

Summary Reports Using Charts

Rishi H. Heerasing
Lecturer

School of Innovative Technologies and Engineering
UTM

Learning Outcomes

- Summarizing Reports
- Producing Charts
- Formatting Charts
- Using the Chart Options
- Modifying Individual Objects in the Chart
- Applying Chart Templates

Summary Reports Using Charts

- We often need to summarize reports by showing a Grand Total or Group Totals, etc...
- We have seen that we can insert a summary anytime by going in Report-> Insert Summary.
- We have also seen how we can use the Group Sort Expert Tool, to display for example, Top N groups (where N is any ordinal number) based on any numeric field.
- We shall now see how Charts can also help in summarizing a report.

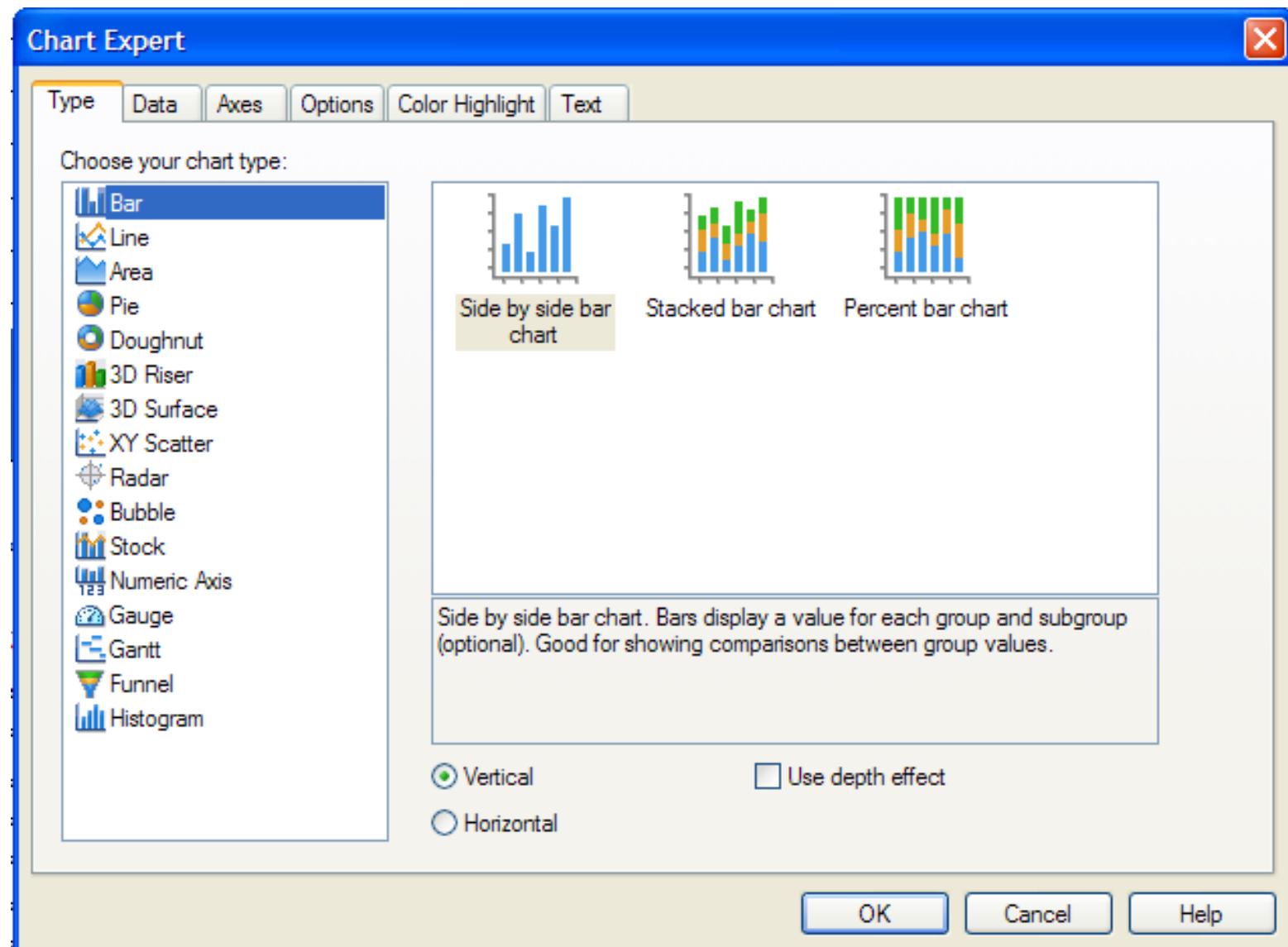
Summary Reports Using Charts

- The main purpose of a report is to communicate meaning to its readers. Lines of text and columns of numbers undeniably communicate meaning, but sometimes they don't do so as forcefully as a visual image. The right picture can sometimes be worth much more than a thousand words.
- The tool we use to create all the charts is Chart Expert. You can open Chart Expert by clicking the Insert Chart icon on the toolbar or by choosing Insert ➔ Chart from the main menu. Either method calls up the Chart Expert dialog box.

Summary Reports Using Charts

- The first tab is **Type**: This allows you to choose amongst 12 categories about how you want your charts to look like. There are 3 2D vertical, 3 2D horizontal, 3 vertical with depth effect, and 3 horizontal with depth effect categories.
- When you select the Vertical option, the bars rise vertically from the bottom of the chart. When Horizontal is selected, the bars move horizontally from left to right.
- These options don't appear when you select a chart type that doesn't distinguish between vertical and horizontal (such as a pie chart).

