

Using Graphs in Reporting

Deep Dive into Graphing Options

Welcome, we will start shortly!

Meet Your Trainer

Annie Novacek

Sr. Training Specialist

ClientTrainingRequests@BonterraTech.com



Learning Objective

By the end of this session, our goal for you is to understand the options available for adding visual impact to your reports and how to create them.

Agenda

Overview

Types & Sources

Configuration

Best Practices

Overview

Graphing Overview



Summarize & Analyze
Data Visually



Update in Real Time
with New Records



Select Most Relevant
Graph Type



Customize Formatting
& Graph Elements

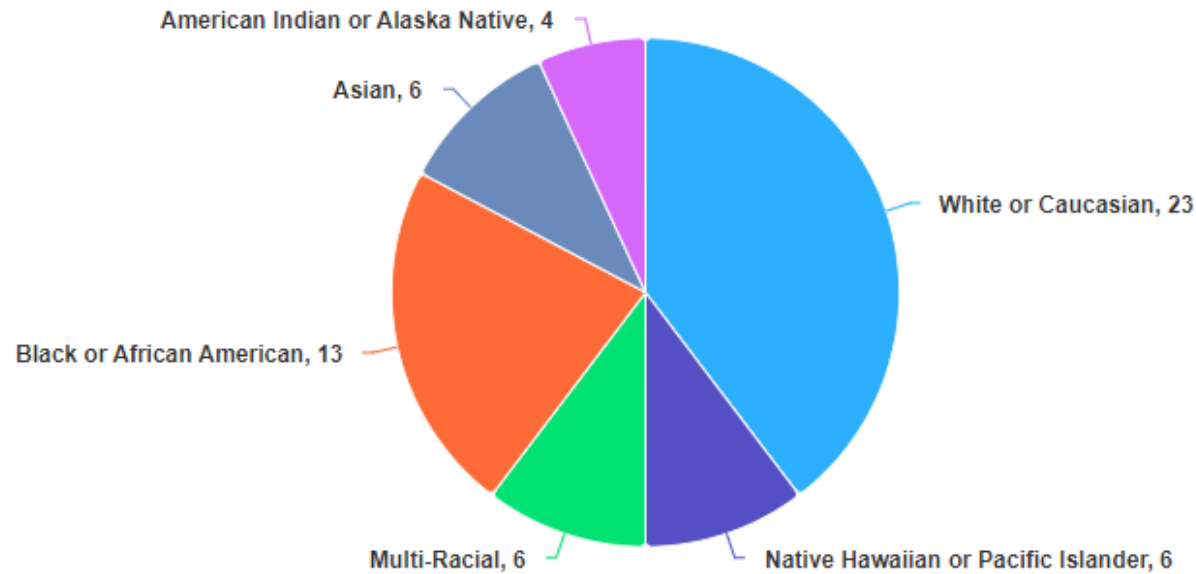
Graph Types & Data Sources

Graph Types

- Auto • Let Apricot choose the type based on data included.
- Pie • Ideal for showing distribution or comparing parts of a whole.
- Doughnut • Ideal for showing distribution or comparing parts of a whole.
- Line • Recommended for showing change over time and trends.
- Area • Recommended for showing change over time and trends.
- Bar • Horizontal or vertical view to compare different categories.
- Column • Horizontal or vertical view to compare different categories.
- Bubble • Showing relationship between at least 3 variables.
- Location Map • Based on Address Lookup field (*geolocation data*).
- Heat Map • Based on Address Lookup field (*geolocation data*).

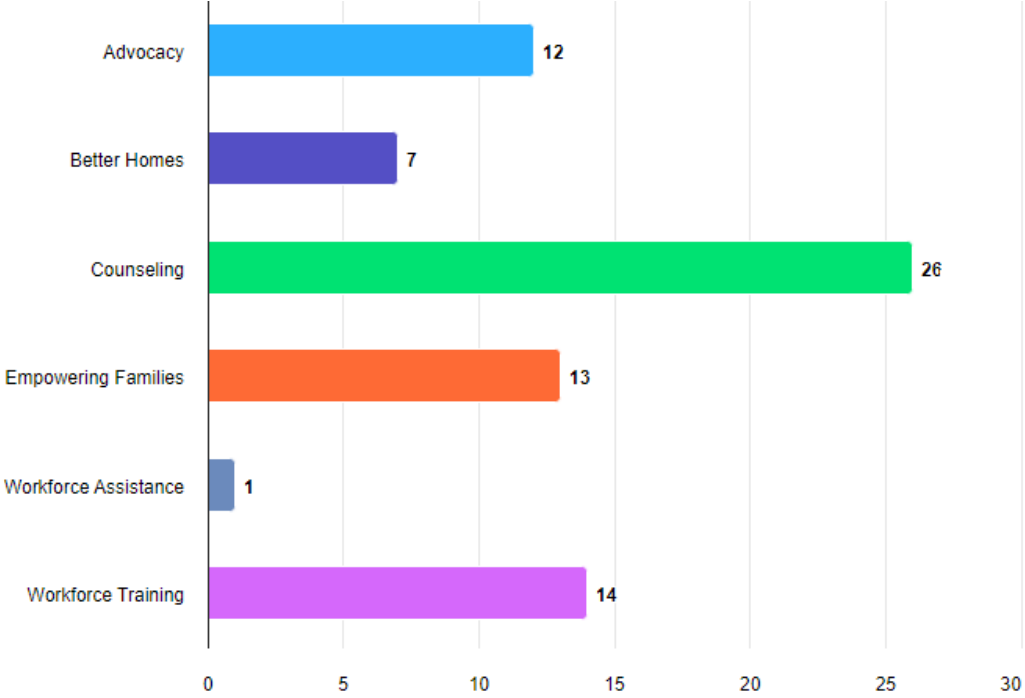
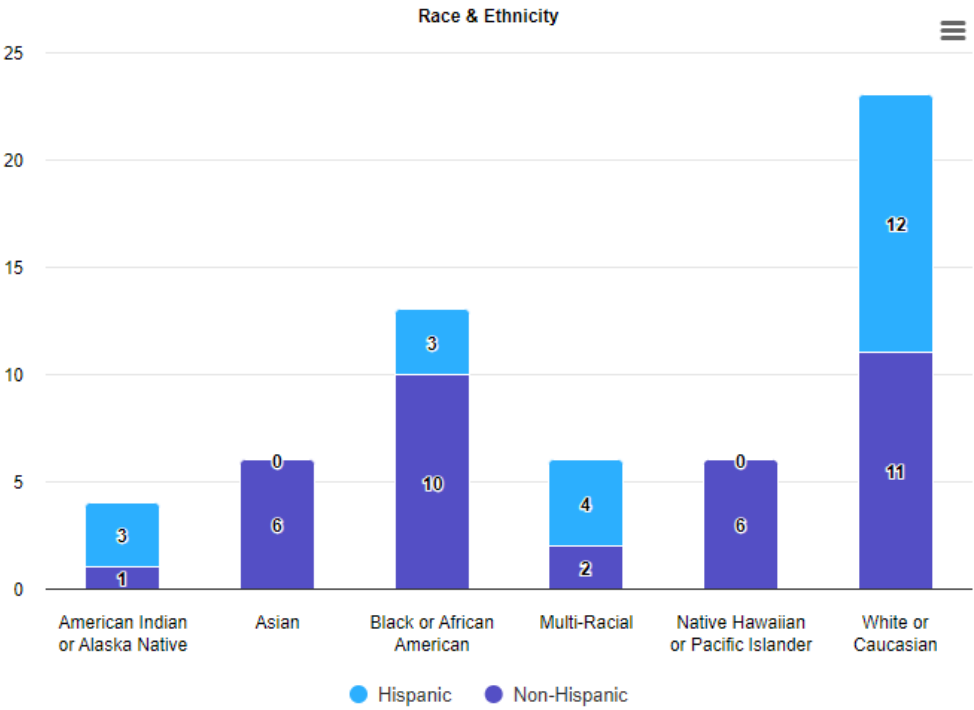
Graph Types

