



Precision Dashboard 7.0 User's Guide

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Introducing Precision Dashboard

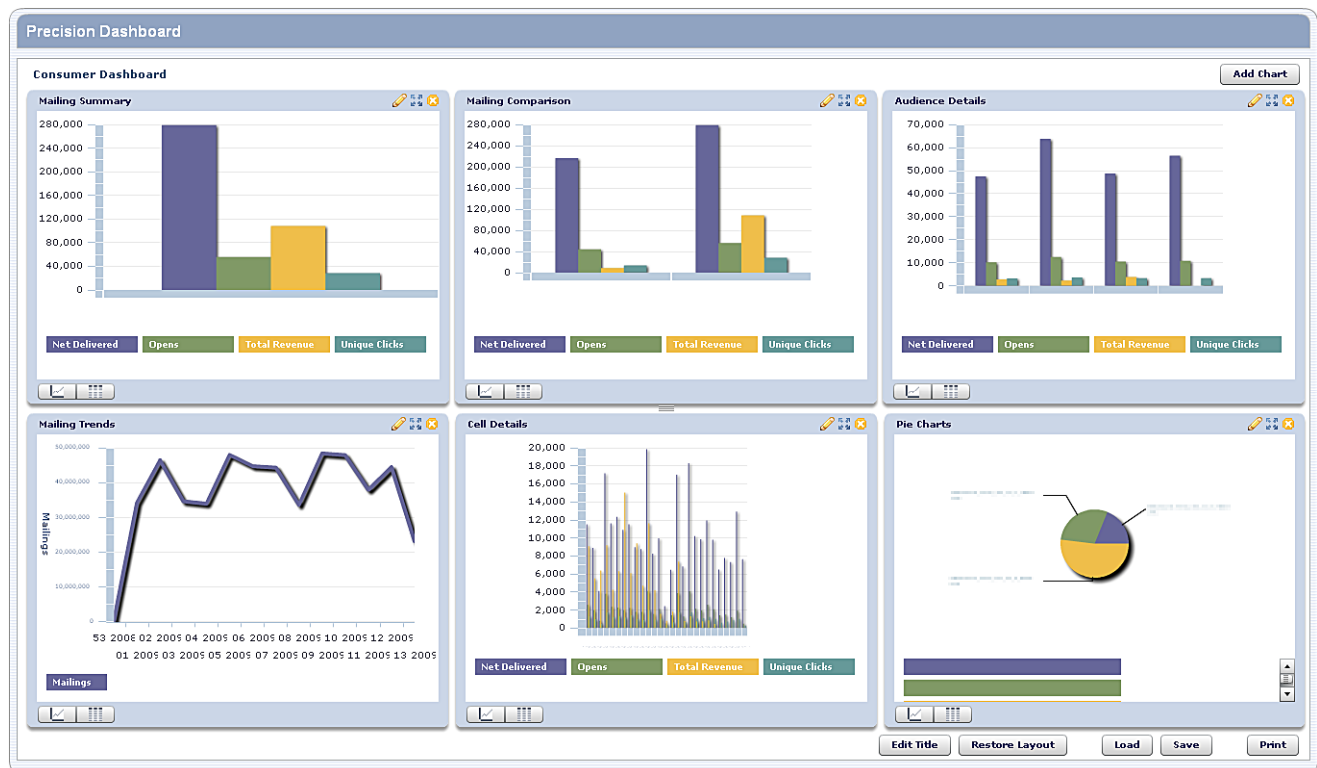
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About Precision Dashboard

e-Dialog Precision Dashboard™ is a reporting tool that displays a set of charts derived from e-mail performance metrics. A chart is the result of a database query that you can view in graphical or table form. You can display up to six charts on a single browser page.

Precision Dashboard (referred to as Dashboard in this document) uses standard business graphics such as line charts, bar charts, and pie charts to provide a simple, graphical view of how well your e-mail marketing efforts are succeeding. It provides a high-level view of statistical data from multiple mailings in a single, configurable, persistent, and printable display. (For more detailed reporting, use e-Reports. For real-time reporting, use Pulse Reports.)



You can chart mailing data (such as number of opens, number of clicks, etc.) on a summary basis, compare multiple mailings at once, or drill into a mailing to see individual cell performance. Mailing data is available in time-based aggregates so that you can view mailing performance metrics on a weekly, monthly, quarterly, or yearly basis.

Dashboard charts have many mouse-over (hover) messages. If you cannot read something easily, maximize the chart, move your mouse to the hard to read area, and keep the cursor stationary for a few seconds.



System Requirements

Precision Central 7.0 requires:

- ◆ Microsoft Windows or Apple Macintosh OS X*
- ◆ Adobe Flash Player 9.0.28 or newer

Adobe Flash Player is required only for Insight Builder, User Management, Precision Dashboard and Data Director.

- ◆ One of the following Web browsers:

§ **Internet Explorer 7** (<http://www.microsoft.com/downloads/>) on Windows

§ **Firefox 3** (<http://www.mozilla.com/en-US/firefox/>) on Windows and Macintosh OS X*

* The middle scroll button of a Macintosh mouse may not work consistently in Precision Central 7.0. This is a known issue in Adobe Flash Player.

Starting Precision Dashboard

To start Precision Dashboard:

- 1 Log in to Precision Central.
- 2 Select **Reporting > Precision Dashboard**.

You can make Dashboard your default Precision Central tool. See Setting Your Default Application in Introducing Precision Central 7.0 for instructions on specifying which application appears when you log in to Precision Central.

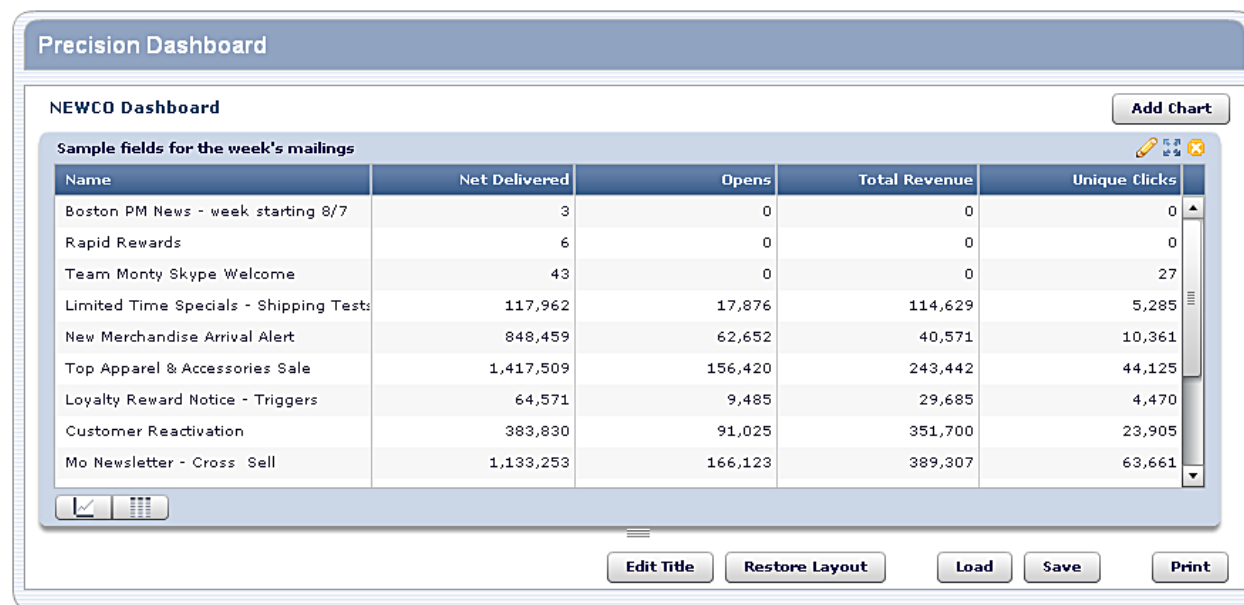
Working With Charts

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Managing the Display Area

The Precision Dashboard display area is a single browser page that can contain up to **six charts** at a time. The default display area, as shown below, consists of a single chart in table view that lists one week of mailings. You can close the default chart and/or add charts of your own design to the display area.



