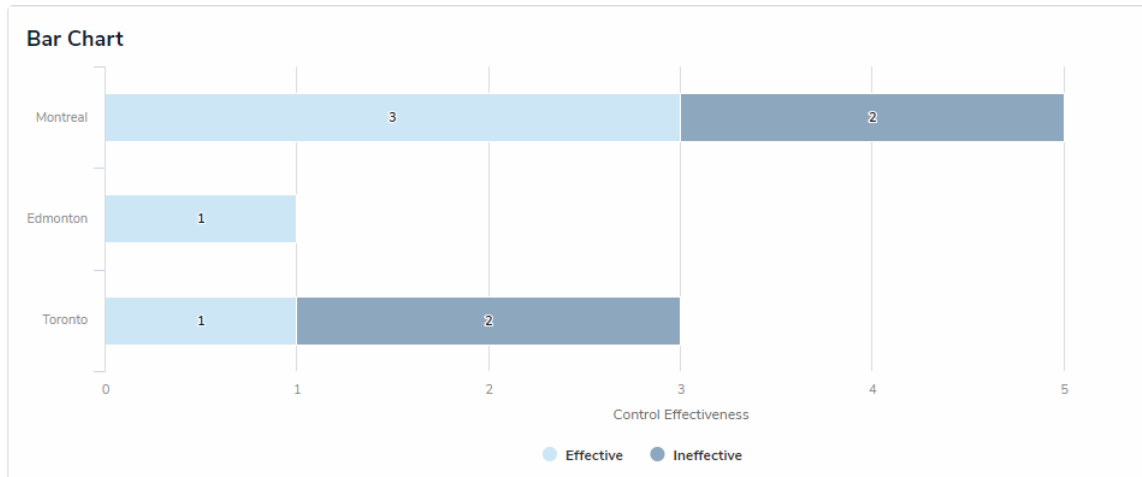


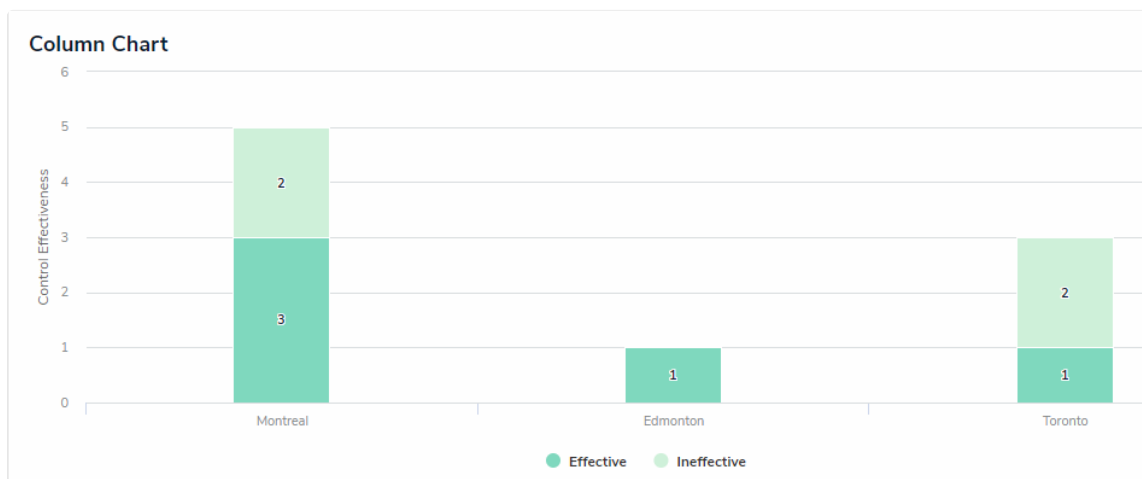
Add a Bar Chart or Column Chart to a Report

Last Modified on 03/17/2022 4:53 pm EDT

Bar charts and column charts display numeric data based on the data definition selected.



A bar chart with grouped data.



