clauses ('Imports' in VB.NET) as follows:

WinForms:

replace using SoftwareFX.ChartFX with using SoftwareFX.ChartFX.Wrapper

WebForms:

replace using SoftwareFX.ChartFX.Internet.Server
with using SoftwareFX.ChartFX.Wrapper.Internet.Server

In order to use a Chart FX 7 property, the chart1_new can be used directly. Another way to access the new chart from the wrapper directly is to use the **ChartFX7Object** property of the wrapper (e.g. chart1.ChartFX7Object). This also applies to any internal object, such as Axis, etc.

Note: If you are generating Chart FX for .NET 6.2 binary files, you can convert them using a Chart FX 7.0 chart converter. For more information, please refer to a knowledgebase article in the Chart FX 7 support site at http://support.softwarefx.com.

Getting Help & Assistance

Whether you are just starting with Chart FX or you are an experienced Chart FX developer, you will find a wealth of documentation and samples in the Resource Center that will help you benefit from Chart FX in Visual Studio.

This Resource Center not only provides a 'Programmer's Guide' reference that discusses interesting Chart FX topics, but also includes the Chart FX API, an Internet Reference specifically catered for web development and a wealth of actual samples and charts (with code) that you can integrate and test in your applications.



Technical Support

Support for Chart FX 7 is available on the web for free. Our state of the art support site (located at <u>http://support.softwarefx.com</u>) was designed to help you quickly and easily find the information you need. In this site, you can view knowledgebase articles, sample code, documentation, product updates and other important technical support information.

Also, forums are a great way to receive feedback from the Software FX Support Team, as well as other Chart FX developers. The Software FX staff is dedicated to providing the best support possible, so monitoring the forums is a daily routine, plus access to the forums is free. You can access the Software FX Community at <u>http://community.softwarefx.com</u>.

Registered users of Chart FX may sign up for a support account online. The account is free for the first 30 days. If you require further assistance after that period, you may renew your support account for a yearly fee. You can create your support account online or call our sales department to activate your support account.

Requirements, Pricing and Licensing

Smart Client Applications

Development:

Chart FX 7 Windows Forms design-time components are licensed on a per-developer basis. The license agreement permits you to use one (1) copy of these components on a single computer. If you need to install design-time components in more than one computer, you need to obtain an Additional Development Seat License per each additional computer or developer.

Deployment:

You have a royalty-free right to distribute Chart FX for your Windows Forms or Smart Client applications subject to the conditions specified in the Chart FX 7 License Agreement 'Redistributable Code'.

ASP.NET 2.0 Applications

Development:

Additionally, Chart FX 7 ASP.NET design-time components are licensed on a per-developer basis. The license agreement permits you to use one (1) copy of these components on a single computer. If you need to install these designtime components in more than one computer, you need to obtain an Additional Development Seat License per each additional computer.

Deployment:

When used in an ASP.NET application, Chart FX is licensed on a per-server basis for deployment, regardless the number of processors (CPU's) in that server. The basic package includes one (1) License for deployment on a Production Server. If you need to deploy Chart FX in more than one production server, you need to obtain an Additional Production Server License per each additional production server.

For multi-server environments and OEM licensing, Chart FX provides a single MSI that you can embed with your application to easily deploy Chart FX run-time components. For more information on this please contact our sales department at sales@softwarefx.com.

Software FX

Software FX, Inc. 5901 Broken Sound Parkway NW Suite 400 Boca Raton, Florida USA 33487 Phone: (800) 392-4278 (561) 999-8888 Fax: (561) 998-2383 sales@softwarefx.com www.softwarefx.com

Technical Support

Phone: (561) 392-2023 support@softwarefx.com

www.softwarefx.com