


Create a New Quick Chart

On a standard list page, click the **Quick Chart** menu , select **Create Quick Chart**, or select **Quick Chart** from the **Reports** menu. The Create Quick Chart Wizard appears.

Step 1: Source

- Select one of the following:
 - **New report:** to create a new quick chart.
 - **Saved report:** to view or edit an existing quick chart. Select the quick chart you want to view or edit from the table of saved charts.
- If you selected **New report**, click **Next**. If you selected **Saved report**, click **Next** to continue editing, or **Finish** to show the chart.


Step 2: Report Type

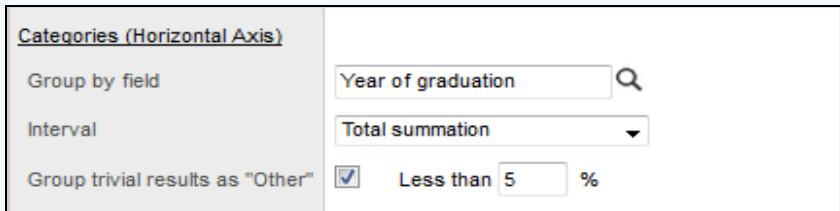
- At the **Report type** drop-down, select one of the following:
 - **Quick Chart—Bar**
 - **Quick Chart—Line**
 - **Quick Chart—Pie**
- At the **Format** drop-down, select a format for the chart. A **Standard** version, an **Enhanced** (3-D) version, and any school-created formats appear.
- Click **Next** to continue, or **Finish** to show the chart.

Note: For more information on chart types, see [What Type of Chart Should I Use?](#) on page 2.

Step 3: Field Selection

Categories (Horizontal Axis)

- At **Group by field**, click  to select a field related to records on your current list. This sets the data you want to measure.



- If you choose a numeric (such as **YOG**), date (such as **Date of Birth**), or time field, additional options appear. Use the table below to complete any additional fields:

Data Type	Field	Input
Numeric	Interval	Select one of the following: <ul style="list-style-type: none"> • Chart each value separately • Interval group • Interval group summations • Total summation
	Interval group size	This field appears if you selected Interval group or Interval group summations at the previous field. Sets the number of data points that are combined into a single category.
	Group trivial results as "Other"	Select this checkbox to group all data points of less than a certain percent into the "Other" category.
	Less than n%	Sets the percent under which data is grouped in the "Other" category.
Date	Interval	Select Chart each date separately , or select one of the options to group By day of week, By week, By month, By day of week and month , etc.
Time	Interval	Select Chart each time separately , or select one of the options to group By minute, By hour, By hour and day , etc.

See next page for further instructions...

Step 3: Field Selection (Continued)

Series (Legend Entries)

Series (Legend Entries)

Group by field

Group trivial results as "Other"

1. For bar and line charts, a **Series (Legend Entries)** section is available. Click at **Group by field** and make a selection. Additional options are available, as described in Step 3 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.

2. If the list of data being charted contains trivial cases which should be excluded from the chart, the **Group trivial results as "Other"** checkbox appears. Select this checkbox 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 groups all codes which total less than 5% of the total data into a single "Other" group.

Note: You are only able to use this option in the Categories or Series, not both.

3. 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

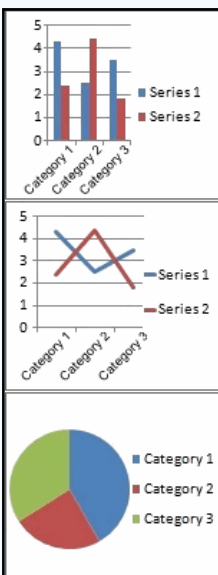
1. At the **Report title** field, type a title to appear above the chart.
2. Select the **Print date** checkbox to include the report date.
3. At the **Chart summary** field, select the **Data Set Totals** checkbox to include a table of summary data to appear below the chart.
4. At the **Chart summary** field, select the **Page Break** checkbox to display the table on its own page.
5. Click **Next** to continue, 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 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.
2. If you selected **Save as**, type the name of the chart in the **Name** field.
3. In the **Owner** section, select **District** or **User** from the **Type** drop-down.
4. If you selected **User** in the previous step, click to select a user from the **Name** pick list.
5. Click **Finish**.

The chart appears in a pop-up window.

What Type of Chart Should I Use?



Bar Chart: Pick one or two 'group by' fields to display. Each bar represents the frequency of each category for each series. For example, use this chart to compare the number of absences, tardies, and dismissals (series) over a number of school years (categories.)

Line Chart: Pick one or two 'group by' fields to display. The information is displayed as a series of data points connected by line segments. For example, use this chart to compare the number of students in each GPA range (categories) for different grade levels (series).

Pie Chart: Consists of subgroups that combine to form a whole unit. For example, use this chart to create a visual representation of diversity in a school by charting the percentage of students by race.