Charts

The Charts system is also available as *Analytics* on the IQXWeb Consultant Portal - charts defined in one place are automatically available in the other.

It allows you to produce graphical visualizations of data. There are two types of chart: Performance Charts and Analysis Charts.

Performance Charts

Performance Charts are line graphs of date based data, with the date plotted along the X axis. Each statistic plots as a line (unless you use Split - see below). You can select one or more **Statistics** from one or more tables.

You can also change the table's Date if there is more than one available (e.g. Vacancy Start Date and Entry Date).

At the bottom, in the **Date Selection** section, you can change the chart's date range and rounding system. E.g you will typically want to group shifts by week or month for the data to be meaningful. You can also select **Previous Year Comparison** to add a line (or lines) for the same period the previous year.

You can use the **Split** option to split a statistic into multiple lines e.g by Temp Desk or Division.

You can use the **Filter** option to restrict the graph to a selection of the overall data. Data is automatically filtered by the **Division** access rules of the logged in consultant.

When you Execute the chart, you can change the **Chart Height** from the default Auto option. You need to experiment with what works best for your data.

After you Execute a chart in the designer you can press the button to save it. You will be prompted to enter or edit the title.

Analysis Charts

Analysis Charts split the data by some item such as Department, Temp Desk, Division, Consultant, Post Code, Country etc. You select this item in the **Analyse by** section at the top.

You then select **Statistics** to graph. The **Statistics** you are offered will depend on your **Analyse by**. E.g. you cannot analyse Person or Company stats if analysing by Vacancy Status. However some analysis items are 'common'. E.g. if you select Person Postcode Area it will offer you Company stats as well as Person stats because it understands that Postcodes have the same meaning for both.

You can use the **Split** option to further split the analysis.

You can use the **Filter** option to restrict the graph to a selection of the overall data. Data is automatically filtered by the **Division** access rules of the logged in consultant.

When you Execute the chart, you can change the **Chart Height** from the default Auto option and also the **Chart Type**. You need to experiment with what works best for your data e.g. if there is a large number of items in your analysis you will probably want to use Horizontal Bar and increase the height.

After you Execute a chart in the designer you can press the button to save it. You will be prompted to enter or edit the title.

Questionnaires

Questions can be used for analysis (single select questions), statistics (numeric questions), timings (date questions) and filters. The questions available are specified in two ways. If you have IQXWeb you can set up a Questionnaire Group with ID 'ANALYTICS' and questions attached to this group will appear in the chart designer. If no such group exists then questions designated 'Web View' will appear.

Drilldowns

Clicking on a bar or a point on a chart will allow you to 'drill down' into a List of the underlying data. Clicking an item on this list will usually open the relevant item in IQX.

You can also specify one or more previously defined charts which appear on the pop-up menu. They will be run in a pop-up window and will be pre-filtered based on the location which you clicked. E.g. you can click on a Department bar and effectively graph the contents of that bar into an Analysis by Consultant or a Performance chart of Timesheets. It is up to you to select Drilldowns which have a data relationship with the calling chart or you may get errors.

Clicking on a point on a Performance chart and drilling down into another performance chart will filter by date and also adjust the date rounding to the next smaller granularity. E.g. you can have a chart of Timesheets by Month and drill down to the SAME chart which will automatically graph the month's Timesheets by Week.

Editing Chart Visibility

Pressing the Edit button on the list of charts allows you to edit the title and also control how you see your charts and who else can see them.

If you want other consultants to have access to your charts, tick the **Shared** checkbox. You can specify an **Access Level** which ties in with the consultant's **Report View Level**. They will see your chart on their list and be able to view it and add it to their dashboard. When they view it, it will obey their Division rights, not yours.

The **Dashboard** and **Home Page** are two groupings of charts which can be shown in a single window

by clicking the relevant button. In IQXWeb the Home Page charts are displayed in special cut down form but in IQX they are like an alternative Dashboard.

On each you can specify a 1 or 2 digit number denoting the row and column. E.g. if you want your dashboard to display 2 charts on the first row and 1 on the second you would set the values to 11, 12, and 2 (or 21). The number of charts across is limited by the width of the form on screen, up to a maximum of 4. The layout will be adjusted automatically as you resize the form, so if you specify 11, 12, 13, 14, 15, 16, 17, 18, 19 it will automatically pack them across then down according to form size.

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