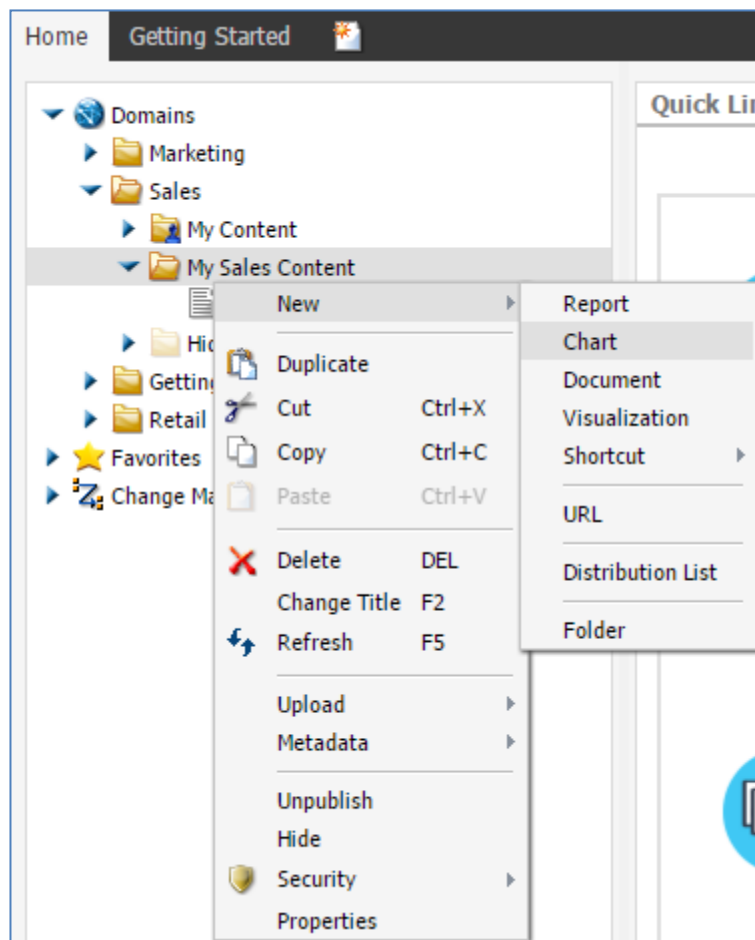




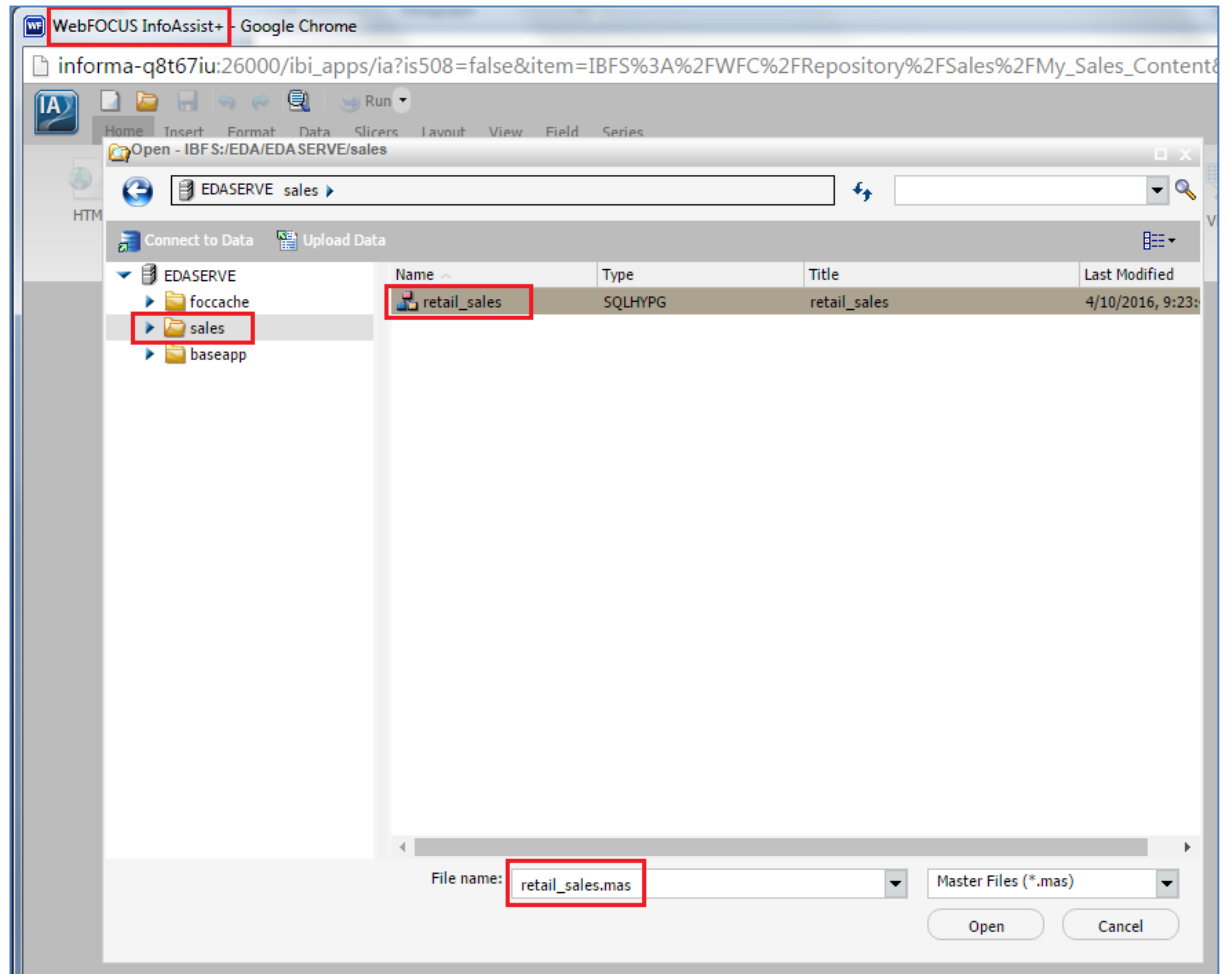
## Module 4: Creating Content → Lesson 4: Creating Charts → *Try Now!*

In this *Try Now!* exercise, you will be creating a chart in your Sales domain based on the data you uploaded from your Microsoft® Excel® spreadsheet (retail\_data\_extract.xlsx). Specifically, you will take a map of the United States and highlight the various states based on their revenue numbers. The spreadsheet you uploaded contained the names of all the states in the United States.

1. In the Resources tree on the Home page, right-click the published *My Sales Content* folder, select *New* from the context menu, and then click *Chart*, as shown in the following image.