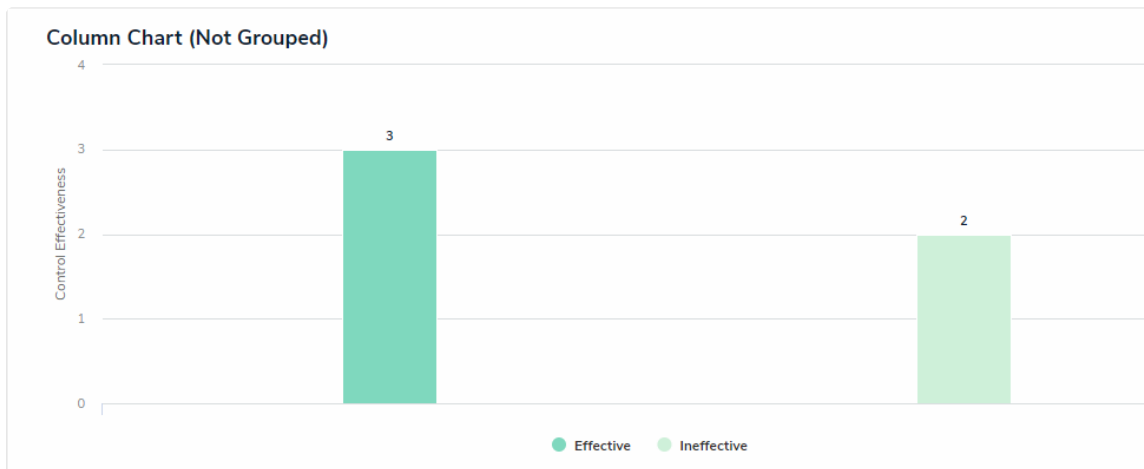
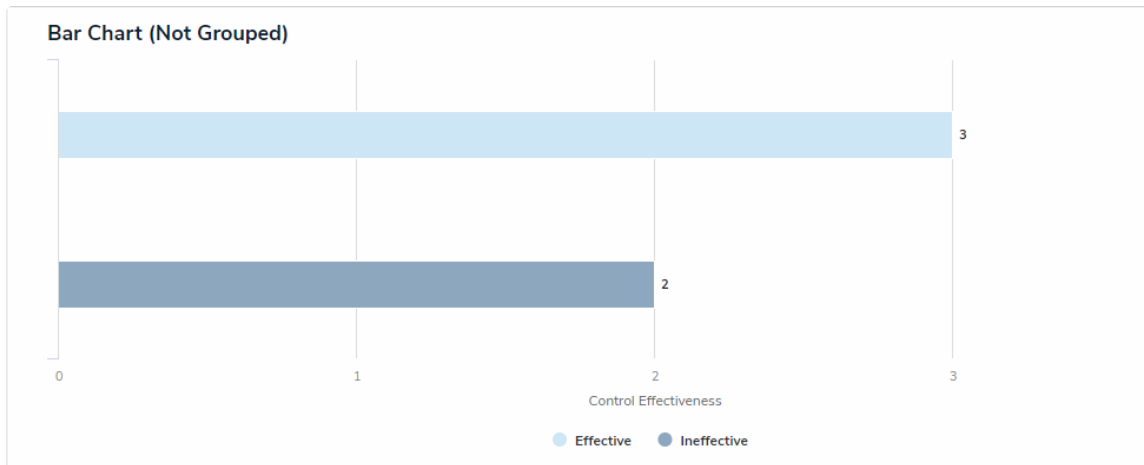
A column chart with grouped data.

Group By

When creating a bar or column chart, you can choose if the data is grouped by an object type or relationship. For example, in the screenshots above, the reports are displaying the number of times the Effective and Ineffective select list options appear on the Incident objects where each location has been referenced (e.g., the Montreal object has been selected on five Incident objects. Three of those Incident objects were effective, while two were ineffective).

When a chart **isn't** grouped, the number of times the selected field, formula, or state appears on a single object is totaled on the chart. For example, in the screenshots below, the data has not been grouped and the charts are therefore displaying the number of times the Effective and Ineffective select list options appear on the Incident objects at the Montreal location.

An ungrouped bar chart.



An ungrouped column chart.

