

Module 4: Creating Content  $\rightarrow$  Lesson 5: Creating Visualizations  $\rightarrow$  Try Now!

In this *Try Now!* exercise, you will be creating a visualization in your Sales domain, based on the data you uploaded from your Microsoft<sup>®</sup> Excel<sup>®</sup> spreadsheet (retail\_data\_extract.xlsx). This visualization will include a bar chart that shows the total revenue for all of your products, broken down by each product category. This tutorial will also show you how to drill up and drill down, and add a prompt to this visualization to filter data. Visualizations allow for data discovery and provide insights to better understand your data.

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 *Visualization*, 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 includes a .mas extension.
- 3. Click Open.

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



4. From the Data pane, drag the *Revenue* measure to the Vertical Axis field container in the Query pane, as shown in the following image.



A single vertical bar is displayed for all of your revenue in the canvas, as shown in the following image.



Notice that if you rest the mouse pointer on the bar, the revenue value is displayed in a ScreenTip.

When creating visualizations, you can continue to explore and discovery new things about your data each time you drag a data field into the Query pane field containers.

Let's add another data field to your visualization to break the bar chart up further.

 From the Data pane, expand the *Retail\_sales* dimension and then the *Geography* dimension. Drag the *City* field to the Horizontal Axis field container in the Query pane, as shown in the following image.





Multiple vertical bars are now displayed in the canvas that show the revenue for each city, as shown in the following image.

Notice that if you rest the mouse pointer on a specific bar (for example, Boise), the revenue for Boise sales is displayed in a ScreenTip.

This exclude action also creates a new filter called City that is automatically added to the Filter pane, as shown in the following image.

Filter	1

Since Boise is the one city that stands out, let's exclude it so we can analyze the other cities in more detail.

6. Since we would like to focus on the United States, drag *Country* under the Retail\_sales and Geography dimensions to the Filter pane.

The Filter for Country dialog box is displayed, as shown in the following image.

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7. Deselect the *All* checkbox, select the *United States* checkbox, and then click *OK*, as shown in the following image.

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The prompt to dynamically change the country is displayed, as shown in the following image.

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To remove this prompt, right-click *Country* in the Filter pane and select *Hide Prompt*, as shown in the following image.



Now let's enhance this visualization by adding color and matrix data.

8. From the Data pane, drag the *Quantity Sold* measure to the Color field container in the Query pane, as shown in the following image.



9. On the Home tab in the Visual group, click the *Swap* icon on the ribbon, as shown in the following image.



The orientation of the chart is changed to a horizontal layout, as shown in the following image.



10. From the Data pane, expand the *Sale Date, Compound* dimension and drag *Sales Date, Year* to the Rows field in the Query pane to create a matrix showing revenue by year and city.



Now let's add this to a storyboard so that we can track our analysis.

11. On the Home tab in the Storyboard group, click the *Add* icon on the ribbon, as shown in the following image.

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A confirmation message is displayed, as shown in the following image.

Message	
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12. Click OK.

Let's now add a second visualization.

13. On the Home tab, click the *Insert* drop-down arrow and select *Chart*, as shown in the following image.

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Notice that a new query pane is automatically added to build your chart.

14. Click the *Change* icon on the ribbon and then select the *Treemap* chart type from the Select a Visual pane, as shown in the following image.



15. Under the Geography dimension in the Data pane, drag *City* to the Grouping field in the Query pane. Under the Product dimension in the Data pane, drag *Product Category* to the Grouping field in the Query pane.



The treemap is refreshed with these dimensions, as shown in the following image.



16. Under the Measures in the Data pane, drag *Revenue* to the *Size* field and *Quantity Sold* to the *Color* field in the Query pane.

The treemap is refreshed with these measures, as shown in the following image.



Notice how all of the filters apply to both charts (for example, Boise is no longer identified as the biggest seller).

17. On the Home tab in the Visual group, click *Insert*, as shown in the following image.



By default, this new visual is a stacked bar chart.

18. Click and hold your pointer on the bar that contains the label (Bar Stacked2) of the new visual.

A red selection area is overlaid on the visual, which allows you to change its orientation by using the position markers that are displayed in the upper-right corner of the selection area, as shown in the following image.



19. Move the new visual above your existing treemap.

The canvas is refreshed and now shows the new visual placed above your existing treemap, as shown in the following image.



Let's join this new visual to a new Excel spreadsheet that we will upload because we want to determine if population change has any impact on sales.

20. On the Home tab in the Data group, click *Join*, as shown in the following image.



The Join dialog box is displayed, as shown in the following image.

