

Line Chart

A Line Chart is great for showing trends over time or continuous data changes (e.g., monthly sales, stock prices, temperature).

Steps to create it

1. Load your dataset (must include a date/time or sequential field and a measure like sales).
2. Go to Report view.
3. In the Visualizations pane, click the Line Chart icon (a line graph).
4. Drag elds into:
 - X-Axis → Time or category eld (e.g., Date, Month)
 - Y-Axis → Numeric value (e.g., Sales, Prot)
 - Optional: Legend → To compare multiple lines (e.g., by Region or Category)

Format Pane (Paint roller icon):

- Enable Data labels to show values.
- Customize line style, markers, and colors.
- Turn on Zoom slider for easier navigation of long timelines.
- Use X-Axis and Y-Axis settings for labels, titles, gridlines.



1. Legend ✓ Purpose: Identifies different series in a chart by assigning them different colors or line styles.

Helps you differentiate categories or groups plotted in the same chart (on the same axis).

📌 Example: A line chart with Sales by Region will use Region in the Legend.

Each region gets its own line (with a different color), but they all share the same Y-axis.

2. Secondary Y-Axis ✓ Purpose: Used when you are plotting two measures with very different scales.

Allows one measure to use the primary Y-axis, and another to use the secondary Y-axis (on the right side).

📌 Example: A Combo Chart showing:

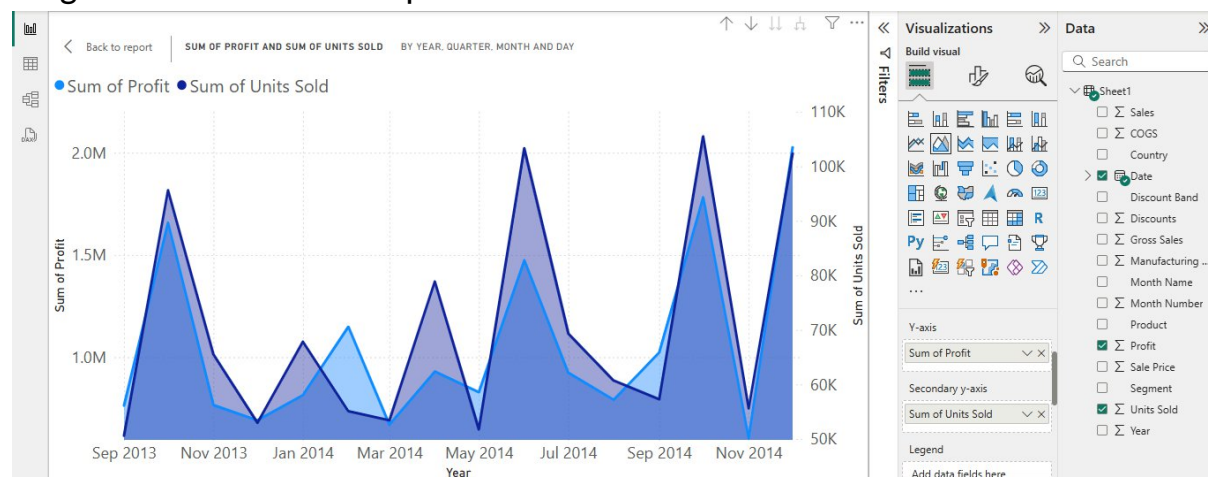
Sales (in millions) as columns (Primary Y-axis)

Prot Margin (as %) as a line (Secondary Y-axis)

This prevents one smaller measure from getting visually attenuated by a much larger one

📊 Area Chart

An Area Chart is a variation of a Line Chart, where the area under the line is filled with color. It's useful for showing trends over time and comparing the magnitude between multiple series.



🔄 Types of Area Charts

Chart Type Description

1. Basic Area: Overlapping filled areas (good for a single series)
2. Stacked Area: Stacks multiple series on top of each other (good for part-to-whole comparisons)

🔍 Drill Through

Drill Through allows users to right-click a data point in one report page and navigate to another page with more detailed, filtered information about that specific item.

- Provides focused, context-specific detail.
- Enhances interactivity and storytelling in reports.
- Commonly used for customer details, product analysis, region performance, etc.

Steps to create Drill Through

1. Create a new page (e.g., “Customer Details”).
2. Drag a field (e.g., Customer Name, Product) into the Drill through filters section (on the page-level filters pane).
3. Add relevant visuals to this new page.
4. On your main report page: Right-click a data point (e.g., a customer name).
5. Select Drill through → Customer Details.

The screenshot displays a report interface with a table of discounts by segment and a sidebar with visualization and data panes.

Segment	Sum of Discounts
Channel Partners	1,34,568.36
Enterprise	14,57,305.63
Government	38,98,805.83
Midmarket	2,00,786.93
Small Business	35,13,781.50
Total	92,05,248.24

The sidebar contains two main panes:

- Visualizations:** A pane with various chart icons and a search bar. It includes a section for "Allow drill through when:" with a dropdown menu set to "Used as category" and a search bar. Below the search bar, there is a list of segments with checkboxes and values: Channel Partn... 100, Enterprise 100, Government 300, Midmarket 100, and Small Business 100.
- Data:** A pane with a search bar and a list of data fields under "Sheet1". The fields are: Sales, COGS, Country, Date, Discount Band, Discounts, Gross Sales, Manufacturing ..., Month Name, Month Number, Product, Profit, Sale Price, Segment, Units Sold, and Year.