Line Charts

Overview

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Type	Icon	When to Use
Line		You want to view trends over time by plotting data at points connected by lines. Use a line chart to plot many metrics.
3D Line		Similar to the line chart, but in three-dimensional form.
Z Chart		Trends over a short period of time; displaying the data, accumulative total, and moving total.
Stepped Line		A line chart where movement is shown in steps rather than straight lines.

Chart Data Options

Option	Description
Horizontal Axis	This is the category label for the X axis
Vertical Axis	Typically a numeric value such as $. An item that you want to measure on your Chart
Colour	This option is only available if you have a cross tab data set available and is used to determine the colour applied for cross tab series data.

Line Chart Tutorial

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Summary

In order to set up a Line Chart you will need:

1. Create a report with chart display
   a. Select a field to use as the **Horizontal Axis**
   b. Select a field to use as the **Vertical Axis**
   c. Select a field to use as the **Colour** (if you have decided to create a cross tab report)
2. Create your chart, selecting **Line** as the type
3. Provide the **Horizontal Axis**, **Vertical Axis**, and **Colour** options
4. Customise the Chart as required
5. Proceed to the **Output** step

6. **Save** your report

Tutorial

1. Start the **Report** creation process by using one of these methods:

- **Left Side Nav** - open the left side navigation panel, click on Create, select the Report option

- **Top Right Button** - click on the create button, select the Report option.

- **Toolbar** - click on the Create link in the toolbar, select the Report option.

You will now see the **New Report** lightbox.

Left Side Nav	Top Right (with Left Side Navigation enabled)	Toolbar
? Unknown Attachment	? Unknown Attachment	? Unknown Attachment

2. Click on the **Ski Team** view in order to use the fields defined within it for creating the report.

3. You will now be taken to the **Data** step of the Report Builder.

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4. Add **Year and Invoiced Amount** to **Columns**.

Columns	🟨 Year	Σ Sum Invoiced Amount
Rows		

Year ▾	Sum Invoiced Amount ▾
2009	$17,633,473
2010	$8,611,470
2011	$11,012,244
2012	$81,690,100
2013	$158,353,519
2014	$152,912,577
2015	$28,207,858
2016	$12,522,605

5. Proceed to the **Charts** step of the builder.

Report	Data	Charts	Output

6. Select the **Line** chart from the **Line** section of the charts panel on the right of the screen.

Line

7. Set the following components:

- **Horizontal Axis:** Year
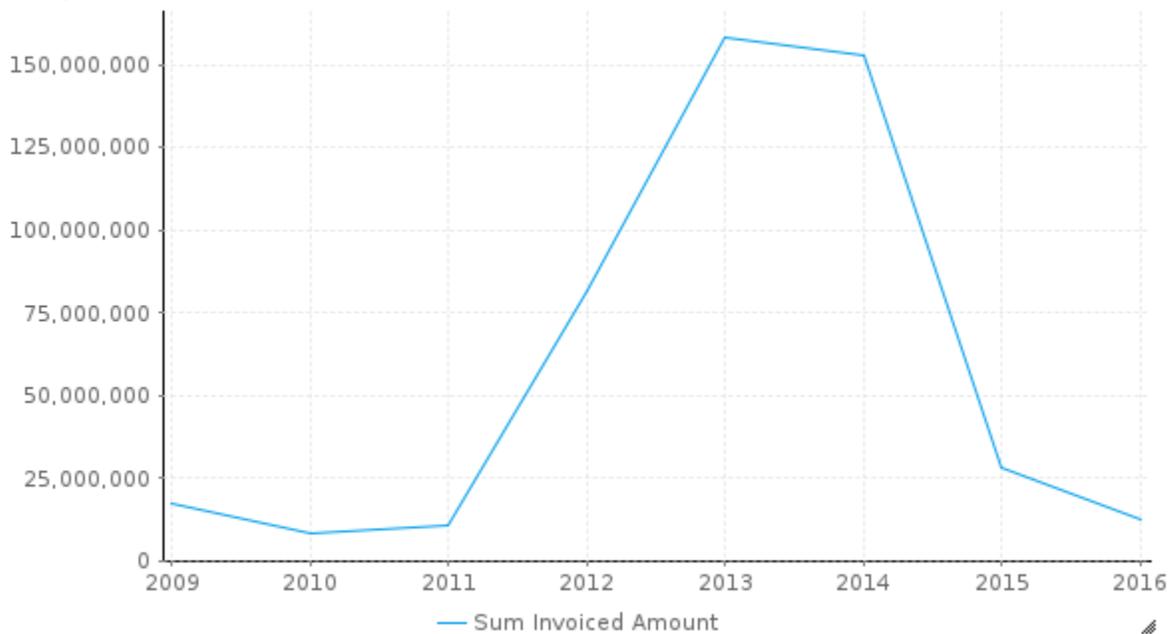- **Vertical Axis:** Sum Invoiced Amount

