

## Credible Business Intelligence:

Concepts and Best Practices  
Report and Chart Building

### Report Planning Questions

- What data do I want?
- Where does the data live?
- What do I want to show?
- Do I want to perform calculations?
- Do I want a subset?
- Do I want to group?
- What do I want it to look like?
- Do I want to map variables?

## What Data Do I Want?

- Client
- Employee
- Visit
- Billing



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## Using Charts

## Why Use Charts?

Convey a lot of information quickly

Draw attention to a certain *aspect* of the data

- Units performing better/worse than others
- Trends over time
- How parts contribute to a whole

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## Charting Questions

1. What kind of data is on my chart?
2. What am I trying to say with my chart?
3. How do I want my chart to look?
4. Can I map variables?
5. Who will want to use the information?

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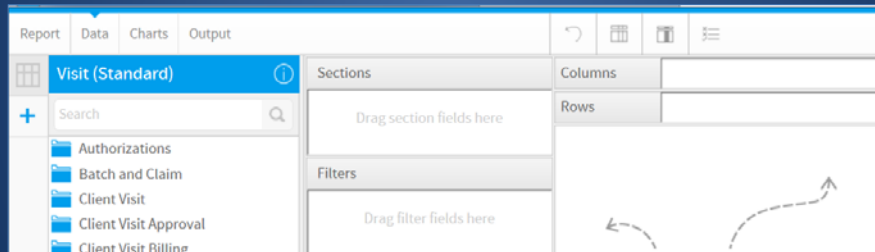
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## 1. What Kind of Data is on my Chart?

Defined in the **Data** section

Charts illustrate simple data best

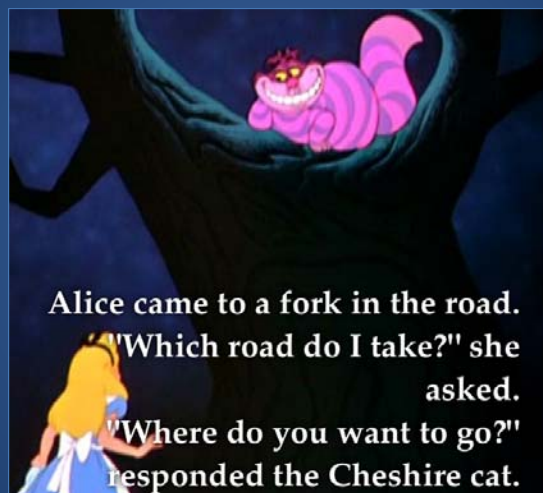


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## 2. What am I Trying to Say?



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## What Are You Measuring?

- How do units *contribute* to a whole?
- How do units *compare* to each other?
- How do units *change* over time?
- How does data progress towards a *goal*?

