


## Create a Quick Chart

On all standard list pages, click the **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**
2. Click the **Format** drop-down to select the format for the chart: **Standard** or **Enhanced (3-D)**.
3. 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.

### Create a Quick Chart (continued)


- 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.

- 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 5: Save Options

- 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.
- Under **Owner**, select **District** or **User** from the **Type** drop-down.
- If you select the type **User** in the **Type** drop-down, click  at the **Name** field to select a user.
- 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.

### Step 4: Format Options

- In the **Report title** field, enter a title for your report. The title appears above the chart.
- 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**.
- Click **Next** to continue editing, or **Finish** to show the chart.