



Module 4: Creating Content → Lesson 5: Creating Visualizations → Learn

Welcome to *Module 4, Lesson 5*. In this lesson, you will learn how to create, edit, and save new visualizations based on your uploaded data using InfoAssist+.

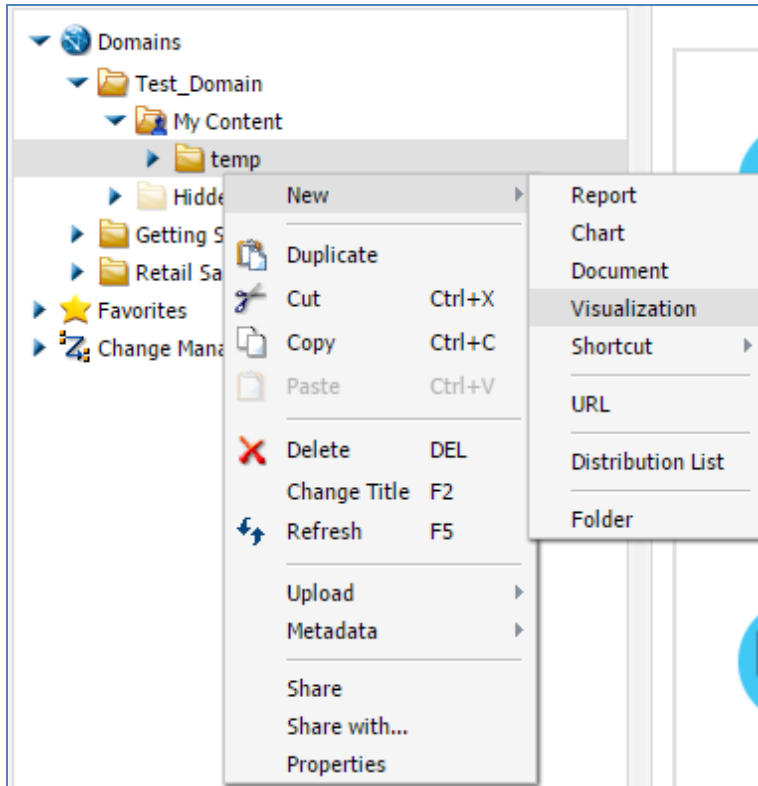
Visualizations allow for data discovery and provide insights to better understand your data.



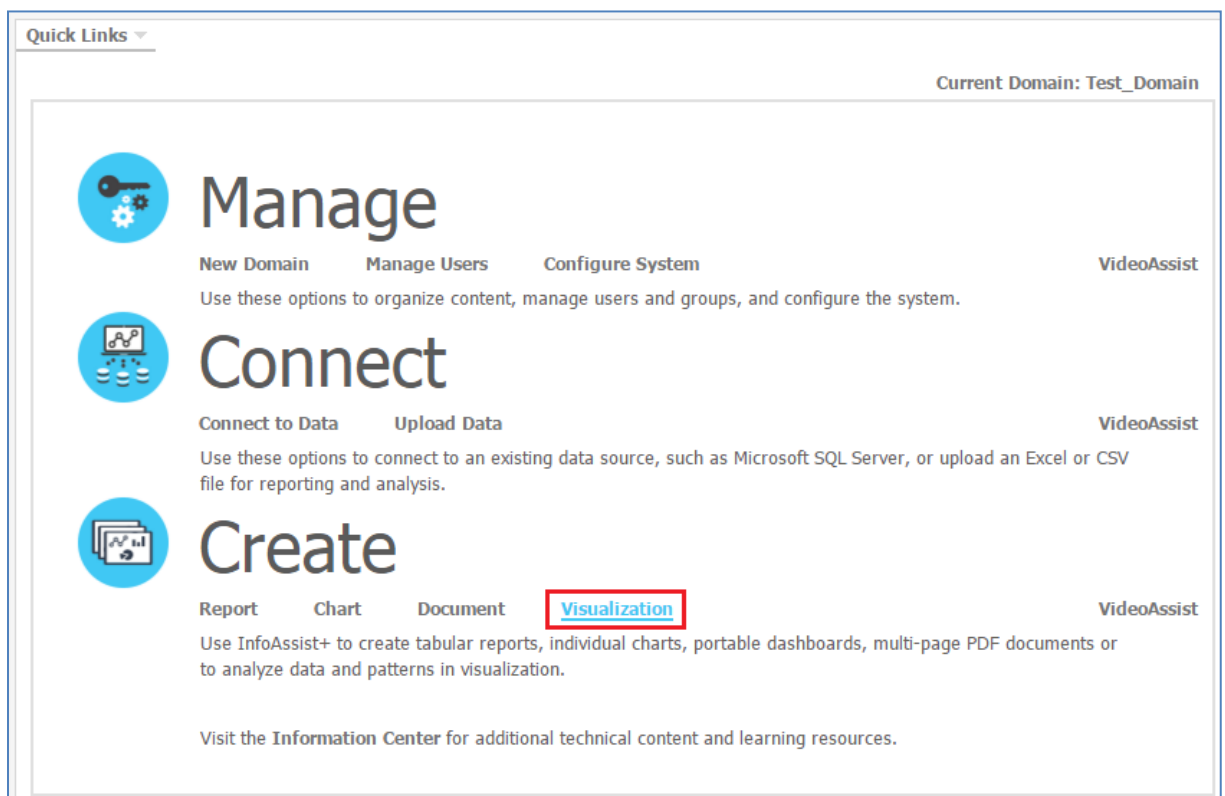
Visualizations consist of interactive visual data displays that can be easily added to storyboards and charts for easy sharing. Visualizations are displays composed of multiple visuals. Visuals can take the form of a chart, map, grid, or text box.

To create a visualization, you can:

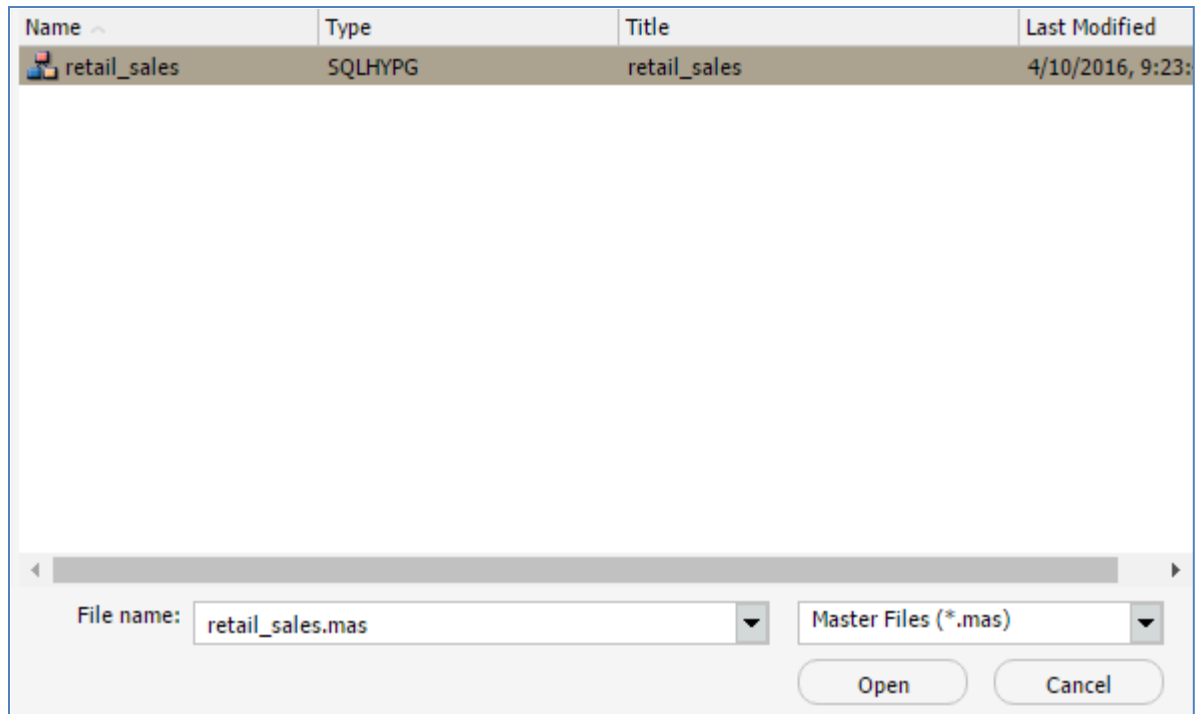
- Right-click the folder in which you want to create the visualization, point to *New*, and then click *Visualization*.