Control	Description
Add Chart	Opens an interactive panel to select settings for a chart to be added to the display. See: ♦ Using the Add Chart Dialog (on page 10) for instructions on configuring charts ♦ Adding Charts to the Display Area (on page 12) for a description of how the display area changes to accommodate multiple charts ♦ Selecting a Chart Type (on page 19) for descriptions of all available chart types

	Opens an interactive panel to edit settings for an existing chart. The panel is the same as the Add Chart panel except that there is an Update Chart button instead of an Add Chart button.
	Maximizes a chart so that it fills the entire display area and hides any other charts. Dashboard's corner icons have a unique appearance but perform the same functions as those used in typical windowing applications. You may find it useful to maximize a chart in order to examine it in detail.
	Minimizes a chart so that it returns to its normal size and position relative to any other charts.
	Closes a chart (removes the chart from the display area). An adjacent chart expands to fill the empty space. CAUTION: Closing a chart causes its settings to be lost unless you have saved the Dashboard layout.
	Drag this icon to vertically resize charts. Depending on the layout, the operation can affect multiple charts simultaneously. See Resizing Charts (on page 15) for details.
	Sets the view to a chart or a data table. The chart view provides a graphical representation of the data. The table view provides a tabular representation of the data and allows you to sort the data on any column as described in Sorting Chart Data (on page 33).
	Specifies a new title for the display. The default display title is <i>name</i> Dashboard, where <i>name</i> is the client name defined during the initial e-Dialog setup process.
	Resizes the display so that charts sharing a section have the same width and/or height. See Resizing Charts (on page 15) for details.
	Loads the saved dashboard layout for the current user.
	Saves the current dashboard layout for the current user. Dashboard saves one layout per user.
	Converts the display to PDF (Portable Document Format). If you have the Adobe PDF Browser plugin, the document opens in a new browser window in which you can click the Print icon. See Printing the Dashboard (on page 16) for more information.

Using the Add Chart Dialog

When you click **Add Chart**, Dashboard opens an interactive dialog panel on the left-hand side of the display area to select settings for a chart to be added. The image below shows the default display area after you click **Add Chart**.

Note: The Add Chart dialog varies according to the Chart Type you select. See *Selecting a Chart Type* (on page 19) for more specific instructions.

Control	Description
Chart type	The type of chart to add. The individual chart types are described in the <i>Selecting a Chart Type</i> (on page 19) section.
Chart title	A title for the chart. The title text appears in the top left of the chart panel.
Include Legend	Adds a key to the chart that indicates the meanings of the colors and is checked by default. Uncheck if you do not want a legend.
Choose a mailing	This field varies according to your selection of Chart Type.
	Lets you optionally filter the mailing list as described in <i>Filtering the Mailing List</i> (on page 12). When you edit a chart, Dashboard returns the mailing list to the default one-week date range. Use Filter Mailing List... to restore the desired date range.
Fields to include	This field varies according to your selection of Chart type.
	Adds the chart to the display. See <i>Adding Charts to the Display Area</i> (on page 12) for a description of how the display area changes to accommodate multiple charts.
	Discards your settings and closes the Add Chart dialog.

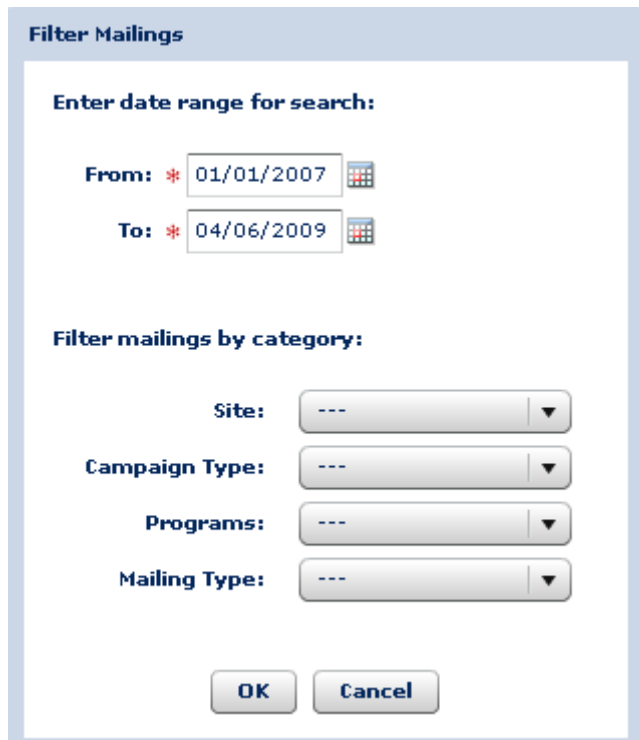
Filtering the Mailing List

Some charts require that you select one or several mailings from a list. If the mailings you want to select are not in the list, or if the list is too long to find the mailings you want, you change the scope of the list.

 Filter mailing list...

Click the Filter mailing list... button to control the scope of the list of mailings.

Note: Only the categories and category values for which you have permissions appear in this dialog.



The 'Filter Mailings' dialog box is titled 'Filter Mailings'. It contains two main sections. The first section, 'Enter date range for search:', has 'From:' and 'To:' labels followed by text input fields and calendar icons. The 'From:' field contains '01/01/2007' and the 'To:' field contains '04/06/2009'. The second section, 'Filter mailings by category:', has four labels: 'Site:', 'Campaign Type:', 'Programs:', and 'Mailing Type:'. Each label is followed by a dropdown menu showing '---'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Enter date range for search:

To find mailings added within a certain time period, specify a From date and a To date. The default range is one week.

Click the calendar icon to display a calendar similar to the following:



◀	January 2009						▶
S	M	T	W	T	F	S	
				1	2	3	
4	5	6	7	8	9	10	
11	12	13	14	15	16	17	
18	19	20	21	22	23	24	
25	26	27	28	29	30	31	

To navigate to another month or year, click the left or right arrow. Then click the day that you want to appear in the From or To field.

Filter mailings by category:

Mailing categories (user-defined fields) are specific to your organization and may be different from the ones shown here.