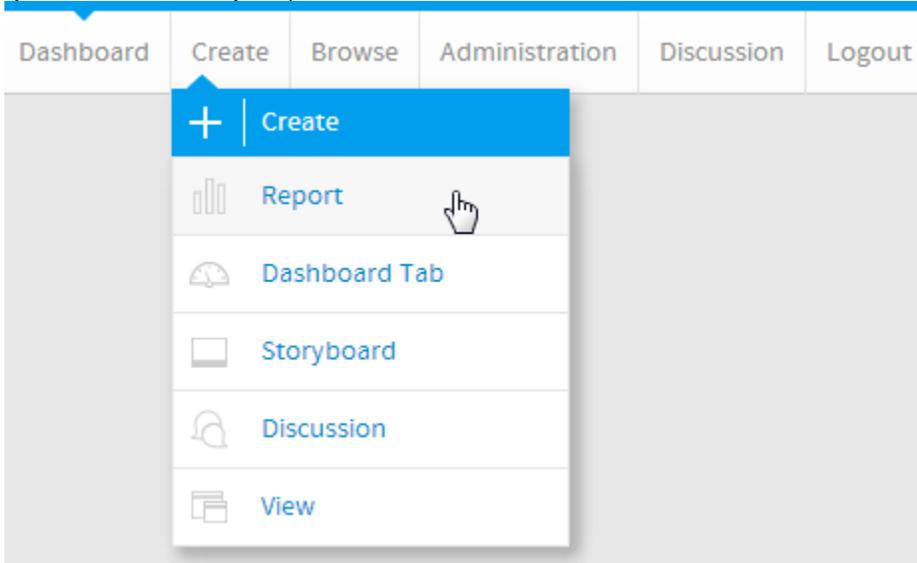8. **Save** your report

Z Chart Tutorial

Summary

In order to set up a Z Chart you will need:

1. Create a report with chart display
    a. Select a date field to use as the **Horizontal Axis**
    b. Select a field to use as the **Vertical Axis**
2. Create your chart, selecting **Z Chart** as the type
3. Provide the **Horizontal Axis** and **Vertical Axis** options

4. Customise the Chart as required
5. Proceed to the **Output** step
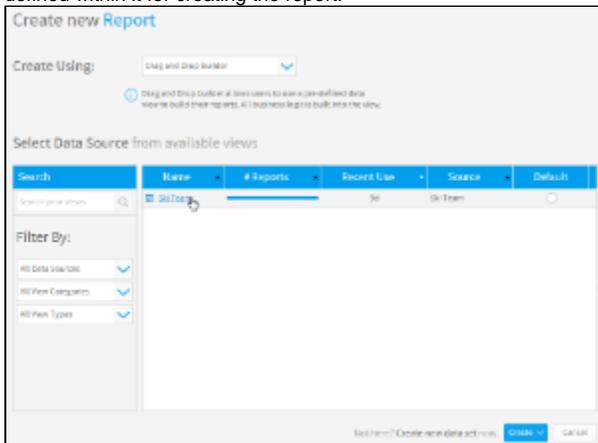6. **Save** your report

Tutorial

1. Click the **Create** link in the main navigation bar of the system, and select the **Report** option.

2. You will now be on the Report Initialisation page. Ensure the **Drag and Drop Builder** has been selected to use for report creation.