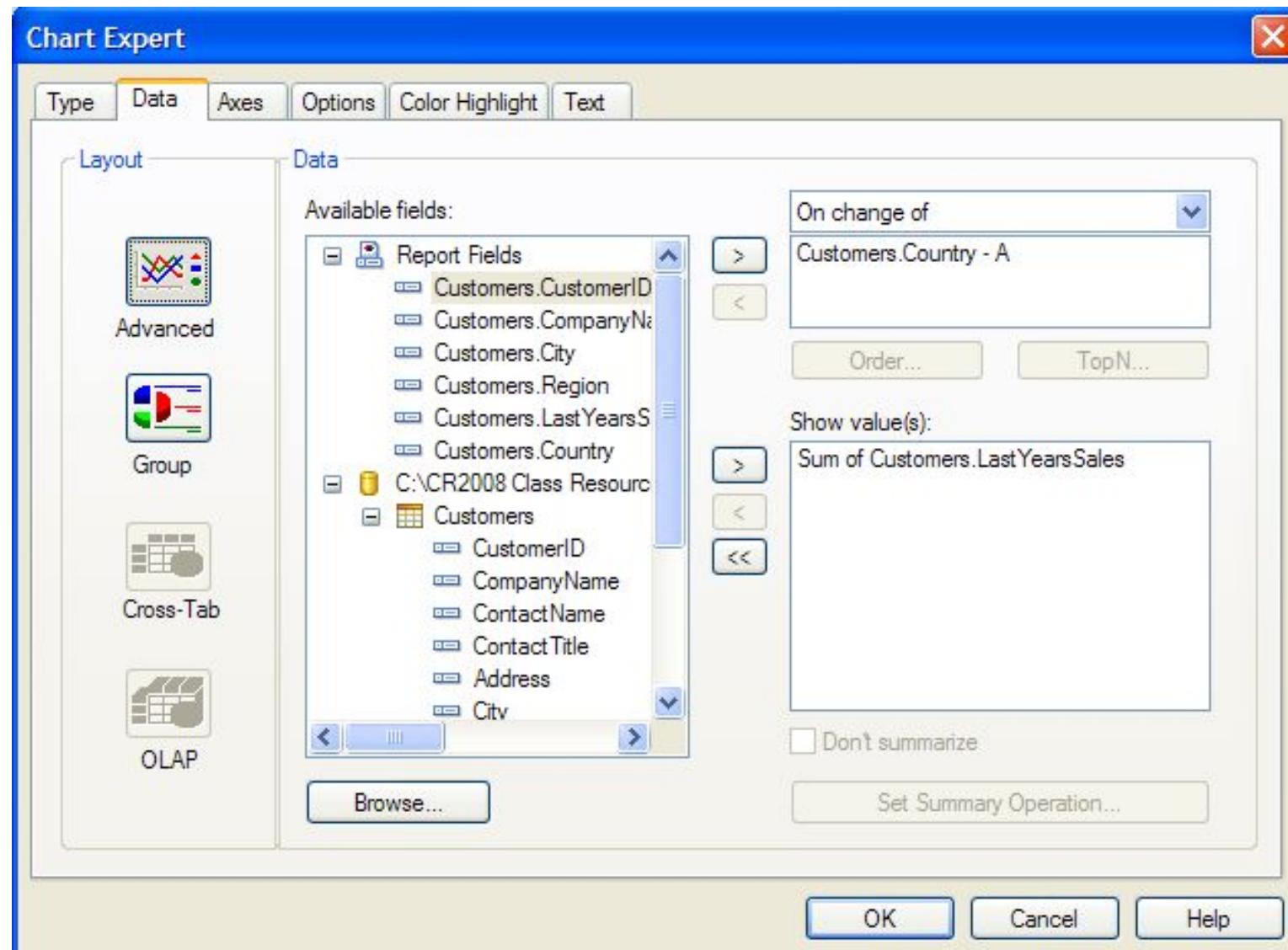
Summary Reports Using Charts



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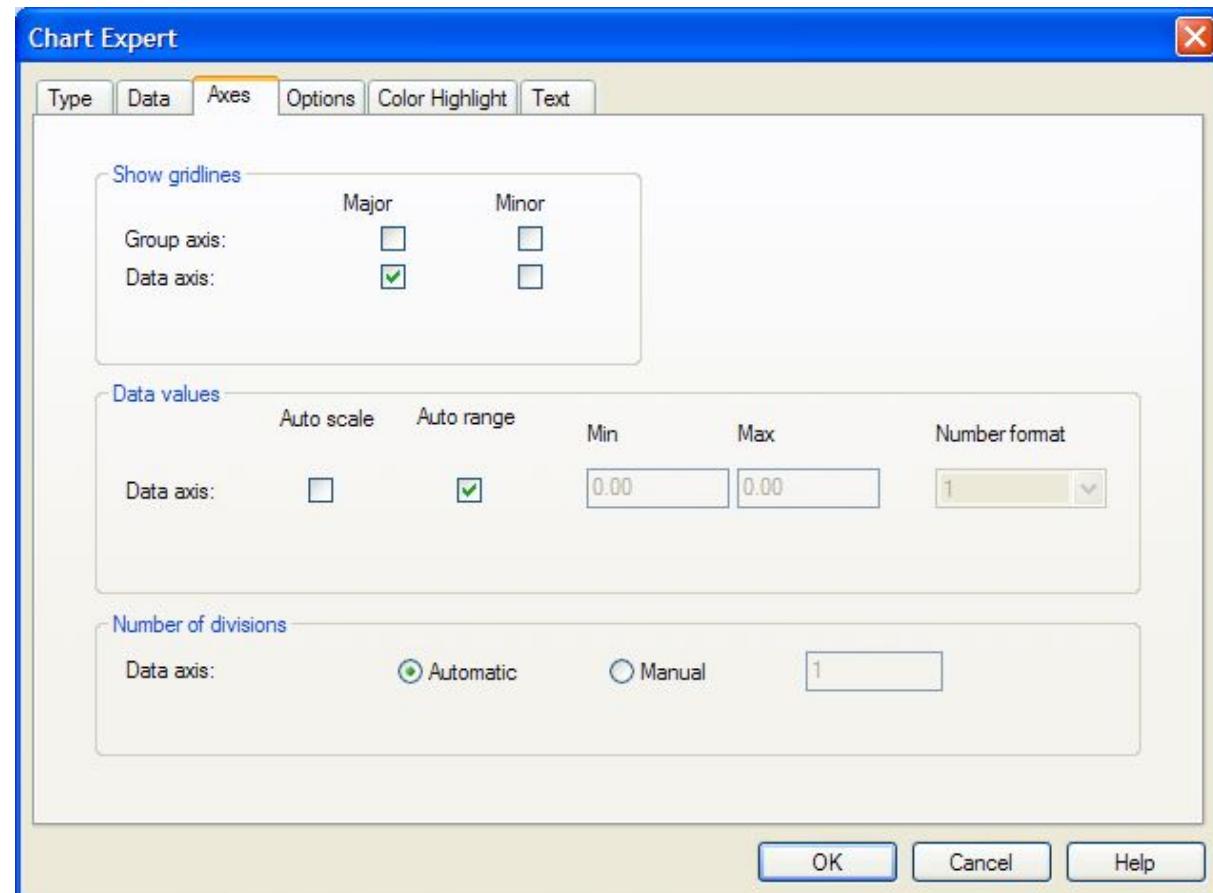
- The second tab is **Data**: This tab has two areas: Layout and Data.
- The Layout options will be described later.
- In the Data area, you specify which data to show in the chart and what event will trigger the chart display. The triggering event is the change in the value of some field.

