

# Results Webinar Chart & Graphs Webinar

# Meet Your Trainer

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Training Specialist

# Learning Objective

Help Report Writers understand best practices for writing charts & graphs in results so that users feel confident when graphing data sets within Results reports.

# Agenda

Summary Tables

Pie Chart

Line Graph

# Summary Tables

# Identified Data Table Versus Summary Table

## Data Displayed in Individualized Records

Participant Profile_16.Record Id	First	Last	Race_202
1,228	Kyle	Butler	African American
1,293	Kelly	Johnson	Asian
1,296	Cali	Bennett	African American
1,299	Matt	Stevens	Caucasian
1,300	John	Amonsta	Caucasian
1,302	Sarah	Stevens	Caucasian
1,303	Wynn	Stevens	Asian
1,490	Robbie	Contreras	Caucasian
1,491	James	Cheney	Caucasian
1,492	Joe	Pickard	Caucasian

## Summary Table

Race_202	Count of Participants
African American	10
Asian	8
Bi-racial	6
Caucasian	111
Hawaiian or Pacific Islander	3
Multi-Racial	10
Native American	3
Other	2

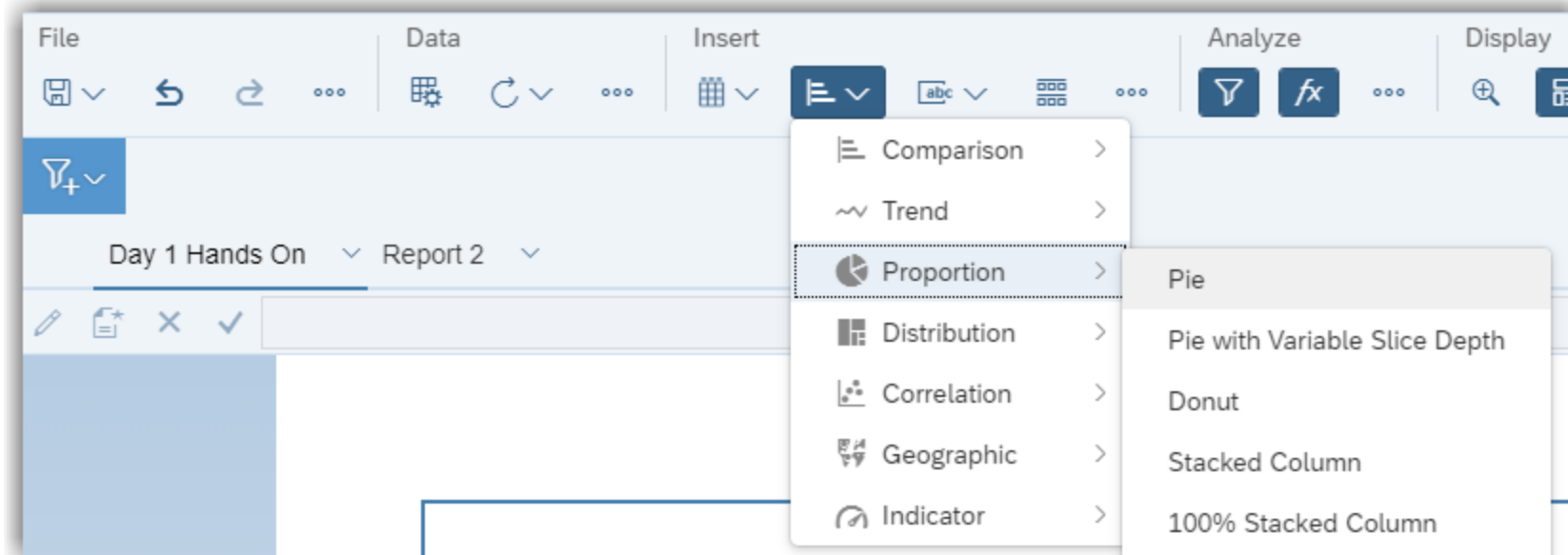
# Pie Charts

# Charts

## Option 1

Insert > Charts > Choose Chart Type

1. Click on the report to place the chart
2. Drag Count onto the chart and another desired object that would work well in that type of chart (the chart will remain gray if Count is not included)