Adding Charts to the Display Area

 Add Chart

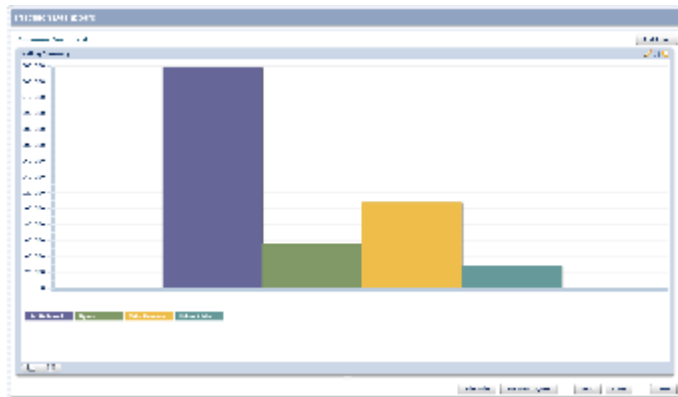
Opens an interactive panel to select settings for a chart to be added to the display. See *Selecting a Chart Type* (on page 19) for details about the types of charts that you can add.

The display area can hold up to six charts simultaneously. The layout is similar to a table with one or two rows and one, two, or three columns. The size of the display area changes according to the size of your browser window.

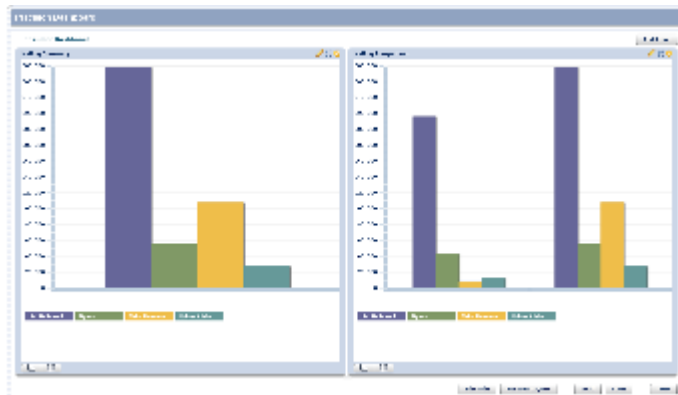
Each time you add a new chart the display automatically subdivides itself by adding a new row or a new column, sizing the charts as evenly as possible. If you have not deleted any charts from the layout, the positioning of new charts follows a specific pattern as shown below. However, if you have deleted charts, adding a chart places it in the next available position.

Adding Charts in Sequence

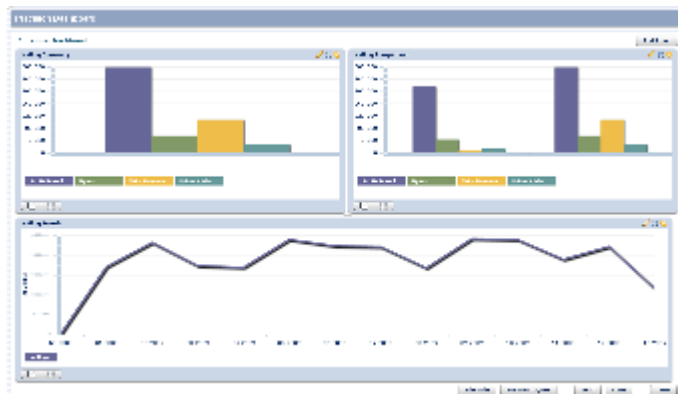
One chart occupies the entire display area. This is the same as maximizing a chart.



Adding a second chart divides the area into two equally-sized columns.

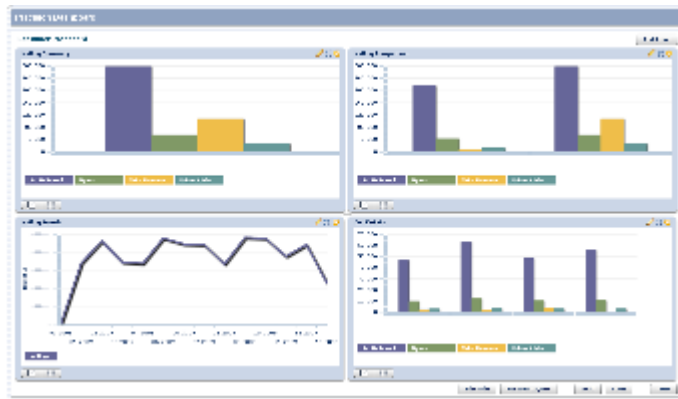


Adding a third chart divides the display area into two equally-sized rows. The third chart occupies two columns.



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Adding a fourth chart divides the display into two equally-sized rows and two-equally sized columns.



Adding a fifth chart divides the top row into three equally-sized columns.

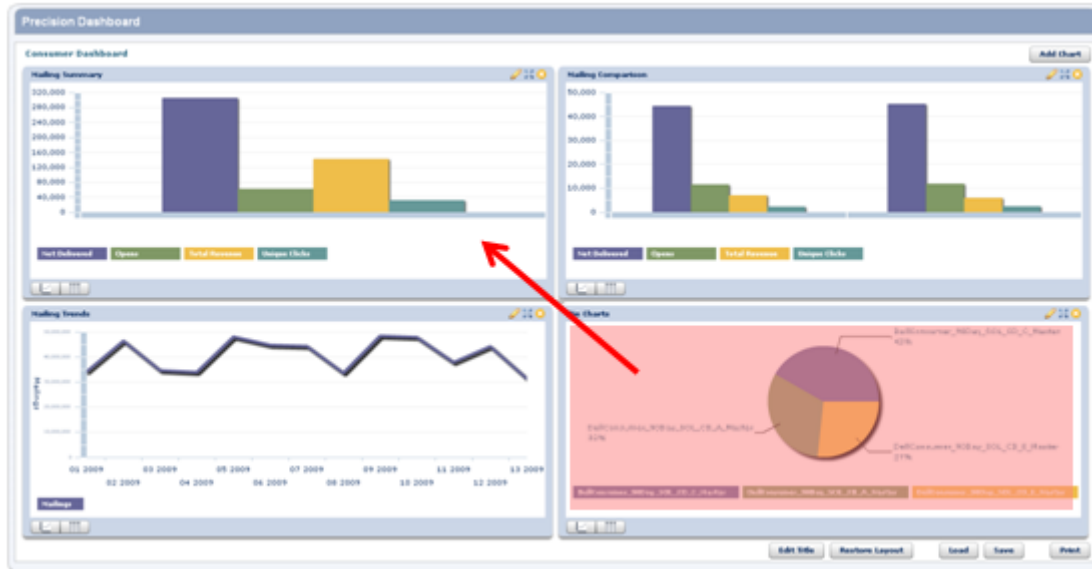


Adding a sixth chart divides the bottom row into three equally-sized columns.

