

Line Charts

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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

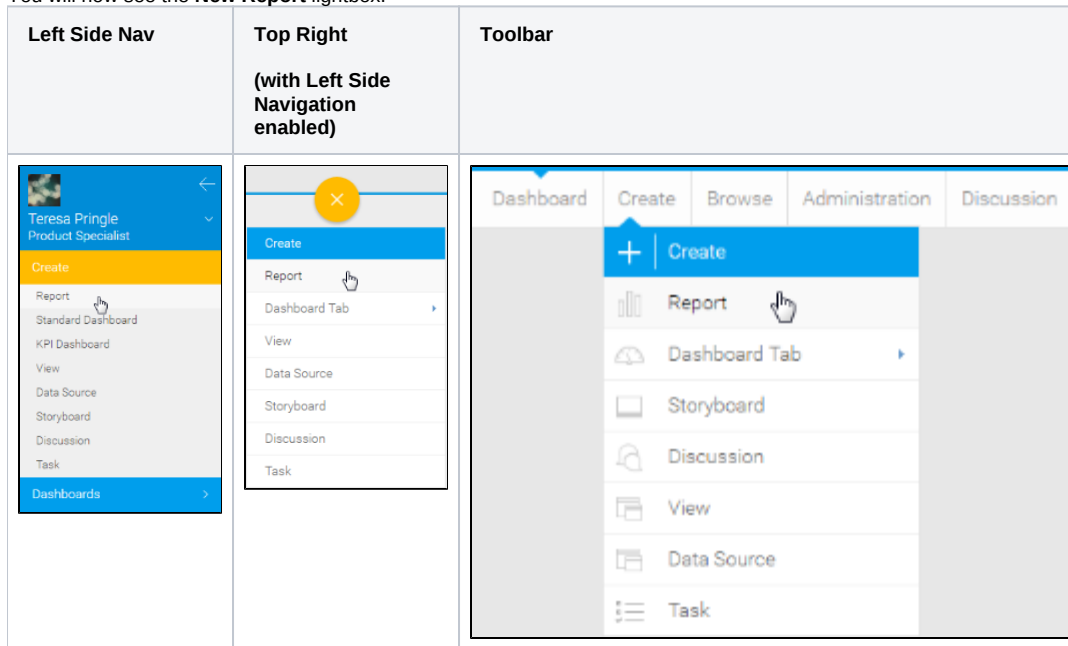
6. Save your report

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.



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.

New Report

Select View

Analyse

Advanced Authoring

Select a view

Search

Advanced

View	Recent Use	Source	
Ski Team	Ski Team		
New Ski Team	This is a tutorial view for training and demo purposes.	am	
Historical Records			