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## Revenue by Program

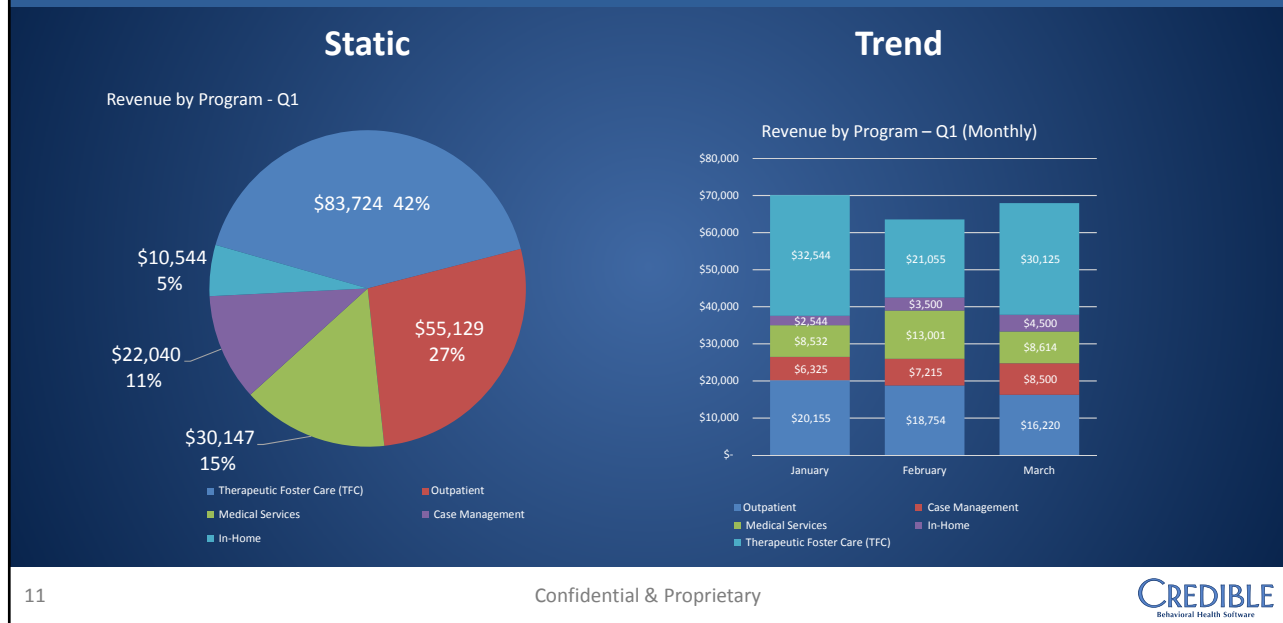
	January	February	March	TOTALS BY PROGRAM
Outpatient	\$ 20,155	\$ 18,754	\$ 16,220	\$ 55,129
Case Management	\$ 6,325	\$ 7,215	\$ 8,500	\$ 22,040
Medical Services	\$ 8,532	\$ 13,001	\$ 8,614	\$ 30,147
In-Home	\$ 2,544	\$ 3,500	\$ 4,500	\$ 10,544
Therapeutic Foster Care (TFC)	\$ 32,544	\$ 21,055	\$ 30,125	\$ 83,724
TOTALS BY MONTH	\$ 70,100	\$ 63,525	\$ 67,959	\$ 201,584

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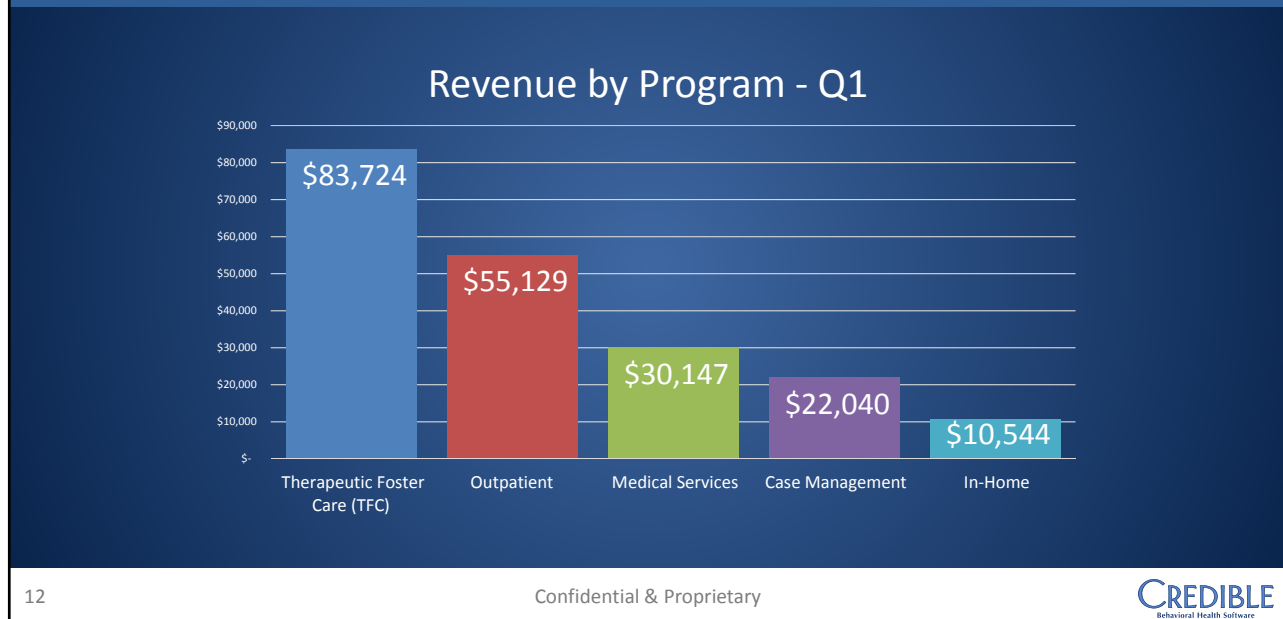
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## How Do They *Contribute* to the Whole?