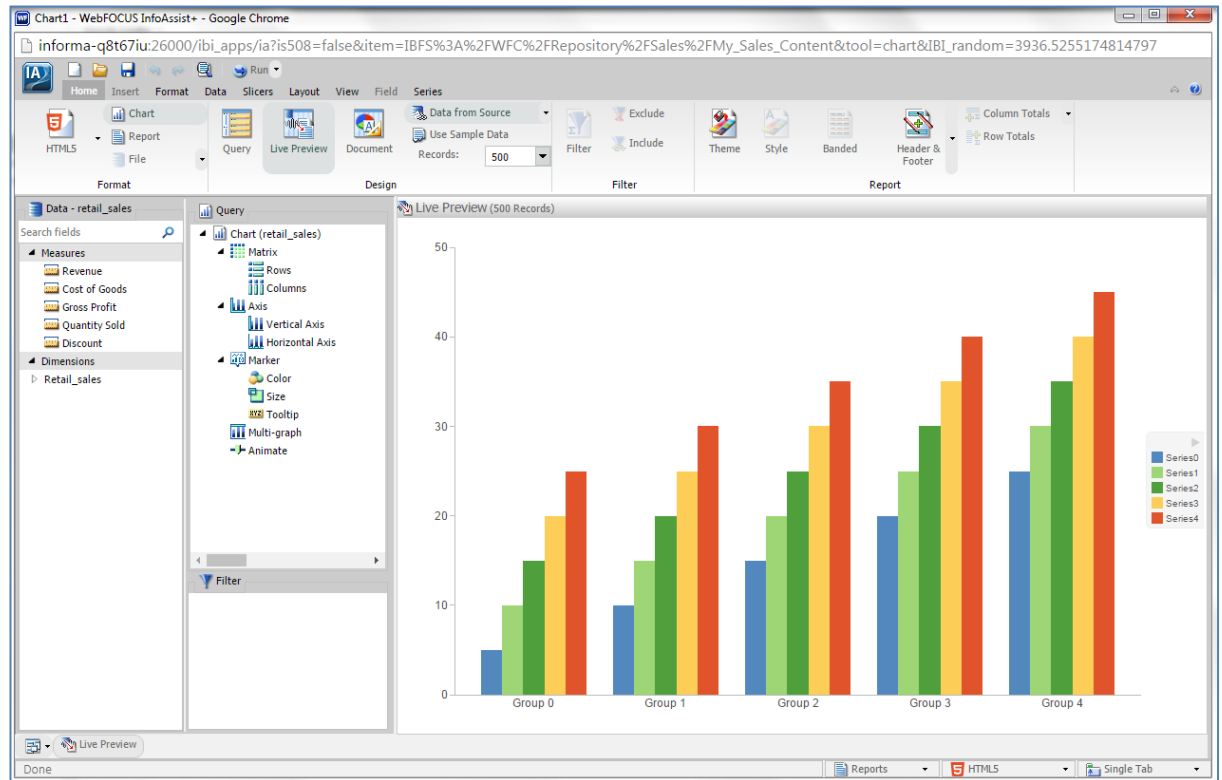


InfoAssist+ opens in the background and an Open dialog box is displayed in the foreground, as shown in the following image.

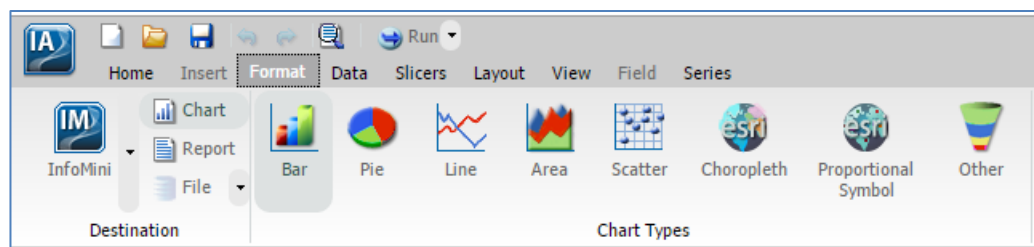


2. Select *sales* in the left pane and the *retail\_sales* Synonym (also known as a Master File) in the right pane. The Synonym, *retail\_sales*, includes a .mas extension.
3. Click *Open*.

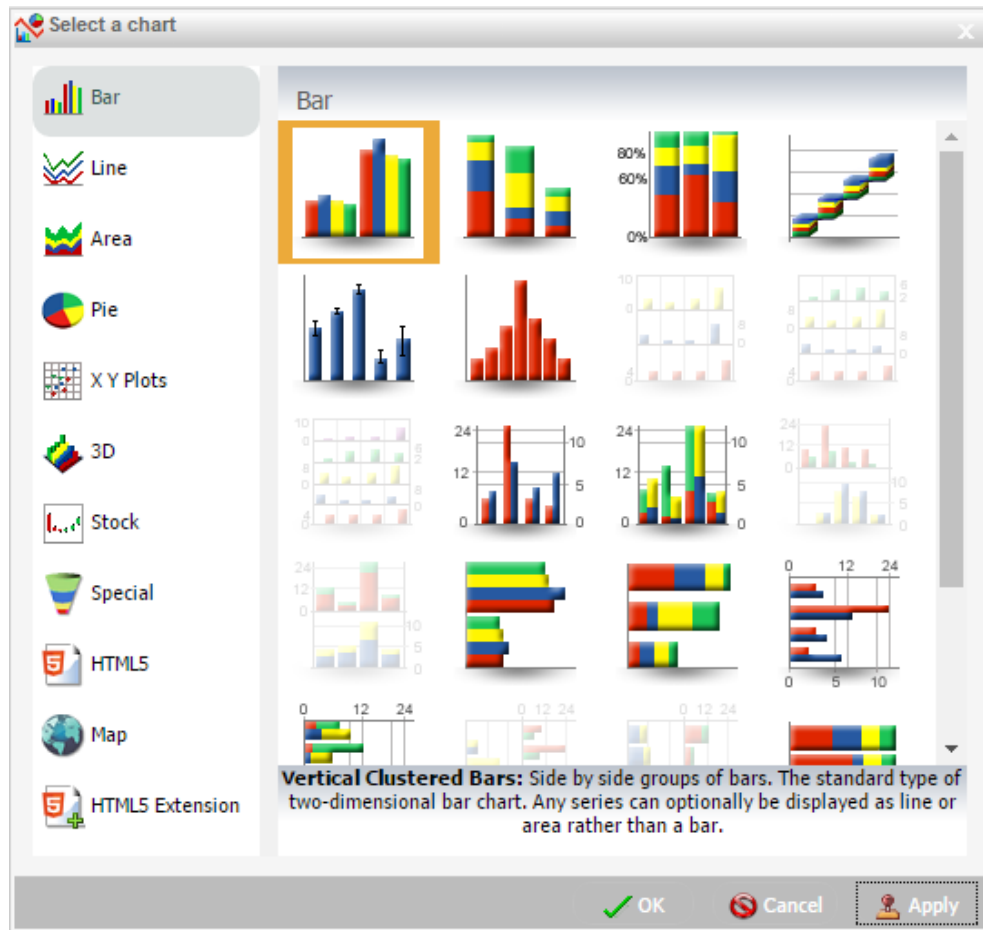
The *retail\_sales* Synonym is loaded into InfoAssist+, as shown in the following image.



4. Click the *Format* tab on the ribbon, and then click *Other* in the Chart Types group, as shown in the following image.

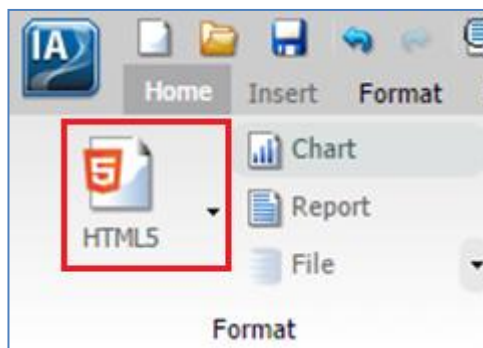


The Select a chart dialog box opens, which displays all of the available chart types that you can use, as shown in the following image.