Not here? Create new

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

Columns	Year	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


Line

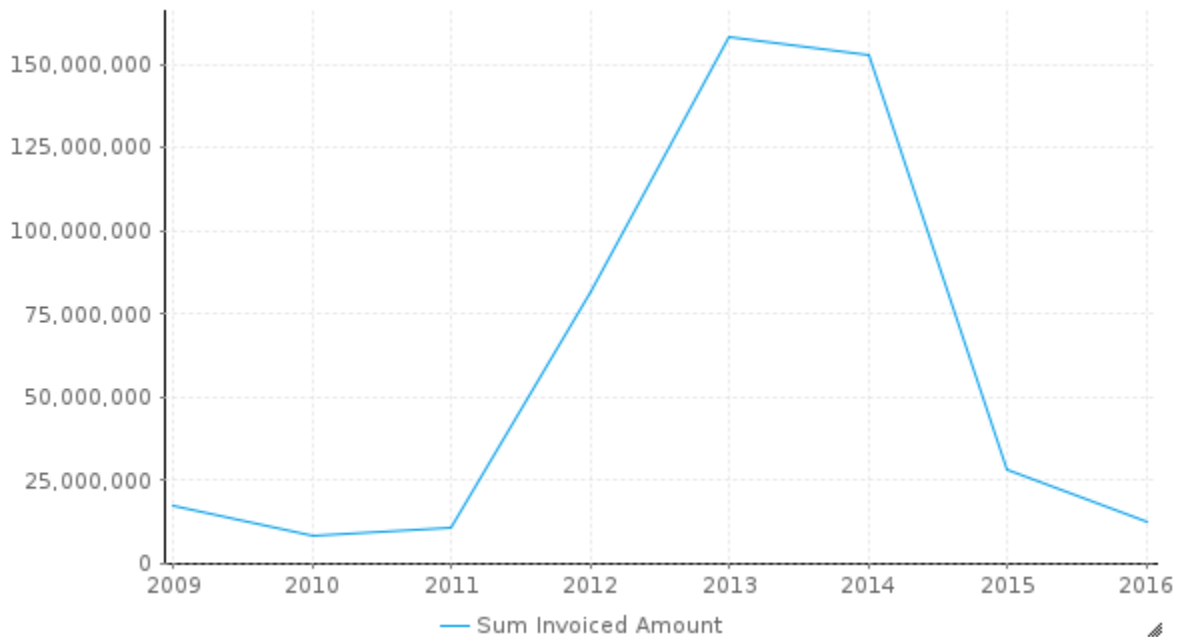
Horizontal Axis
☐


Year

Vertical Axis
☐


Sum Invoiced Amount

8. **Save** your report



Z Chart Tutorial

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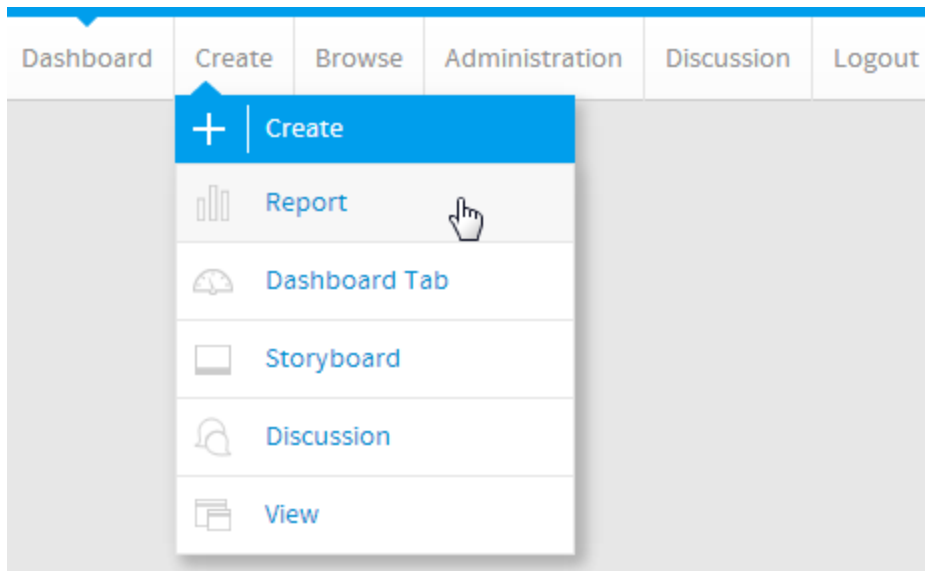
Summary

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

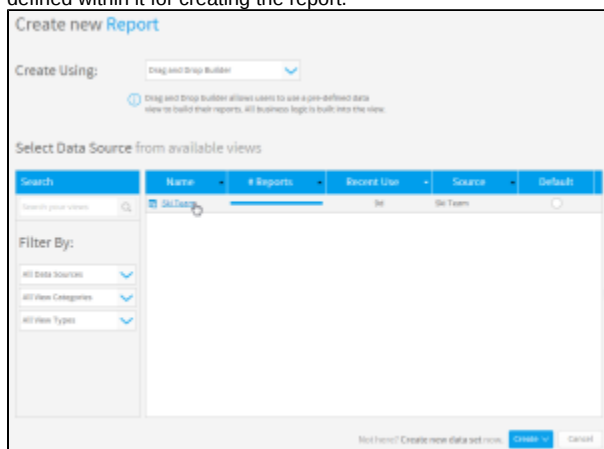
Tutorial

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.

