

## **Report Designer Job Aid for Inserting and Formatting a Chart**

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## PURPOSE OF THIS JOB AID

This job aid provides steps to add a chart to a report in the Report Designer. You will learn to define the data set to populate the chart, then research formatting options.

## INSERT AND FORMAT A CHART

Your reviewers like the user listing report that you created. Now they have asked if you can include a pie chart that shows how many users belong to each organization.

Figure 1 shows what the customer wants.

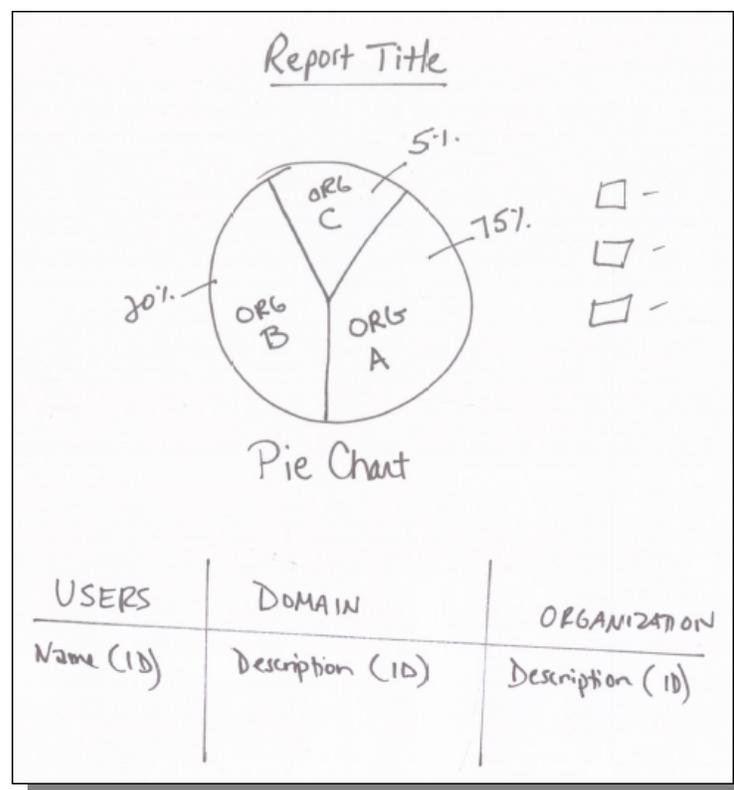


Figure 1. Sketch of the Desired Report Output



## Define a Data Set to Populate a Chart

### Step

1. Create a new data set and give it a meaningful name, such as “UserxOrg Chart”.
2. Enter the following SQL:  

```
SELECT COUNT(stud_id), org_id  
FROM PA_STUDENT  
GROUP BY org_id
```
3. Select **OK**.
4. Observe the new data set in the **Data Explorer** tab, as shown in Figure 2