- **Pie or Doughnut** – Ideal for showing distribution or comparing parts of a whole.



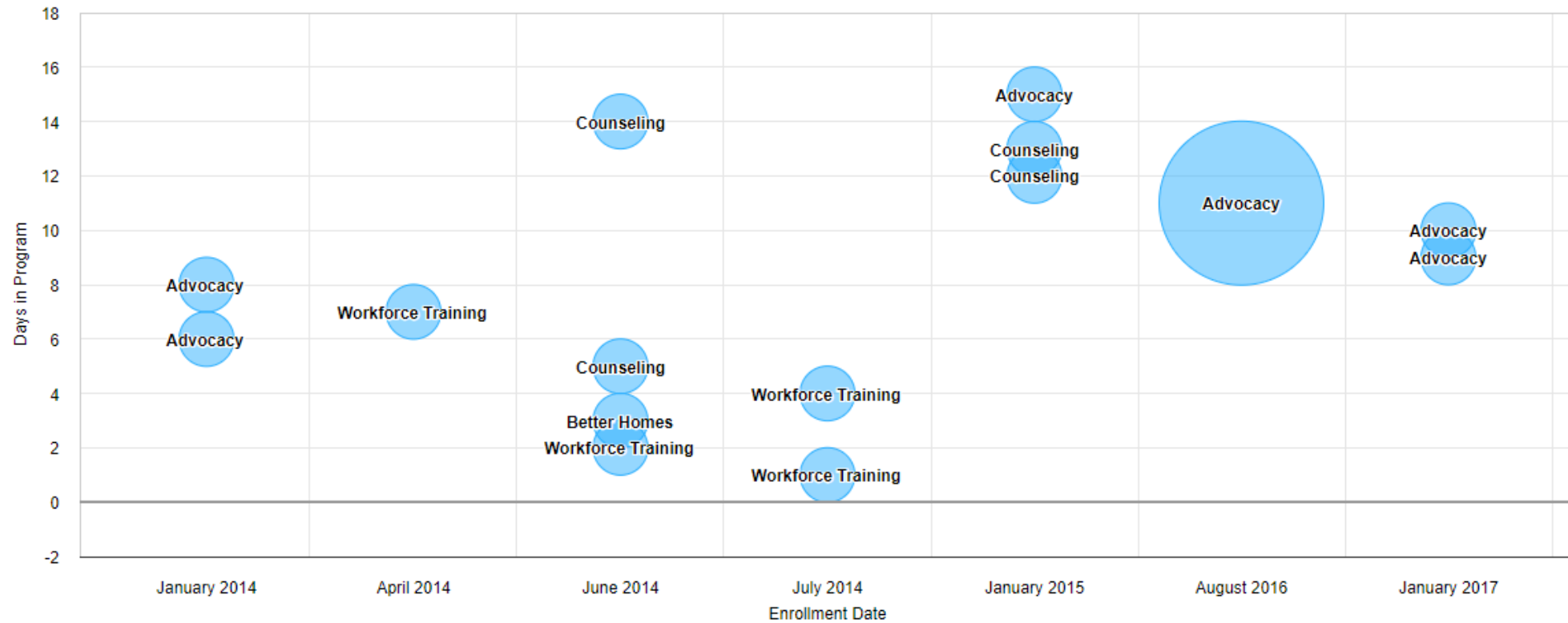
Graph Types

- **Bar or Column** – Horizontal or vertical view to compare different categories.