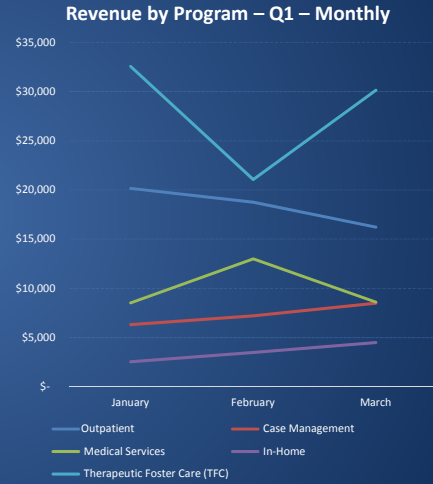
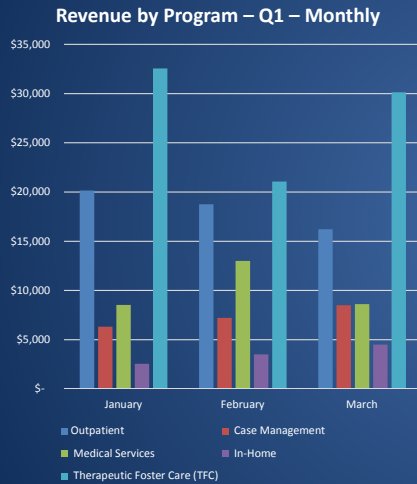


## How Do They *Compare* to Each Other?





## How Do They *Change Over Time*?



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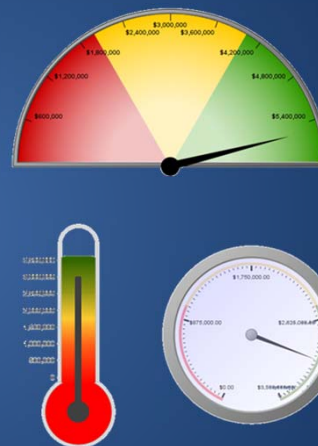
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## Showing Progress Towards a Goal

The Key Performance Indicator (KPI) that tells us what equals success

Can be shown as a gauge, a thermometer, or a dial







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## What Chart Do I Use?

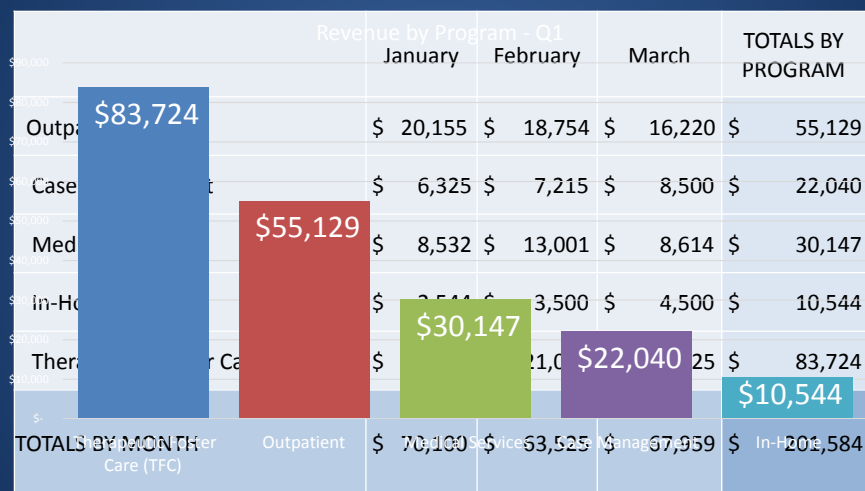
Question being Answered	Charts to Try
How do units CONTRIBUTE to a whole?	Pie Charts Stacked Bar Stacked Column 
How do units COMPARE to each other?	Bar Charts Column Charts 
How do units change over TIME?	Line Charts Column Charts 
How am I progressing towards a GOAL (KPI)?	KPI Charts (Gauge, Thermometer, Dial) 