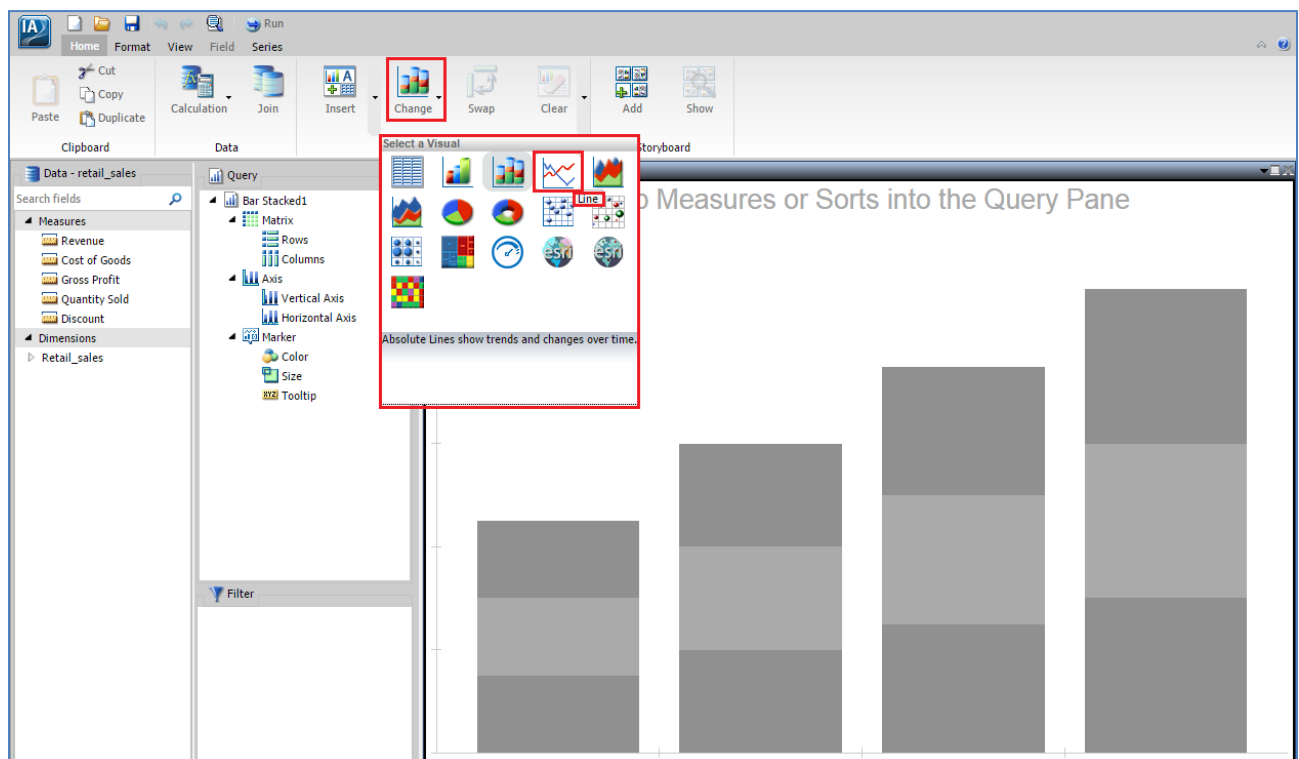
- Click *Visualization* from the Quick Links on the Home page.



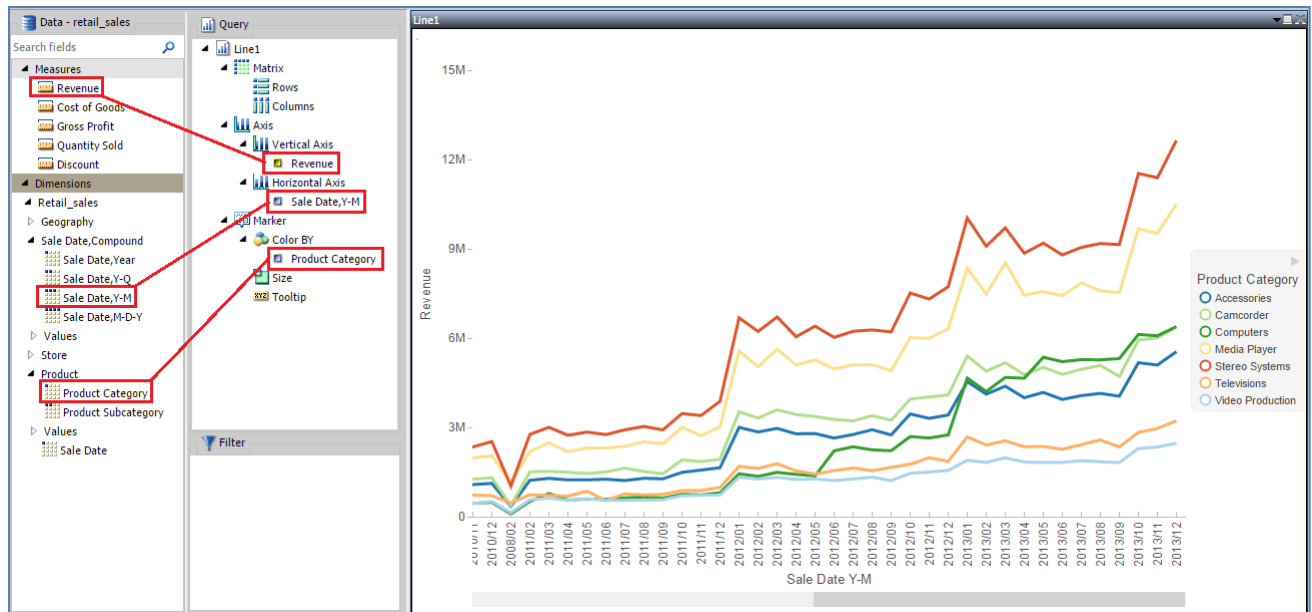
Once you select a Synonym (also known as a Master File) to use as a data source, you can begin creating your visualization.



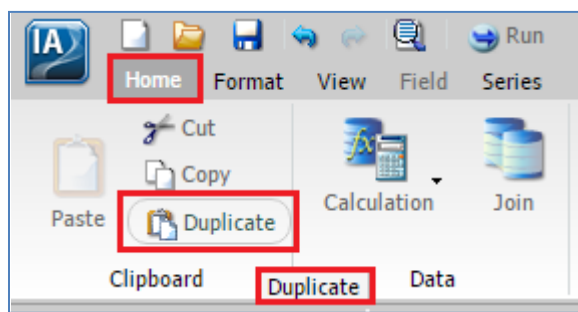
The default visual type is a stacked bar chart, but you have a variety of visual types available in the Change menu.



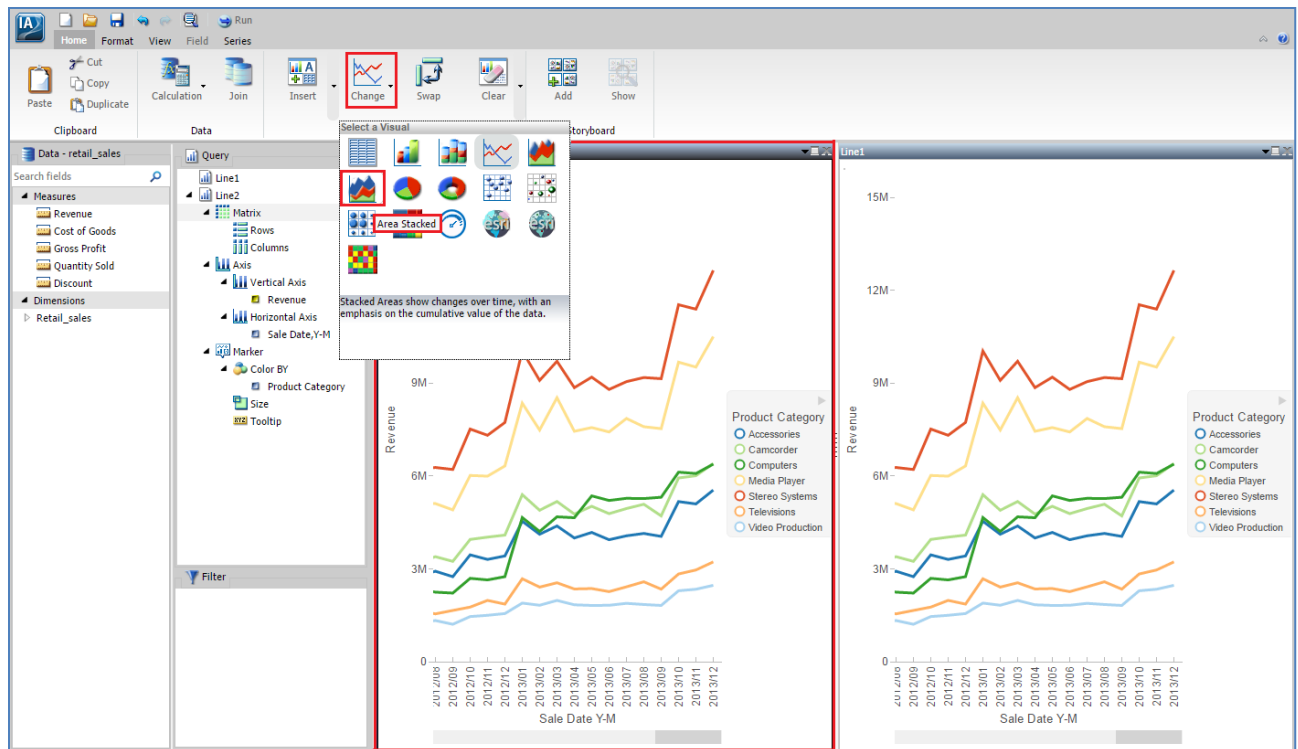
Once you've selected the type of visual to make, add fields by double-clicking them or dragging them to the canvas or appropriate bucket.