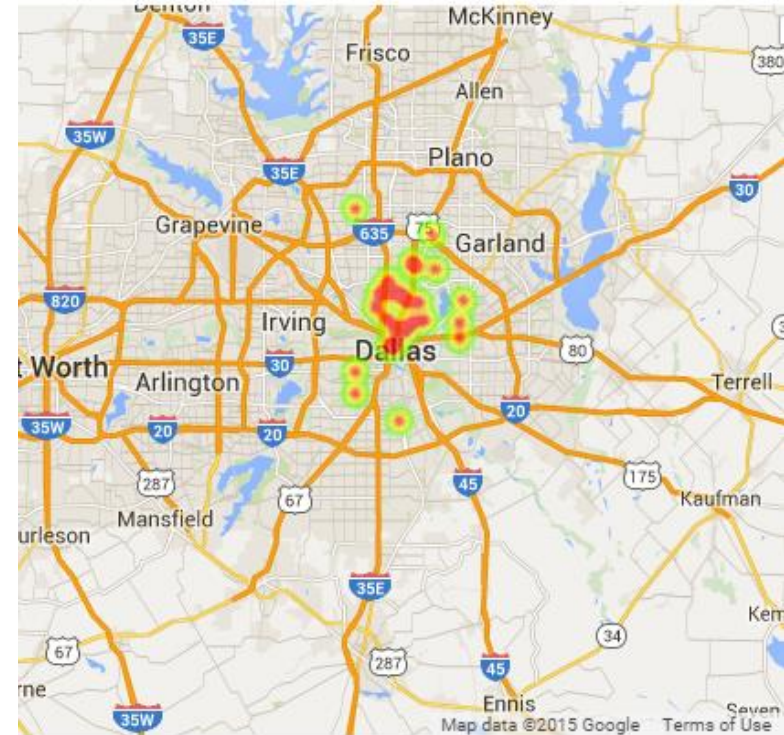
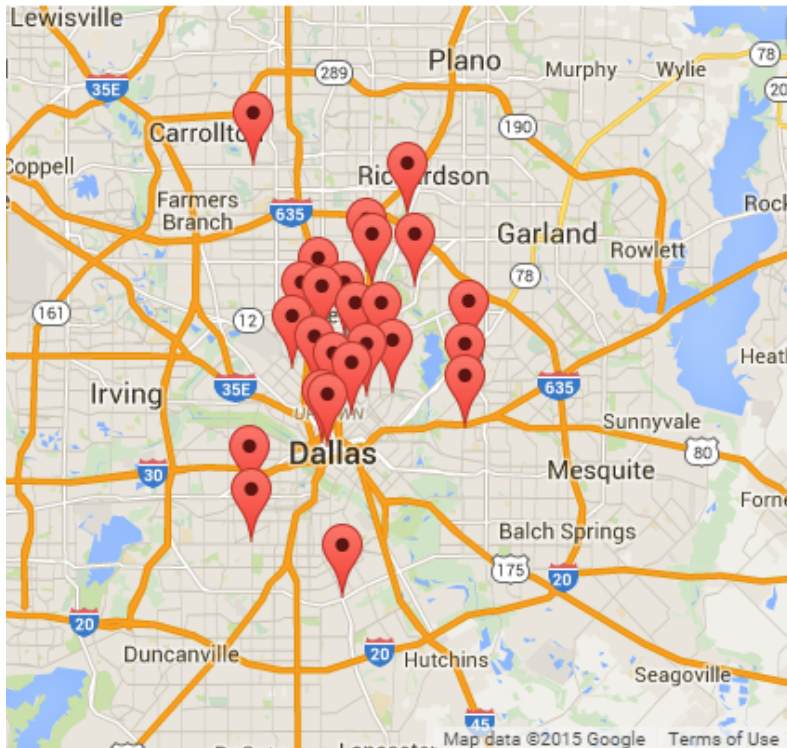
Graph Types

- **Bubble** – Showing relationship between at least 3 variables (using Grouping).



Graph Types

- **Location Map** or **Heat Map** – Based on Address Lookup field (*geolocation data*).