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21. Click Add New and then click Upload Data.

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The Upload wizard opens, as shown in the following image.

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or	
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22. Click Select Upload File.

The Open dialog box appears, as shown in the following image.

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- 23. Navigate to the location where the sample *populationchange.xlsx* file is located, select the file, and then click *Open*.
- 24. Click Next.

The Select Worksheet from populationchange.xlsx pane opens, as shown in the following image.

WebFOCUS BUE 82 Reporting Server on VMWIN2012 - Google Chrome	x
twwin2012:26000/ibi_apps/webconsole/IWAYNODE_EDASERVE/E9CFD324D5E3B964/wc/bcstart.html	
User: man	ager
Select Worksheet from populationchange.xlsx	
Select the Excel worksheet to upload by clicking on the corresponding radio button.	
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Activate GEOGRAPHIC_ROLE assignment     ON - Turn On	
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25. Accept all of the default values on this pane and click Next.

The Categorize Fields into Measures, Dimensions and Hierarchies pane opens, as shown in the following image.

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Density per sq mi	P11.2C	171.19	1,289.25				
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26. Drag the *ID Store* measure from the Measure Groups folder (Populationforecast subfolder) and drop it onto the *Dimensions* folder.

The Categorize Fields into Measures, Dimensions and Hierarchies pane is refreshed, as shown in the following image.

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2013 Estimate	I10	300950	201332		
Change	P8.2C	3.13	-2.15		
Area sq mi	P10.2C	1,704.70	159.60		
Density per sq mi	P11.2C	171.19	1,289.25		
Area sq km	P10.2C	4,415.10	413.30		
Density per sq km	P11.2C	66.10	497.86		
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27. Click Next.

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The Open dialog box is displayed, as shown in the following image.

28. Select the *populatonforecast.mas* file, which is the synonym that was created for the uploaded spreadsheet and then click *Open*.

You are returned to the Join dialog box, as shown in the following image.

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Name 🔺		Name	<u> </u>	
STORE_TYPE		CITY_STATE		
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29. Click OK.

30. From the *Populationforecast* measure folder in the Data pane, drag *Change* to the *Vertical Axis* field in the Query pane, and drag *City* from the *Geography* dimension in the Data pane to the *Horizontal Axis* field, as shown in the following image.





Your new visual (Bar Stacked2) is refreshed with the selected measures and dimensions, as shown in the following image.

31. On the Home tab in the Storyboard group, click the *Add* icon on the ribbon, as shown in the following image.



A confirmation message is displayed, as shown in the following image.



## 32. Click OK.



33. Lasso (select) the cities with negative population growth and choose *Filter Chart*, as shown in the following image.

Your chart is filtered to only show the population change data for Detroit and Montgomery, as shown in the following image.



Now you can see that Detroit has had negative sales in 2012 and 2013 due to population decline and would be a candidate for closure. Also based on the treemap, you can see that Montgomery sales are nowhere near Detroit's sales, also making it a candidate for closure.



34. To further re-enforce this information, click the down arrow on the Bar Stacked 1 chart and select *Show Data*, as shown in the following image.

Bar Stacked1	
	Show Data
Sale Date Vear, City	Show Data with Related Columns
	Export Data 🕨
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An active report is displayed with the current data on this chart that you can analyze further, as shown in the following image.

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Sale Date							
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	2008 Detroit	17,584.20	60				
	2009 Detroit	2,245,678.22	7580				
	2010 Detroit	2,588,449.46	8986				
	2011 Detroit	3,046,547.07	10077				
	2012 Detroit	1,608,524.81	5383				
	Montgor	nery 78,369.74	219				
	2013 Detroit	1,223,992.53	3928				
	Montgor	nery 1,193,812.75	3909				
8 of 8 records, Page <u>1</u> of 1							

35. On the Home tab in the Storyboard group, click the *Add* icon on the ribbon, as shown in the following image.



A confirmation message is displayed, as shown in the following image.



36. Click OK.

37. On the Home tab in the Storyboard group, click the *Show* icon on the ribbon, as shown in the following image.



Microsoft PowerPoint opens and displays the complete storyboard for your visualizations, as shown in the following image.



38. Save your visualization by clicking the *Save* icon on the Quick Access Toolbar, as shown in the following image.



The Save As dialog box opens.

39. Provide a name for your new visualization and then click *Save*.

You are now ready to move on to *Module 4, Lesson 6*, where you will learn how to create, edit, and save new documents using InfoAssist+.