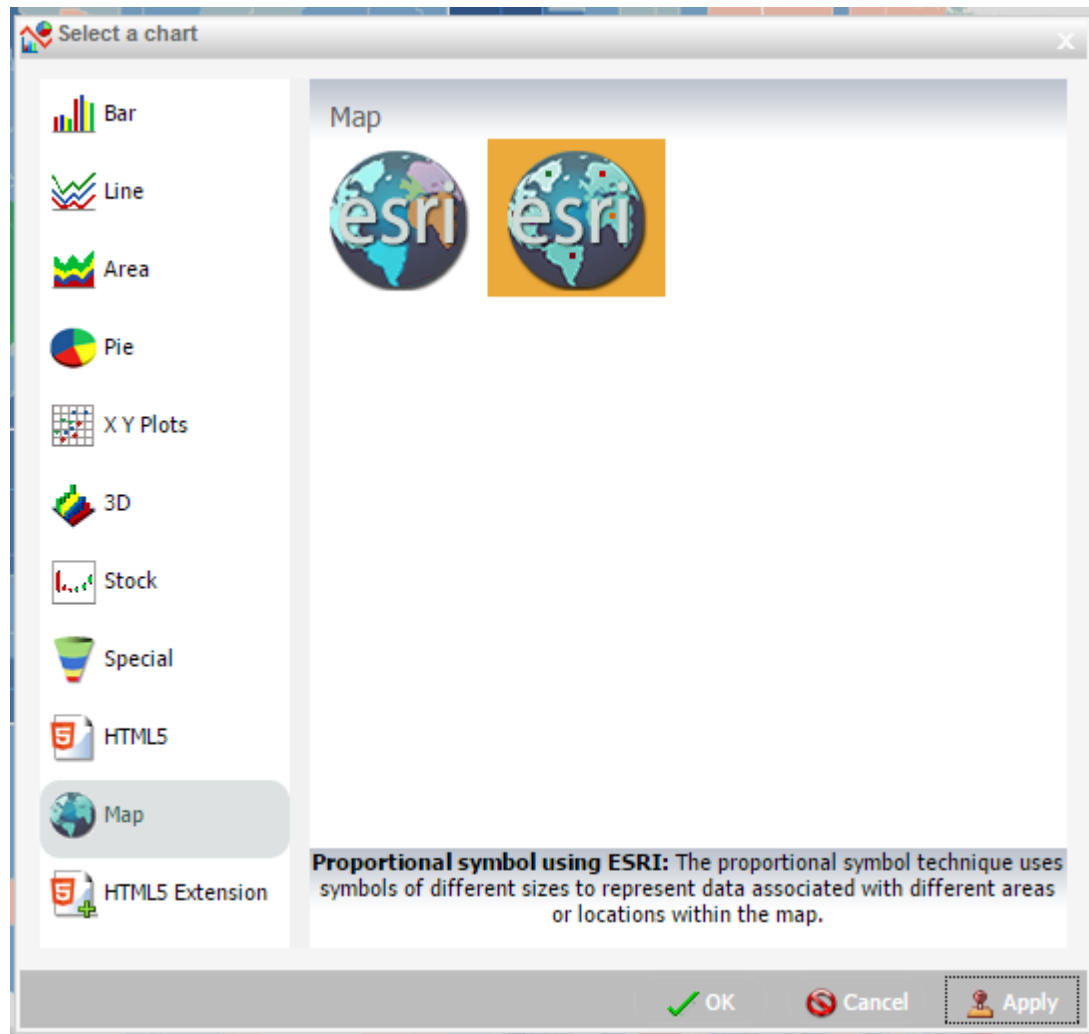


Click each chart type to view the abundance of available choices.

**Note:** Since HTML5 is selected by default in the Format group on the ribbon, any charts that are dimmed in the Select a chart dialog box do not use HTML5 format.

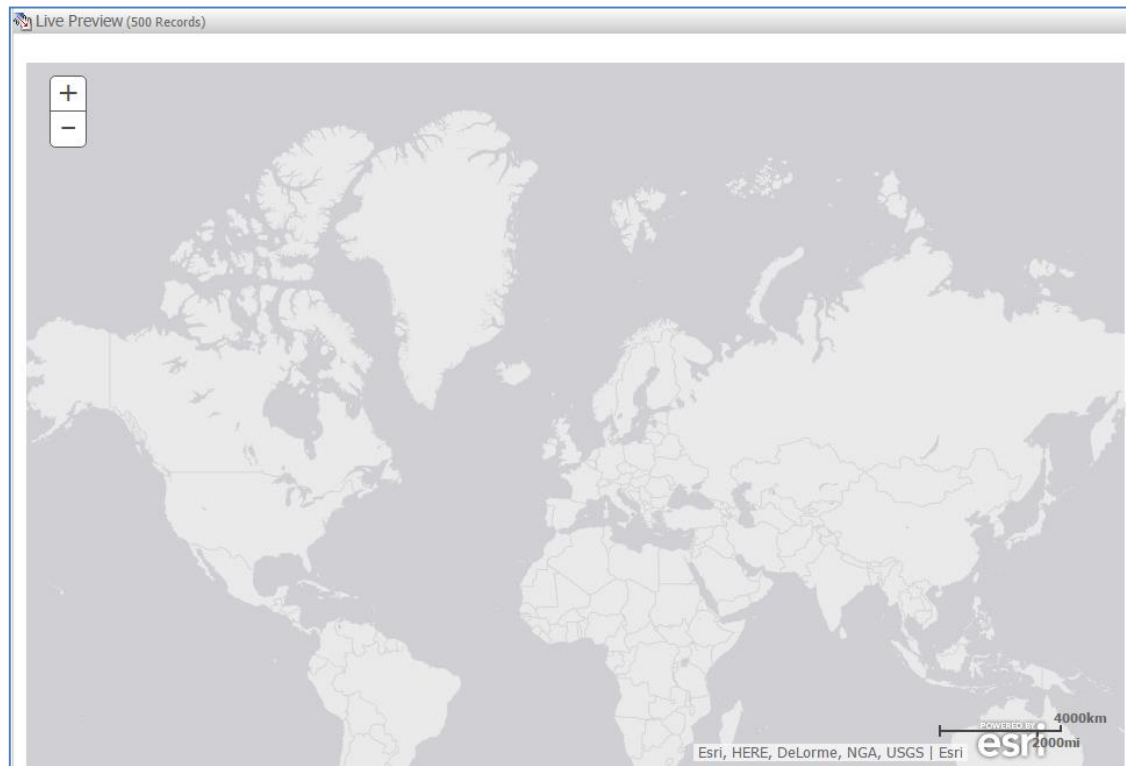


- Click Map in the Select a chart dialog box and then select the second icon (*Proportional symbol using ESRI*), as shown in the following image.

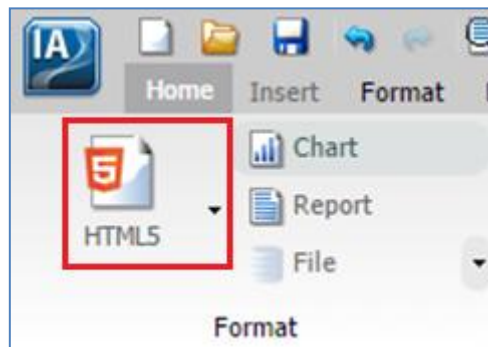


- Click OK.

A general world map displays in the Live Preview pane, as shown in the following image.

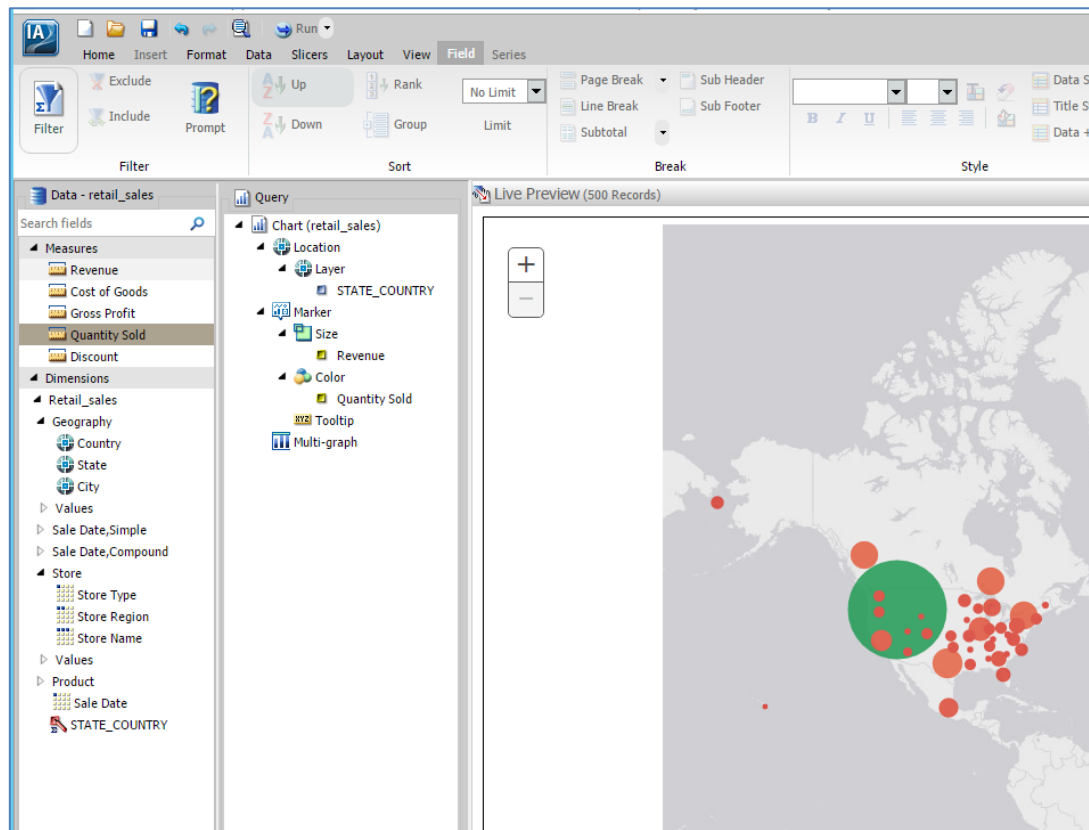


**Note:** By default, any new chart in InfoAssist+ is built using HTML5 format.



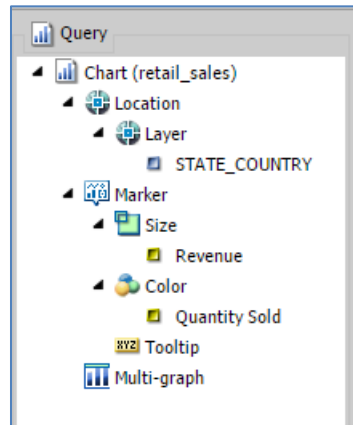
7. From the Data pane, drag the *Revenue* measure onto the map.