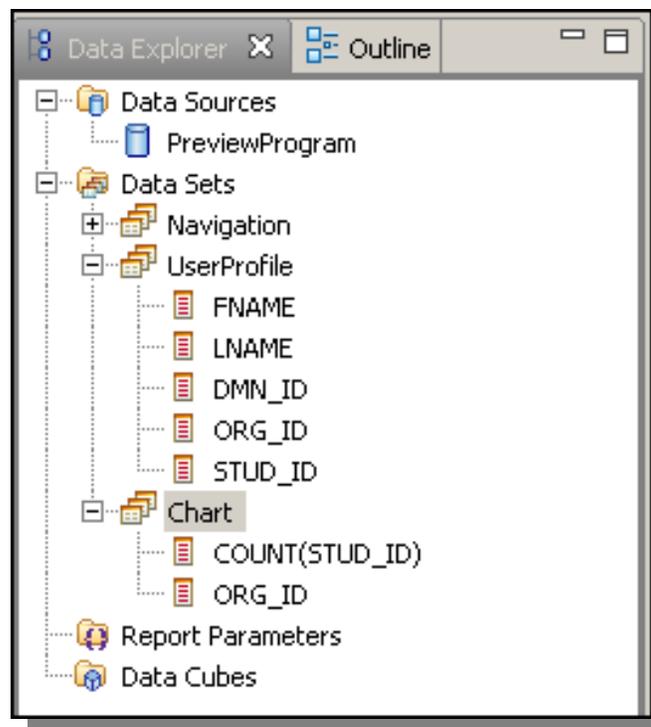


Figure 2. New Data Set for Chart



## Add and Configure a Pie Chart

### Step

1. If you inserted a grid earlier, then you can right-click in grid and insert a **Chart** above the existing table.  
If you did not use a grid earlier, you can insert a two row grid now.
  - a. Select the existing table and use Control/X to cut it from the report temporarily.
  - b. Right click in the workspace and insert a grid with one column and two rows.
  - c. Place your cursor in the bottom row and right click > **Paste** to put the table into this row.
  - d. Place your cursor in the top row and right click > **Insert > Chart** (or drag a chart from the palette into the row).
2. Select the **Pie** chart type, shown in Figure 3.

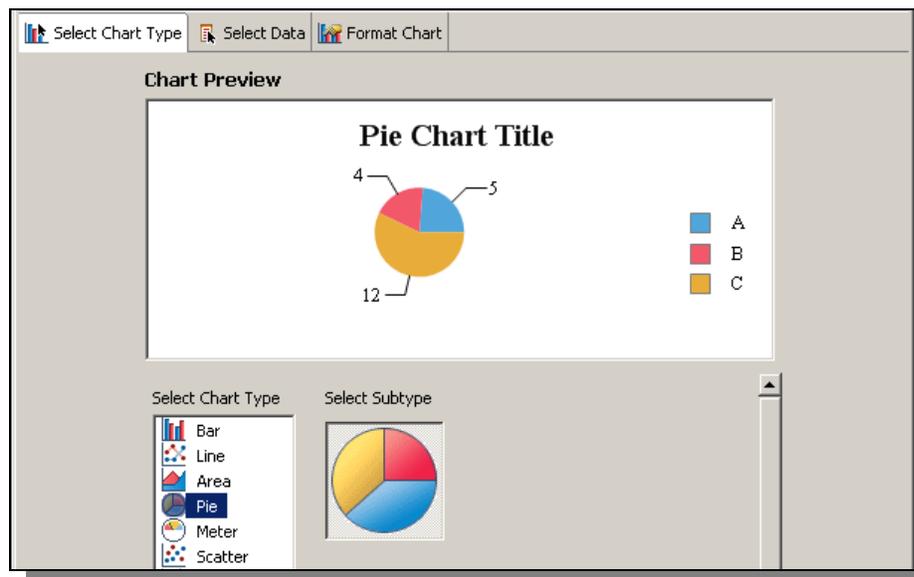


Figure 3. New Chart Wizard > Select Chart Type

3. Select **Next** and you will advance to the **Select Data** tab.

4. In the **Select Data** section, select the option to **Use Data from** and select your chart data set. Then set up the details to tell PRD which dimensions to use (illustrated in Figure 4):
  - a. *To define the Slice Size Definition* – Locate the Count (stud\_id) column heading under the **Data Preview** section, then drag and drop it to the field under Series 1.
  - b. *To define the Category Definition* – Locate the org\_id column heading under the **Data Preview** section, then drag and drop it to the Category Definition field

