

Charts Page

The Charts Page of the Reports Module displays a table of all charts that have been created by or shared with an individual.



If an individual created the chart, the three dot icon opening the chart table context menu will be visible. If a chart was shared with an individual, the three dot icon accessing the context menu will not be visible. The Chart Table Context Menu displays options to view, edit, or delete a chart.

Chart Table Context Menu Explanations		
Option	Comments	Image
View Chart	Selecting “View Chart” from the context menu opens a Chart Modal that shows the selected chart.	A screenshot of a line chart titled "DED - Collected Rock Songs - Line Chart". The chart displays a line graph with data points for each year from 2007 to 2023. The y-axis is labeled "Value" and ranges from 0 to 700. The x-axis is labeled "Year" and ranges from 2007 to 2023. The data shows a general upward trend with significant fluctuations, peaking around 2022 at approximately 600 and ending at approximately 250 in 2023. A legend in the top right corner indicates the data series is "Value".

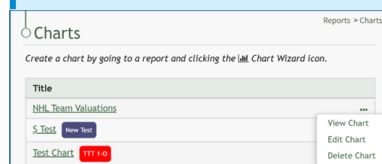
Edit Chart

Selecting “Edit Chart” from the context menu opens the Chart Wizard Modal, allowing an individual to make changes to the chart properties while viewing a preview of the chart.

How To: Edit a Chart

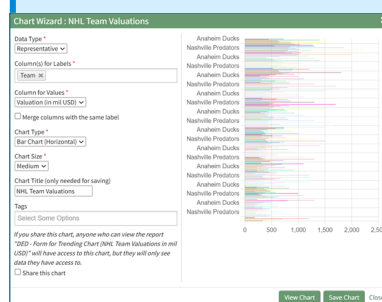
To edit a chart, go to the Charts Page of the Reports Module.

To be able to edit a chart, you must be the individual who created the chart.

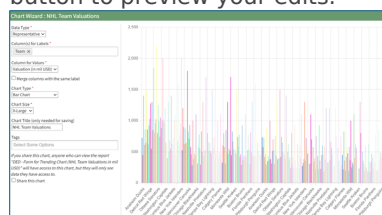


Click the three-dot icon to the right of the chart you wish to edit and select “Edit Chart”. This opens the Chart Wizard, where the data type, values for the independent and dependent axis, chart type, chart size, chart title, and tags can be edited. If you select the “Share this Chart” checkbox, anyone who can view the report the chart is based will have access to the chart.

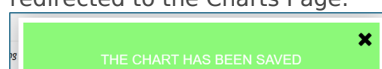
Individuals will only see the data they have access to.



Make the desired edits to the chart. Select the “View Chart” button to preview your edits.



When you are satisfied with your edits, select the “Save Changes” button. A confirmation modal states, “The chart has been saved,” and you will be redirected to the Charts Page.



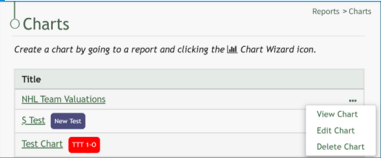
Delete Chart

Selecting “Delete Chart” from the context menu opens the Delete Chart Confirmation Modal.

How To: Delete a Chart

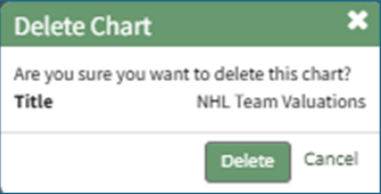
To delete a chart, go to the Charts Page of the Reports Module.

To be able to delete a chart, you must be the individual who created the chart.



Click the three-dot icon to the right of the chart you wish to delete, and select the “Delete Chart” option. This opens the Delete Chart Confirmation Modal which states, “Are you sure wish to delete this chart?” The modal also states the title of the chart being deleted.

If the chart had Share this Chart enabled, deleting the chart will remove its visibility from all individuals it was previously shared with.



Click the “Delete” button and a Confirmation Modal states, “This chart has been deleted.”



Delete Chart

Are you sure you want to delete this chart?