Instructions

To add a bar chart or column chart to a report:

1. In the **Elements** section, click the  icon beside **Display**.

Elements

Display 

Free Form Text

Table

Pie Chart

Half-Pie Chart

Heat Map

Bar Chart

Column Chart

Repeatable Forms

Page Break

AutoText

The Elements section.

2. Drag and drop **Bar Chart** or **Column Chart** from the **Elements** section to the **Report Canvas**.



Configurations for bar and column charts are identical. To change an existing bar chart to a column chart or vice versa, open the **Edit Chart** palette and select **Bar** or **Column** in the **Configure Display** section.

3. Select a **data series** from the **Select a data series** dropdown menu, then click **Done**. The data definition selected here will determine which object types you can choose to display in the chart.

ADD BAR CHART

Select a data series

Select a Data Definition

CANCEL

DONE

Selecting a data series.

4. Choose the data types you'd like to display in the pie chart from the **Data Type** tab. Selecting **LIBRARY DATA** will include object type data, while selecting an **Assessment Type** will include the assessment name and workflow state. By default, all data types are selected. To make individual selections, deselect the **Select All** checkbox, then click the data type(s) you wish to include.

Data series: Requirements, Controls*, Issues, Corrective Actions

Data Type

Columns

Parameters

SELECT YOUR DATA TYPE

☒ Select All

☒ LIBRARY DATA	LIBRARY
☒ Audit	ASSESSMENT TYPE
☒ Control Assessment	ASSESSMENT TYPE
☒ QCA	ASSESSMENT TYPE
☒ Quarterly Control Assessment	ASSESSMENT TYPE
☒ Risk Assessment	ASSESSMENT TYPE

The Data Type tab.

5. Click the **Configure Your Chart** tab.
6. Choose the anchor or an object type in the data path from the **Select a Relationship** dropdown menu. The options in this dropdown menu will vary depending on the definition selected in the data series step above.

Data Type

Configure Your Chart

SELECT A RELATIONSHIP

Anchor

Selecting which object type's data will appear in the report.

- From the **Select Data** section, select the data (select list field, formula, or state) that you wish to display in the chart.

SELECT DATA

Select the data you want to visualize in the bar chart.

Search...

✓ Control Effectiveness	CONTROL	SELECT LIST
Operating Effectiveness	CONTROL	SELECT LIST
Design Effectiveness	CONTROL	SELECT LIST
Control Self Assessment	CONTROL	SELECT LIST
Conflicting Duties exist?	CONTROL	SELECT LIST
Control Source	CONTROL	SELECT LIST
Dependent on IT?	CONTROL	SELECT LIST
Key Control	CONTROL	SELECT LIST
Preventative or Detective	CONTROL	SELECT LIST
Frequency	CONTROL	SELECT LIST
Inherent Risk	CONTROL	FORMULA
No Labels	CONTROL	FORMULA
Control	CONTROL	WORKFLOW STATE

The Select Data section.



You can only select one data type for each bar chart.

- Optional:** Select an object type or relationship from the **Group Data** dropdown menu. This selection will determine the legend to the left of the chart and the category of the data displayed. If the data is not grouped, a total count of the field, formula, or state selected in step 5 above will be displayed.

GROUP DATA

Select the Object Type or Relationship you would like to use to group the data.

Select one...

Issue	RELATIONSHIP
Control	OBJECT TYPE
Issue	OBJECT TYPE

The Group Data section of Edit Chart palette. Your selection here will determine how the legend of the chart is displayed.

- Optional:** Enter a name for the chart in the **Chart Title** field.
- Optional:** To display the chart as bars or columns, select either **Bar** or **Column** in the **Configure Display** section.
- Optional:** If the data is grouped (see step 6), select the **Column Totals** checkbox to display a total count of the grouped data in each bar or column. If the data is not grouped, this option will be grayed out.
- Click **Done** when finished.
- Repeat the steps above to continue adding more bar or column charts to the report as needed. Once multiple elements are on the **Report Canvas**, you can rearrange them by hovering your cursor over the element, then clicking the icon and dragging the element

to a new location on the canvas. To delete an element, hover your cursor over it, then click the  icon.

Once you're done adding elements and configuring your report, you must add it to a report view to make it available to end-users. See the [Views Overview](#) and [Create a Report View](#) articles for more information.