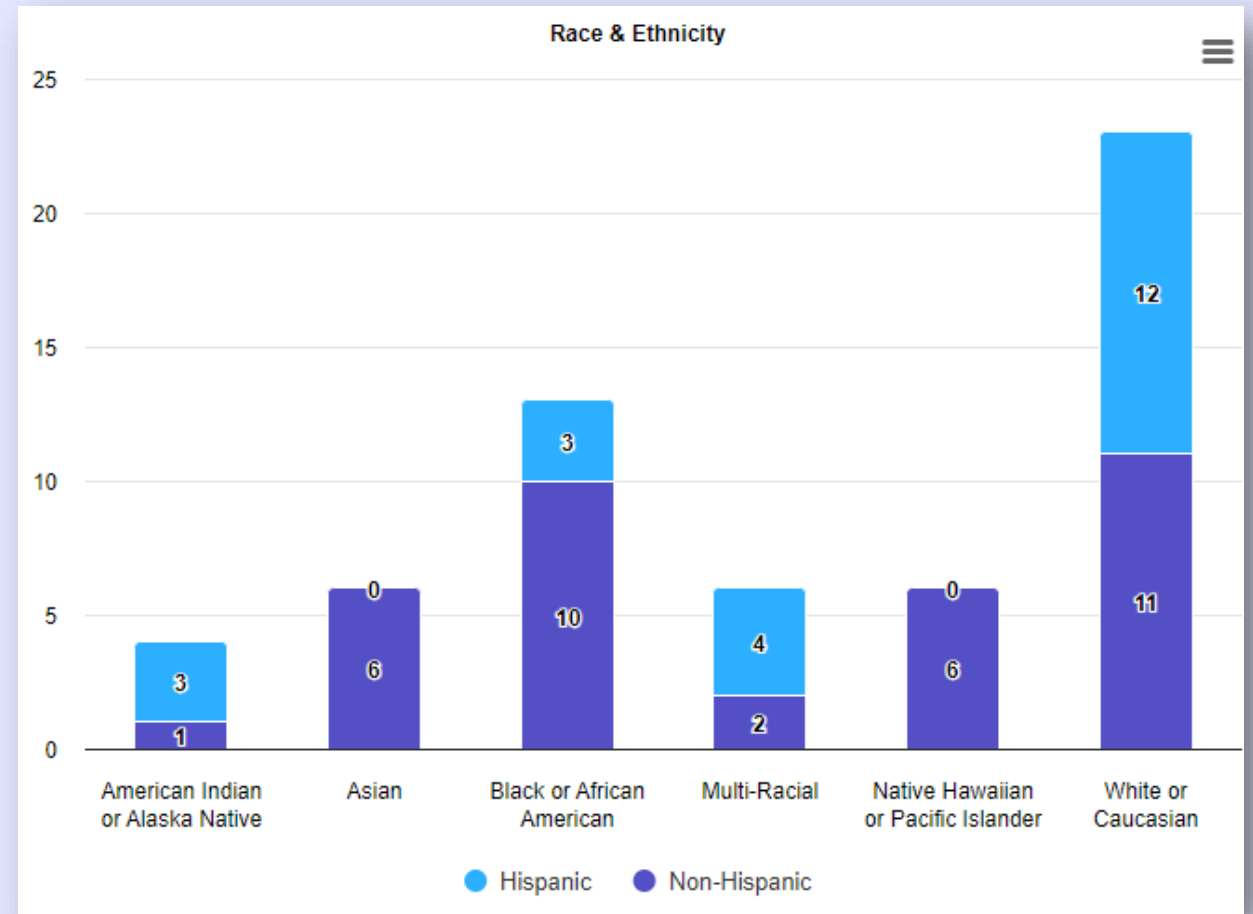
Data Sources

Group Counts

Totals by Group (includes all).

Data Source	
<input checked="" type="radio"/> Group Counts	
<input type="radio"/> Summaries	
<input type="radio"/> Rows	

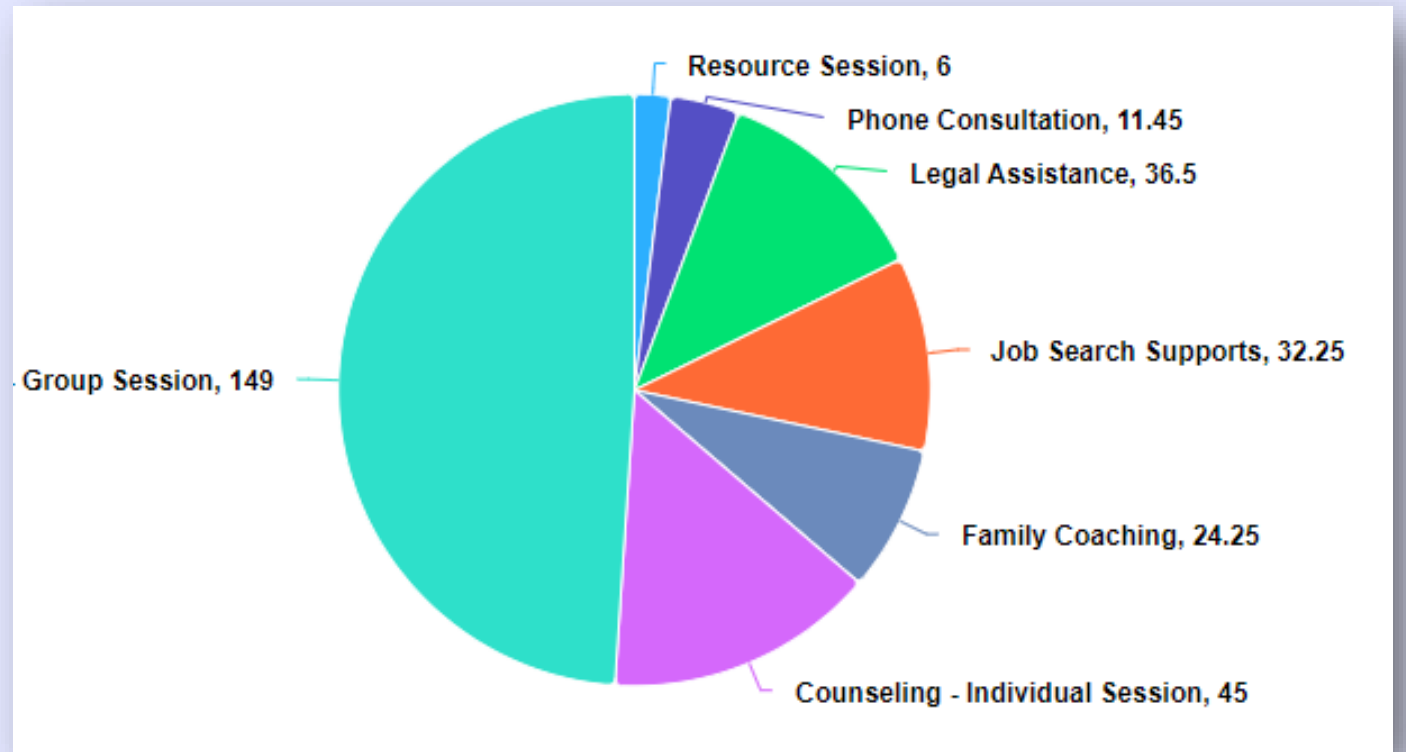
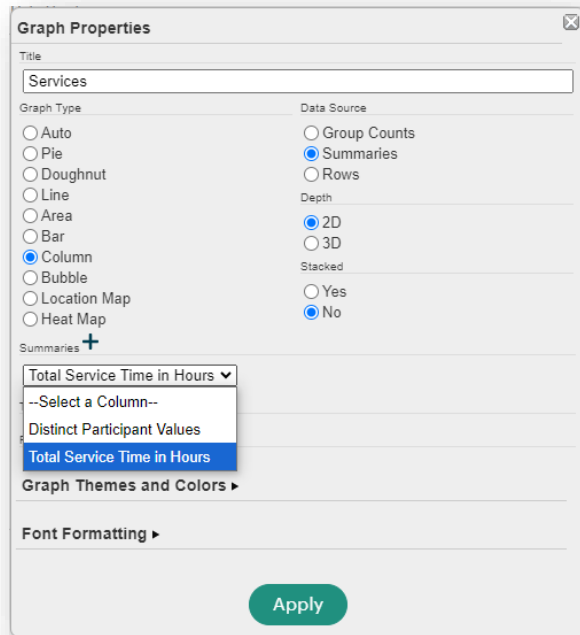
▶ Hispanic	Row Count 22
▼ Non-Hispanic	Row Count 36
▶ American Indian or Alaska Native	Row Count 1
▶ Asian	Row Count 6
▶ Black or African American	Row Count 10
▶ Multi-Racial	Row Count 2
▶ Native Hawaiian or Pacific Islander	Row Count 6
▶ White or Caucasian	Row Count 11
Total Rows 58	