Under Dimensions, Retail\_sales, Geography, drag the *State* dimension onto the map. Then under Measures, drag *Quantity Sold* to Color, in the Query pane, as shown in the following image.

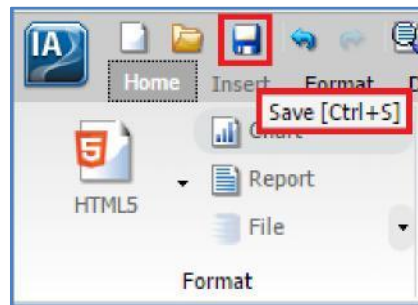


By default, the map in the Live Preview pane changes to a geographically-based heat map that colors the geographic areas using a color range from **red** (indicating lower values) to **green** (indicating higher values).

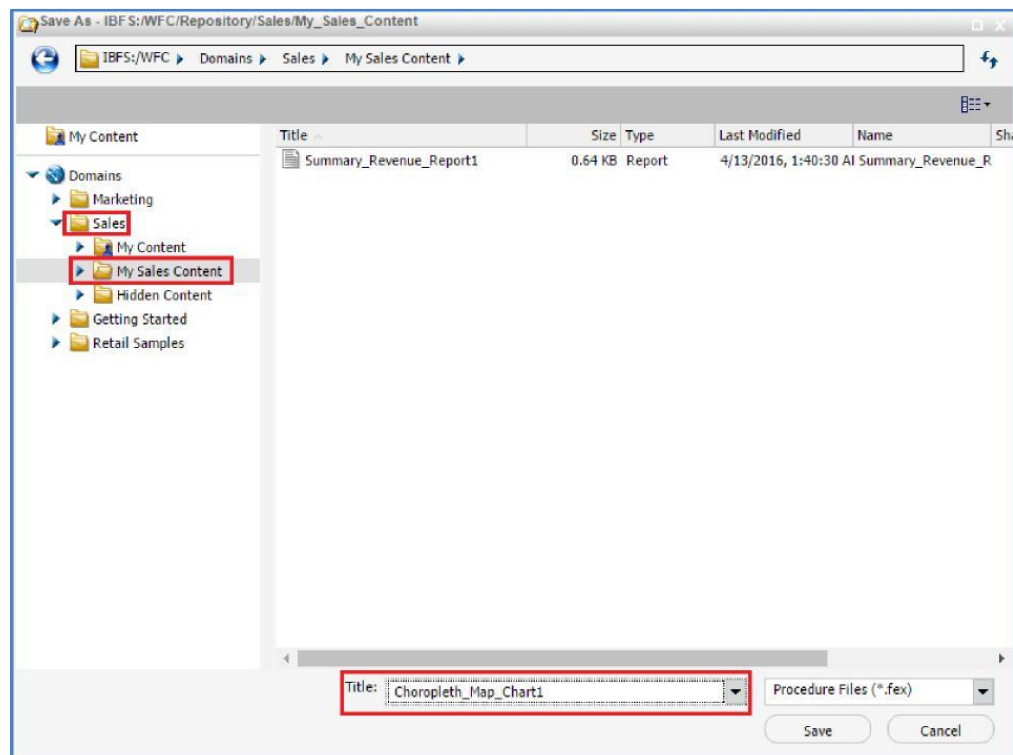
Notice that in the Query pane, STATE\_COUNTRY is added under the Layer node as a result of dragging it onto the map. Revenue is added under the Size node and Quantity Sold is added under the Color node, as shown in the following image.



8. At this point, save your chart by clicking the *Save* icon in the Quick Access Toolbar, as shown in the following image.



The Save As dialog box opens, as shown in the following image.





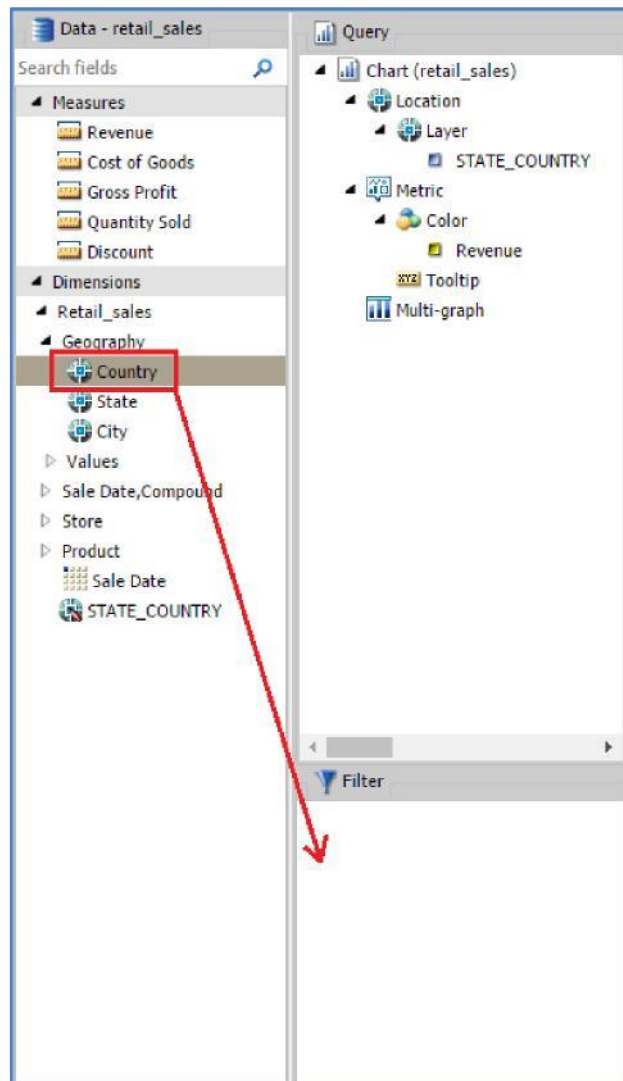
Notice that your Sales domain and the new folder you created (My Sales Content) are selected in the left pane.

9. Provide a name for your new chart and click *Save*.

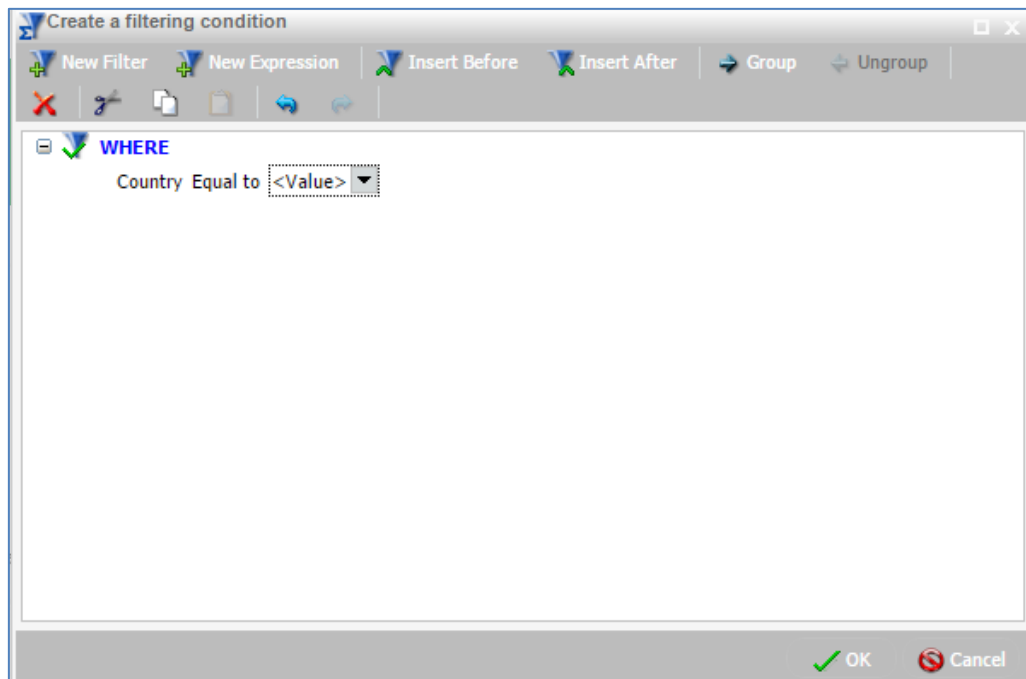
Let's continue working on this chart in InfoAssist+.

