CREATING GRAPHS WITH SIM

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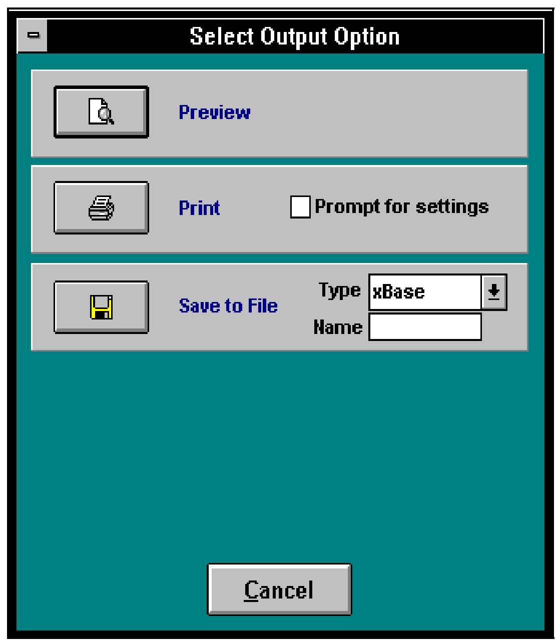
Do you need to create graphs as part of your reporting package to management? Are you currently doing this by manually typing in information from SIM reports into a spreadsheet package? Then you need to review the following information!

We at Total Quality Systems (TQS) had originally planned to provide a graphing package module in the early 90's. However we found that most of our users already had access to a spreadsheet package with adequate graphing capabilities and were very comfortable using it. The graphing package we had slated for introduction had similar capabilities but would require learning another way of creating graphs. We realized that this would be cumbersome for our customers so we came up with a better approach. Most of our reports have the ability via the printer setup screen to a spreadsheet type format. The best reports to use for graphing is the PARTICIPATION SUMMARY report and the USAGE reports (e.g., KEYWORD USAGE). The KEYWORD USAGE report is idea to use for a PARETO type analysis if sorting by the NO. RECEIVED.