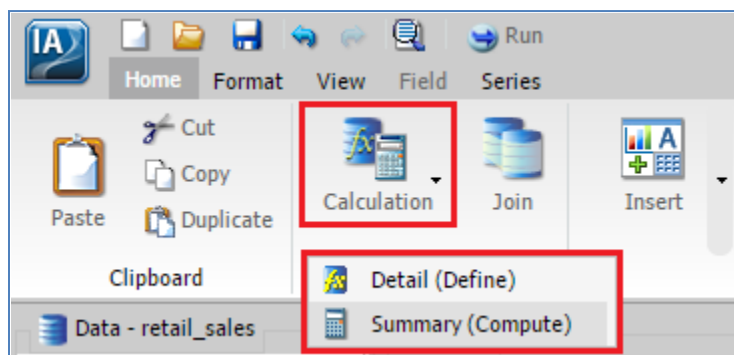
Once you've added your data, you can make modifications using the options on the ribbon.



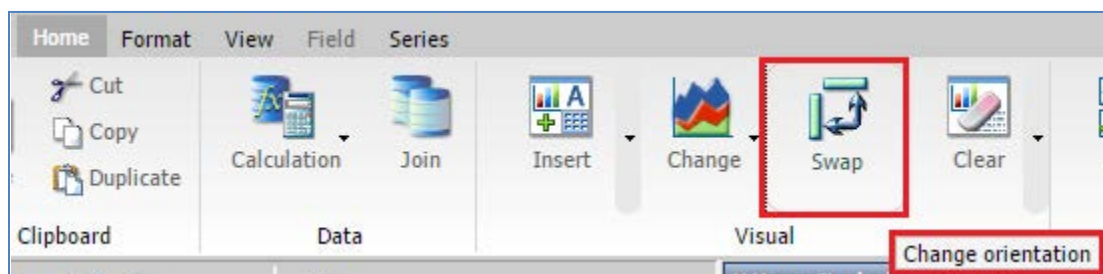
You can use the Duplicate option if you want to add a new visual based on an existing visual.



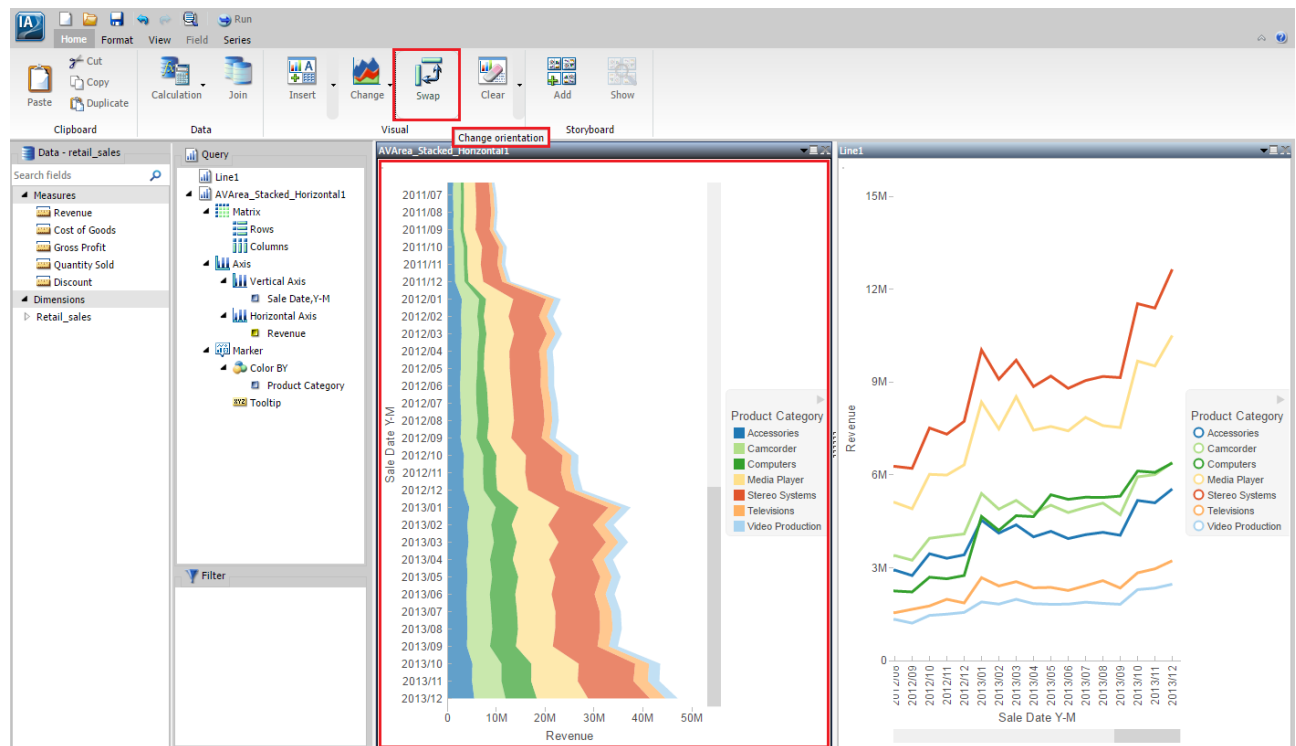
Calculations and Joins allow you to modify the data that you are using. You can use the options in the Calculation menu to make a new temporary field, or use Join to bring in outside data.



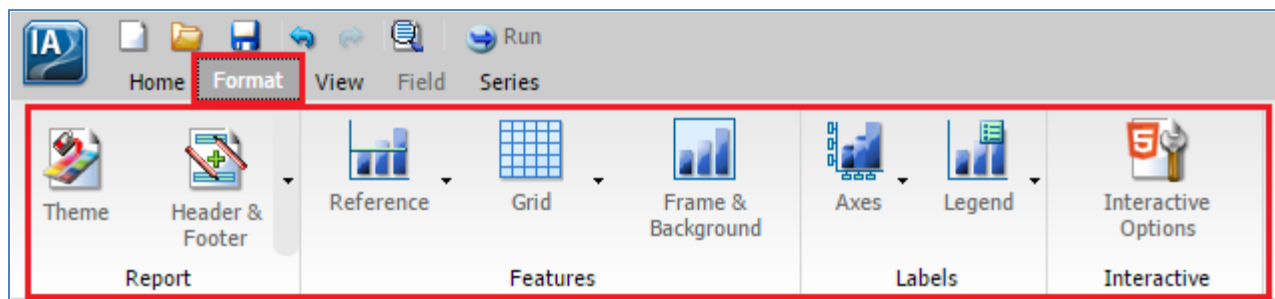
The Swap button allows you to reorient certain types of visuals.



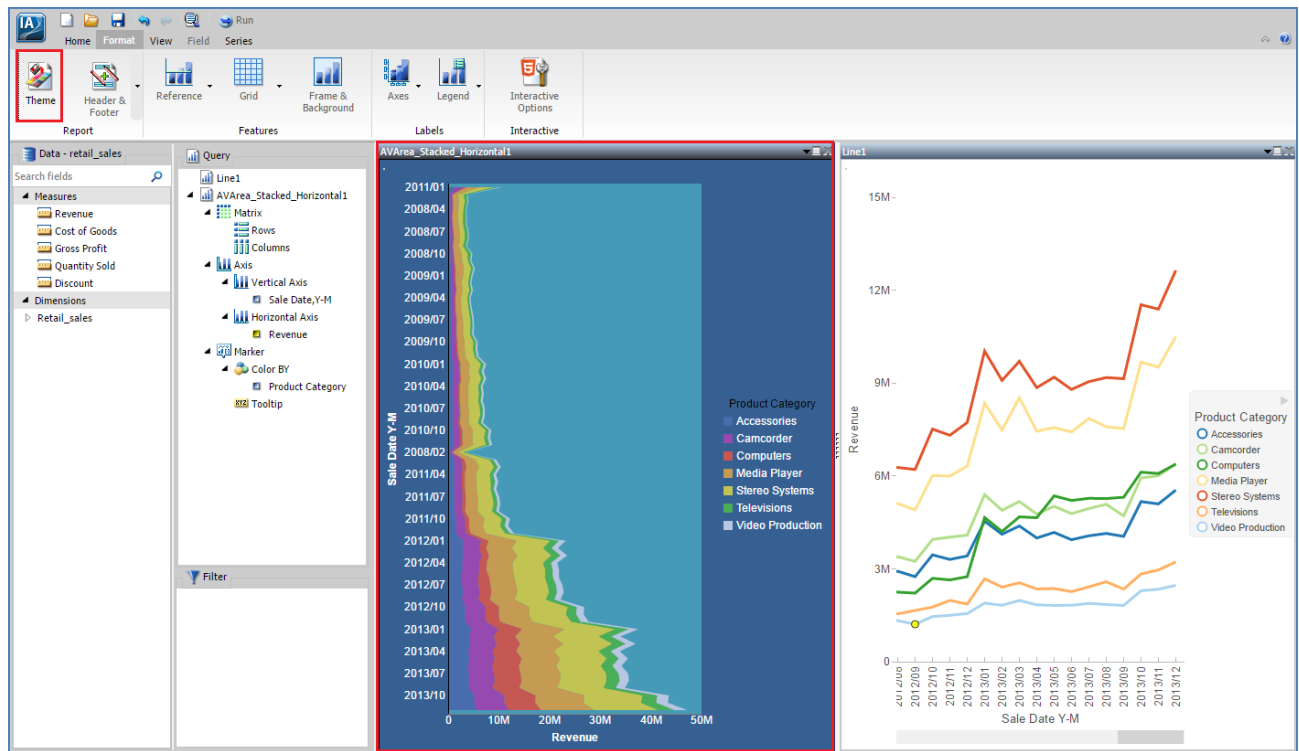
Swapping a grid will switch rows and columns, turning By fields into Across fields. Swapping some other visual types, such as bar charts, area charts, or scatter plots, will switch the axes. Other visuals, such as pie charts or maps, cannot be swapped.