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## Or Use Auto Chart Builder!



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## About Auto Chart Builder

Drag desired fields to horizontal/vertical axes

Make common chart types:

- Bar
- Column
- Scatter
- Line

For specialty charts, don't use Auto Chart Builder

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## 3. How Do I Want My Chart to Look?



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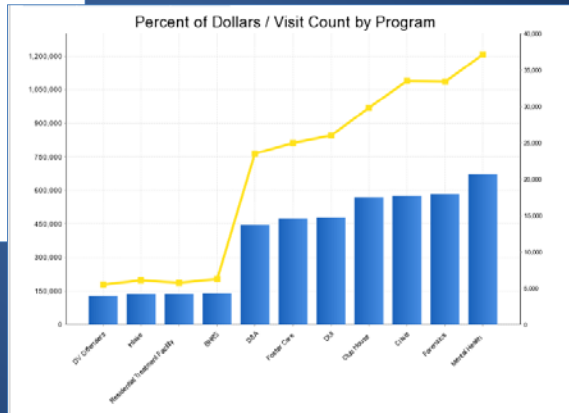
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## Building a Combo Chart

Day 2 Report 4 Dollars / Visit Count by Program Combo Chart  
Displays count of visits and Percent of Dollars by program in a Combo Chart

Visit Count	Program	Total Dollars
4,003	DV Offenders	\$180,775.00
4,198	Intake	\$188,790.00
4,211	Residential Treatment Facility	\$188,775.00
4,355	BHRS	\$203,881.32
13,720	D&A	\$764,395.00
14,808	Foster Care	\$813,775.00
14,811	DUI	\$846,510.00
17,554	Club House	\$970,875.00
17,761	Crisis	\$1,091,130.00
17,957	Forensics	\$1,086,435.00
20,722	Mental Health	\$1,208,825.00



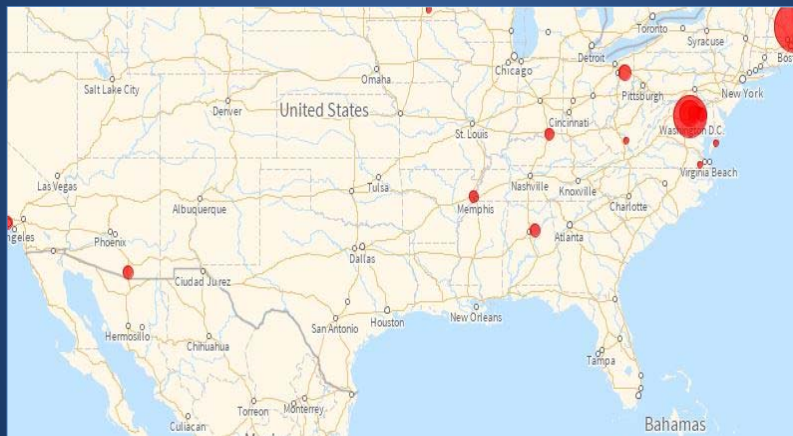
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## Do I Want to Map Variables?

### Mapping Variables



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## Creating a Chart/Map