3. Click on the **Ski Team** view in order to use the fields defined within it for creating the report.
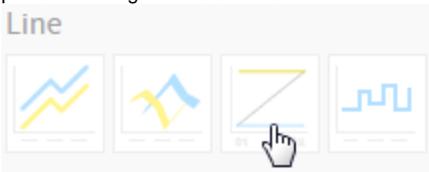

4. Add **Month** and **Profit Margin** to Columns.

Columns	☐ Month	Σ Sum Profit Margin
Rows		

Month ▼	Sum Profit Margin ▼
April	$9,512
May	$22,012
June	$6,994
July	$11,395
August	$20,659
September	$19,005
October	$16,854
November	$55,723
December	$68,007
January	$258,633
February	$144,676

5. Proceed to the **Charts** step of the builder.

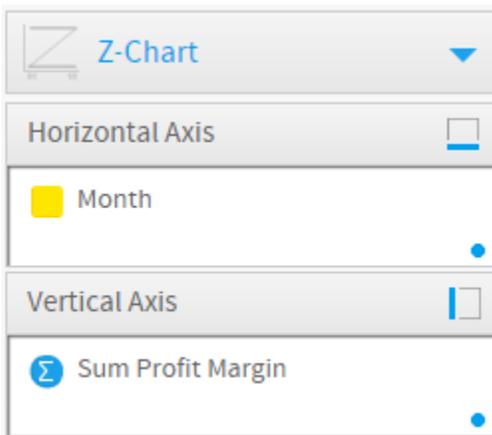| Report	Data	Charts	Output

6. Select the **Z Chart** from the **Line** section of the charts panel on the right of the screen.

Line
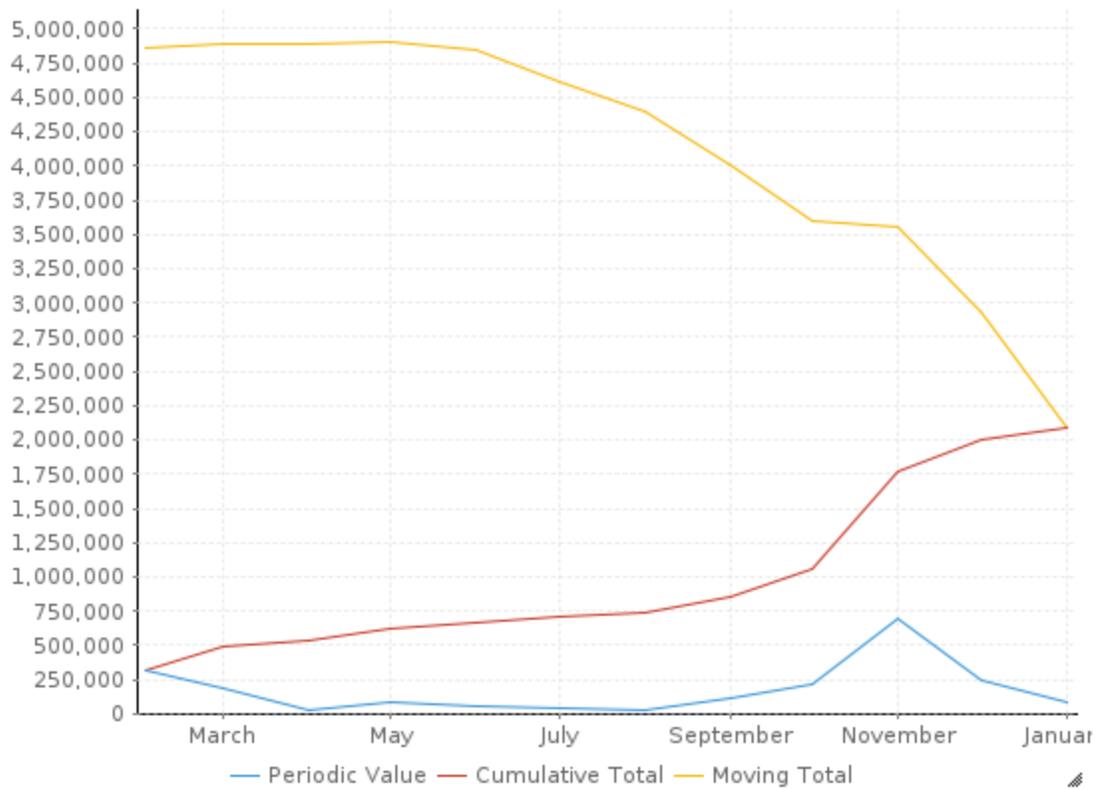

7. Set the following components:

- **Horizontal Axis:** Month
- **Vertical Axis:** Sum Profit Margin

Z-Chart ▼

Horizontal Axis

☐ Month

Vertical Axis

Σ Sum Profit Margin

8. **Save** your report

Legend: Periodic Value — Cumulative Total — Moving Total

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