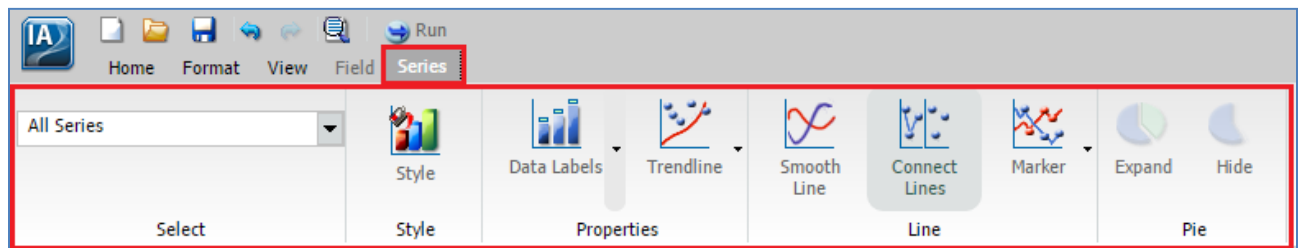
You can style the visual by using the options on the Format tab and the Series tab.



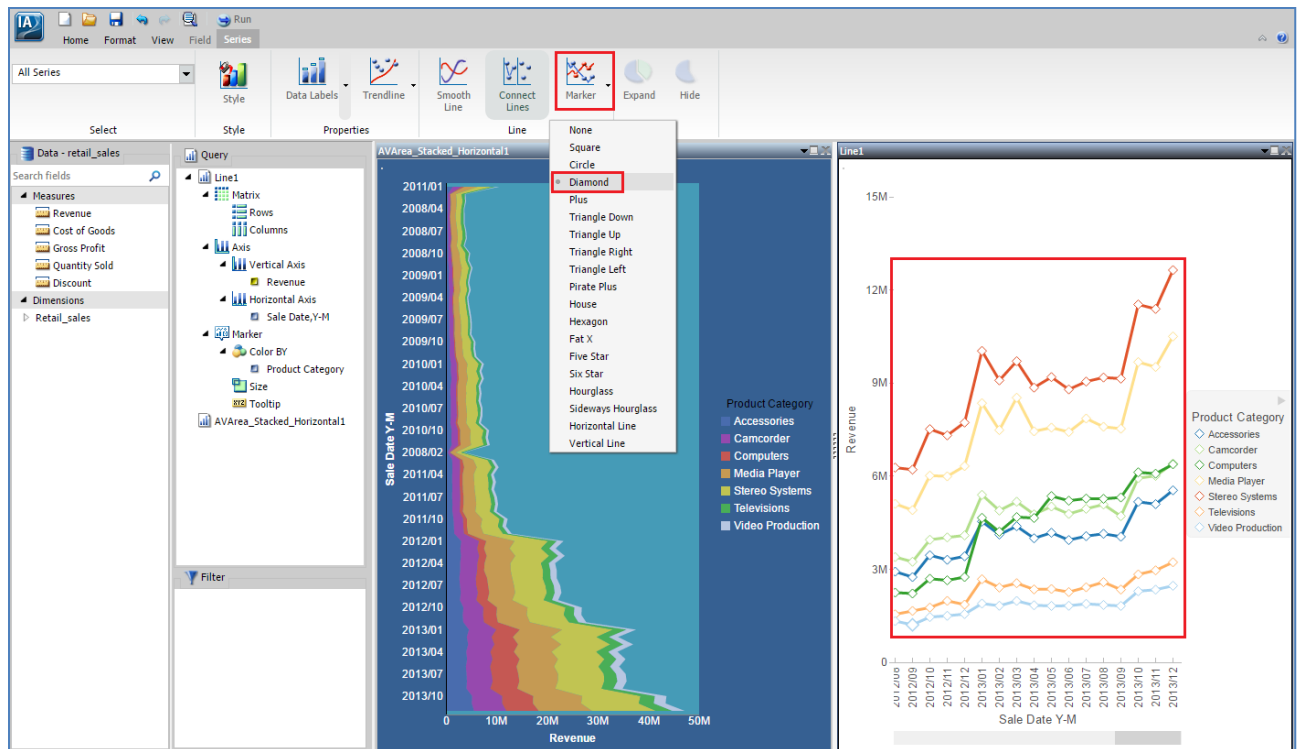
The Format tab allows you to change the StyleSheet used by the visual, add a header or footer or reference line, or format the gridlines, background, axis labels, legend, or load animation of the visual.



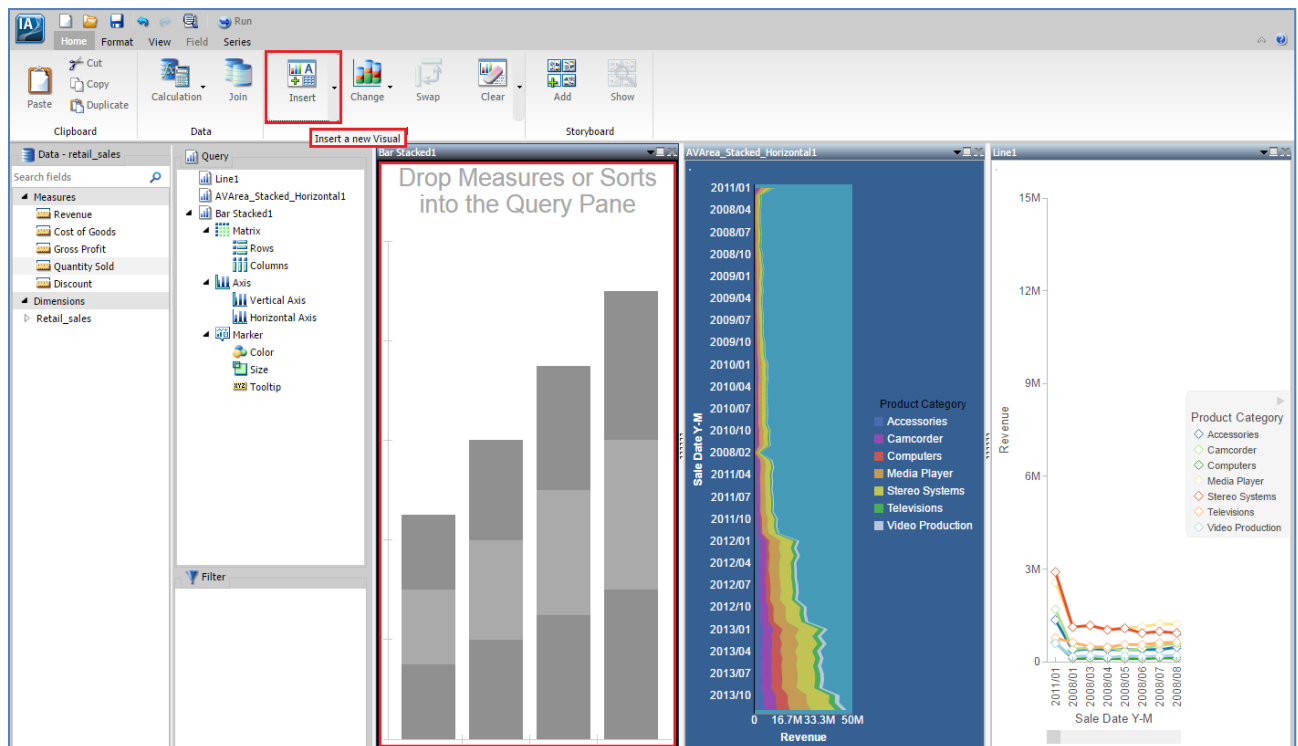
The Series tab allows you to style individual series.