Data Sources

Summaries

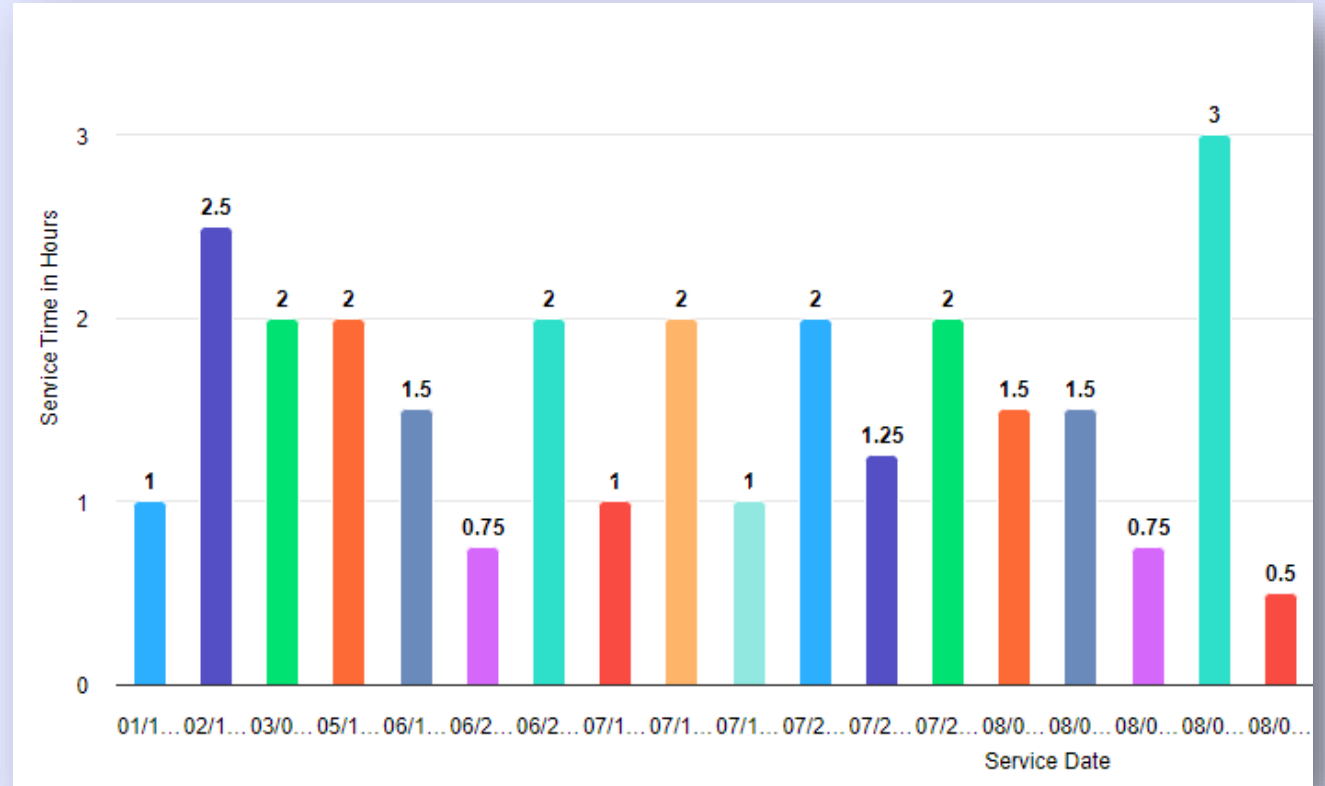
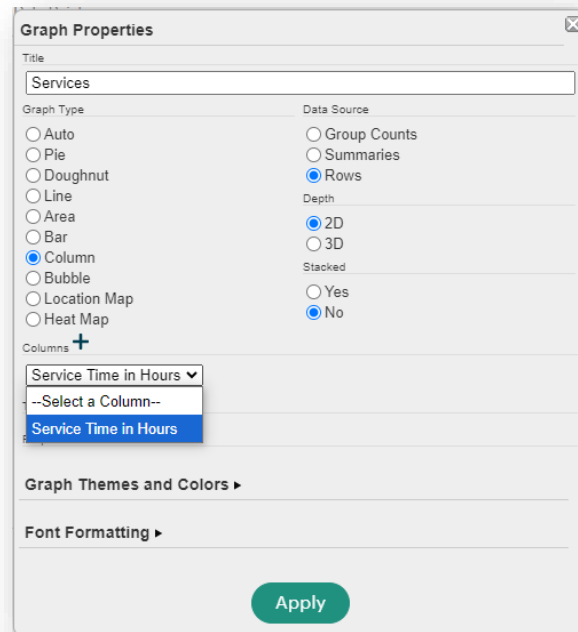
Column level Summaries like Total, Average, Min/Max (specify which).



Data Sources

Rows

Individual Rows of Numeric Data
(select columns).



