# Follett Aspen™

## Version 6.7

## Create a Quick Chart

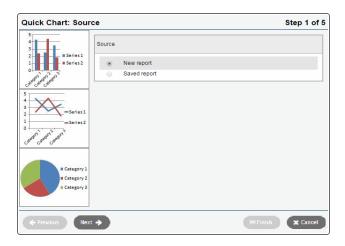
On all standard list pages, click the  ${\bf Quick\ Chart\ menu}$  to access the following options:

- Create Quick Chart: Brings up the Quick Chart Wizard, which lets you customize many different areas of the resulting chart.
- Bar Chart: Brings up a streamlined Quick Chart screen, which requests only minimal information required to create a bar chart.
- Line Chart: Brings up a streamlined Quick Chart screen, which requests only minimal information required to create a line chart.
- Pie Chart: Brings up a streamlined Quick Chart screen, which requests only minimal information required to create a pie chart.

#### To create a Quick Chart:

In any standard list view, click and select **Create Quick Chart** to open the Quick Chart wizard, or select **Quick Chart** from the **Reports** menu.

The Create Quick Chart wizard appears.

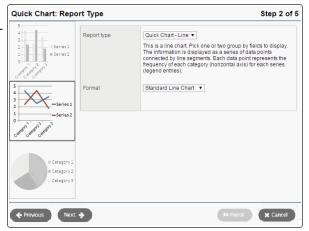


The Create Quick Chart wizard has five steps:

#### Step 1: Source

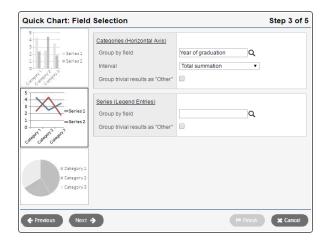
- 1. Click one of the following:
  - New report: Select this option if you want to create a Quick Chart from scratch.
  - Saved report: Select this option if you want to use a Quick Chart you previously created.
- 2. Do one of the following:
  - If you selected **New report**, click **Next**.
  - If you selected Saved report, a table of saved Quick Charts appears in the pop-up. Select the one you want to edit or view. Then click Next to continue editing, or Finish to show the chart.

#### Step 2: Report Type



- 1. Click the **Report type** drop-down to select one of the following:
  - · Quick Chart—Bar
  - · Quick Chart—Line
  - Quick Chart—Pie
- Click the Format drop-down to select the format for the chart: Standard or Enhanced (3-D).
- If this is a new report, click Next. If you are editing a saved report, you can click Next to continue editing, or Finish to show the chart.

#### **Step 3: Field Selection**



1. In the Categories (Horizontal Axis) box, click at Group by field and make a selection. You can choose from the tables and fields that are related to the records in your current list. The Categories (Horizontal Axis) box, sometimes called the independent variable, sets the data you want to measure. If you choose a Numeric, Date, or Time field, additional options let you further organize the data on the chart.

Enter information in the additional fields as necessary.

# Version 6.7

### Create a Quick Chart (continued)

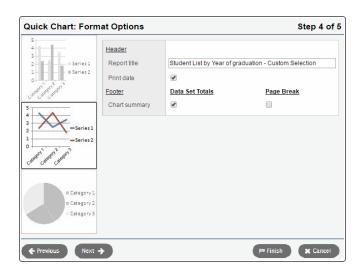
2. For bar and line charts, a Series (Legend Entries) box is available.

Click at the **Group by field** and make a selection. Additional options are available, as described above for **Categories** selection. Series groups appear in a legend to the right of the chart and provide a color-coded guide to data shown in the chart.

**Note**: Bar and line charts do not require both a category and series to be selected. Charts that exclude a category will not have x-axis labels. Charts that exclude a series will not include a legend.

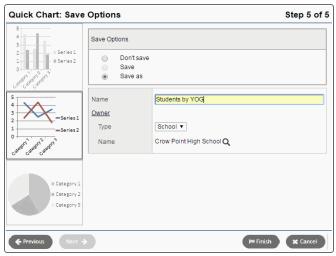
- 3. If the list of data being charted contains trivial cases which should be excluded from the chart, the option Group trivial results as "Other" is provided. Select this checkbox if you want to group all data points of less than a certain percent together into a single point called Other. For example, if you are only concerned with viewing the most common conduct codes, you might want to select this option and enter a value of 5% in the Less than n % field. This will group all codes which total less than 5% of the total data into a single Other group.
- You can click Next to continue the wizard and set chart options, or Finish to create the chart. New charts use the default format options if you click Finish at any point before the final step in the wizard.

#### **Step 4: Format Options**



- 1. In the **Report title** field, enter a title for your report. The title appears above the chart.
- 2. Do any of the following:
  - If you want the date the report was created to appear on the report, select Print date.
  - If you want a table of data summarizing the chart to appear below the chart, select Data Set Totals.
  - If you want the table data summarizing the chart to appear on its own page, select Page Break.
- 3. Click **Next** to continue editing, or **Finish** to show the chart.

#### Step 5: Save Options



- 1. In the Save Options section, click one of the following:
  - **Don't save:** The report appears in your job queue, but if you want to run the chart again, you must recreate it.
  - Save: This option is only available if the chart has already been saved. This option overwrites the previous version.
  - Save as: This option saves the chart with the name you type in the Name field.
- If you selected Save as in the Save Options section, type what you want to name the chart in the Name field.
- 3. Under **Owner**, select **District** or **User** from the **Type** drop-down.
- 4. If you select the type **User** in the **Type** drop-down, click **\rightarrow** at the **Name** field to select a user.
- 5. Click Finish.

The chart appears in a pop-up window.

#### Notes:

- The Quick Charts widget lets you run saved Quick Charts on a Page
- When a saved Quick Chart is deleted (using the Quick Charts wizard), Aspen deletes any widget that references that Quick Chart.