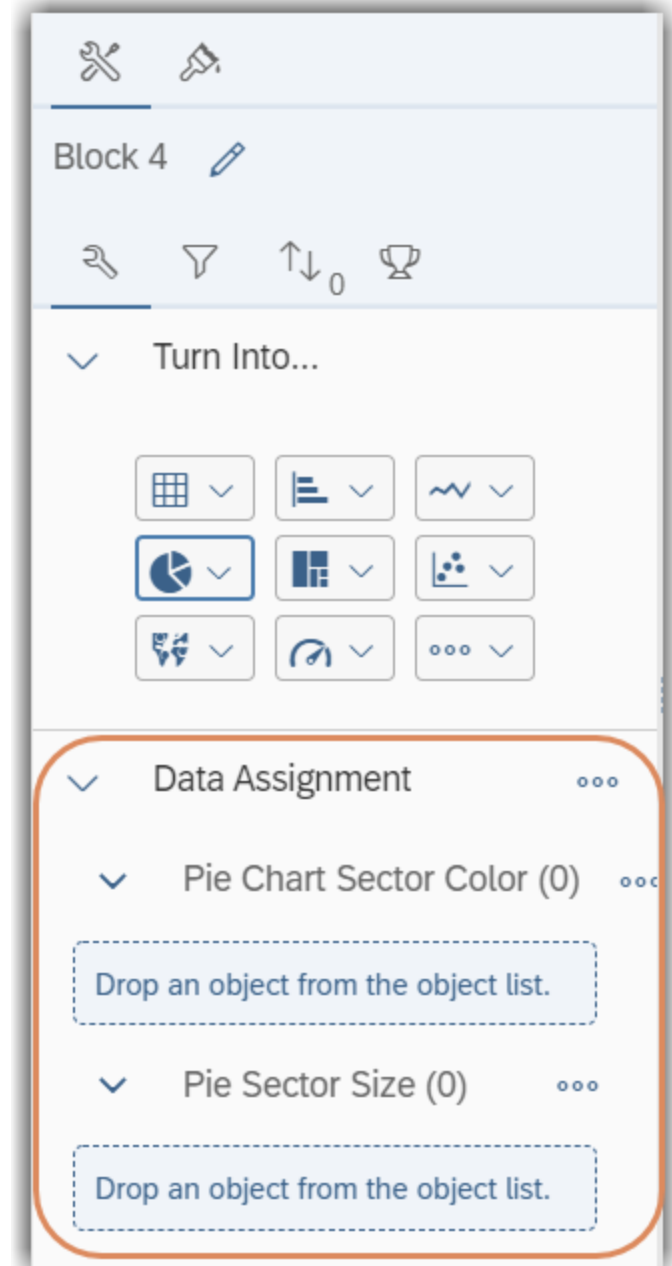
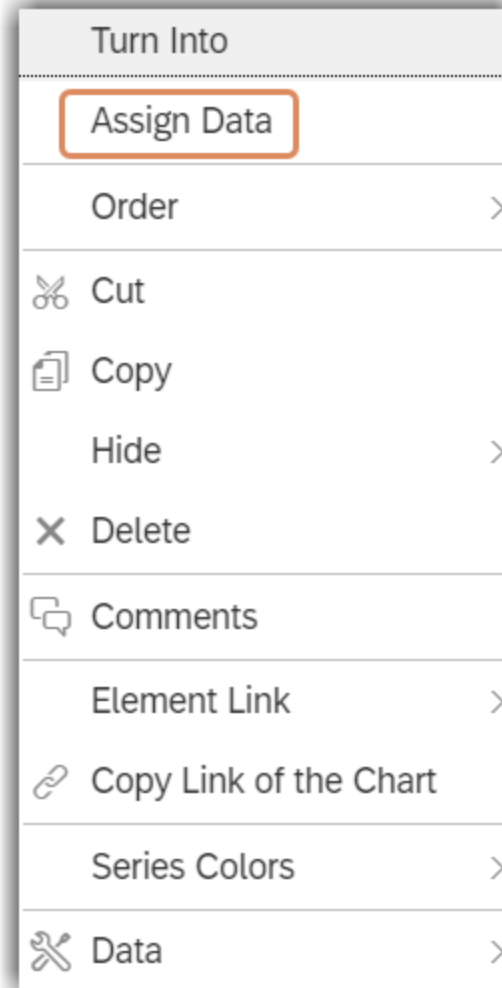




# Charts

## Option 2

- Another way to determine which data will appear in the chart is to right click on the blank chart and select **Assign Data**.
- Drop the Count in the Pie Sector Size and the desired object in the Pie Chart Sector Color.