Since we are only mapping the states in the United States, we should restrict our data to this geography.

10. From the Data pane, drag the *Country* dimension onto the Filter pane, as shown in the following image.



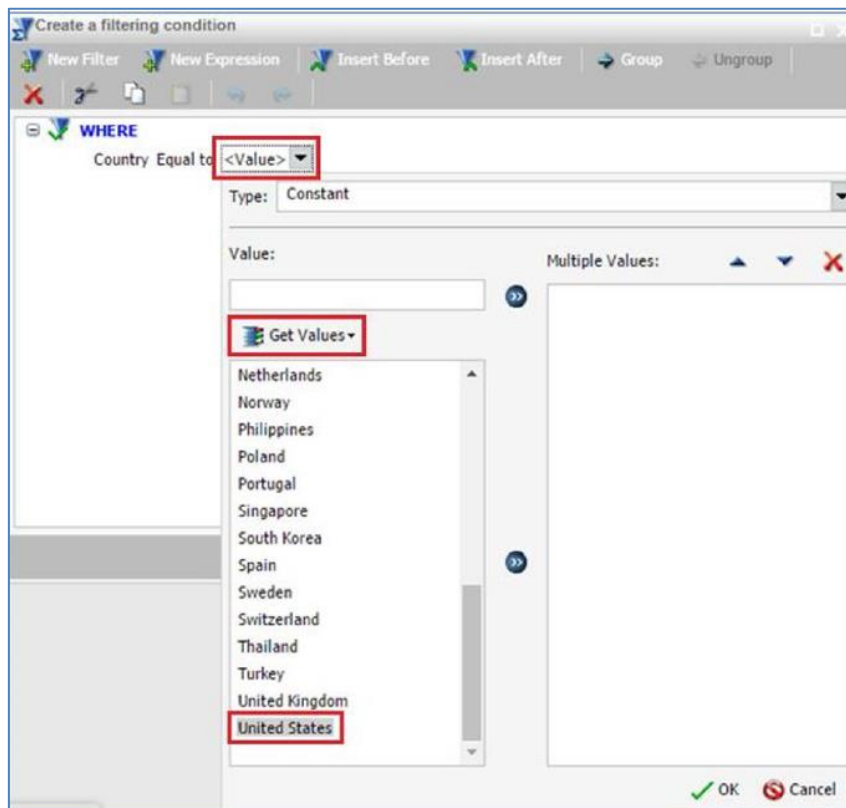
The Create a filtering condition dialog box opens, as shown in the following image.



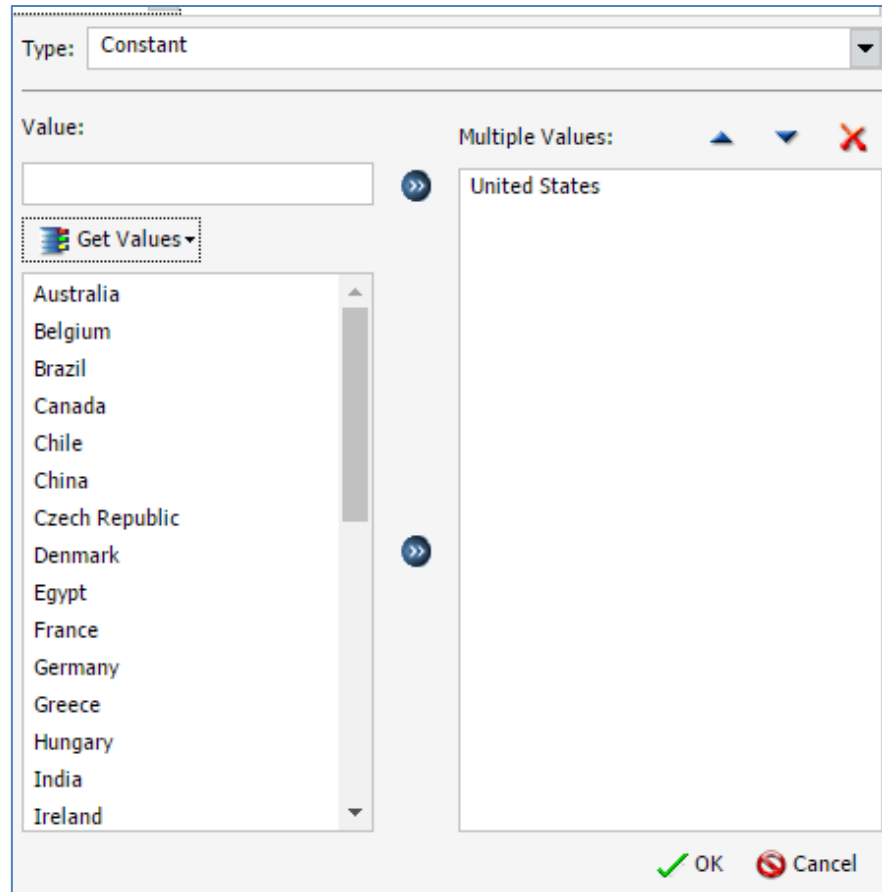
11. Double-click the <Value> attribute in the WHERE expression.

The <Value> attribute changes to a drop-down list menu.

12. Click the down arrow to view a pop-up list of available values you can select.

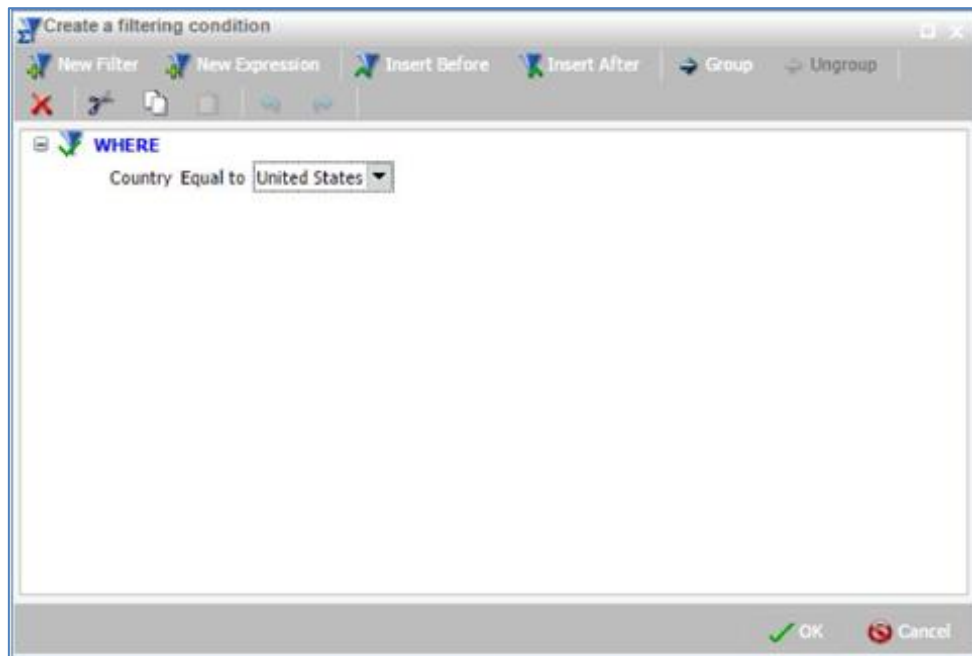


13. Click the *Get Values* drop-down menu and then select *All* from the list.
14. Scroll down the list of values and select *United States*.
15. Double-click *United States* or click the double right arrow (>>) to add this value to the selected area, as shown in the following image.