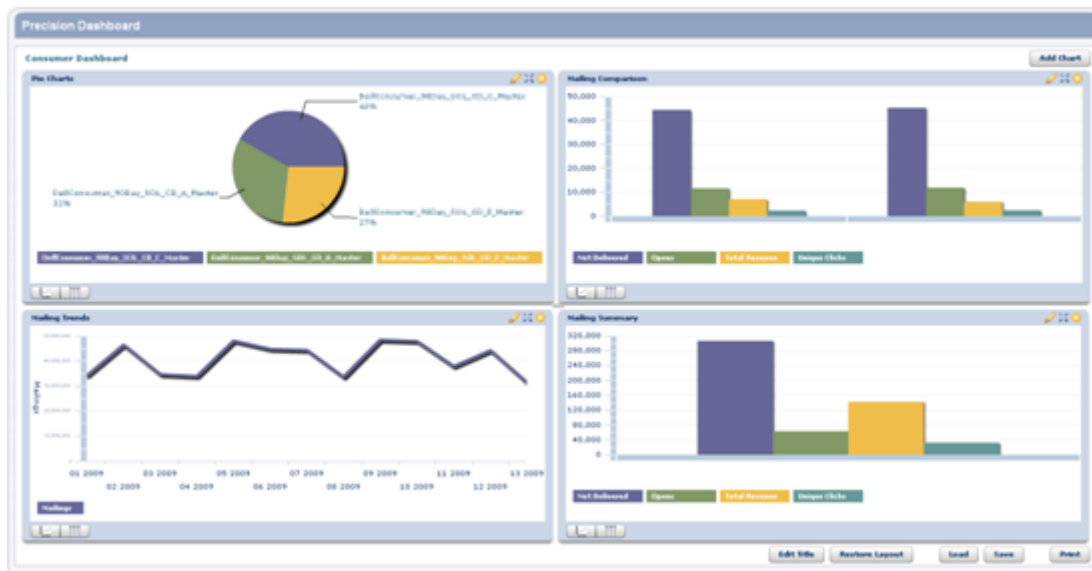


Swapping Chart Positions

To swap the positions of two charts, drag one chart onto another chart and drop it there. Make sure to place your cursor on the chart content (not the blue frame) to move the chart. Only the chart content is swapped. The sizes of the chart positions remain the same.



The charts exchange positions, resulting in:



Resizing Charts

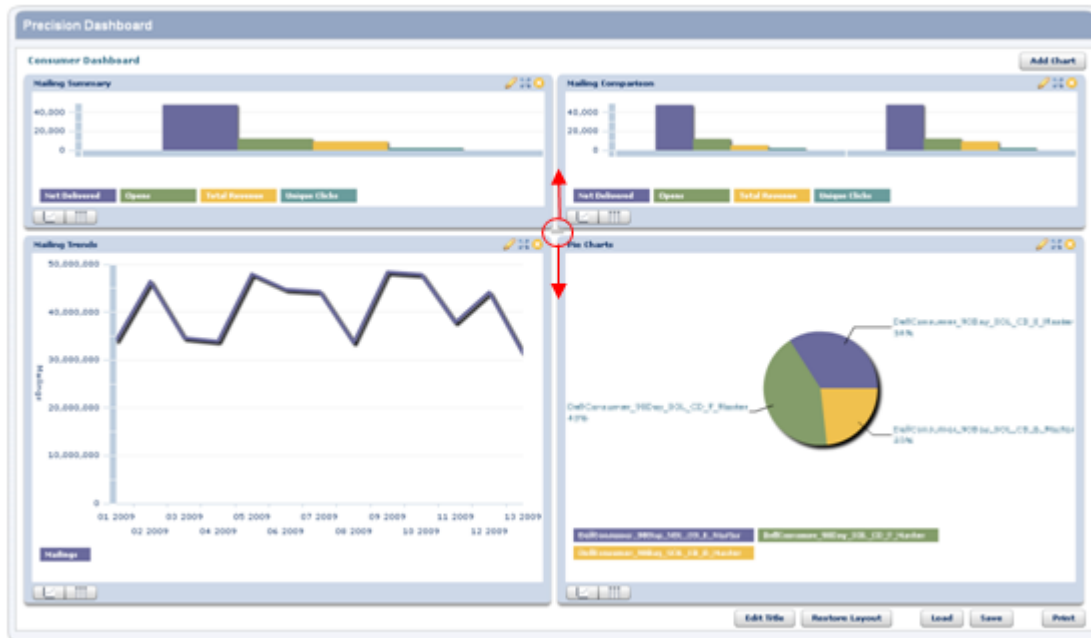
You can click and drag the divider icon to resize charts vertically.



Resizes charts vertically.

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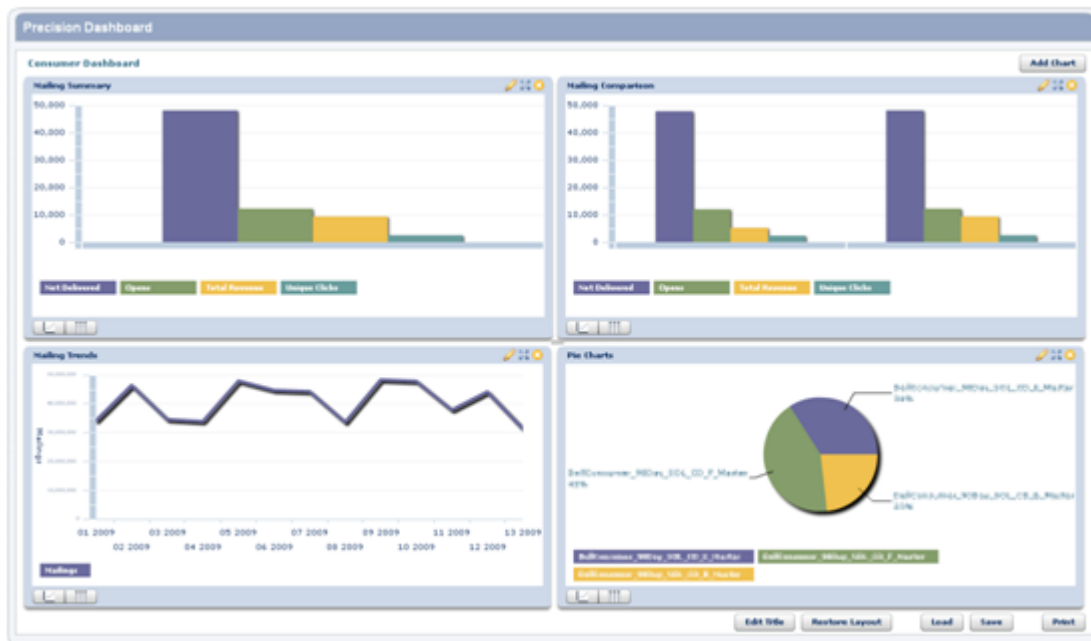
A resize operation can affect one or more charts simultaneously, depending on how the charts are arranged. For example:



Restore Layout

Resizes the display area layout so that all charts are equally sized.

For example, restoring the layout of the chart shown above results in:



Printing the Dashboard

Print

Click **Print** to convert the dashboard display to a PDF (Portable Document Format) document.

Note: Using your browser's Print button or right-click menu is not supported.

If your browser has a PDF viewer plug-in, such as the Adobe PDF Browser plug-in, the document opens in a new browser window or tab (depending on how your browser is configured). You can then use the plug-in's print command to send the document to a printer queue.

Otherwise, the PDF document opens in the default application if one is installed on the system. If the file type .PDF is not associated with a program on your computer, **download the latest version** <http://get.adobe.com/reader/> of the free Adobe Reader program (or any other PDF viewer program) and install it.

Note: The PDF document generated by Precision Dashboard is not automatically saved to disk.

Saving the dashboard display

Use your PDF browser plug-in or default application to save a copy of the document on your local machine.

E-mailing the dashboard display

Use your PDF browser plug-in or default application to save a copy of the document on your local machine and e-mail the PDF file as an attachment.

