

Report Charts

Report Charts

Purpose and when to use this record

Turn an advanced report into a chart by selecting label, value, grouping, sorting, series, and display options.

At a glance

- **Identify it by:** **Chart Title**, **Label Field**, **Label Subfield**, and **Show Values On Chart**.
- **Check its business context:** **Standard Report**, and **Advanced Report**.
- **Why care:** A report is only trustworthy when its data source, date field, filters, grouping, and totals answer the intended business question.

Before you begin

You need the Brisk permission for the action you are taking on report charts. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Create a Report Chart

Save Chart Cancel

Chart Guide
Start with the report this chart should explain. Once the source is selected, I will suggest practical chart setups.

Choose a label field and at least one value series, or use a suggested setup.

1. Pick the source

2. Choose the visual

3. Set labels

4. Add values

5. Polish

Report Chart New Chart

What should this chart explain?

Chart Title

Standard Report

Advanced Report

Description

Suggested chart setups

Choose a source report to see suggested setups.

Previous Next Save Chart

The Report Charts create screen in the Brisk documentation demo.

Create a Report Chart after searching for the person, organization, item, location, or resource under alternate names and identifiers. Merge or correct an existing master record instead of creating a duplicate.

1. Select the business context first: **Standard Report**, and **Advanced Report**.
2. Enter the required identifying and operational values: **Chart Title**.
3. Review **System Chart**, **Chart Type**, **Time Grouping**, **Sort**, **Stack Series**, and **Show Legend**, plus the remaining screen fields deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Report Chart, then confirm **Chart Title**, **Label Field**, **Label Subfield**, and **Show Values On Chart** on its detail page before continuing.

After saving: Verify this Report Chart in **Chart Series** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a Report Chart

Delete this Report Chart only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

Before confirming, check for related **Chart Series**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Chart Title**, **Label Field**, **Label Subfield**, and **Show Values On Chart**. After confirmation, return to the Report Charts list and make sure only the intended Report Chart was removed.

Review Report Chart details

Use the detail page as the shared record of what this Report Chart currently means. Verify **Chart Type**, **Time Grouping**, **Sort**, and **Color Palette** before relying on it for a decision.

Follow **Standard Report**, and **Advanced Report** to determine whether the issue is on this Report Chart or on one of those linked records.

Next check: Verify this Report Chart in **Chart Series** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

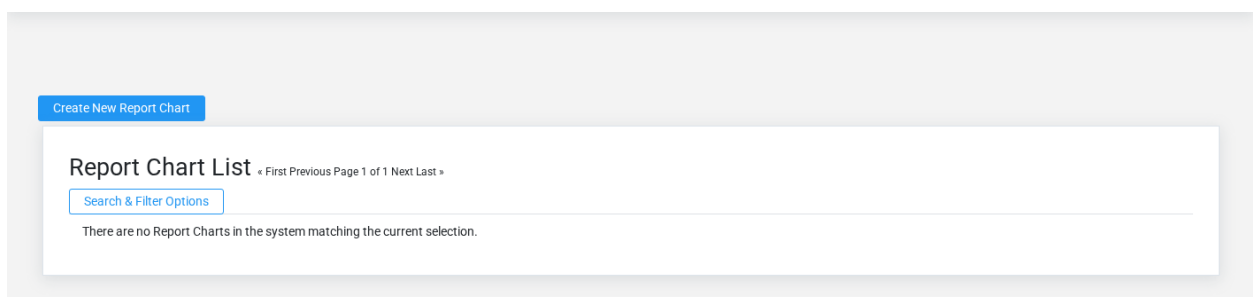
Edit an existing Report Chart

Edit this Report Chart to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **Standard Report**, and **Advanced Report** with the supporting document or approved request.
2. Recheck **Chart Type**, **Time Grouping**, **Sort**, and **Color Palette**. These values are most likely to change the population, date range, grouping, and totals users see.
3. Save the change, return to the list, and confirm that the Report Chart now appears under the expected **Chart Type**, **Time Grouping**, **Sort**, and **Color Palette**.

After the change: Verify this Report Chart in **Chart Series** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review report charts



The Report Charts list screen in the Brisk documentation demo.

Use the Report Charts list to find the correct record before opening or changing it. Compare **Chart Title**. Records with similar names or numbers can still belong to different **Standard Report**, and **Advanced Report**.

- The initial order emphasizes **Chart Title**. Select a column heading when you need a different comparison.

Open the Report Chart whose **Chart Title** match the task. If it is missing, clear the list filters and recheck **Chart Type**, **Time Grouping**, **Sort**, and **Color Palette** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 18 user-relevant fields for this Report Chart, including 2 linked-record selections and 4 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Chart Title	Yes	Human-readable name for this report chart.
Description	No	Description of this report chart.
Standard Report	No	The standard report associated with this report chart.
Advanced Report	No	The advanced report associated with this report chart.
Display Order	No	The display order value recorded for this report chart.
System Chart	No	Charts provided by Brisk can be copied but not modified by standard users.
Chart Type	No	The chart type recorded for this report chart. Available values: Bar, Horizontal Bar, Line, Area, Pie, Doughnut, Polar Area, Radar.
Label Field	No	Field used for labels. For dates, combine this with Time Grouping.
Label Subfield	No	The label subfield recorded for this report chart.
Time Grouping	No	Group date or datetime label fields into reporting periods. Available values: No Time Grouping, Day, Week, Month, Quarter, Year.
Sort	No	The sort recorded for this report chart. Available values: Source Order, Label A-Z, Label Z-A, Smallest Value, Largest Value.

Field	Required	What it controls
Maximum Labels	No	Limits long charts and groups the remainder into Other where possible.
Stack Series	No	Whether the stack series option applies to this report chart.
Show Legend	No	Whether the show legend option applies to this report chart.
Start Axis At Zero	No	Whether the start axis at zero option applies to this report chart.
Show Values On Chart	No	Whether the show values on chart option applies to this report chart.
Chart Height	No	The chart height value recorded for this report chart.
Color Palette	No	The color palette recorded for this report chart. Available values: Business, Finance, Inventory, High Contrast.

What happens next

Verify this Report Chart in **Chart Series** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Chart Title** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Open **Standard Report**, and **Advanced Report** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Revision #3

Created 2026-08-10 16:09:32 UTC by Brisk

Updated 2026-08-10 20:29:44 UTC by Brisk