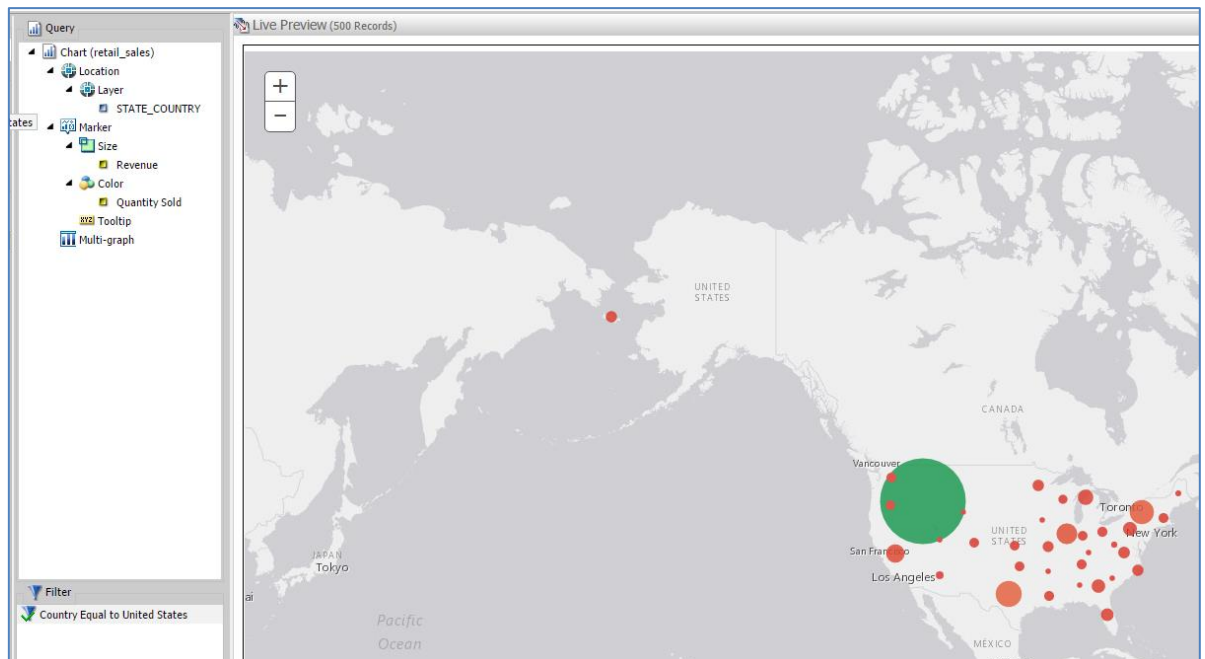


16. Click *OK*.

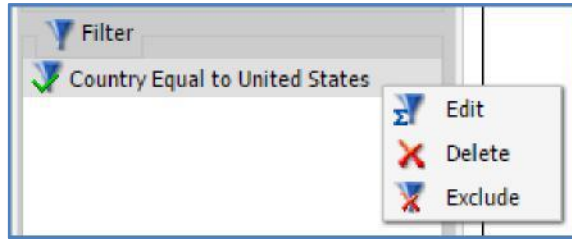
The Create a filtering condition dialog box opens, and now indicates *Country Equal to United States* for the WHERE expression, as shown in the following image.



The map in the Live Preview pane changes to a geographically-based heat map that colors the geographic areas using a color range from **red** (indicating lower values) to **green** (indicating higher values), as shown in the following image.



Notice that the Filter pane also includes the new filter you created (*Country Equal to United States*), as shown in the following image.



If you right-click the filter, a context menu opens, which allows you to:

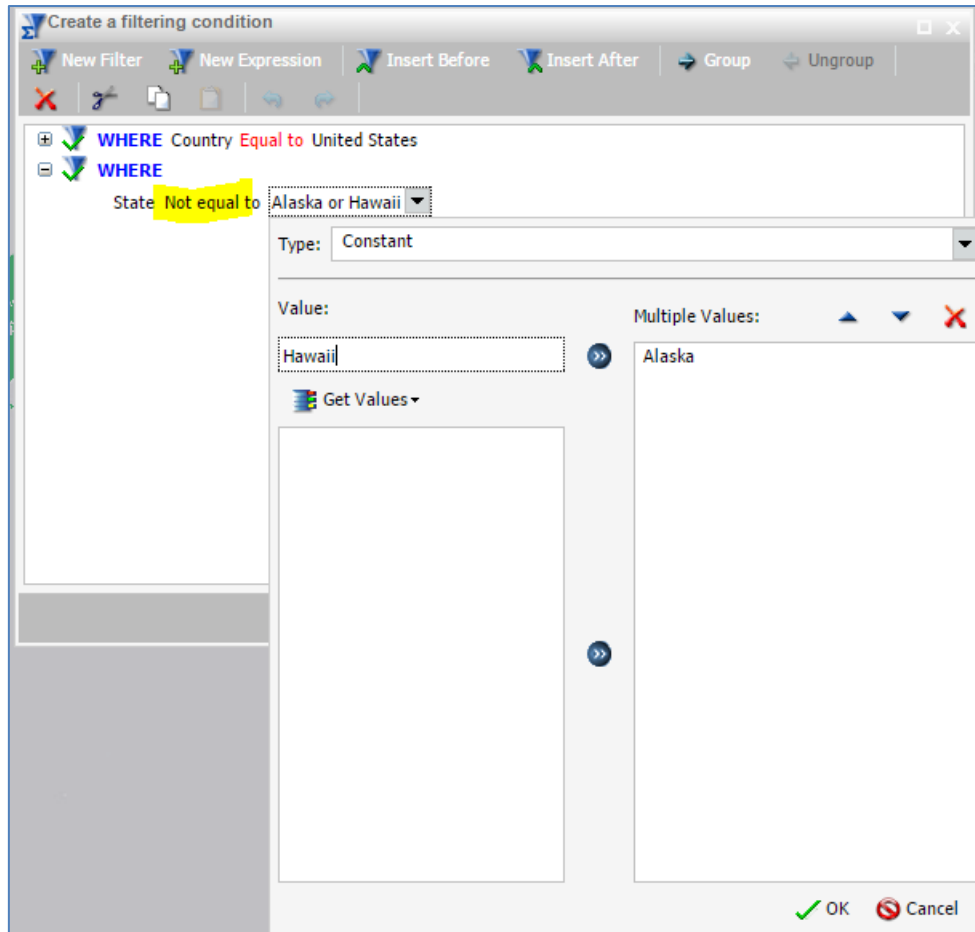
- Edit the conditions for the selected filter using the *Create a filtering condition* utility.
- Delete the selected filter completely.
- Exclude the selected filter, which disables the filtered conditions that appear on the chart.

If you select Exclude and then right-click the filter again, the Include option becomes available, which allows you to enable the filtered conditions for the selected filter.