Configuration

Configuring Graphs

Step 1:
Enable in
Section
Properties.

Step 2:
Configure
Graph
Properties.

Step 3:
Customize
Formatting.

Step 4:
Publish to
Preview.

Configuring Graphs

Step 1: Enable in Section Properties.

Section Properties

Section Name
Breakdown by Rep

Display Style

- Hidden
- Graph Only
- Totals
- Rows
- Vertical

Count

- Total Rows
- Knowledge Base Project Records
- Users Records
- Suppress Total Row Count

Show Graph

- No
- Yes

Show Percentages

- No
- Yes

Auto Run (Run Mode)

- No
- Yes

Show Outcomes

- No
- Yes

Auto Run (Edit Mode)

- No
- Yes

Basic SQL Statement ▶

Delete Copy Apply

Configuring Graphs

Step 2: Configure Graph Properties.

- Enter Graph Title
- Choose Graph Type
- Indicate Data Source

Overall Completion

Hailey - Completed, 10

Kent - Completed, 3

Liz - Completed, 16

Graph Properties

Title: Overall Completion

Target lines and Stacked do not apply.

Graph Type:

- Auto
- Pie
- Doughnut
- Line
- Area
- Bar
- Column
- Bubble
- Location Map
- Heat Map

Data Source:

- Group Counts
- Summaries
- Rows

Depth:

- 2D
- 3D

Stacked:

- Yes
- No

Properties +

Graph Themes and Colors ▶

Font Formatting ▶

Apply

Configuring Graphs

Step 3: Customize Formatting.

- Depth: 2D / 3D
- Option to Stack
- Additional Properties
- Themes & Colors
- Fonts

The screenshot shows a 'Graph Properties' dialog box with the following sections:

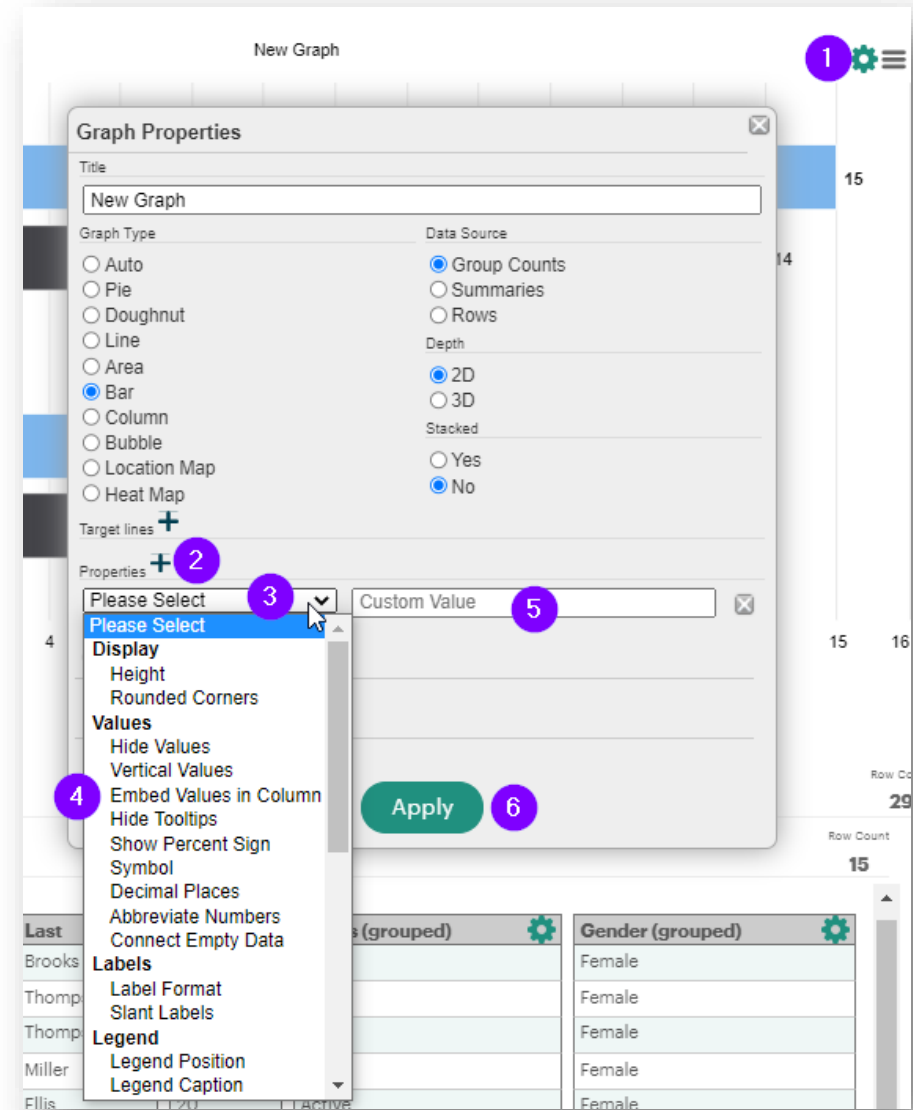
- Title:** A text field containing 'Graph'.
- Graph Type:** Radio buttons for Auto, Pie (selected), Doughnut, Line, Area, Bar, Column, Bubble, Location Map, and Heat Map.
- Data Source:** Radio buttons for Group Counts (selected), Summaries, and Rows.
- Depth:** Radio buttons for 2D (selected) and 3D.
- Stacked:** Radio buttons for Yes and No (selected).
- Properties:** A plus sign icon to expand additional settings.
- Graph Themes and Colors:**
 - Themes:** A dropdown menu set to 'Ocean'.
 - Colors:** A section with an 'Add Color' button and a grid of 12 color swatches, each with a delete 'X' icon.
- Font Formatting:**
 - Title:** Arial font, size 14, bold.
 - Axis Labels:** Arial font, size 12, bold.
 - Data Labels:** Helvetica font, size 12, bold.
- Apply:** A large green button at the bottom.