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- The **Axes** tab relates to only some of the chart types. It gives you the option of showing gridlines on the chart, scaling the axes, and indicating the number of divisions displayed.



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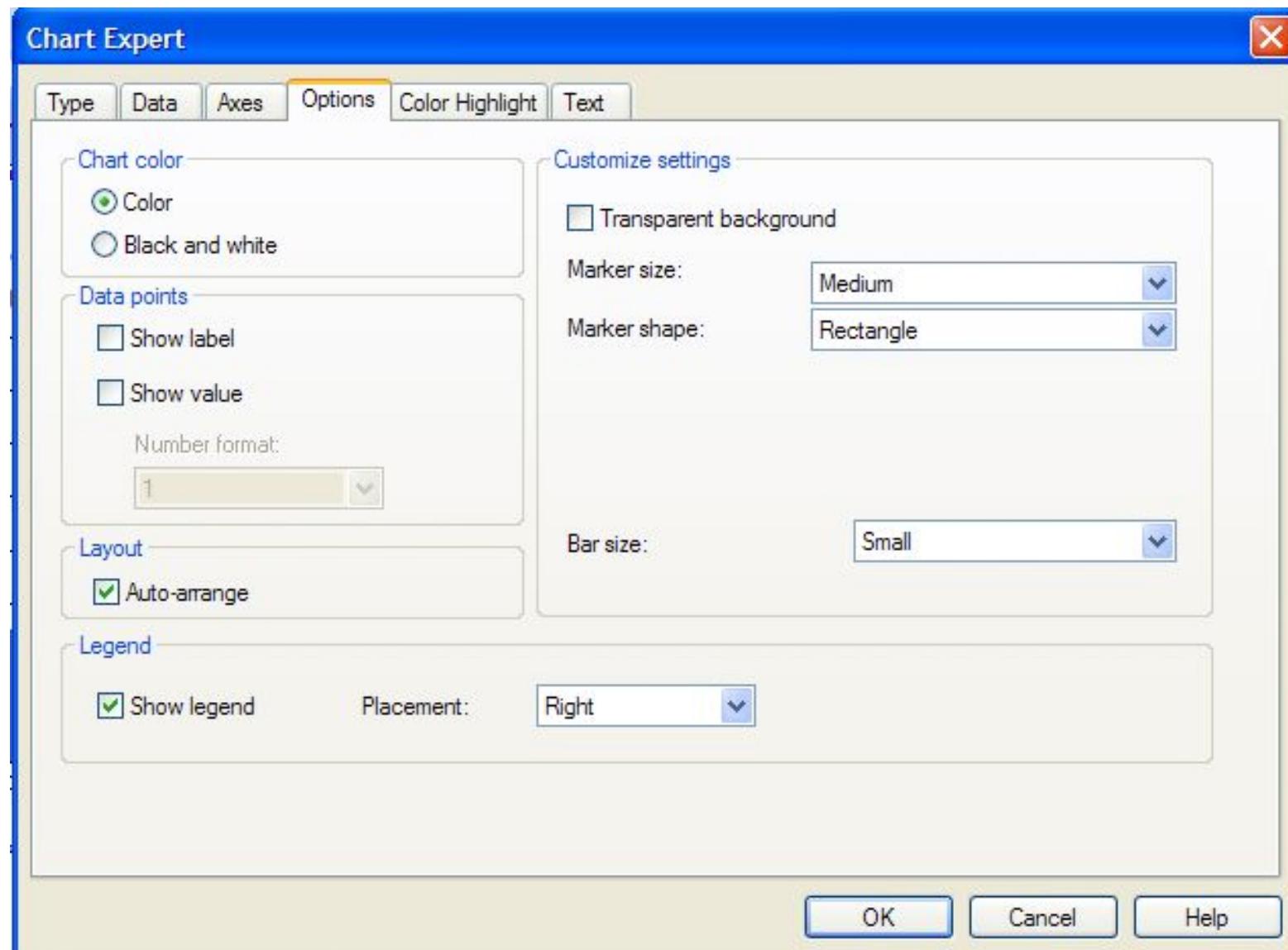
The Options tab contains areas such as Chart Color, Data Points, Customize Settings, Layout, and Legend. You can specify a chart color of either Color or Black and White. Black and White, for use with grayscale printers, uses different patterns to show the different areas.