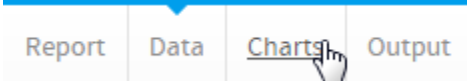


4. Add **Month** and **Profit Margin** to Columns.

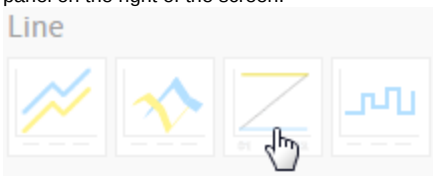
Columns	Month Σ Sum Profit Margin
Rows	

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.



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



7. Set the following components:

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

Z-Chart

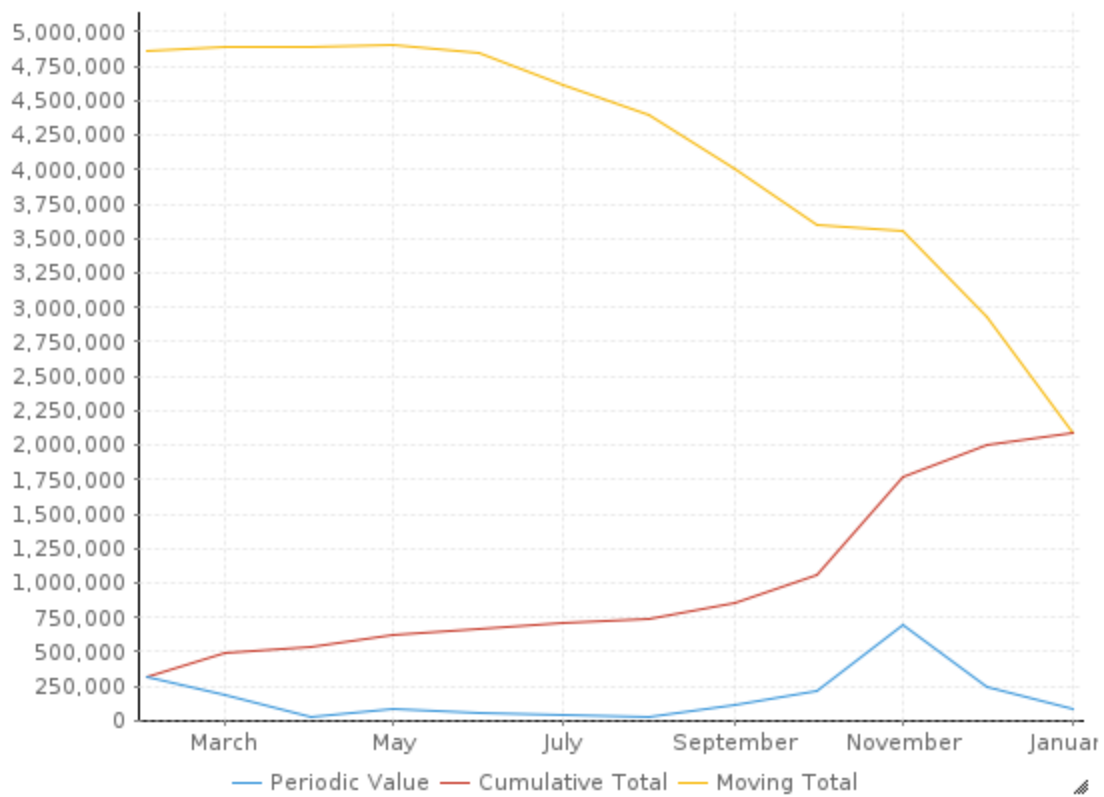
Horizontal Axis

Month

Vertical Axis

Σ Sum Profit Margin

8. **Save** your report



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