Additional Properties

- Ability to add graph elements & customizations.
- Use case depends on type of graph.

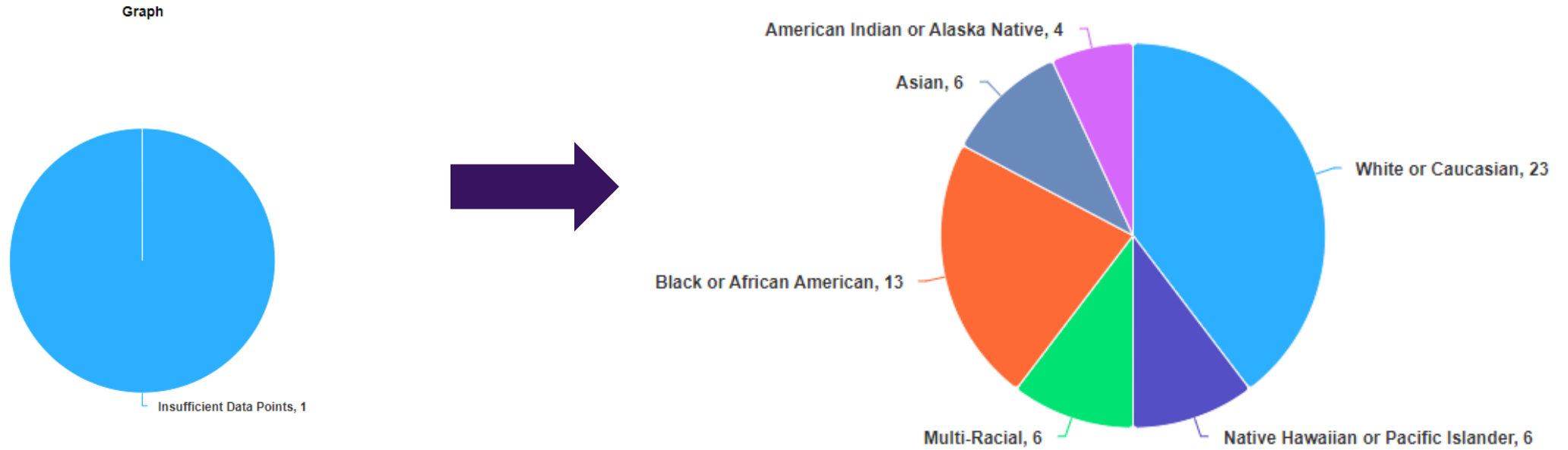
Common Customizations:

- Target Lines
- Position of Values
- Add a Legend
- Add a Logo
- Axis Labels
- Map Zoom



Configuring Graphs

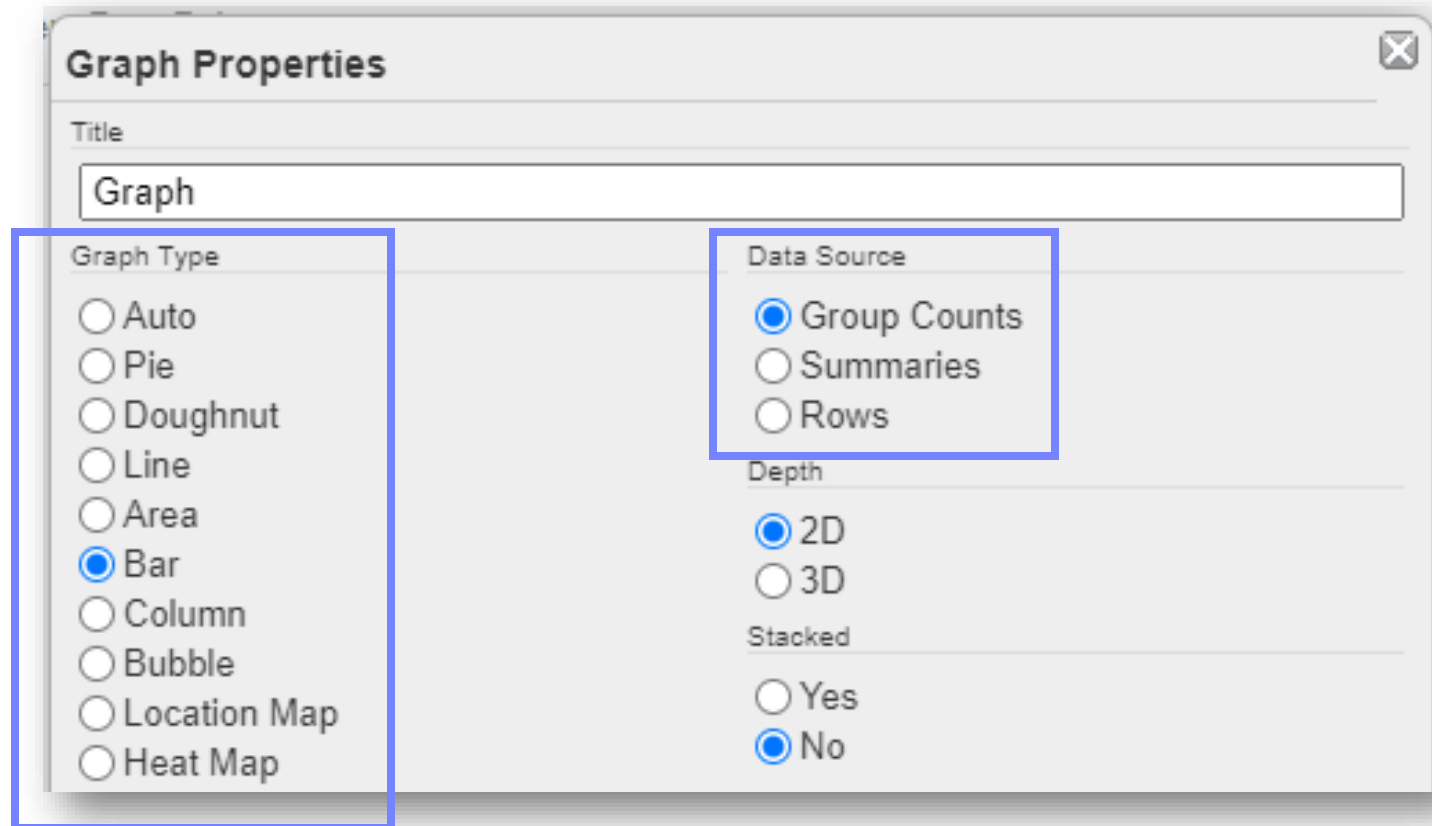
Step 4: Publish to Preview.