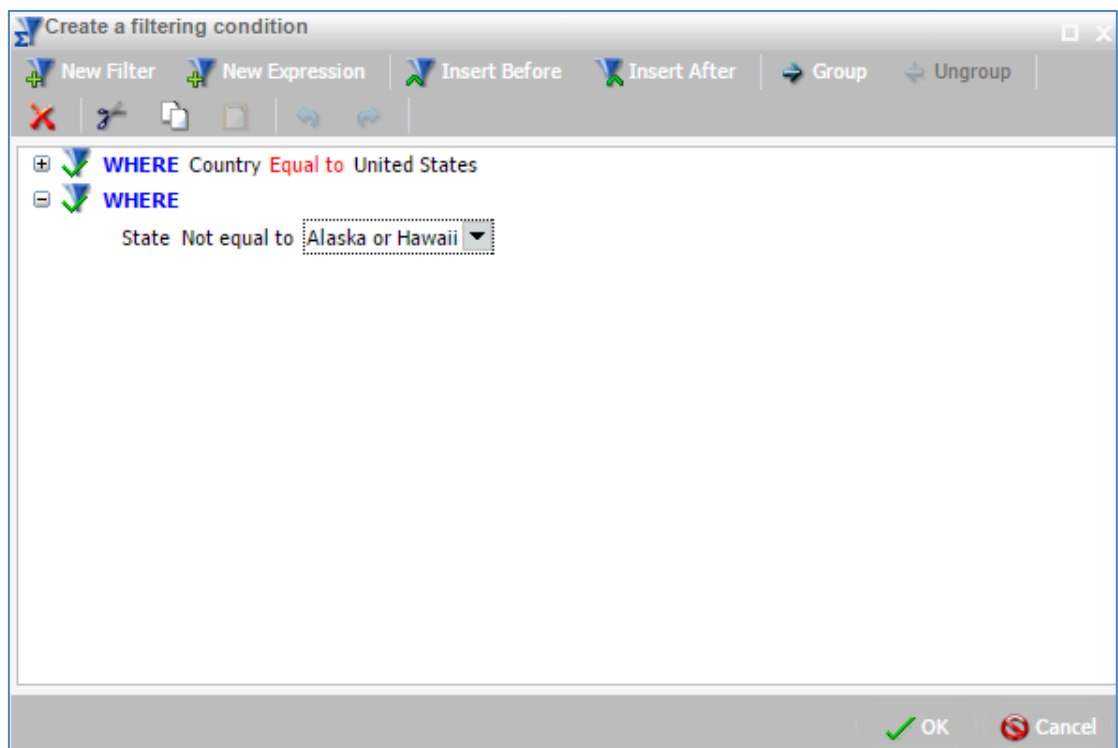
Let's add an additional filter to exclude Alaska and Hawaii.

17. Drag the *State* field to the Filter.

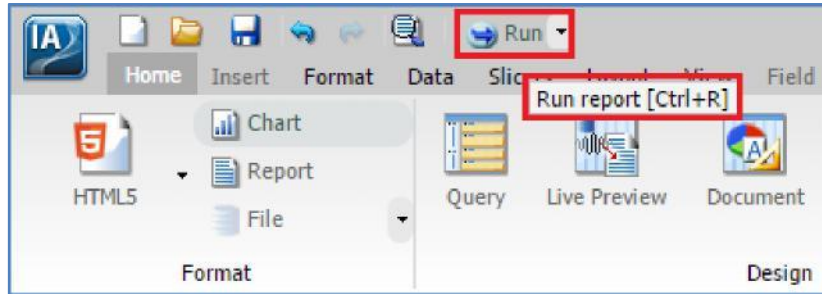
Change *Equal* to *Not equal* by double-clicking the *Equal* to option. Next, click the <Value> option, type *Alaska* in the Value field, and then move it to the right panel. Repeat this step for Hawaii.



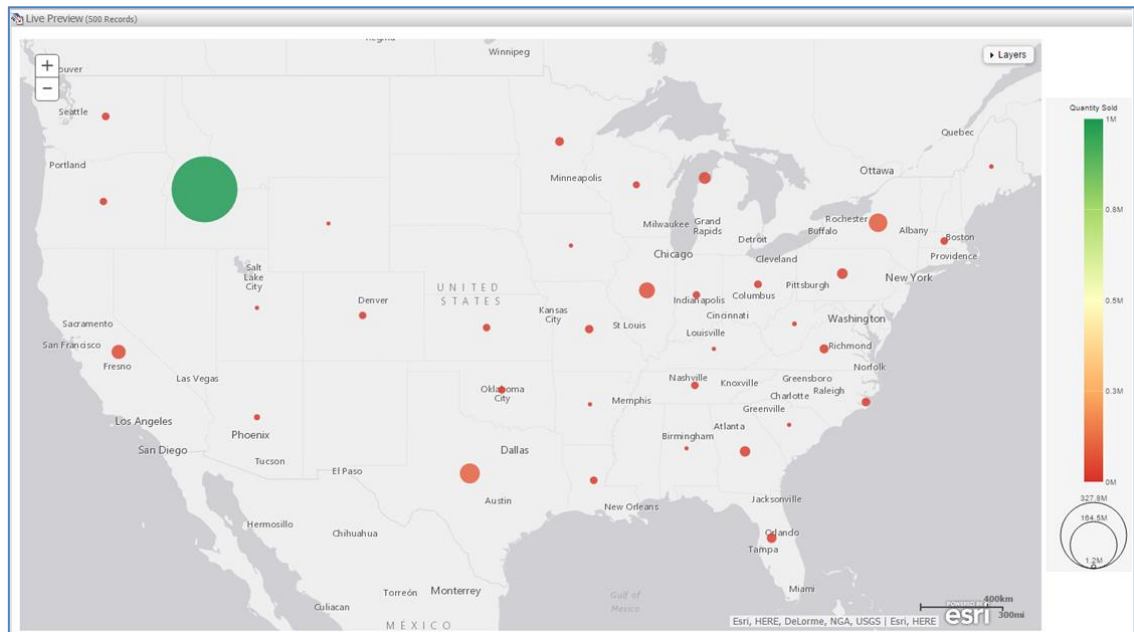
18. Click *OK*.



19. Run your new chart by clicking the *Run* icon on the Quick Access Toolbar, as shown in the following image.

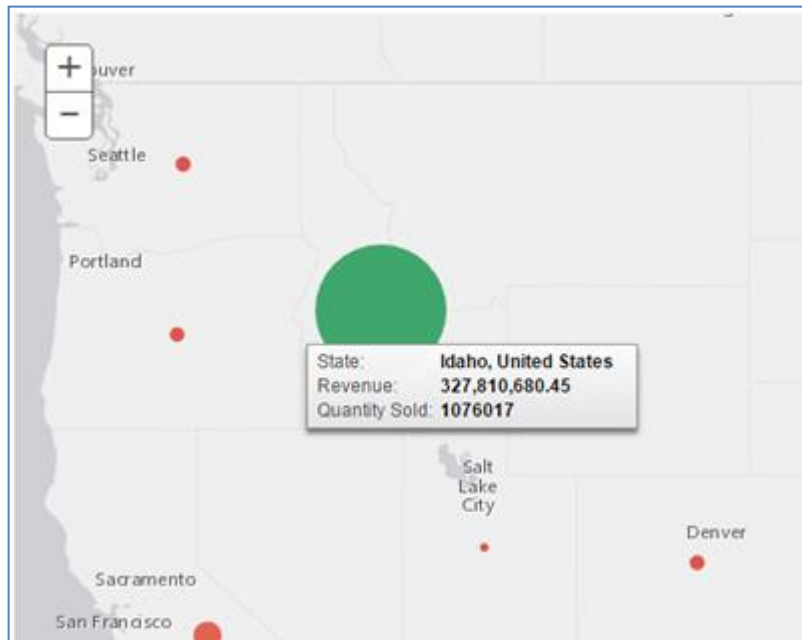


The chart is rendered in the Live Preview pane, as shown in the following image.



You can zoom in or zoom out of the map as required by clicking the plus (+) and minus (-) controls in the upper-left corner. You can also pan the map in any direction by clicking and dragging directly on the map with your pointer.