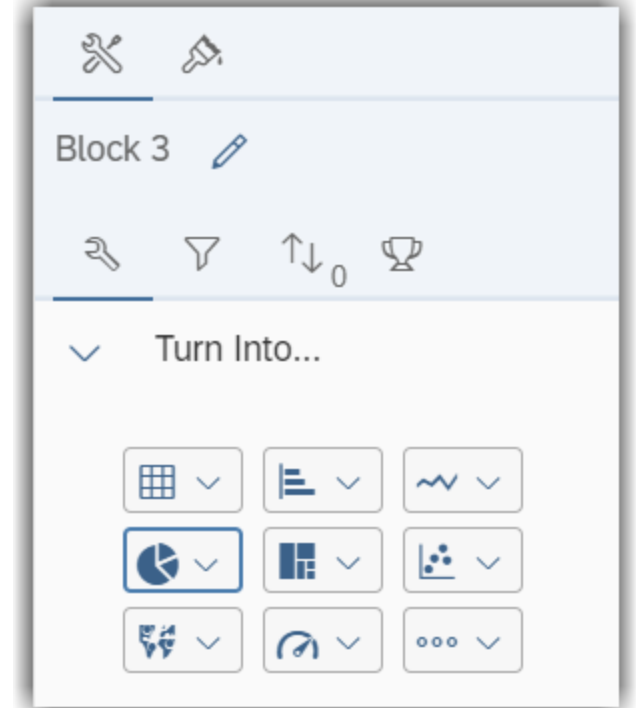
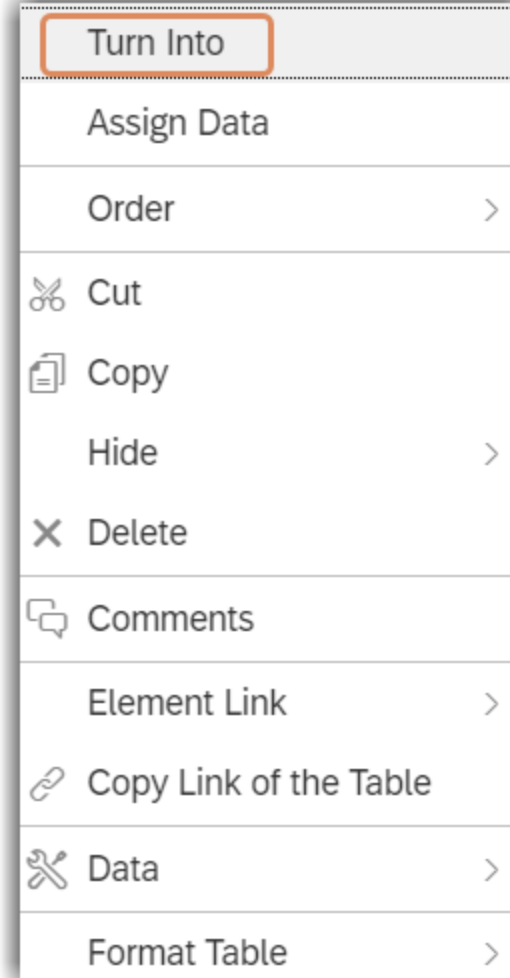


# Charts

## Option 3

1. Create a Summary Table with Count and a desired Object
2. Select the table and choose Turn Into
3. Select the desired chart type