Best Practices

Best Practices

1. Check the **Graph Type** and **Data Source** to match your needs.



The screenshot shows a dialog box titled "Graph Properties" with a close button in the top right corner. Below the title bar is a "Title" field containing the text "Graph". The dialog is divided into two main sections: "Graph Type" and "Data Source".

Graph Type options (indicated by a blue box):

- Auto
- Pie
- Doughnut
- Line
- Area
- Bar
- Column
- Bubble
- Location Map
- Heat Map

Data Source options (indicated by a blue box):

- Group Counts
- Summaries
- Rows

Below the Data Source section are two more options:

- Depth**
 - 2D
 - 3D
- Stacked**
 - Yes
 - No

Best Practices

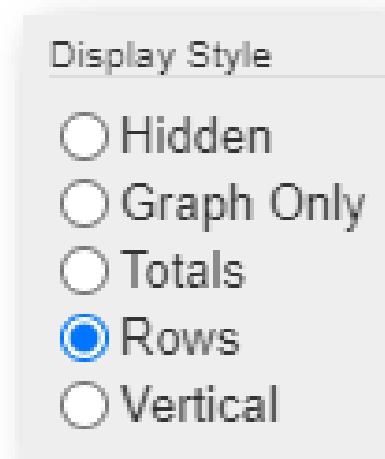
1. Check the **Graph Type** and **Data Source** to match your needs.
2. **Publish** to see end result; do not rely on the preview.
3. Keep your graph **simple**; only add elements that complete the picture.
4. The **order** of your columns matters for the way some graphs render.

Summaries 

Only the left most column (or the left most summary if grouping is present) will be graphed - any additional columns will be ignored.

Best Practices

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2. **Publish** to see end result; do not rely on the preview.
3. Keep your graph **simple**; only add elements that complete the picture.
4. The **order** of your columns matters for the way some graphs render.
5. Make sure you use **related data** for stacking or combining.
6. Use the **Graph Only** Display Style in Section Properties for a clean visual.



Best Practices

1. Check the **Graph Type** and **Data Source** to match your needs.
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4. The order of your columns matters for the way some graphs render.
5. Make sure you use **related data** for stacking or combining.
6. Use the **Graph Only** Display Style in Section Properties for a clean visual.
7. If you need more advanced customization, consider **Results Reporting**.

Additional Resources

Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities
- [Private Training](#) – 1:1 Sessions with Training Expert in Your Apricot (End User & Admin Topics Available)

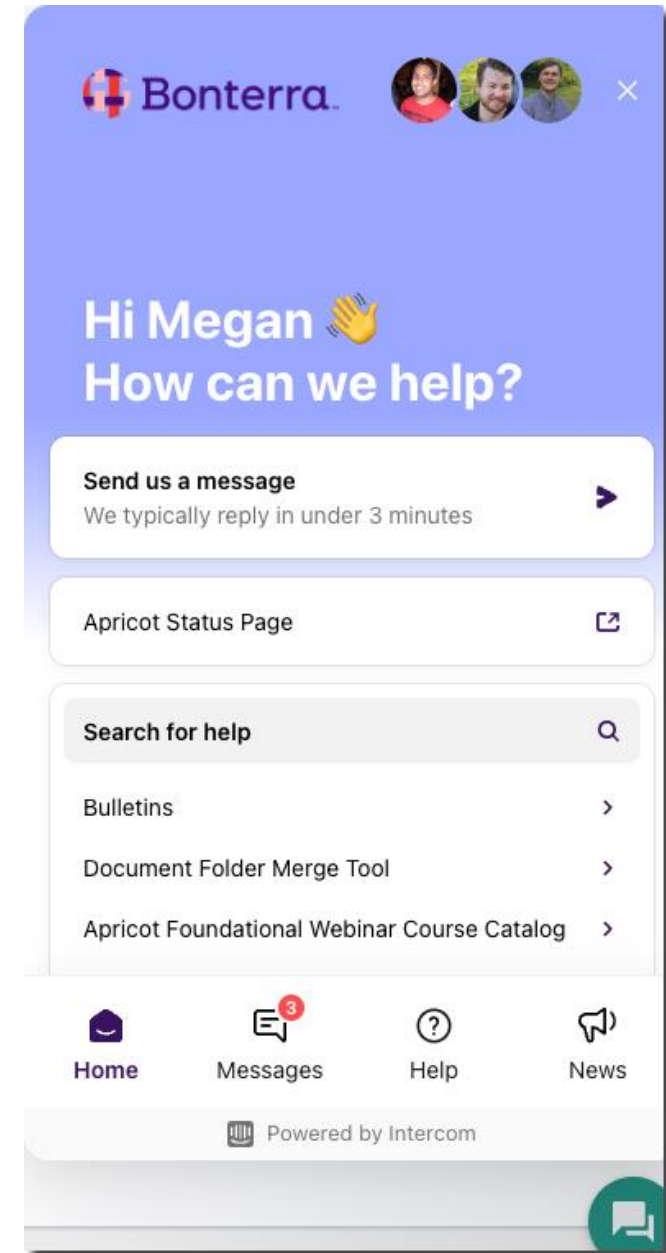


Build confidence & knowledge in
our software!

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



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.