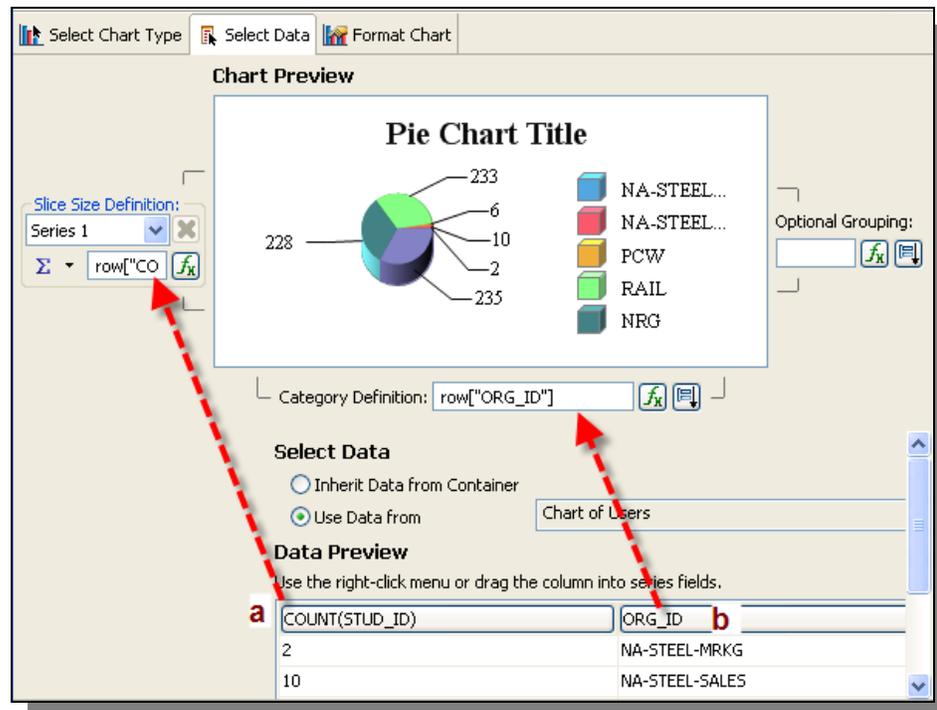


Figure 4. Define Slice Size and Category

5. Check the preview to confirm your settings, then select **Next**.
6. Use the **Format Chart** tab to add formatting such as Titles and Legends.
7. Select **Finish** to save the chart and return to the report workspace.
8. Click on **File > View Report** and run the report in a selected output format.

## FINE TUNE AND CUSTOMIZE THE CHART

There are a variety of ways to tailor the chart's appearance and behavior.

### Edit Chart to Hide Users without Org ID

**Scenario:** Many users do not have organization ID indicated on their user record. This skews the pie slices.

**Solution:** You can select one of several strategies:

- ◆ Edit the query and add a WHERE statement to exclude null values (WHERE org\_id IS NOT NULL)
- ◆ Edit the data set, selecting **Filter**, and create a new filter for **ORG\_ID, Is Not Null** (Figure 5).

Enter a filter condition:

Expression row["ORG\_ID"] fx

Operator Is Not Null

Figure 5. Filter Condition to Hide Users with Null Org ID

### Show Only the Top 10 Organizations

**Scenario:** Display only the ten largest organizations.

**Solution:** Edit the data set, selecting **Filter**, and create a new filter for **Count** with the Operator Top n and set a Value 1 = 10.

Enter a filter condition:

Expression row["COUNT(STUD\_ID)"] fx

Operator Top n

Value 1 10

Figure 6. Filter Condition to Show 10 Highest Counts

## More Tips for Formatting the Chart

**Scenario:** Your customer wants to have pie chart colors that are different from the default settings.

**Solution:** Double-click on the chart to open it if needed. Then:

1. Go to the **Format Chart** tab.
2. Select the **Series** menu, listed on the left.
3. Click the **Series Palette** button on the bottom of the screen.
4. Look at the **Series Palette** window and see that the colors are shown in the order they will be used – you can select a different color from the drop down.