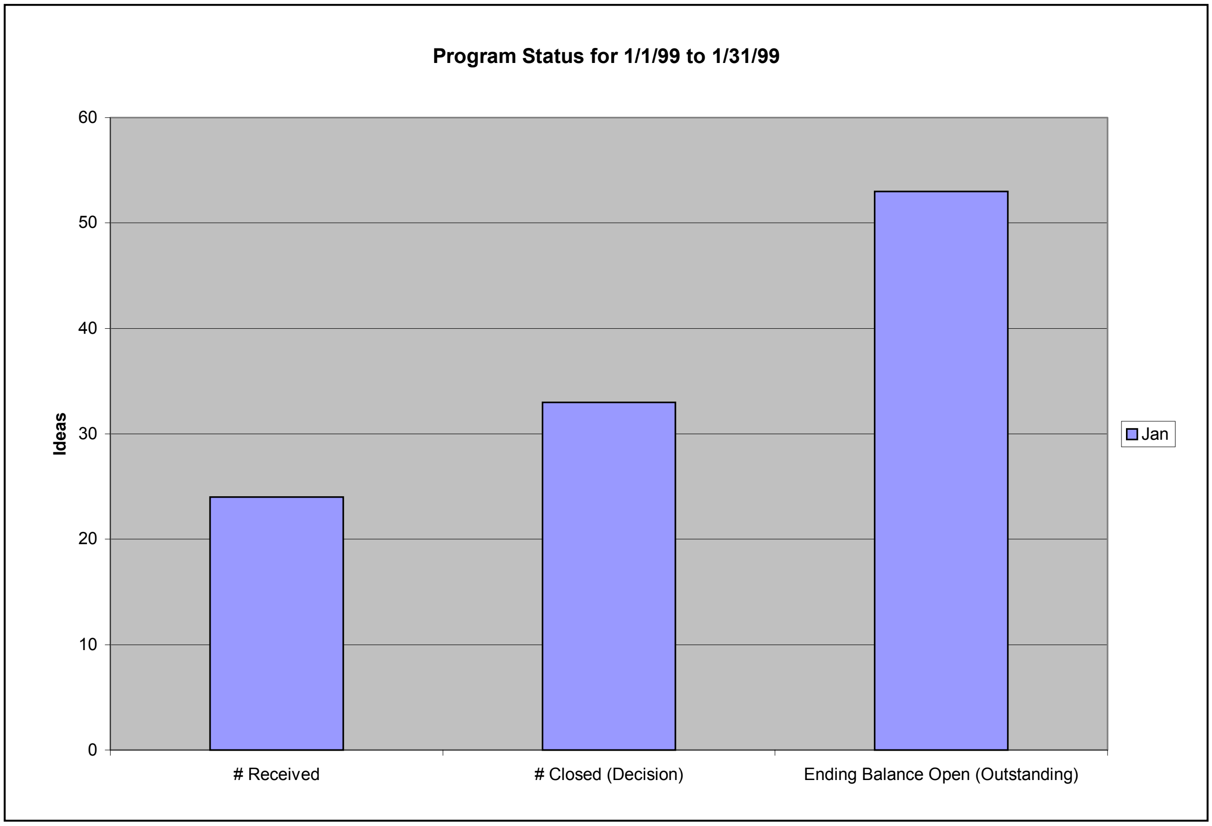


For instance we will create a graph using the PARTICIPATION SUMMARY REPORT as follows:

- ♦ Select the REPORTS menu option MANAGEMENT OVERIVIEW - PARTICIPATION SUMMARY.
- ♦ Set up the report set up screen to fit the parameters that you want (e.g. the actual number of eligible employees may not fit what the screen displays). Click on OK.
- ♦ Now the printer setup screen will appear. Select TYPE from the pop-up list as EXCEL (123 for Lotus users). Enter the name GRAPH1 under NAME. Click on the SAVE TO FILE button.
- ♦ SIM will display a message where the file was saved. For instance if SIM is installed into C:\SIMWIN the message will read: FILE SAVED AS C:\SIMWIN\EXPORT\GRAPH1.XLS. It is important to note the exact location since you must find the file from your spreadsheet package. Click on OK.
- ♦ Now open up the spreadsheet file we have created. We will use the example of Microsoft Office 97 (in earlier versions of Office open up the file from the FILE-OPEN option in EXCEL). Click on the OPEN A DOCUMENT button on the toolbar. From the LOOK IN option, find the correct location for the file. In this case it is C:\SIMWIN\EXPORT. The GRAPH1 file should appear - double click on it.

- Microsoft EXCEL for WINDOWS will now appear with the selected spreadsheet file opened. The report information is shown with several rows in the spreadsheet. NOTE: Depending on the version of SIM you are using, there may be more columns to the left of the actual data. Normally there should be a column E labeled ROWNAME and column F labeled ROWTITLE. The ROWNAME column includes the abbreviated titles for each report element (e.g., TOTSUB is total ideas received or submitted). It may be useful to also print a copy of the report until you become familiar with how the data relates to a printed report. The ROWTITLE contains a full description of the information for that row. The column(s) following ROWTITLE contains the actual data.
- Lets say we want a bar graph with three elements: ideas received (TOTSUB), ideas completed (COMP) and ideas outstanding (OUT). Using CUT/PASTE move a copy of the three columns down to another mini-spread sheet (you will have to do this for each of the three elements). Make sure to include the titles (ROWTITLE column) and the columns of data you require. For instance, if there were three quarters of data, you would have PERIOD1, PERIOD2 and PERIOD3 (with optional columns for GOALS and TOTALS if your version of SIM allows inclusion of those items).
- If you printed the reports for several weeks, months or quarters; there will be several columns of data. You will want to label those columns (e.g., Quarter 1, Quarter 2…).
- Using the mouse to select the mini-spreadsheet we have created (start at one side and "drag" the mouse to the other side). Make sure to include the titles for the rows (left side) and columns (top) so the chart properly displays the titles we need.
- Click on the CHART WIZARD button on the EXCEL toolbar and then click on the highlighted graph we have created.

♦ A box will appear and there will now be four steps to complete the graph:
   1) Select the Chart Type – select a column chart type and then select the desired sub-column - click on NEXT
   2) Next for Chart Source Data – Click on NEXT (we normally will use the default settings).



   3) Now fill in Chart options – typically change the titles and for your first graph, leave other settings unchanged. For instance the title below is: Program Status for '1/1/99 – 1/31/99' and the Y axis is 'Ideas'. Typically the Y axis will be the number of ideas and the X axis date related if using the PARTICIPATION SUMMARY report for graphing.
   4) For the Chart Location – place it in a new sheet or with in the existing sheet (whichever you prefer).
   5) The sample chart will change with the changes being made on the spreadsheet, so you can see how they affect the graph.

♦ The updated graph will now appear which can then be printed or inserted (pasted) in a word processing document. A copy a created graph is shown above. In a similar manner, graphs could be created using other spreadsheet packages. If you have interest in another package, please call our support line (928)527-0002.