Title NHL Team Valuations

DeleteCancel

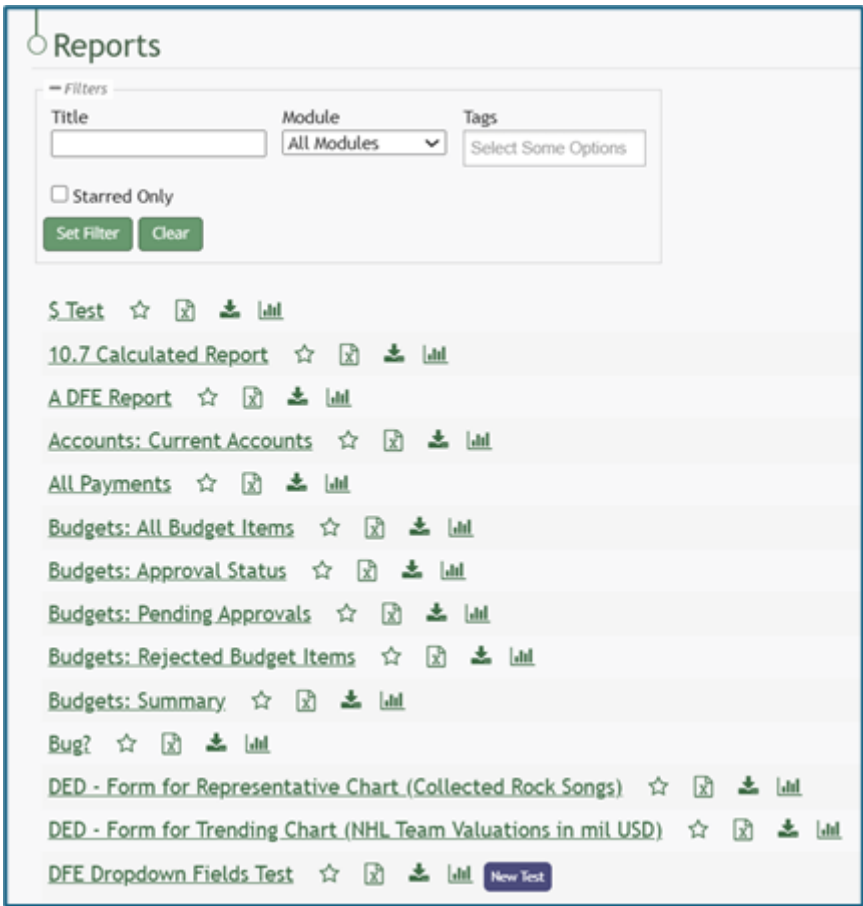
Charts are created based on the data from a specific report. To create a chart, select the chart wizard icon on a report page or from the Reports Module Home Page.

How To: Create a Chart

To create a chart, go to the Home Page of the Reports Module and open the report you wish to use for the necessary chart data.

How To: Run a Report

To run a report, go to the Home Page of the Reports Module.



Click the name of the report you wish to run.

Reports > Run Ded - Form For Trending Chart (nhi Team Valuations in mil USD)

Team	Year	Valuation (in mil USD)
Anaheim Ducks	2022-01-01	725
Arizona Coyotes	2022-01-01	450
Boston Bruins	2022-01-01	1400
Buffalo Sabres	2022-01-01	610
Calgary Flames	2022-01-01	855
Carolina Hurricanes	2022-01-01	640
Chicago Blackhawks	2022-01-01	1500
Colorado Avalanche	2022-01-01	860
Columbus Blue Jackets	2022-01-01	620
Dallas Stars	2022-01-01	925
Detroit Red Wings	2022-01-01	1030

DED - Form for Trending Chart (NHL Team Valuations in mil USD)

Reports > Run Ded - Form For Trending Chart (nhl Team Valuations in Mil Usd)

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Colorado Avalanche	2022-01-01	860
Columbus Blue Jackets	2022-01-01	620
Dallas Stars	2022-01-01	925
Detroit Red Wings	2022-01-01	1030

Select the chart icon to the right of the report title header. This opens the Report Module Chart Wizard Modal.

The chart icon for a specific report is also accessible on the Home Page of the Reports Module.

Chart Wizard : DED - Form for Trending Chart (NHL Team Valuations in mil USD)

Data Type *
Representative

Column(s) for Labels *
Team

Column for Values *
Year

☐ Merge columns with the same label

Chart Type *
Bar Chart

Chart Size *
Medium

Chart Title (only needed for saving)
DED - Form for Trending Cha

Tags
Select Some Options

If you share this chart, anyone who can view the report "DED - Form for Trending Chart (NHL Team Valuations in mil USD)" will have access to this chart, but they will only see data they have access to.

☐ Share this chart

View Chart

Close

Chart Wizard Modal Explanation		
Input	Comments	
Data Type (required)	Representative	Trending*
Chart Type (required) Options are based on the data type.	Bar Chart (Vertical)	Line Chart
	Bar Chart (Horizontal)	
	Pie Chart	
	Line Chart	
	Doughnut Chart	

Column for Labels (required)	For representative data, any field can be selected as your independent axis.	*For trending data, the label (independent axis) should be a value representing the date.
Column for Values (required)	The dependent axis must be linked with a column that contains numeric values for a chart to be made.	
Merge Columns with the same label Checkbox	When the merge columns with the same label checkbox is selected, the numeric values input will be added together and the total shown on the chart as opposed to individual values.	
Chart Size (required)	Options: Small, Medium, Large, X-Large, Max	
Tags	Select open, restrictive, or permissive tags as desired.	
Share this chart Checkbox	If you share this chart, anyone who can view the report will have access to the chart, but they will only see data they have access to.	
View Chart	Selecting the View Chart button will expand the Chart Wizard Modal and show a preview of the chart being generated.	

After specifying the appropriate inputs for the chart, select “View Chart” to see a preview of the representation of the data. If no additional changes are needed, select “Save Chart”. A confirmation modal states, “The chart has been saved.”



The new chart is now visible on the Charts Page of the Reports Module.