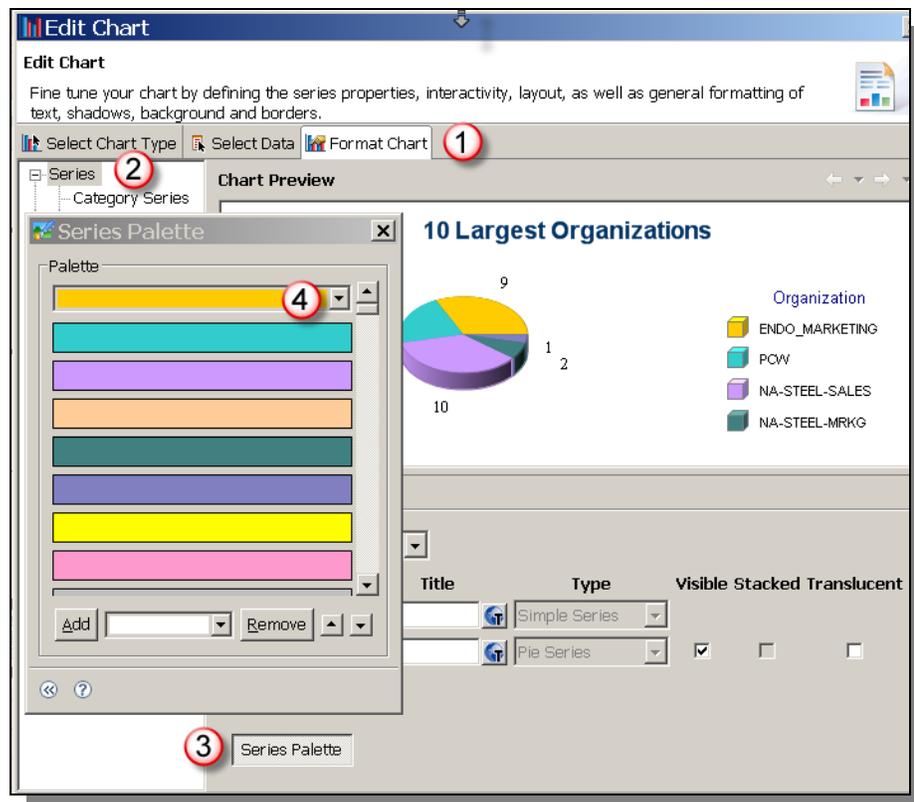


Figure 7. Menu to Edit Series Palette and Select Pie Slice Colors

**Scenario:** Your customer wants the pie chart layout to be more distinctive. And they would like separation between the pie slices.