In the Data Points area, you can put labels and values in the vicinity of points on the graph. Sometimes these are helpful, but often they just clutter up the chart, without adding much additional information. In many cases, leaving both options unchecked is a good idea.

Select the Transparent Background check box of the Customize Settings area to underlay content beneath a chart and make the underlaid content visible. You can select from several marker sizes, marker shapes, and bar sizes (for a bar chart). The defaults are good choices to start with.

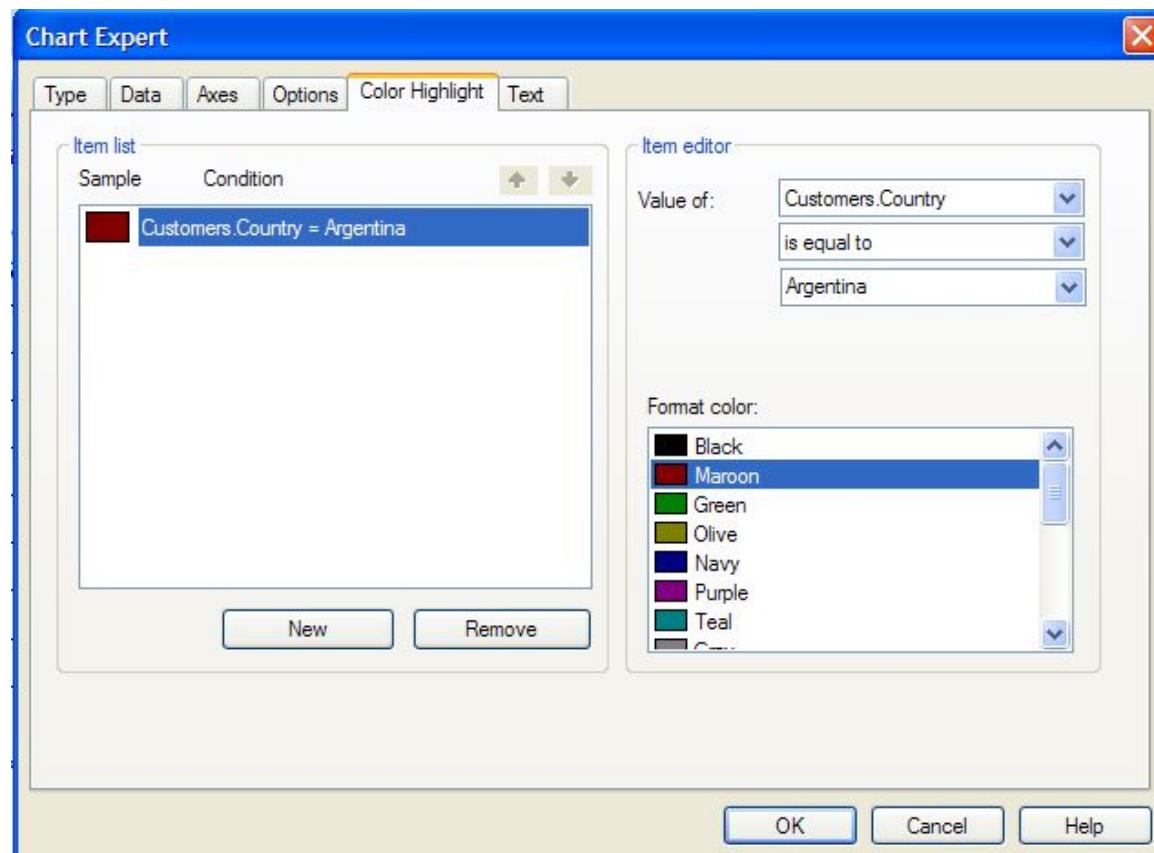
The Legend is an explanation of what the various elements of the chart represent.