Selecting a Chart Type

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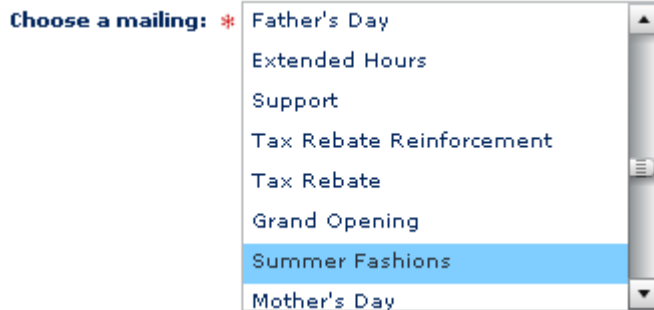
Mailing Summary Chart

A Mailing Summary Chart displays the performance of a single mailing.



Settings

- 1 Click to choose a single mailing. If necessary, ***filter the mailing list*** (see "Filtering the Mailing List" on page 12).



- 2 Click to select any number of the following data fields:

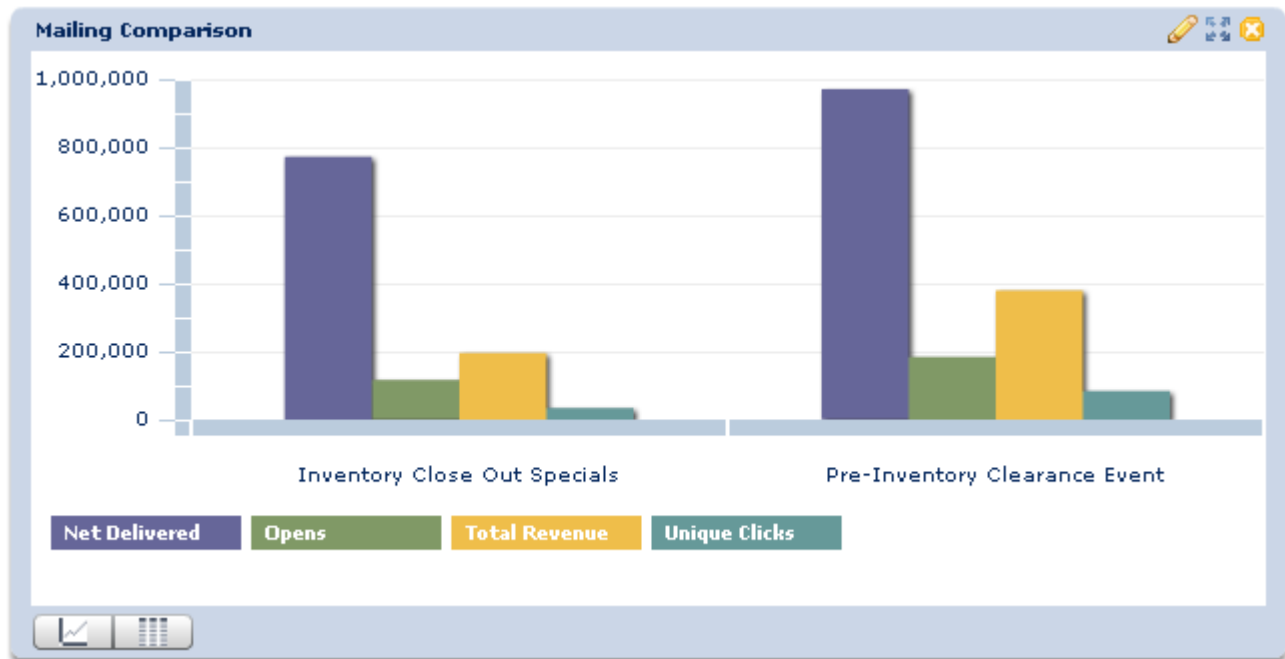
- ☐ # audiences
- ☐ # cells
- ☐ # links
- ☐ net delivered
- ☐ opens
- ☐ total clicks
- ☐ total conversions
- ☐ total mailed
- ☐ total revenue
- ☐ undelivered
- ☐ unique clicks
- ☐ unique conversions
- ☐ unsubscribes

Notes

- ◆ If you choose many fields, you may have to maximize the chart in order to read it effectively. Maximizing a chart expands it to fill the entire display area and hides any other charts.
- ◆ Fields containing relatively small numbers may be difficult to read in the chart. For example, a field containing a single-digit number is virtually impossible to see in the same chart with a field containing a number in the tens of thousands. You can, however, maximize the chart and/or place your cursor over the field to view a popup description of any field.

Mailing Comparison Chart

A Mailing Comparison Chart displays a side-by-side comparison of multiple data fields in multiple mailings.



Settings

- 1 Control-click (hold down the Ctrl key and click the left mouse button) to select multiple mailings. Shift-click or Ctrl-Shift-click to select ranges of mailings. If necessary, **filter the mailing list** (see "Filtering the Mailing List" on page 12).



If you choose many mailings, you may have to maximize the chart in order to read it effectively. Maximizing a chart expands it to fill the entire display area and hides any other charts.

- 2 Click to select any number of the following data fields:

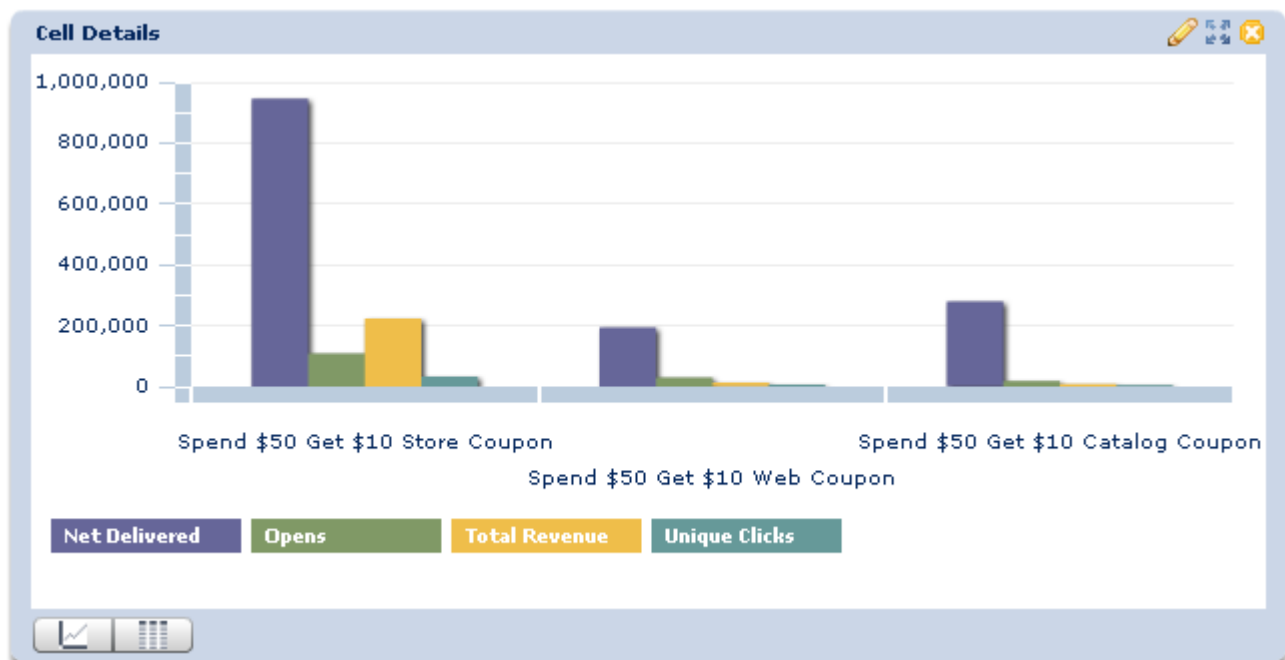
- ☐ # audiences
- ☐ # cells
- ☐ # links
- ☐ net delivered
- ☐ opens
- ☐ total clicks
- ☐ total conversions
- ☐ total mailed
- ☐ total revenue
- ☐ undelivered
- ☐ unique clicks
- ☐ unique conversions
- ☐ unsubscribes

Notes

- ◆ If you choose many fields, you may have to maximize the chart in order to read it effectively. Maximizing a chart expands it to fill the entire display area and hides any other charts.
- ◆ Fields containing relatively small numbers may be difficult to read in the chart. For example, a field containing a single-digit number is virtually impossible to see in the same chart with a field containing a number in the tens of thousands. You can, however, maximize the chart and/or place your cursor over the field to view a popup description of any field.