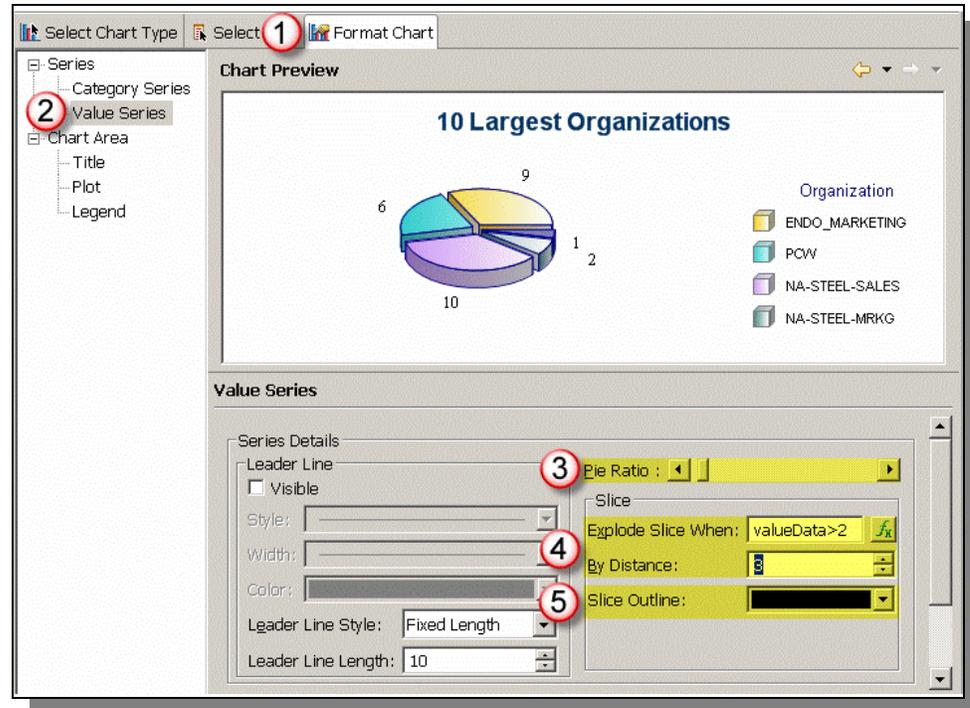


Figure 8. Set Up Pie Slices to “Explode”

Go to **Format Chart > Chart Area > General Properties**.

Set Units and Series Depth.

