

Exercise 1: Change visualization types in a display


Task 1. Create a Discovery set.

1. Click the American Time Use Survey data set.
2. Under Starting points, click the first starting point.
3. At the top of the page, beside Discovery 1, click Add a new tab.
4. Under Starting points, click the second starting point.
5. At the top of the page, click the down arrow
6. Beside Ne discovery set, click the x.
7. Click Save.
8. In the New discovery set box, type American Time Use Survey discovery set.
9. Click Save.

Task 1. Create a Display.

1. Click the Display tab.
2. In the left pane, click + New display
3. In the New display box, type American Time Use Survey display.
4. Ensure Dashboard is selected, and then click Create.
5. Under Select a layout, click the option in the third column, first row.
6. Under Add Discoveries, click the Personal folder.
7. From the In progress folder, click American Time Use Survey discovery set.
8. Drag and drop Discovery 1 to the top drop zone of the layout.
9. Drag and drop Discovery 2 to the bottom drop zone of the layout. If necessary , maximize the Discovery.

Task 2. Edit a Discovery in a Display.

1. On the toolbar, click the Toggle View/Edit Mode button twice.
2. Click the visualization you want to change
3. At the top right of the visualization, click the set focus button .
4. In the left pane, click Visualization.

When changing the visualization type, Watson Analytics performs an analysis of the data items used in this visualization. It then recommends the best possible options for changing to a new visualization type.

5. Under Recommended, click Bar.

As well, you can format the visualization to suit your preferences. In this case, you will use the Variations feature to swap the axis and stack the columns.

6. In the left pane, click Format.
7. Click Variations.
8. Deselect the Swap axes check box.
9. Select the Stacked check box.
10. Click Format.
11. Click the x at the top right of the visualization to exit focus mode.
12. On the toolbar, click the Toggle View/Edit Mode button.

Exercise 2: Modify properties of a Display

Task 1. Modify properties of a Display.

1. On the toolbar, click Toggle View/Edit Mode.

To modify properties that affect the entire Display, ensure that you do not have any visualizations selected.

You can modify the background of the Display, using a Theme, or by choosing a specific background color

2. In the left pane, click Format.
3. Click the Grey theme.
4. Under Background color, in the color palette, click the color in the second row, fifth column.

Note that, any formatting changes you make to the Display, while on an individual tab, are propagated to all tabs in the Display.

You can also add widgets to the Display, to enhance its visual appearance.

5. In the left pane, click Widgets.

These can include basic objects such as Text, Image, Media, or Web page. You can also choose from a wide variety of shapes that help you communicate and enhance understanding of your Display.

Task 2. Modify properties of an individual visualization.

1. Click the top visualization.
2. In the left pane, click Format.

There are many formatting options for individual visualizations. You can change the Title Style by choosing to hide, or show the title, or to show, or hide filter details.

3. Deselect the Show title check box.
4. Select the Show title check box.
5. Deselect the Filter details check box.
6. Select the Filter details check box.

You can also show either the Custom title of the visualization, or a Smart title. The Smart title provides more descriptive information, including keywords and question phrasing for how the visualization is derived.

7. In the left pane, in the box that contains "Smart title", click the down arrow.
8. Click Custom title.
9. Run the cursor over the smart title in the top left visualization.
10. In the left pane, in the box that contains "Smart title", click the down arrow.
11. Click Smart title.

You can change the color palette, set the opacity, and modify the colors for Background, Border, and Element.

12. Click Colors and Opacity to expand.
13. Click the 2nd palette from the left
14. Drag the Opacity scale to 80%.
15. Click Background.
16. Click Border.
17. Click Element.

18. Click Background.

Depending on which visualization you select, the available properties may be different.

19. Click the bottom visualization.

20. Ctrl+click the top visualization.

Only Visual themes and Background color are available for modification. If you select more than one visualization, you can set properties for multiple visualizations at the same time, but only properties that are common to all selected visualizations can be modified.

You can modify additional properties for a visualization if you enter focus mode. You can change the visualization type, change the text of the visualization title, and modify data items using the data tray.