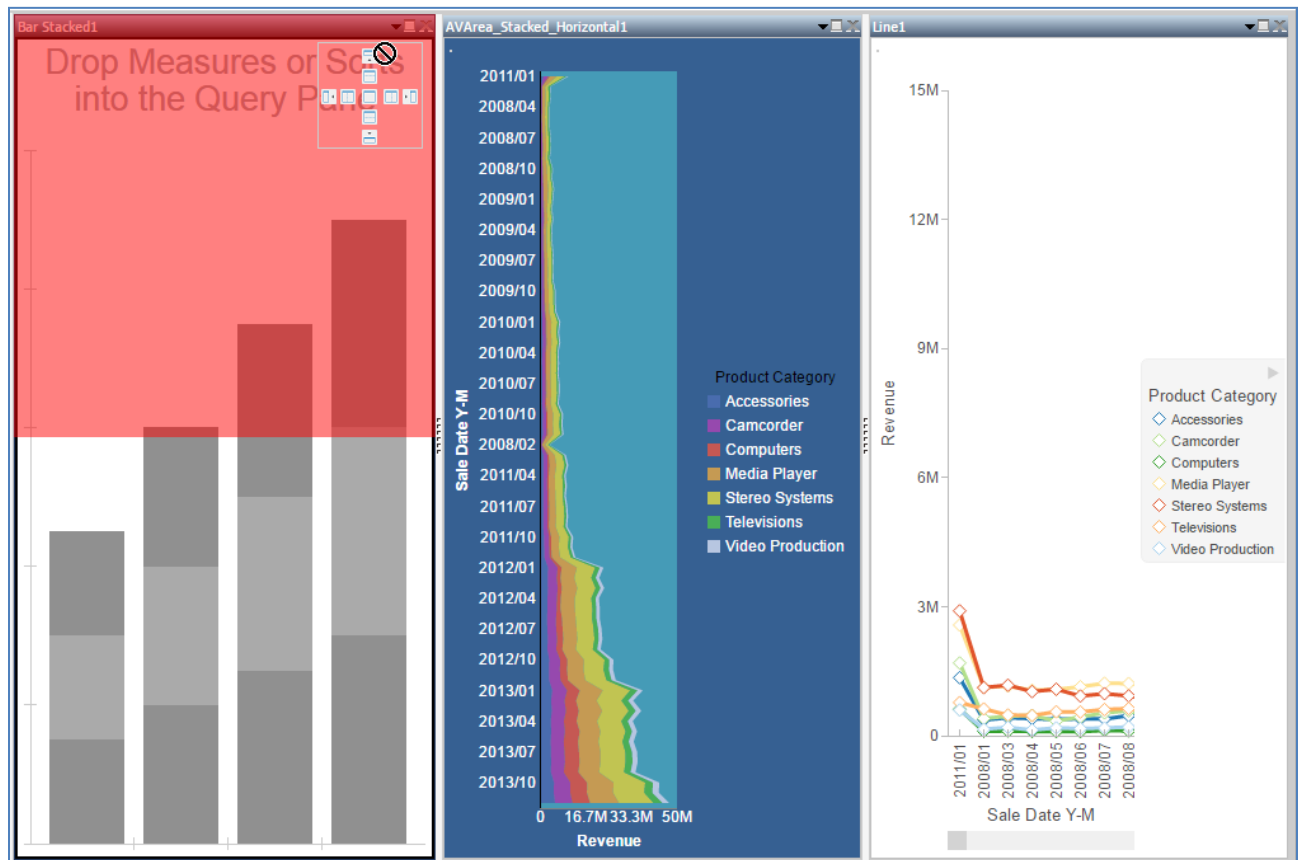
For example, you can change the color of the series or change the marker shape if the visual uses markers.



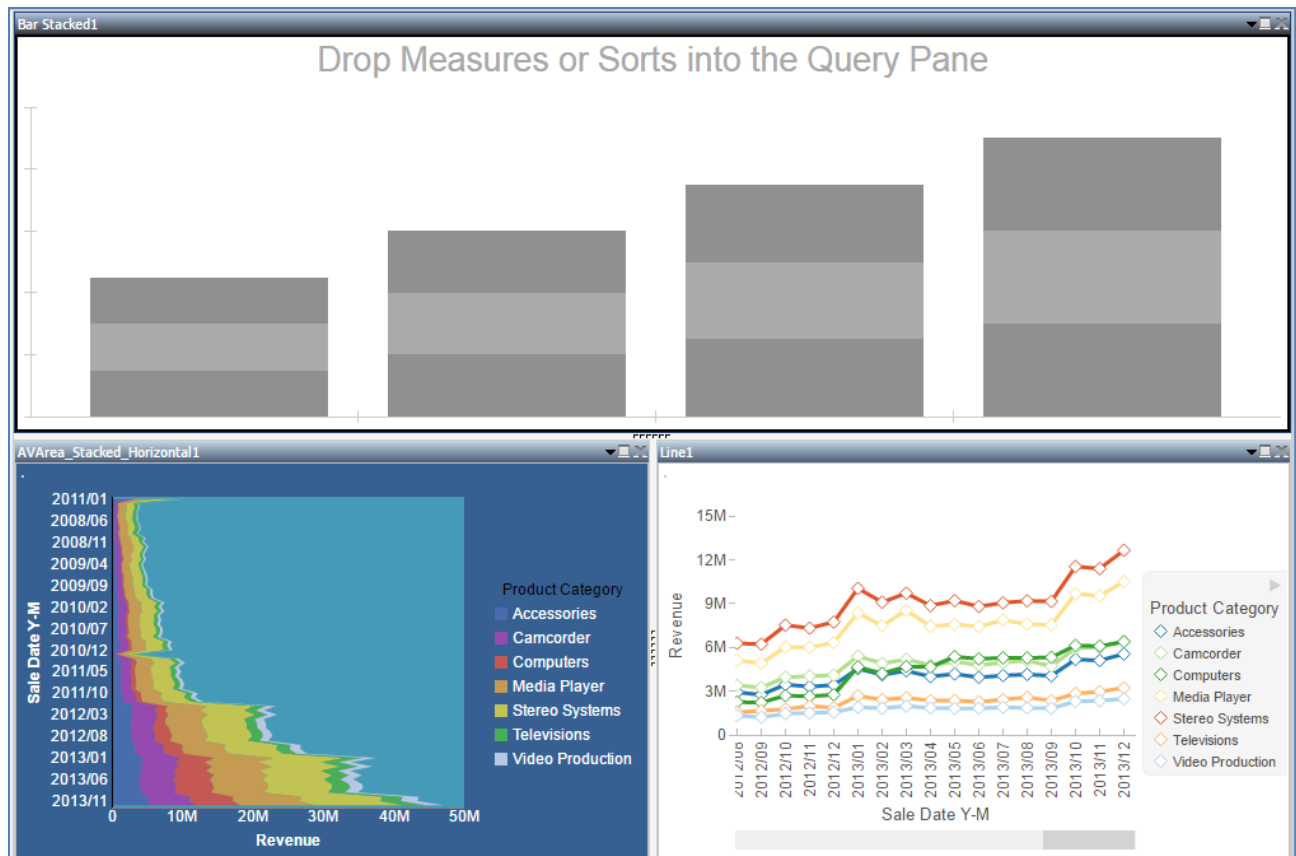
You can add a new visual from the Home tab. You can either click the Insert button, which will add a chart visual, or you can use the drop-down menu to insert a grid or text box.