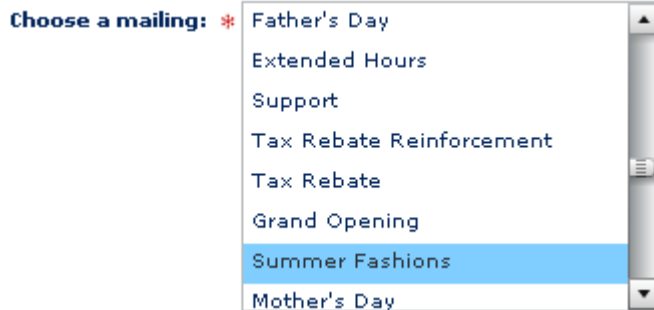
Cell Details Chart

A Cell Details Chart displays cell by cell performance of a single mailing.



Settings

- 1 Click to choose a single mailing. If necessary, ***filter the mailing list*** (see "Filtering the Mailing List" on page 12).



- 2 Click to select any number of the following data fields:

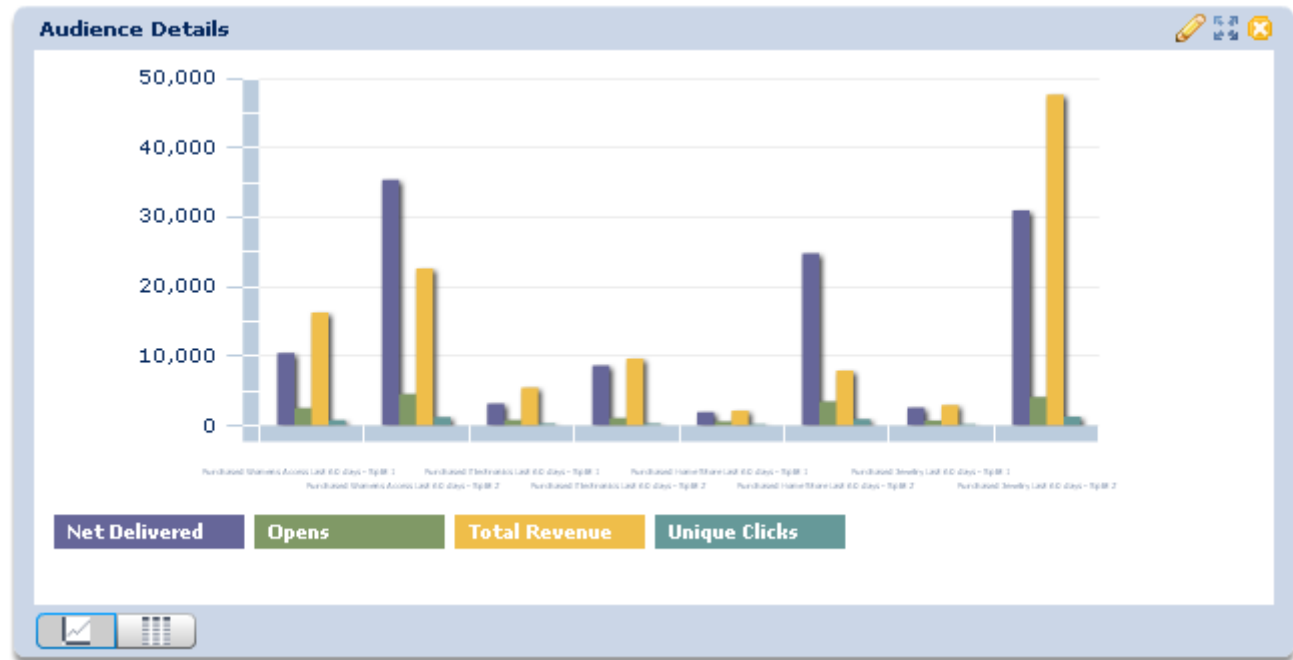
- ☐ net delivered
- ☐ opens
- ☐ total clicks
- ☐ total conversions
- ☐ total mailed
- ☐ total revenue
- ☐ undelivered
- ☐ unique clicks
- ☐ unique conversions
- ☐ unsubscribes

Notes

- ◆ If you choose many fields, you may have to maximize the chart in order to read it effectively. Maximizing a chart expands it to fill the entire display area and hides any other charts.
- ◆ Fields containing relatively small numbers may be difficult to read in the chart. For example, a field containing a single-digit number is virtually impossible to see in the same chart with a field containing a number in the tens of thousands. You can, however, maximize the chart and/or place your cursor over the field to view a popup description of any field.

Audience Details Chart

An Audience Details Chart compares the performance of each audience list in a single mailing.



Settings

- 1 Click to choose a single mailing. If necessary, **filter the mailing list** (see "Filtering the Mailing List" on page 12).

Choose a mailing: *

- Father's Day
- Extended Hours
- Support
- Tax Rebate Reinforcement
- Tax Rebate
- Grand Opening
- Summer Fashions
- Mother's Day

- 2
- 3 Click to select any number of the following data fields:

- ☐ net delivered
- ☐ opens
- ☐ total clicks
- ☐ total conversions
- ☐ total mailed
- ☐ total revenue
- ☐ undelivered
- ☐ unique clicks
- ☐ unique conversions
- ☐ unsubscribes

Notes

- ◆ If you choose many fields, you may have to maximize the chart in order to read it effectively. Maximizing a chart expands it to fill the entire display area and hides any other charts.
- ◆ Fields containing relatively small numbers may be difficult to read in the chart. For example, a field containing a single-digit number is virtually impossible to see in the same chart with a field containing a number in the tens of thousands. You can, however, maximize the chart and/or place your cursor over the field to view a popup description of any field.

Database Health Chart

A Database Health Chart displays deliverability metrics across the entire database.



There are two different vertical scales in the chart. The scale on the left (Total Email Addresses) corresponds to the corresponding Total Email Addresses line in the chart. The scale on the right (All other fields) corresponds to Total Soft Bounces, Total Hard Bounces, Total Unsubscribes, and Total Inactive.

A Database Health Chart is a snapshot of the data and does not change over time. You can expand the date range as necessary.

Settings

- 1 Choose an interval and a date range. The default date range is three months.

Interval: Weekly

From: * 12/31/2008

To: * 03/31/2009

Click the calendar icon to display a calendar similar to the following:



To navigate to another month or year, click the left or right arrow. Then click the day that you want to appear in the From or To field.