21. Click the bottom visualization.

22. In the top right corner of the top left visualization, click the focus mode button.

23. In the left pane, click Visualization.

24. In the left pane click Format.

25. In the Smart title box, click the down arrow.

26. Click Custom title.

27. In the visualization, click the title.

28. Type Number of Children by Year and Employment Status.

29. Click X to close out of focus mode.

Exercise 3: Filter visualizations in a Display

Task 1. Examine filter regions in the Display.

1. On the toolbar, click Toggle View/Edit Mode.

You can filter data on all tabs of a Display, using the global filters region, or filter data on the current tab using the local filters region.

You can collapse these regions to give you a better view of the visualizations in the Display, or keep them expanded to view and work with filters.

2. Below and to the right of the local filters region, click the filter button.
3. Click the filter button again.

Task 2. Add filters.

1. In the left pane, click the Add filter button.

Because a Display can be created using Discovery sets that represent different data sets, the data items in the Filters list are from any data set represented in the Display. And, you can apply a filter using any data items from a data set. You are not limited to using data items that appear in the visualization in the Display.

2. In the left pane, scroll the list of data items.
3. In the left pane, in the Filters list, beside the data set name, click the up arrow.
4. Beside the data set name, click the down arrow.

There are two methods to add data items to the Display so that they can be used as Filters. If you use drag and drop, you can add the data item to either the local filters region, or to the global filters region

5. From the Filters list, drag a data item to the global filters region. Choose a data item representing categorical data.

You can also add data items using the plus sign beside the data item. Clicking the plus sign adds the data item to the local filters region only.

6. Scroll down the list of items in the Filters list.
7. Click + beside a data item.

To apply the filter, you must choose values from the data item. If you add a data item representing categorical data, you can choose from a list of distinct values.

8. In the global filters region, beside the filter, click the ellipsis.
9. Click Edit filter values.
10. Click a value.
11. Click in the white space in the global filters region.

If you add a data item representing continuous data, you can choose to filter on a range of values using the slider.

12. From the Filters list, drag a data item representing continuous data to the global filters region.
13. Beside the filter, click the ellipsis.
14. Click Edit filter values.
15. Move the left hand cursor to the mid point of the slider.
16. Move the left hand cursor back to 0.
17. Click the white space in the global filters region.

Task 3. Delete and clear filters

You can delete filters, from both the local filters region, and the global filters region

1. In the local filters region, beside the filter in the local filters region, click the ellipsis.
2. Click Delete filter.
3. In the global filters region, beside the filter (the one representing continuous data), click the ellipsis.
4. Click Delete filter.

You can also clear filter values from a filter, in either region.

5. In the global filters region, beside the filter representing categorical data, click the ellipsis.
6. Click Clear filter.

Task 4. Filter individual visualizations in a Display,

1. Click a visualization to select it.
2. In the legend, right-click an item.
3. Click Exclude.

You can also filter a visualization while in focus mode.

4. On the toolbar, click Toggle View/Edit Mode.
5. Click a visualization.
6. In the top right corner of the visualization, click the enter focus mode button.

In focus mode, you have access to the data tray, where you can apply filtering to data items that are not part of the visualization. Note that, the data items in the data tray are from the data set that was used to create the current visualization, not from any other data set.

Again, as was done when filtering using the global or local filter regions, if you choose a data item representing categorical data, you can pick from a list of distinct values.

7. In the data tray, click a data item representing categorical data.
8. Click a value for the data item.
9. Click the empty space in the visualization.

If you choose a data item representing continuous data, you can use the slider to set a range of values on which to filter

10. Click a data item representing continuous data.
11. Move the left hand cursor to the mid point of the slider.
12. Move the left hand cursor back to 0.
13. Click the empty space in the visualization.

Also while in focus mode, you can apply filtering to data items that are part of the visualization, using either keep or exclude, or by using the items populating the Axis label, and Color by data slots.

14. In the visualization, right-click a data item, to show that you can keep or exclude the item.
15. Click the empty space in the visualization.
16. In the Color by data slot, click the down arrow beside the data item.
17. Click a value
18. Click Done.
19. Click Close to turn off focus mode.
20. In Watson Analytics, at the top of the page, click the down arrow.
21. Beside American Time Use Survey, click the x.
22. Click Don't save.