**CHARTS**

Charts allow you to present your information graphically. Report Studio offers 12 groups of charts with multiple configurations for each group. To see the chart types, you can open the **New** report box in Report Studio and select **Chart**.

**A. Look at the various chart groups/ types** (start with **UD Financial Data Mart**):

1. Select **Create a new report or template**
2. **New** window – select **Chart**



1. Choose a **Chart group** on the left side
2. Choose a **Chart type** on the right side
3. The **Information** panel displays a description and usage details for that specific group/type combination.

 

**B**. **Create a Pie Chart for a Purpose’s current fiscal year expenses**

1. Open Report Studio using **UD** **Financial Data Mart**
2. Click **Create a new report or template**
3. Double-click the **Chart** icon 
4. In **Chart Group** panel, choose **Pie, Donut**
5. In the **Chart type**, choose a **Pie** or **Pie with 3-D** and click **OK**

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1. The work area shows your chart type and three data elements you’ll add:
	* **Default measure –** transactions amount
	* **Pie Slices –** Account and Account description
	* **Pies –** fiscal year



1. Open **UD Financial Data Mart** and add the following fields to the chart
2. **Default measure**, drag and drop:

|  |  |  |
| --- | --- | --- |
| Field Name | Query Subject  | Folder  |
| TRANS\_AMOUNT | Trans Detail |  |



Drop **TRANS\_AMT** here

1. **Pie Slices**, drag and drop:

|  |  |  |
| --- | --- | --- |
| Field Name | Query Subject  | Folder  |
| ACCOUNT | Chart of Accounts | Account |
| ACCOUNT\_DESCR | Chart of Accounts | Account |

1st   2nd 

Look for thin, blinking line under ACCOUNT and drop **ACCOUNT\_DESCR** here

Drop **ACCOUNT** here

 3rd 

**Pie Slices** should look like this

1. **Pies**, drag and drop:

|  |  |  |
| --- | --- | --- |
| Field Name | Query Subject  | Folder  |
| FISCAL\_YEAR | Trans Detail | Dates |



Drop **FISCAL\_YEAR** here

1. **Save** this report in **My Folders** and name it ***Pie Chart Curr FY Trans***
2. Click on **<#ACCOUNT#>** and **Sort  Ascending**
3. Click the chart area and add the following three filters from thepre-written **Filters** folder:
	* **ACTUALS Ledger Filter**
	* **Current Fiscal Year Filter**
	* **Journal ID not blank Filter**
	* **Statistics Code not ENP ENU Filter**
4. Add the following prompt from the pre-written Prompts folder:
	* **Purpose Prompt**
5. Your work area should look like this:



1. **Save** your work
2. **Run** the report with one Purpose code

To enhance the readability of the pie chart, we’ll make some formatting changes.

1. Add a dynamic title for the Purpose
	* In the **Insertable Objects** pane, click **Toolbox** 
	* Click  **Block** and drag to title area, release when black dotted line surrounds the title area



* + Click  **Layout Calculation** and drag it into the block
	+ In the **Report Expression** window, click the **Parameters** tab 
	+ Double-click  **Select Purpose** and click **OK**
1. Change the label for the **Pie**(s):
	* In the **Pies** box, click the box around **<#FISCAL\_YEAR#>**
	* Make sure **Properties** says **Pies** (use the **Ancestor ** button if needed**)**
	* In **Properties**, go to **Data Item/Label**
	* Type in **Fiscal Year**
2. Change the title for the **legend**
	* Under the **Pie Slices** box, double-click where it says ***(Default Legend Title)***
	* A warning message pops up – “This selection does not have a default action.” Click **OK**
	* The text in the box changes to “Double click to edit the text”
	* Double-click the new text
	* In the **Text** box type: **Accounts** and click **OK**
3. Change the legend to display entire Account Description
	* Click the legend box  in the work area