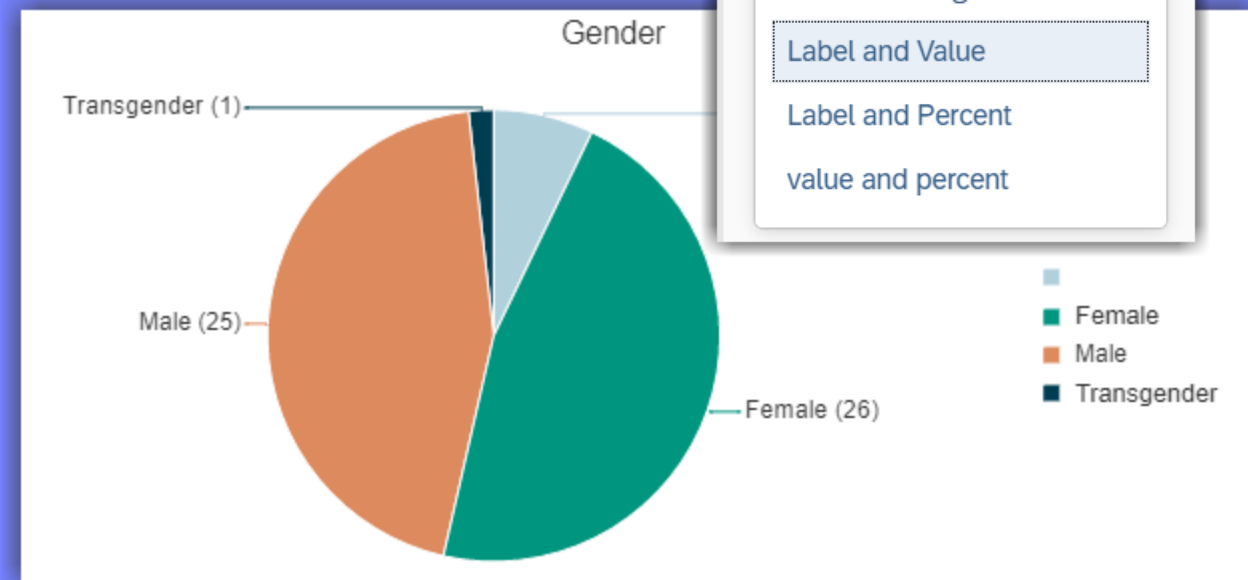
\*To create a custom legend, have a Summary Table and chart on a report to display the same data set in different ways. For example, whole numbers in the table and percentages in the chart



# Customizing Charts

## Refine Chart Look & Feel

- Select the chart area
- Go to Report Element Format (paint brush)
- Click Style Settings (palette) to determine how values should appear on the chart and legend settings
- To modify the header, click there, then go to the menus