Summary Reports Using Charts



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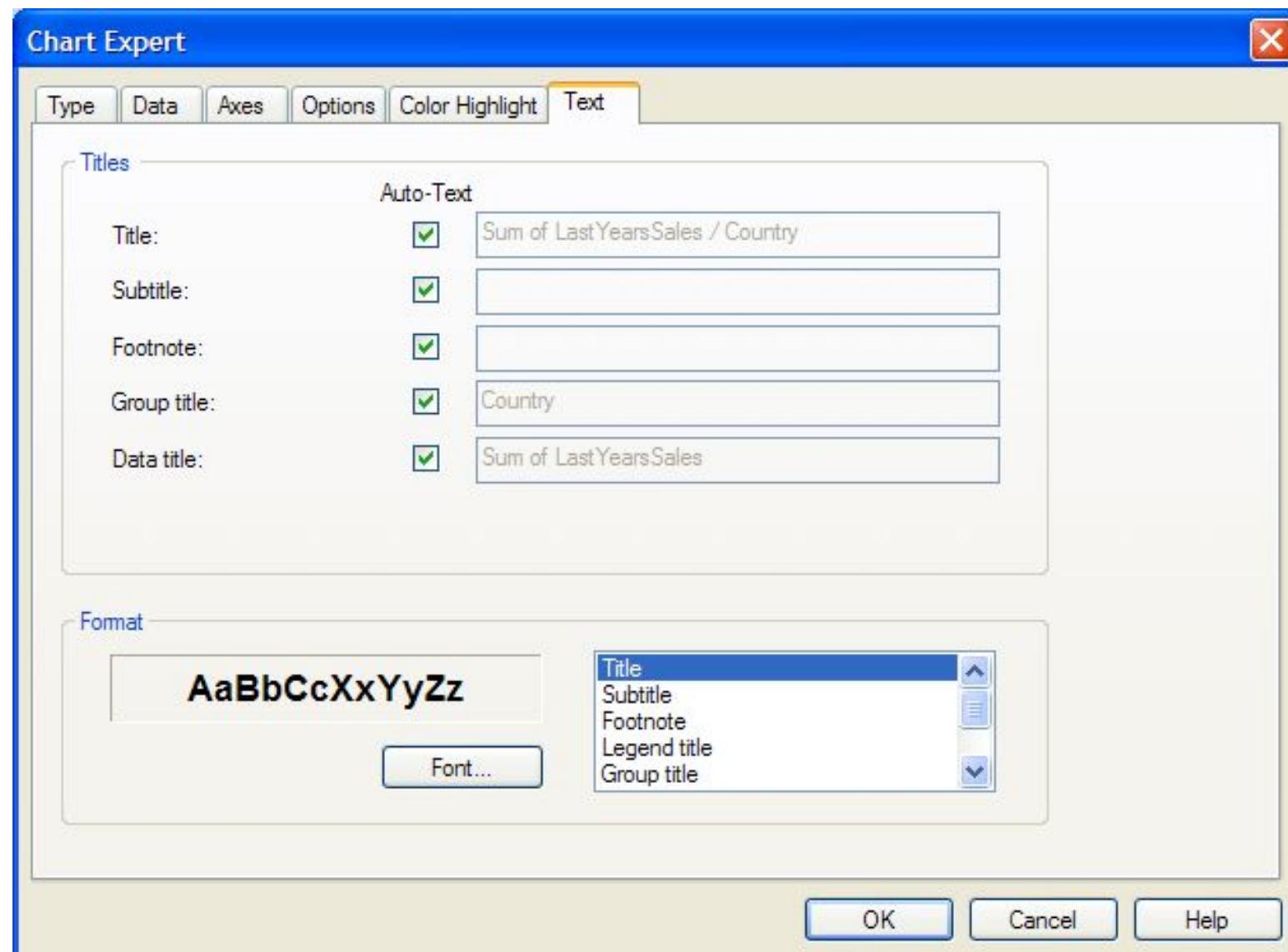
- From the **Color Highlight** tab, you can give the individual elements of a chart the exact color that you want rather than merely accepting the default colors that are automatically assigned to each element.