* + In **Properties** (it should say **“Legend”**)
	+ Go to **General/Auto Truncation**
	+ Change to **No**
1. Add a percentage value to the pie slices
	* Click on the chart
	* In **Properties** (it should say **“Pie Chart”**)
		1. Go to **Chart Labels**
		2. Click **Values** and change to **Outside slices with lines**
		3. Click **Tooltips** andchange to **Show**
		4. Click **Value Representation** and change to **Percent**
2. Save your work
3. Run the report
4. Change the chart to grey scale or patterns (in case it will be printed b&w)
	* Click on the chart
	* In **Properties**, go to **Color & Background**
	* Select **Palette** and click the ellipses 
	* In the **Palette** window, click the **Palette** dropdown 



* + Choose either **Patterns** or **Grey Scale**
	+ Click **OK**
1. **Save** your work
2. **Run** the report
	* Hover your mouse pointer over the pie slices to see the additional info

**C. Add a Column Chart to a Crosstab report**

1. **New ** (we will use the **UD Financial Data Mart** package) and select **Crosstab**
2. Add this field to the **Rows**:

|  |  |  |
| --- | --- | --- |
| Field Name | Query Subject  | Folder  |
| FISCAL\_YEAR | Balances | Dates |

1. Add these fields to the **Columns**:

|  |  |  |
| --- | --- | --- |
| Field Name | Query Subject  | Folder  |
| CHARTFIELD1  | Balances |  |
| ACCOUNTING\_PERIOD | Balances | Dates |

1. Add this field to the **Measures**:

|  |  |  |
| --- | --- | --- |
| Field Name | Query Subject  | Folder  |
| AVAILABLE\_BALANCE  | Balances |  |

1. **Sort**  CHARTFIELD1 **Ascending**
2. **Sort**  ACCOUNTING\_PERIOD **Ascending**
3. Your work area should look like this:



1. Add the following pre-written prompt from the Prompt folder:
	1. **Purpose Prompt**
2. Add the following filters with the **Filter**  button and **Add**  button:
	1. **[FISCAL\_YEAR] in (2009,2010)**
		* **Validate** the expression before clicking **OK**
	2. **[ACCOUNTING\_PERIOD] in (1, 2, 3, 4, 5, 6)**
* **Validate** the expression before clicking **OK**
1. **Save** the report in **My Folders** and name it ***Column Chart Crosstab***
2. **Run** the report and review the data

Next we’ll add a column chart to the crosstab report:

1. Click the **Insert Chart**  button from the toolbar
2. Accept the default **Chart group** and **type** (a basic column graph) and click **OK**



1. Your work area should look like this:



1. In the Column Chart, **Sort**  the following fields **Ascending**:
	1. **Series**: <#FISCAL\_YEAR#>
	2. **Category**: <#CHARTFIELD1#>
	3. **Category**: <#ACCOUNTING\_PERIOD#>
2. **Save** your work
3. **Run** the report

To enhance the readability of the column chart, we’ll make some formatting changes.

1. Add some space between the chart and the crosstab
	1. Click the **Toolbox ** tab
	2. Drag and drop a **Block**  next to the chart when you see the thick black blinking line



* 1. Drag and drop a **Text Item**  into the block



* 1. Type [space] [space] in the **Text** window
	2. In the work area, click the block and choose the **Font** size of **16 pt**
1. Change the colors of the column bars to make them better “UD” colors (or not)
	1. Click the chart in the work area
	2. In **Properties**, go to **Color & Background/Palette,** click **Ellipses **
	3. In the Palette window the colors for the columns will be used in the order displayed.

*(Note - There are only two years in our chart, so we’re only concerned with the top two colors.)*

* 1. Find the “bright blue” color and move it up to the top with the **Up**  arrow
	2. Find the “bright gold” color and move it up to second from the top position with the **Up**  arrow
	3. Click **OK**
1. Turn on Tooltips for the chart
	1. In **Properties**, go to **Chart Labels/Tooltips** and change to **Show**
2. **Save** your work
3. **Run** the report

Note: Hover your mouse over the columns in the chart to see the additional information

**D. Convert a chart to a different type** (using the chart from C. above)

1. In the menu **File/Save As**… save the report with a new name, **Convert Chart Crosstab**
2. In the work area, right click on the chart and choose **Convert Chart…**
3. Experiment with different chart groups/types
	1. Line
	2. Bar
	3. Pareto
4. Run the report after each new chart to see how you like the results.
5. Save the report when you are done trying out different charts.