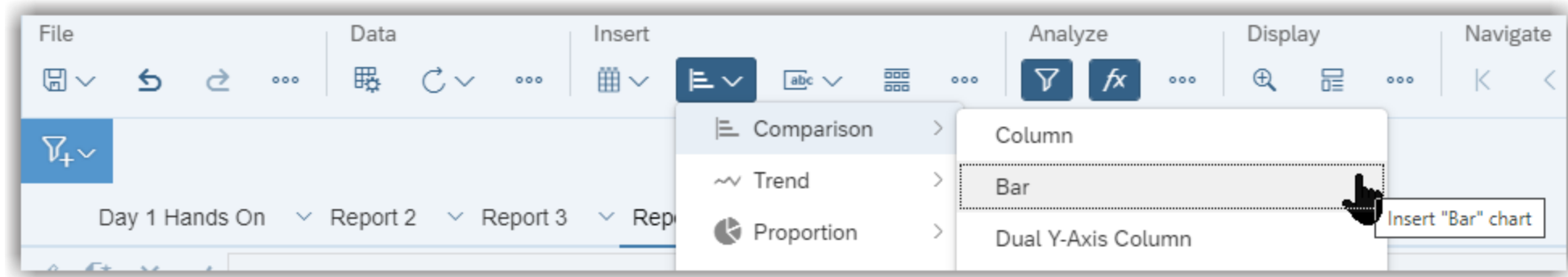


# Bar Graph

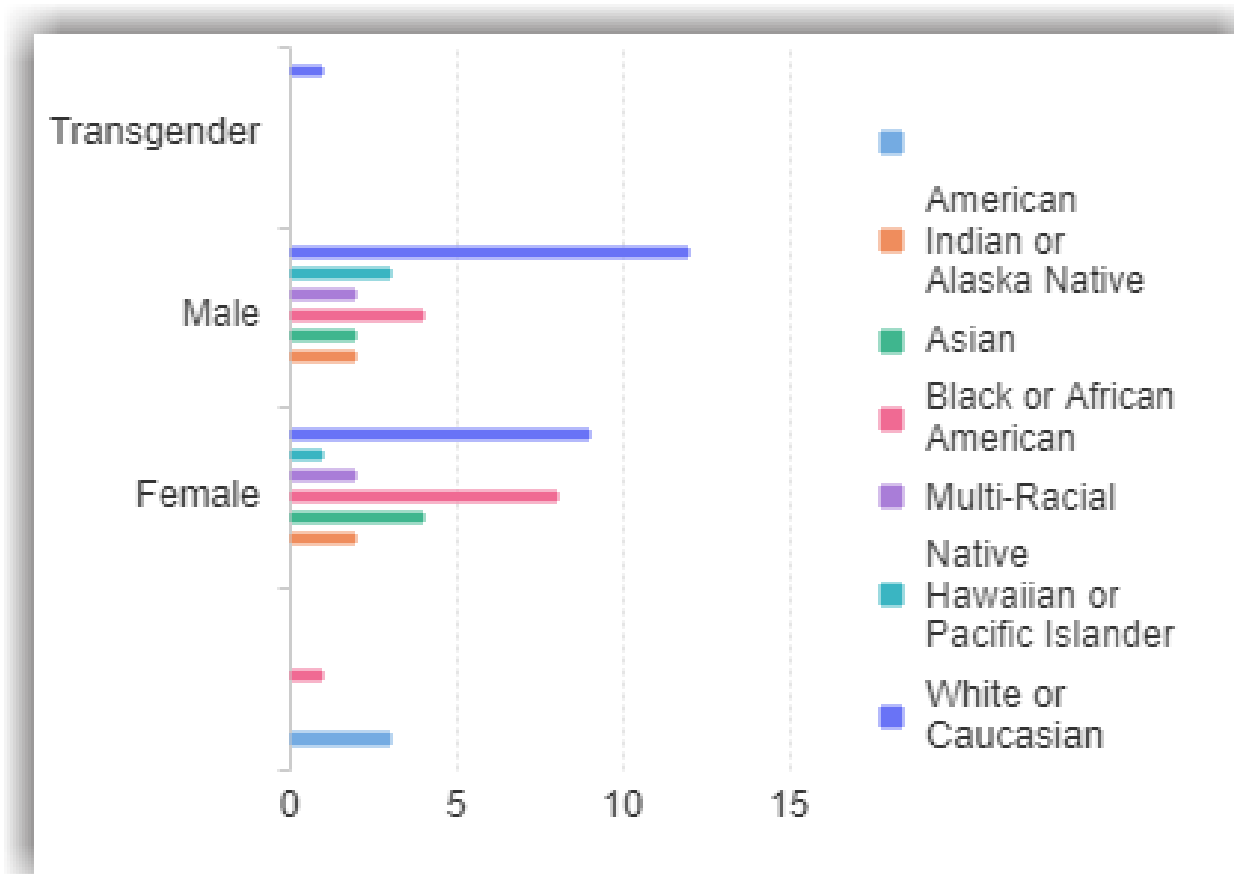
# Bar Graphs

Insert > Charts > Comparison > Bar

- Bar Graphs are a great option for looking at two objects in the same visual representation



# Bar Graphs



# Additional Resources

# Additional Training Opportunities

- Knowledge Base Articles – Search in Chat
- On-demand Videos in our [Bonterra Academy](#)
- Free Webinars & Recordings
- Foundations - Intensive Multiday Trainings that Cover the Basics
- Labs - 2 hr Live Trainings on Specific Topics and Capabilities



Build confidence and knowledge  
in our software.



# Customer Support

**Reach out to our Customer Support Team with Questions or Concerns.**

Weekdays 7am – 7pm CST via chat or through email: [apricot@bonterratech.com](mailto:apricot@bonterratech.com)

# Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you  
in future trainings.