Although the calendar icon shows the week beginning on Sunday, the data displayed by a Weekly interval uses a week beginning on Monday. Thus, mailings dated January 4, 2009 and January 5, 2009 appear in different data points in a chart.

- 2 Click the checkboxes to select any of the following fields:

Fields to include: *

☐	soft bounces
☐	hard bounces
☐	unsubscribes
☐	inactive

- § Soft bounces are messages sent to an active (live) e-mail address but turned away before being delivered. Reasons include a full mailbox or the mail server being down.
- § Hard bounces are messages sent to invalid, closed, or nonexistent email accounts.
- § Unsubscribes are self-explanatory.
- § Inactive combines the other three fields. Each recipient is counted only once. For example, if messages to a single recipient have resulted in a soft bounce and a hard bounce and the recipient has unsubscribed, that recipient counts as one inactive.

Mailing Trends Chart

A Mailing Trends Chart shows total message sent over time intervals, covering a specific date range.



Settings

- 1 Choose an interval and a date range. The default date range is three months.

Interval: **Weekly** ▼

From: * 12/31/2008

To: * 03/31/2009

Click the calendar icon to display a calendar similar to the following:



To navigate to another month or year, click the left or right arrow. Then click the day that you want to appear in the From or To field.

Although the calendar icon shows the week beginning on Sunday, the data displayed by a Weekly interval uses a week beginning on Monday. Thus, mailings dated January 4, 2009 and January 5, 2009 appear in different data points in a chart.

Revenue to Mailed Chart

A Revenue to Mailed Chart shows the total number of messages sent and their resulting revenue over time intervals, covering a specific date range.



Settings

- 1 Choose an interval and a date range. The default date range is three months.

Interval: **Weekly** ▼

From: * 12/31/2008

To: * 03/31/2009

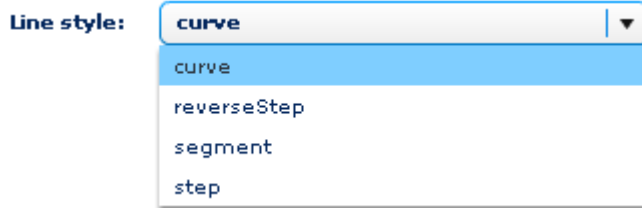
Click the calendar icon to display a calendar similar to the following:



To navigate to another month or year, click the left or right arrow. Then click the day that you want to appear in the From or To field.

Although the calendar icon shows the week beginning on Sunday, the data displayed by a Weekly interval uses a week beginning on Monday. Thus, mailings dated January 4, 2009 and January 5, 2009 appear in different data points in a chart.

2 Select a line style.

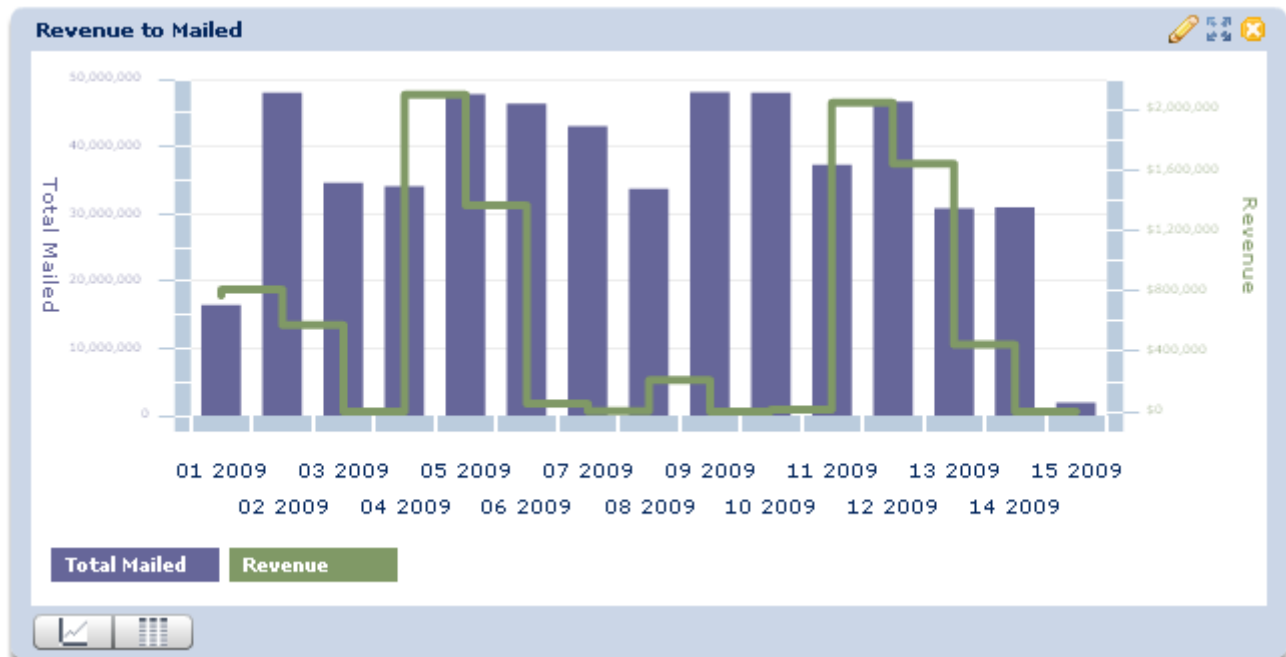


Curve

The default. Draws curves between data points as shown in the example above.

reverseStep

Draws lines as horizontal and vertical segments. At the first data point, draws a vertical line, and then a horizontal line to the second point. Repeats this for each data point.



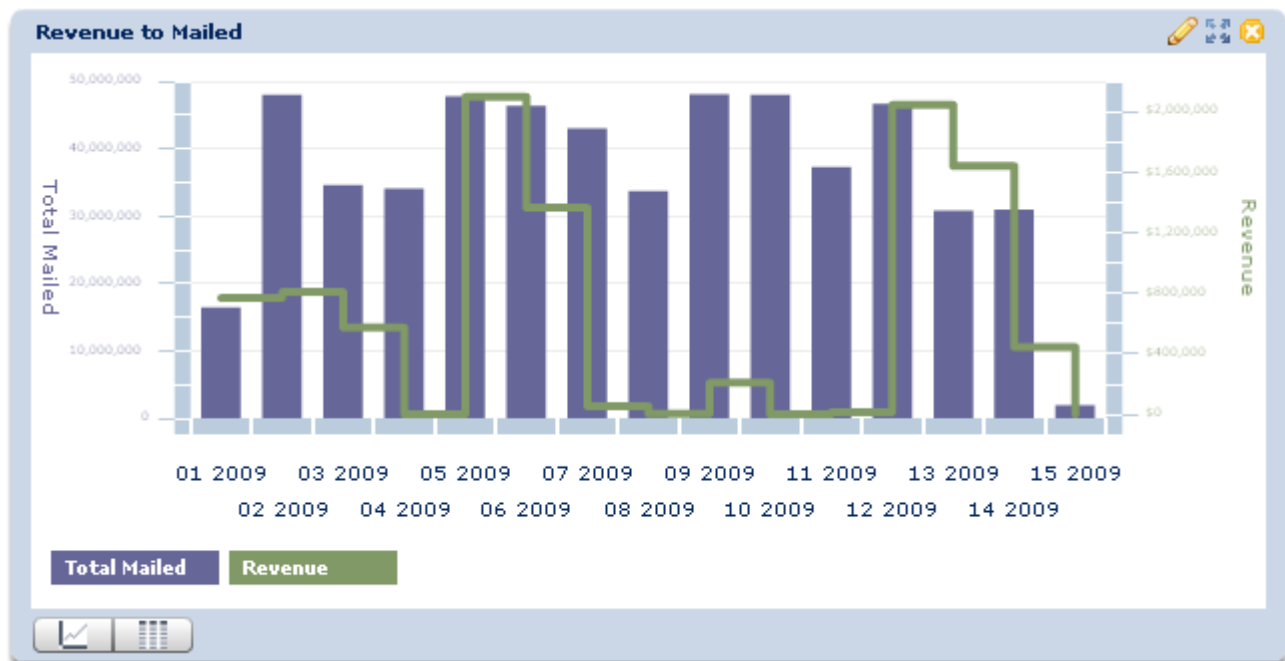
segment

Draws lines as connected segments that are angled to connect at each data point.