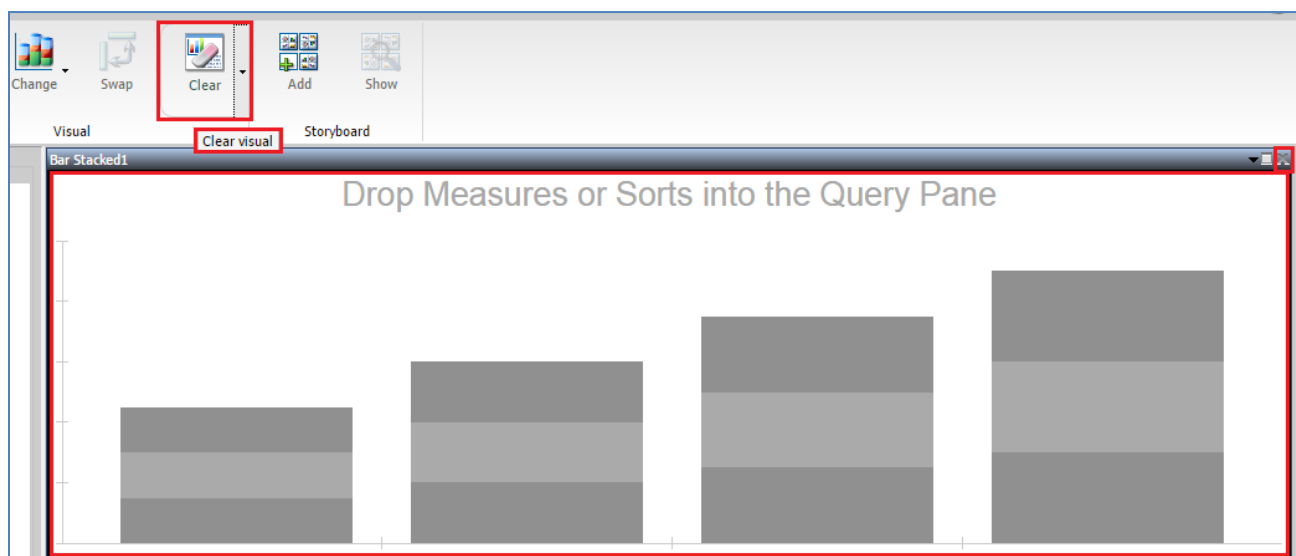
You can reposition visuals at any time by dragging the title bar of the visual.



A red highlighted area will appear to show where the visual will be located if you drop it, and you can use the set of handles in the corner of the visual to choose a new position.



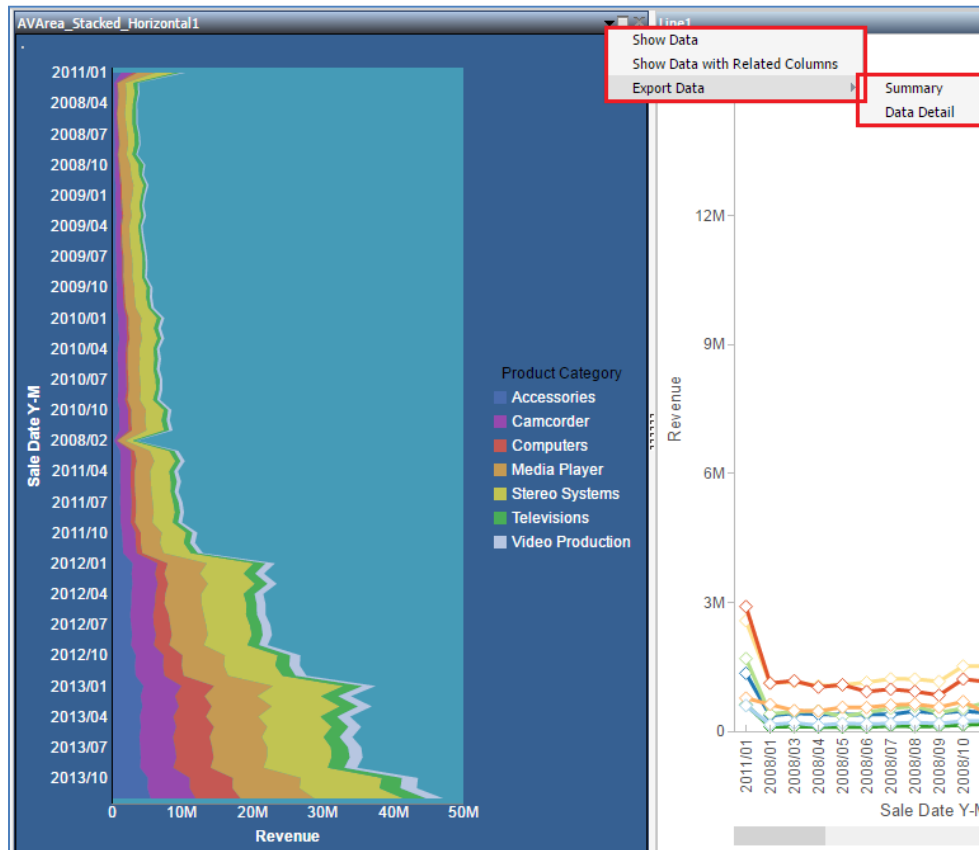
You can remove a visual by clicking the X in the corner of each visual. You can also reset a visual by selecting it and clicking Clear or by opening the Clear menu and clicking Component.



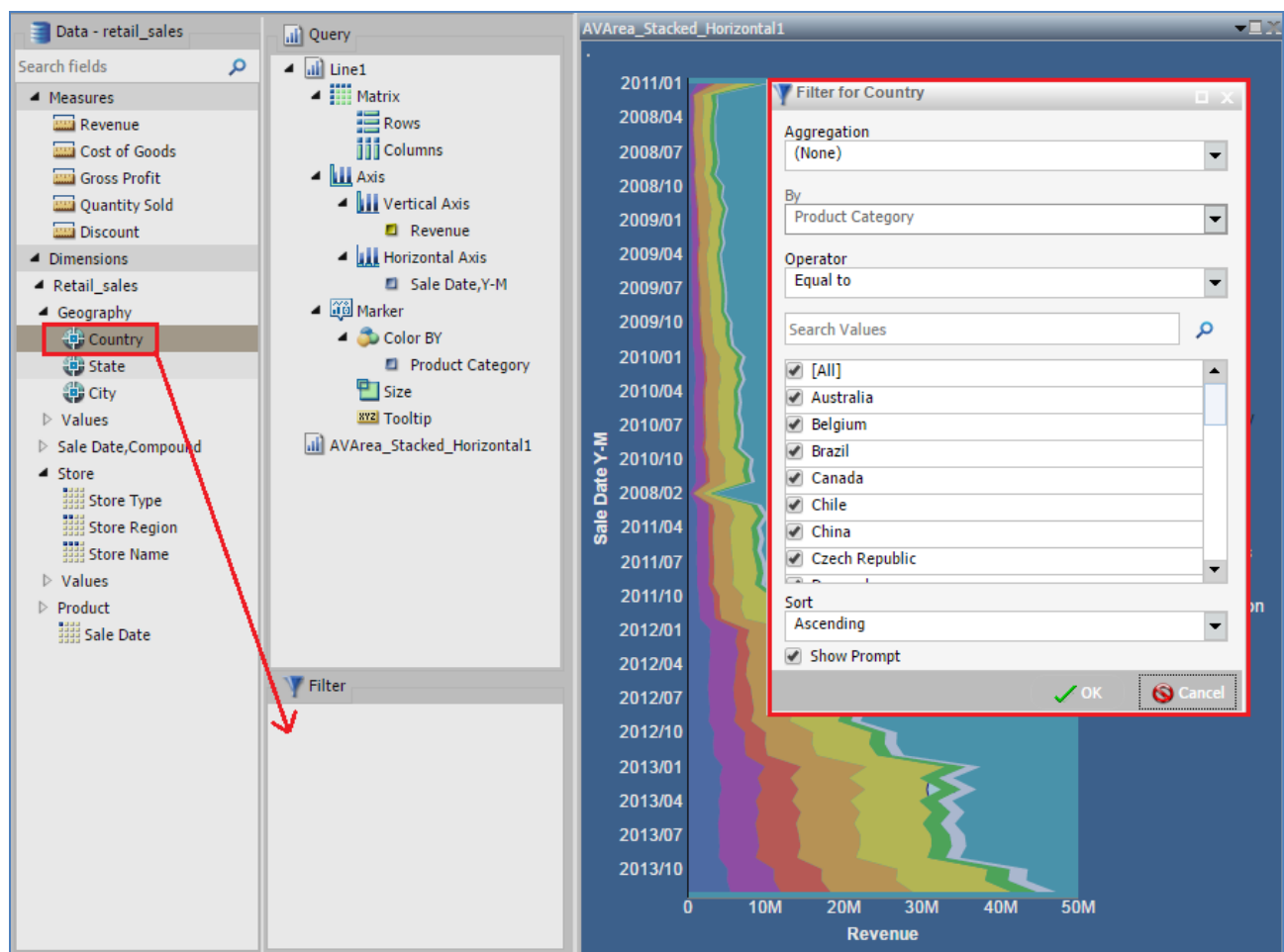
Clearing a visual will remove all data and formatting. You can also clear the entire visualization by opening the Clear menu and clicking Visualization.

