Data Central Visualizations QRC: Create a Visualization

Creating a Chart, Custom Listing, or Pivot Table in Data Central Visualizations

All Data Central users can create visualizations and save them as private; users with the Data Central Designer privilege can also save visualizations as public.

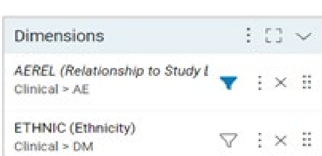
Create a New Visualization

1. From the Navigation Pane, click the **'+'** next to Visualizations.
2. Select the **type of visualization** you want to create. The Designer window opens. Options vary depending on the type of visualization.
3. From the Fields column, expand the data store(s) or search for the field(s) you want to select.
4. From the list of fields, drag the field(s) to the areas: **Dimension(s), Measure(s), Legend, Columns, Rows, Values,** or **Filters**. The number of fields you can add depends on the type of visualization. If fields are selected from multiple domains, joins are required.
   Depending on the type of visualization, additional options are available.
   - Either a pop-up opens automatically; or click the ellipsis next to a field in an area or an area header.
   - Update fields, such as labels, chart type, aggregate, start and end dates, add joins, filters, and add dynamic dimensions and measures.
5. Click **OK** in the pop-up and the preview updates.
6. Continue adding fields to the areas and updating the options.
7. Optionally:
   - Update the visualization using the **Toolbar** icons.
   - Enter the **Chart Description** (title) and Enter **Notes**, which displays when clicking on the Notes icon.
   - Update **Advanced Chart Settings**. *See Advanced Chart Settings.*
8. Click **Save**.

Visualization Options

Additional options are available for selected areas:

- **Update Options** by clicking the ellipsis next to a header or field to open the Options pop-up. Options vary.
- **Expand / Collapse an area** by clicking on the window icon or arrow in the area header.
- **Add a filter** by clicking the **filter** icon next to desired field to apply a field level filter. OR, drag a field to the Filters area and apply filter to the entire visualization.
- **Remove** a field by clicking the 'X' at the right of the term.
- **Change the order** of fields by hovering over the 6 dots and dragging a field above or below the other, or to another area.
- Hover over a field name to display a **tooltip** with field details.



Toolbar Options

Icons in the toolbar vary depending on the visualization type. Highlighted icons indicate they are activated. Click a highlighted icon to deactivate it or click an icon to perform an action. See the Help Center for more information about the available toolbar icons and their actions.

Advanced Chart Settings

When creating charts, default settings apply until you change them.

To change default settings:

1. Click **Advanced** in the bottom right corner or the tool icon in the toolbar.
   Advanced Chart Settings expands from the left, displaying the current settings.
2. Select a different radio button to adjust the layout of the visualization. Radio buttons vary depending on the type of visualization.
3. Click the drop-down arrows next to the items and select a different option.
4. Add Reference Lines (horizontal and / or vertical).
5. Add Highlight Strips (horizontal and / or vertical).
6. Enter Chart Notes, appropriate text that describes your chart. If Chart Notes are entered, a note icon displays in the toolbar. When a user clicks on the icon the Chart Note displays.
7. Click the **'x'** in the top right of Chart Settings to hide the window.

See the Help Center for details on specific visualizations.

Save / Save As Window

Visualizations can be saved initially, edited, and saved, or saved with a new name.

1. Click **Save or Save As**. The Save window opens.

In the Save Window

1. Enter the **Name** of the visualization.
2. Select the folder where the visualization will be located.
3. Select **Public** or **Private**.
4. Select **Roles** (if public) and **Scope**.
5. Click **Save**.

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See the elluminate Help Center for more information.

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