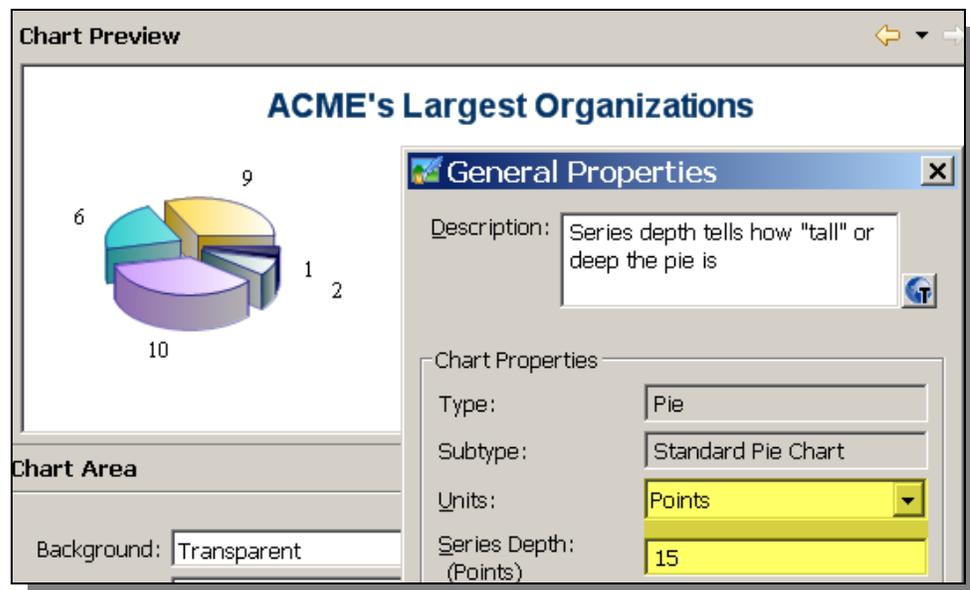


Figure 9. Set Up Pie Depth/Height

**Scenario:** The customer wants to see pie slice gradients with transparent color, as shown in Figure 10.

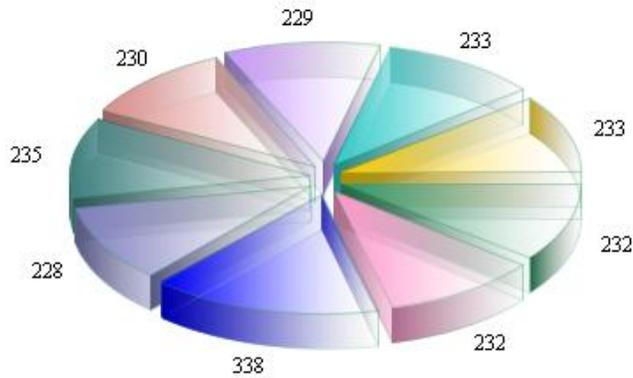


Figure 10. Desired Look for the Pie Chart

### Steps

1. Select **Series > Series Palette > dropdown color > set end color to Transparent** (Figure 11).

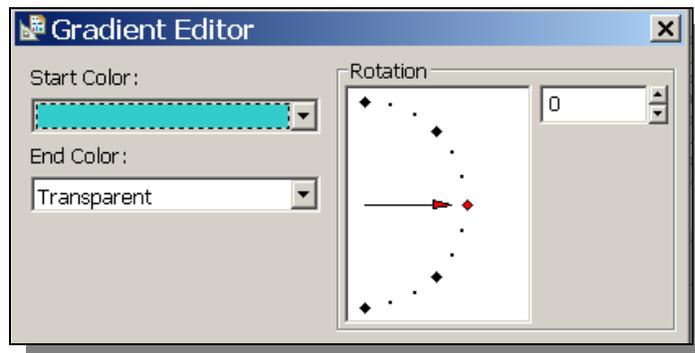


Figure 11. Set Gradient with Transparent End Color

2. Set line color to be fairly subtle by defining opacity.

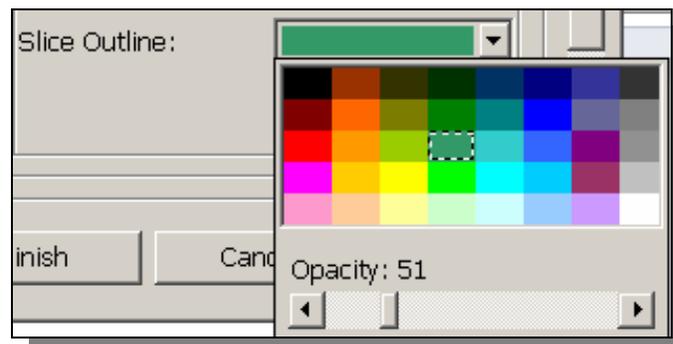


Figure 12. Set Pie Slice Outline with Low Opacity

- Go to **Format Chart** tab > **Series** > and select the checkbox for **Translucent** (Figure 13).

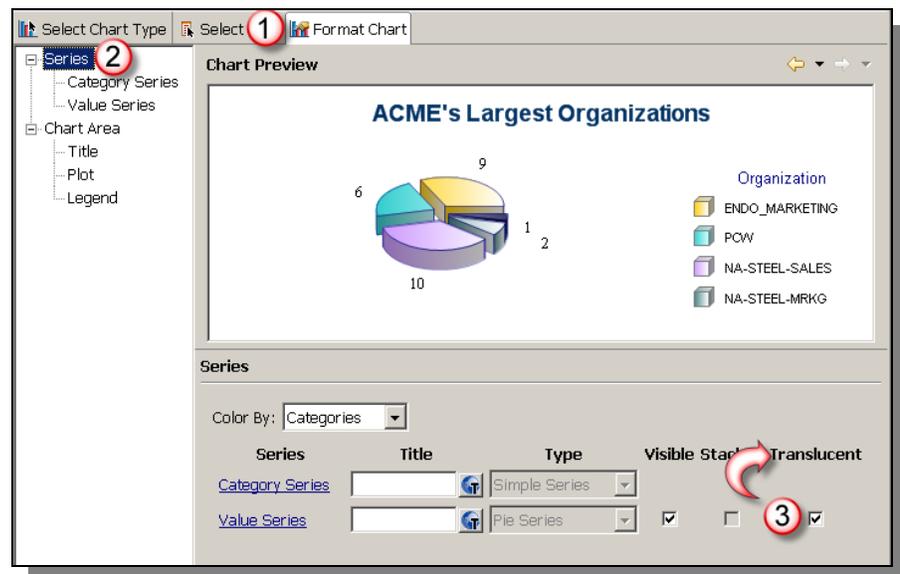


Figure 13. Set Up Color for Pie Slices to be Translucent

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## **NOTES**