You can view the data behind the visualization by clicking the down arrow on a visual and clicking:

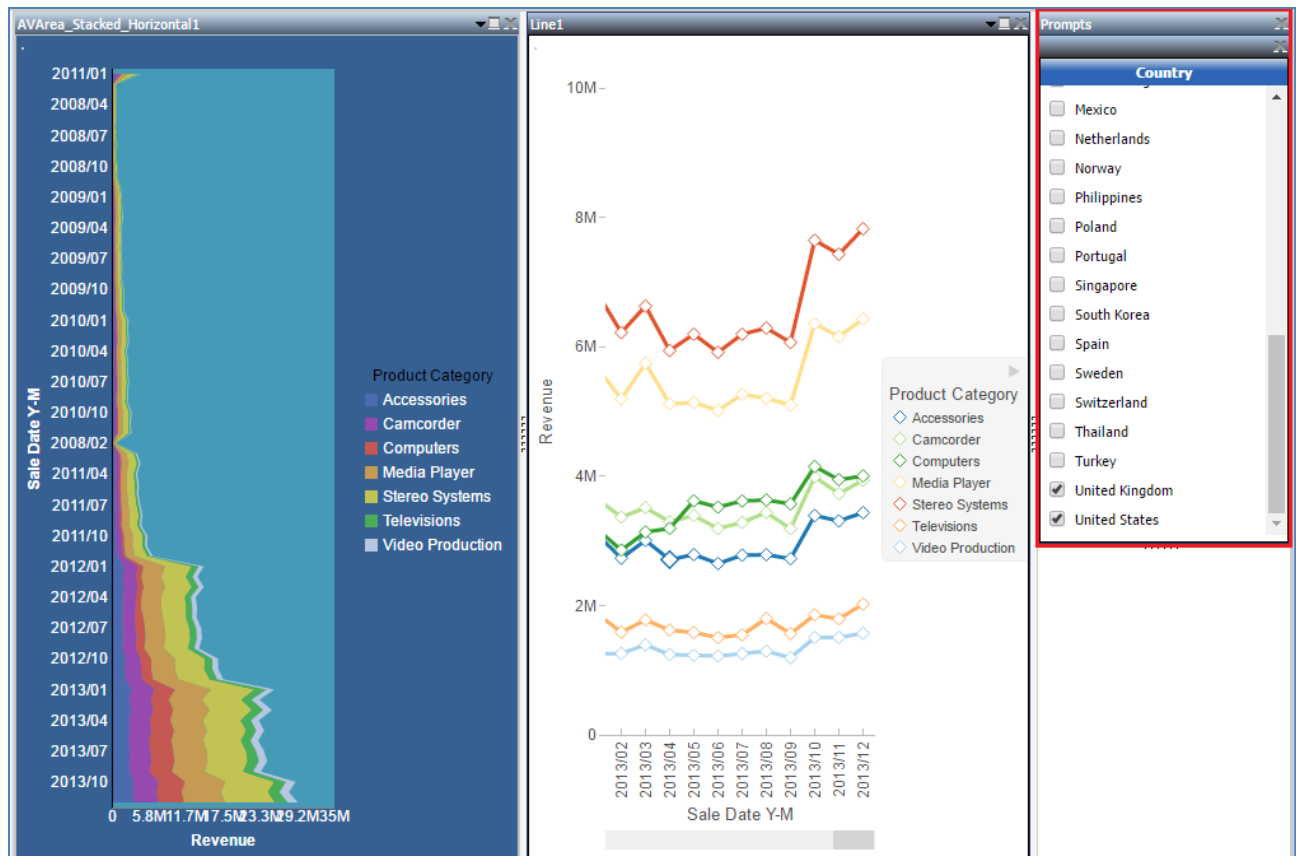
- **Show Data** to view the fields in the visual.
- **Show Data with Related Columns** to show the data in the visual with additional fields.
- **Export Data** options to view the data in a spreadsheet.



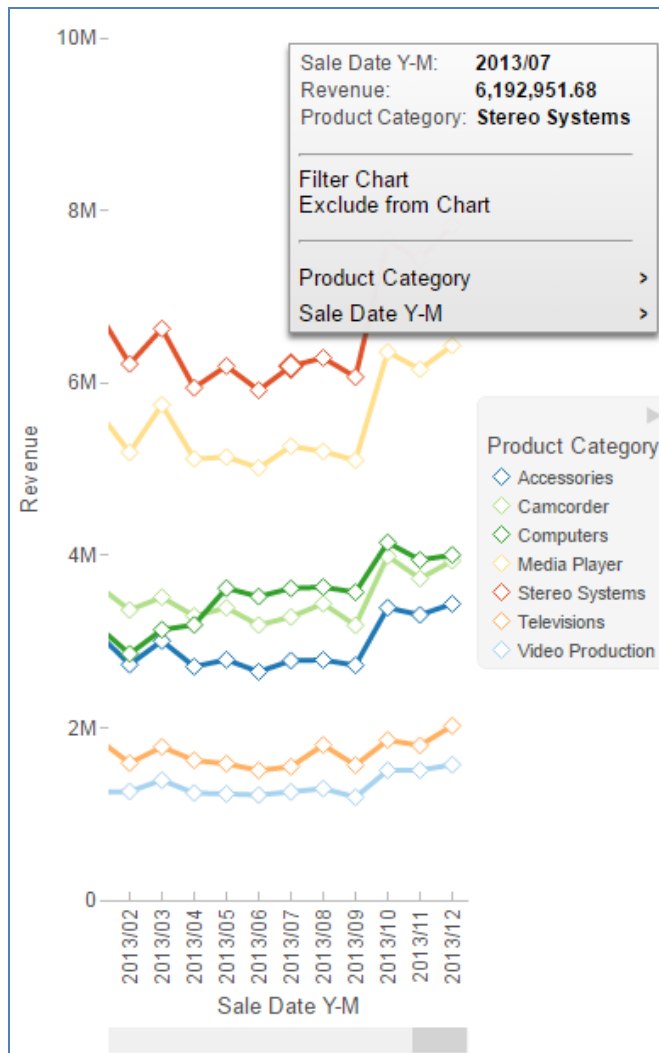
Visuals can utilize user-friendly filters. To add a filter, just drag the field that you want to filter into the Filter panel, then choose whether to include all filter values, or just some of them, as options.



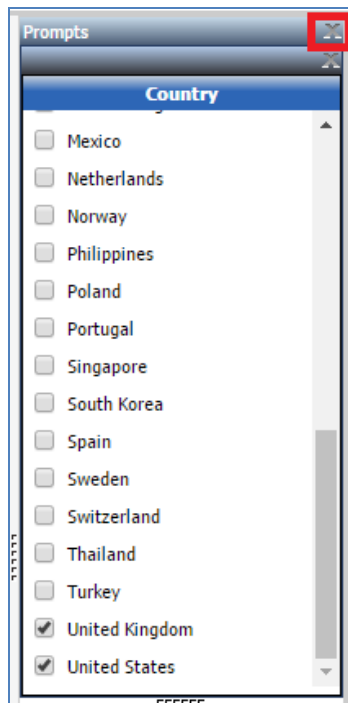
When you finish, a filter prompt appears on the right side of the visualization. This filter can be modified at run time.



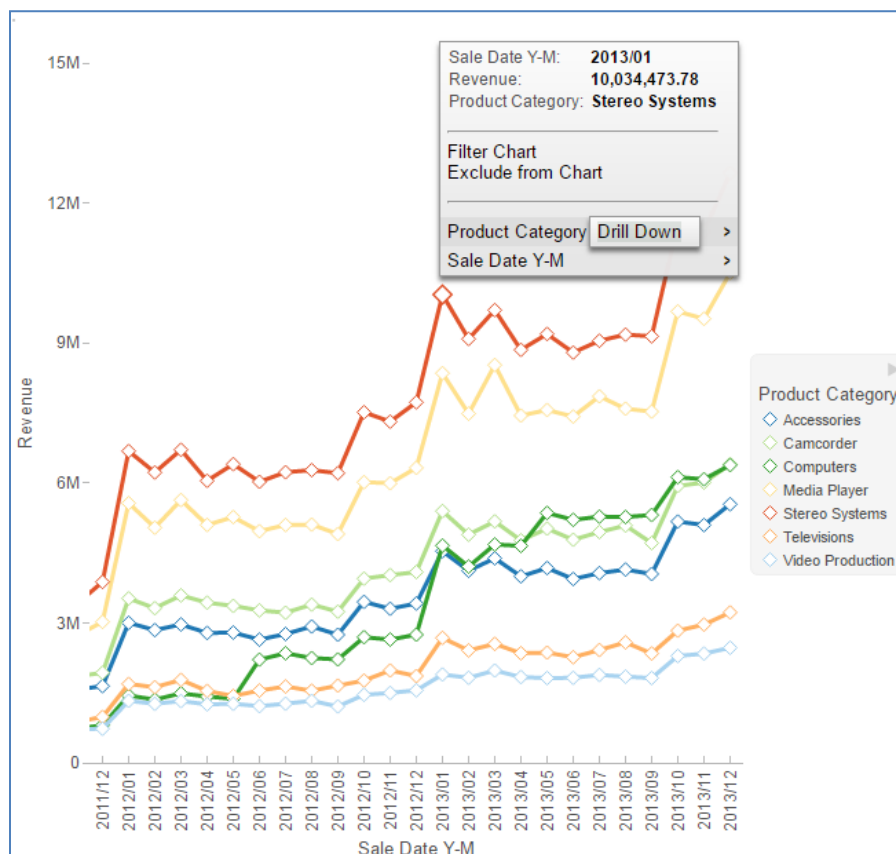
You can also filter the visualization at run time by lassoing an area of a visual or by pointing to part of it and clicking Filter Chart or Exclude from Chart.