20. Rest your pointer on a state in your map, as shown in the following image.



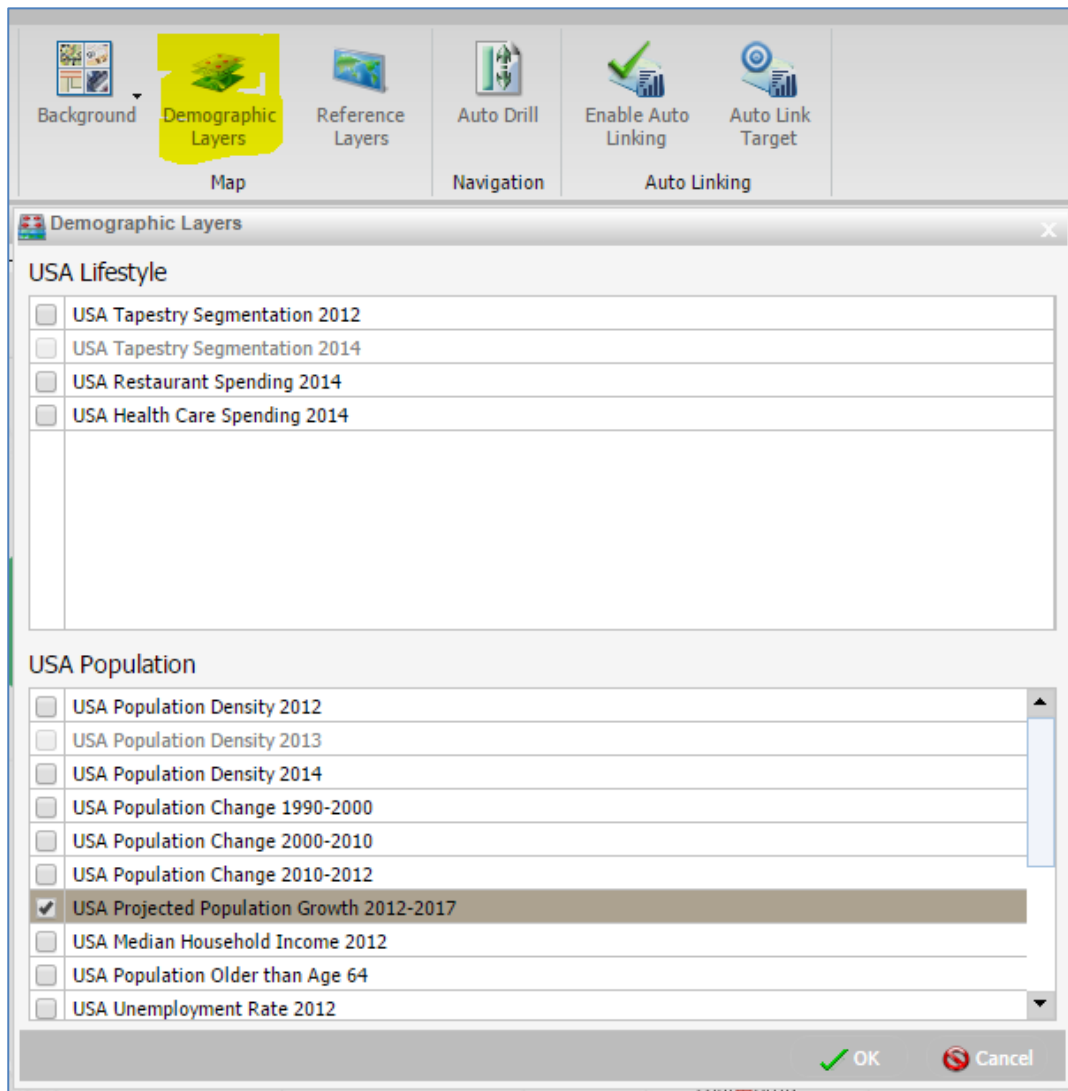
Notice that the full name of the state displays in a tooltip along with the corresponding revenue and quantity sold.

Now let's add the ESRI demographic layer.

21. Click *Demographic Layers* in the Format tab.

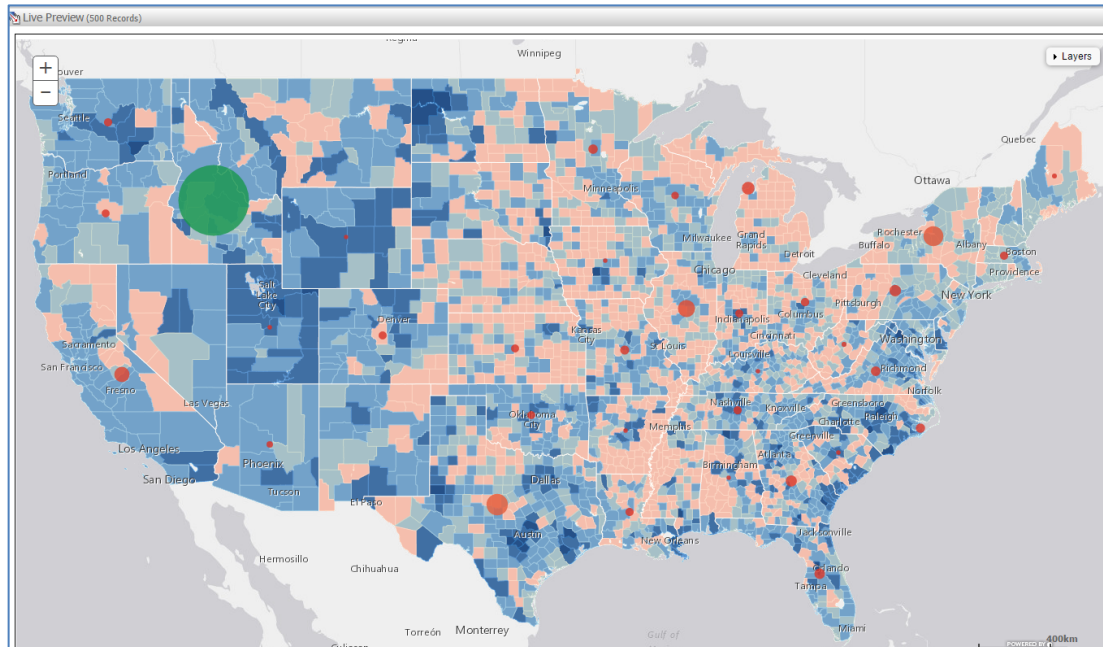


Select *USA Projected Population Growth 2012-2017*, as shown in the following image.

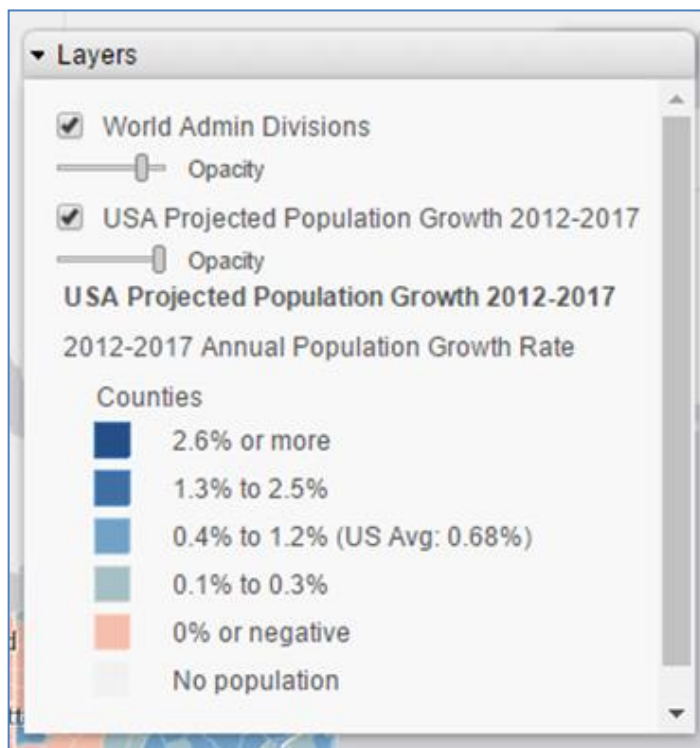


22. Click *OK*.

A new layer showing the projected population growth in the USA for 2012-2017 is overlaid on the map, as shown in the following image.



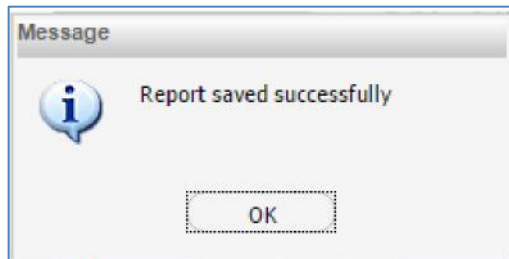
You can control the opacity of the shaded regions by clicking the *Layers* drop-down arrow in the upper-right corner, and moving the *Opacity* slider left (lower opacity) or right (higher opacity), as shown in the following image.



If you want to temporarily hide this demographic layer, you can uncheck the box.

23. Click *Save* to save your map.

A message displays indicating that the report was saved successfully, as shown in the following image.



You are now ready to move on to *Module 4, Lesson 5*, where you will learn how to create, edit, and save new visualizations using InfoAssist+.