Summary Reports Using Charts

- The **Text** tab in Chart Expert is where you add some text to the chart. The two areas are Titles and Format.
- In the Titles area, the Auto-Text check boxes are selected by default. This means that Chart Expert selects a title for you, based on the fields that the chart uses.
- The Format area at the bottom of the dialog box displays the default fonts chosen for the different types of text objects on the chart. You can select a different font for each of the Title, Subtitle, Footnote, and Legend Title categories by clicking the Font button. Doing so displays the Font dialog box, from which you can specify the font you want.

Summary Reports Using Charts



Summary Reports Using Charts

- In order to add a Chart, we need a report which already contains data. We will take the example of Customer Orders Report grouped by Region (USA) that we did previously [here](#).



<i>Cust. ID</i>	<i>Company Name</i>	<i>City</i>	<i>Region</i>	<i>Last Year's Sales</i>	
1,032.00	Great Lakes Food Market	Eugene	OR	\$	9,149
1,036.00	Hungry Coyote Import Store	Elgin	OR	\$	2,283
1,043.00	Lazy K Kountry Store	Walla Walla	WA	\$	357
1,045.00	Let's Stop N Shop	San Francisco	CA	\$	2,039
1,048.00	Lonesome Pine Restaurant	Portland	OR	\$	1,837
1,055.00	Old W orld Delicatessen	Anchorage	AK	\$	5,896
1,065.00	Rattlesnake Canyon Grocery	Albuquerque	NM	\$	19,659
1,071.00	Save-a-lot Markets	Boise	ID	\$	60,673
1,075.00	Split Rail Beer & Ale	Lander	WY	\$	2,973
1,077.00	The Big Cheese	Portland	OR	\$	2,955
1,078.00	The Cracker Box	Butte	MT	\$	1,621
1,082.00	Trail's Head Gourmet Provisioners	Kirkland	WA	\$	1,333
1,089.00	White Clover Markets	Seattle	WA	\$	10,263

Summary Reports Using Charts

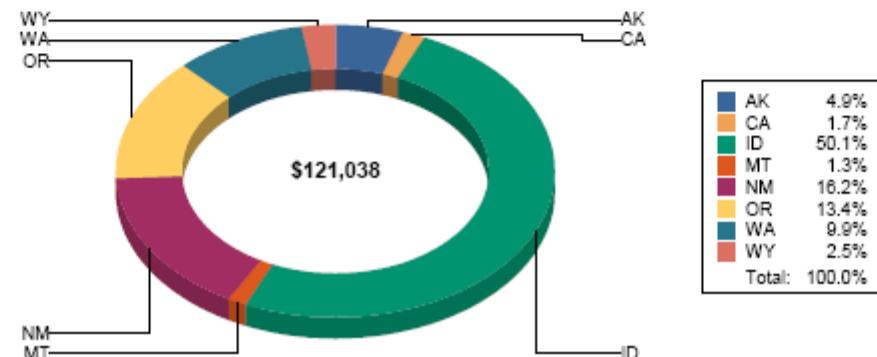
- Select Insert → Chart, a bounding orange rectangle appears. Place it in the RF below the report. Right-click on the Chart and select Chart Expert. You should create a Doughnut chart with depth effect like [this](#).

Customer Sales By City



Cust. ID	Company Name	City	Region	Last Year's Sales
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Sum of Last Years Sales by State in USA



Summary Reports Using Charts

Task 9c (Milestone)

- This is the culmination of all we have done so far.
- Create a report as faithfully as this one.
- Database is Northwind2008.mdb.
- Tables are Employees, Orders.
- Save your report as 9c.rpt