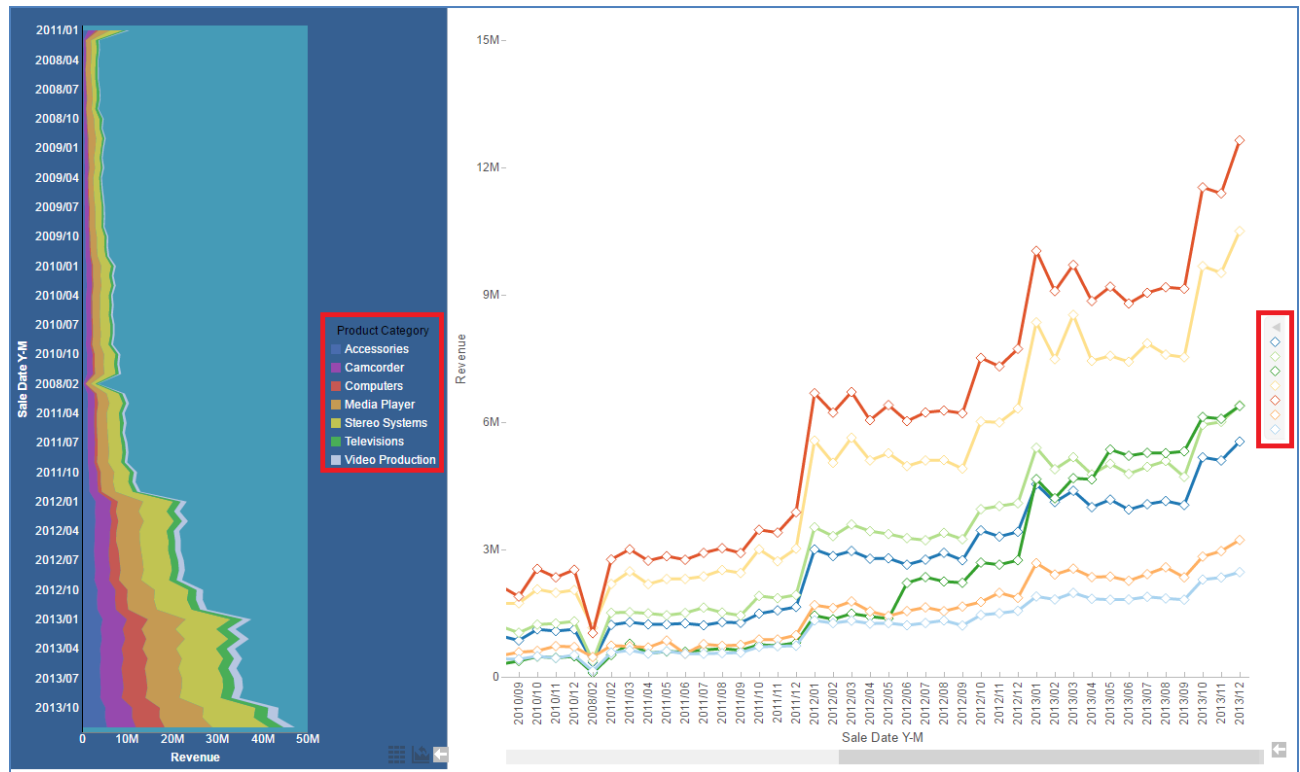
You can remove the filter by clicking the Remove Filter button in the corner of the visual.



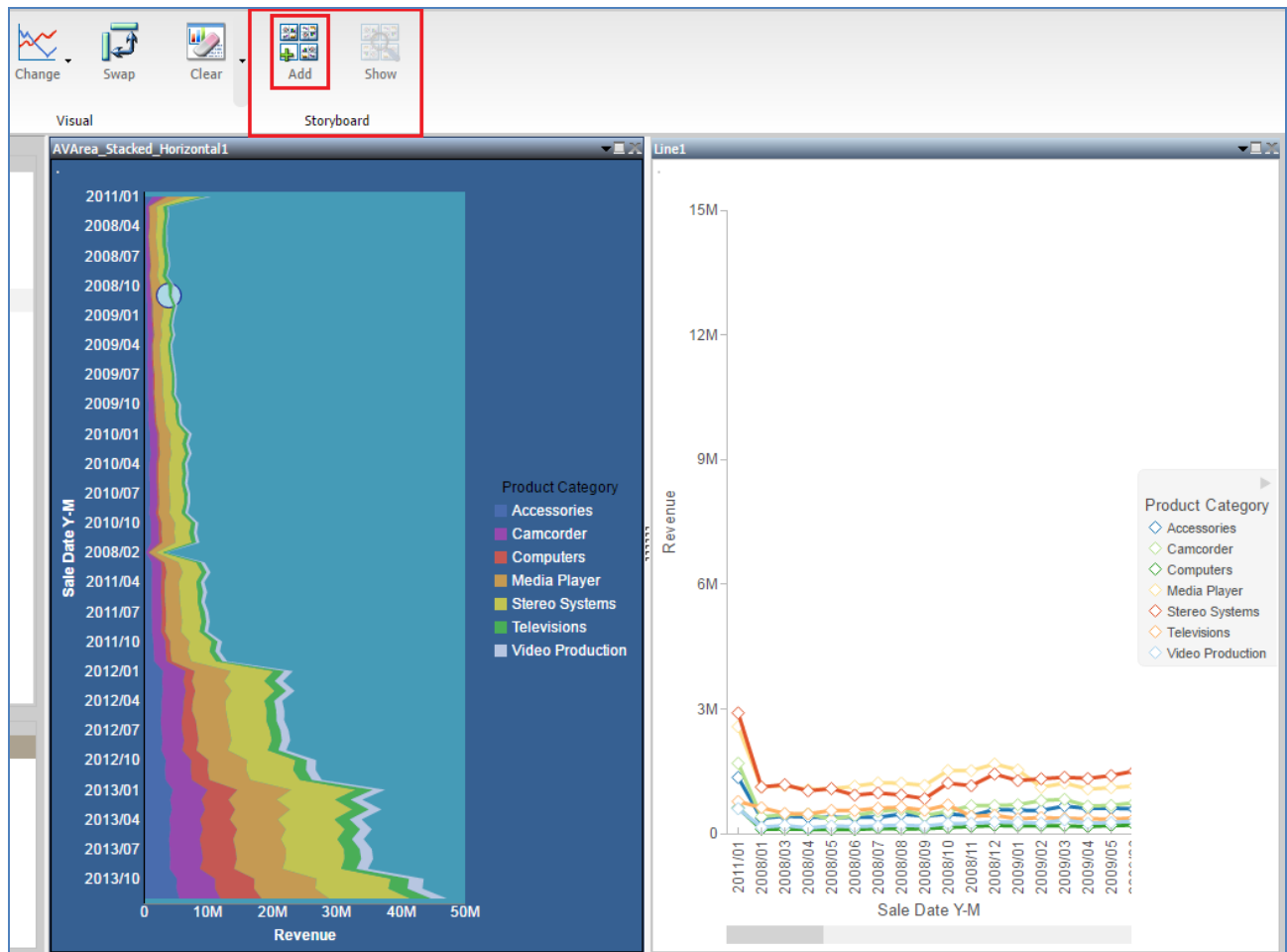
You can also drill down into a field at run time if it is hierarchical. For instance, you can drill down from Product Category to Product Subcategory by pointing to the field you want to drill into and selecting Drill Down. You can drill back up using the same method.



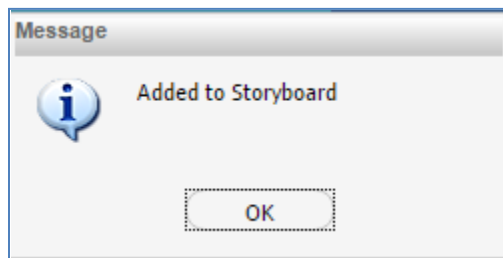
Other run-time options include the ability to view each visual in a grid format, and to hide the legend if you don't want to see it.



When you're finished configuring your visualization, click Add to turn it into a slide in your storyboard.

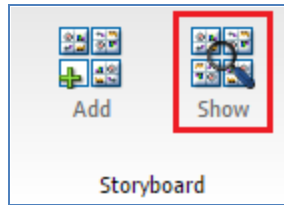


A confirmation message is displayed.



A storyboard is a PowerPoint presentation containing all of your visualizations as slides, conveniently organizing and displaying multiple snapshots of your visualization in sequence to show how it developed over time. If you make any further modifications, you can add those as well.

To view the storyboard containing all of the added snapshots of your visualization, click Show.



The storyboard will download as a PowerPoint presentation.

You are now ready to create a visualization on your own as described by the Try Now! exercise that is provided for this lesson.

After you complete the exercise, you can move on to *Module 4, Lesson 6*, where you will learn how to create, edit, and save new documents using InfoAssist+.