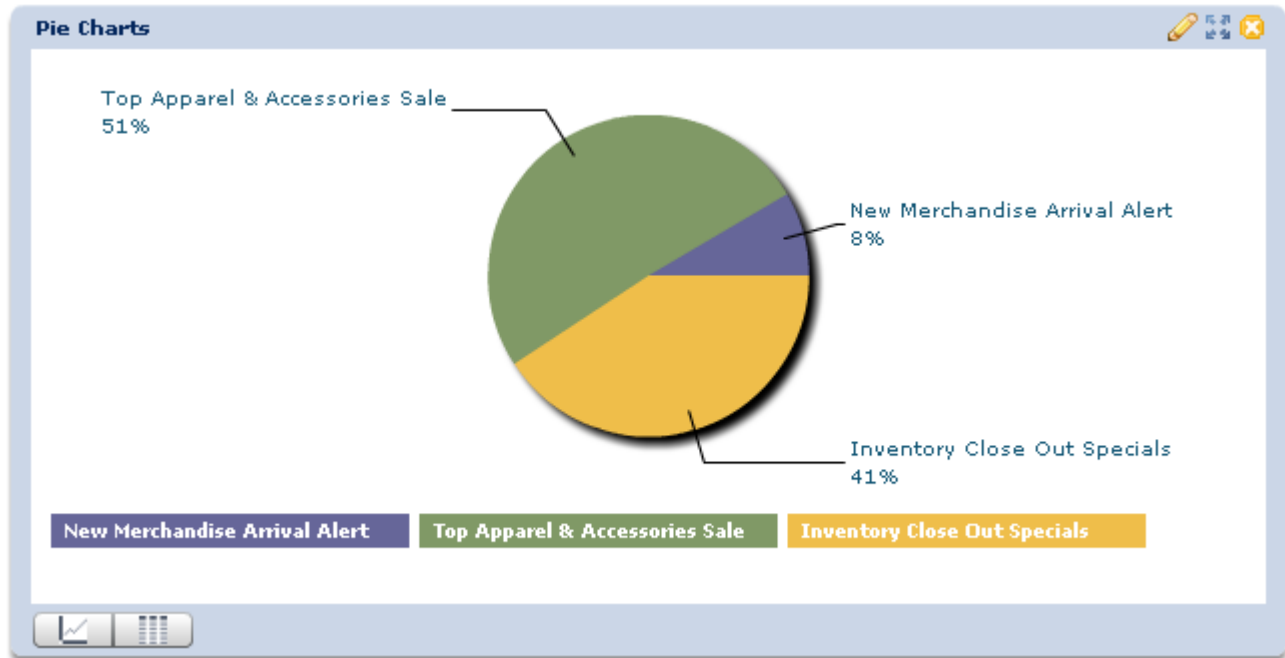
step

Draws lines as horizontal and vertical segments. At the first data point, draws a horizontal line, and then a vertical line to the second point. Repeats this for each data point.



Pie Charts

A Pie Chart displays a visual comparison of a single data field across multiple mailings. The selected mailings taken as a whole make up the pie while the selected field determines the proportional size of the pieces.



Separating One Slice

Click any slice of the pie to separate it from the rest for emphasis.



Settings

- 1 Control-click (hold down the Ctrl key and click the left mouse button) to select multiple mailings. Shift-click or Ctrl-Shift-click to select ranges of mailings. If necessary, **filter the mailing list** (see "Filtering the Mailing List" on page 12).



If you choose many mailings, you may have to maximize the chart in order to read it effectively. Maximizing a chart expands it to fill the entire display area and hides any other charts.

- 2 Click to select any number of the following data fields:

- ☐ # audiences
- ☐ # cells
- ☐ # links
- ☐ net delivered
- ☐ opens
- ☐ total clicks
- ☐ total conversions
- ☐ total mailed
- ☐ total revenue
- ☐ undelivered
- ☐ unique clicks
- ☐ unique conversions
- ☐ unsubscribes

Notes

- ◆ If you choose many fields, you may have to maximize the chart in order to read it effectively. Maximizing a chart expands it to fill the entire display area and hides any other charts.
- ◆ Fields containing relatively small numbers may be difficult to read in the chart. For example, a field containing a single-digit number is virtually impossible to see in the same chart with a field containing a number in the tens of thousands. You can, however, maximize the chart and/or place your cursor over the field to view a popup description of any field.

Understanding Chart Data

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Using Chart and Table Views

Each set of chart data has two available views: chart and table. The **chart view** provides a graphical representation of the data. The **table view** provides a tabular representation of the data and allows you to:

- ◆ Sort the data on any column, in ascending or descending order.
- ◆ Resize the columns. Select the dividing line between two columns and drag it in the desired direction.
- ◆ Change the order of the columns. Select a column and drag it to a new position.
- ◆ Scroll through multiple rows of data if there is too much to fit in one screen.

Note: Sorting the data affects the chart view. The other table operations do not.

Sorting Chart Data

The table view provides a tabular representation of the data and allows you to sort the data on any column, in ascending or descending order. Click a column name to sort the data on that column. Click the column name again to reverse the sort order.

Note: Sorting the data in the table view also sorts the data in the graphical view and can make it much easier to see important information.

Using Sort Order Effectively

You can change the sort order of a chart to make the information easier to visualize. For example,

How Chart Data Changes Over Time

Charts can change over time as the data in the Master Database changes.

Chart	How the Charts Can Change
Mailing Summary Chart Mailing Comparison Chart Cell Details Chart Pie Chart	These charts show the most recent data about the chosen mailings. (The list of chosen mailings does not change over time and must be updated manually.) The data shown in a chart includes changes resulting from: ◆ cells and/or audiences being added to a mailing ◆ recipients being added to the database ◆ recipients generating opens, clicks, etc., days or even

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	weeks after a cell is sent
Audience Details Chart	New cells can be given additional audience lists.
Database Health Chart	Static. The Database Health Chart is a snapshot.
Mailing Trends Chart Revenue to Mailings Chart	If a chosen mailing moves out of a chart's date range due to a cell being sent, the chart no longer includes data from that mailing. In other words, Dashboard does not include data from chosen mailings in which a cell is sent after the last day in the date range. Similarly, Dashboard does not include data from mailings that have moved into its time range. Revenue can always change.

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