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Self-analysis Portal

QUICK-START GUIDE

Self-analysis Portal Quick-start Guide

Contents

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Welcome to the Self-analysis Portal

Welcome Page

When you log in to the Self-analysis Portal, you will be greeted by a welcome page like the one shown on the right.

You can click on one of the orange buttons to go straight to Table Lab or Chart Lab. You can also use the navigation bar at the top right to switch between them at any time.

This quick-start guide will give you everything you need to get you up and running with the Self-analysis Portal. You can follow along using the same demo shown in this guide by clicking on the button below.

Go to live demo

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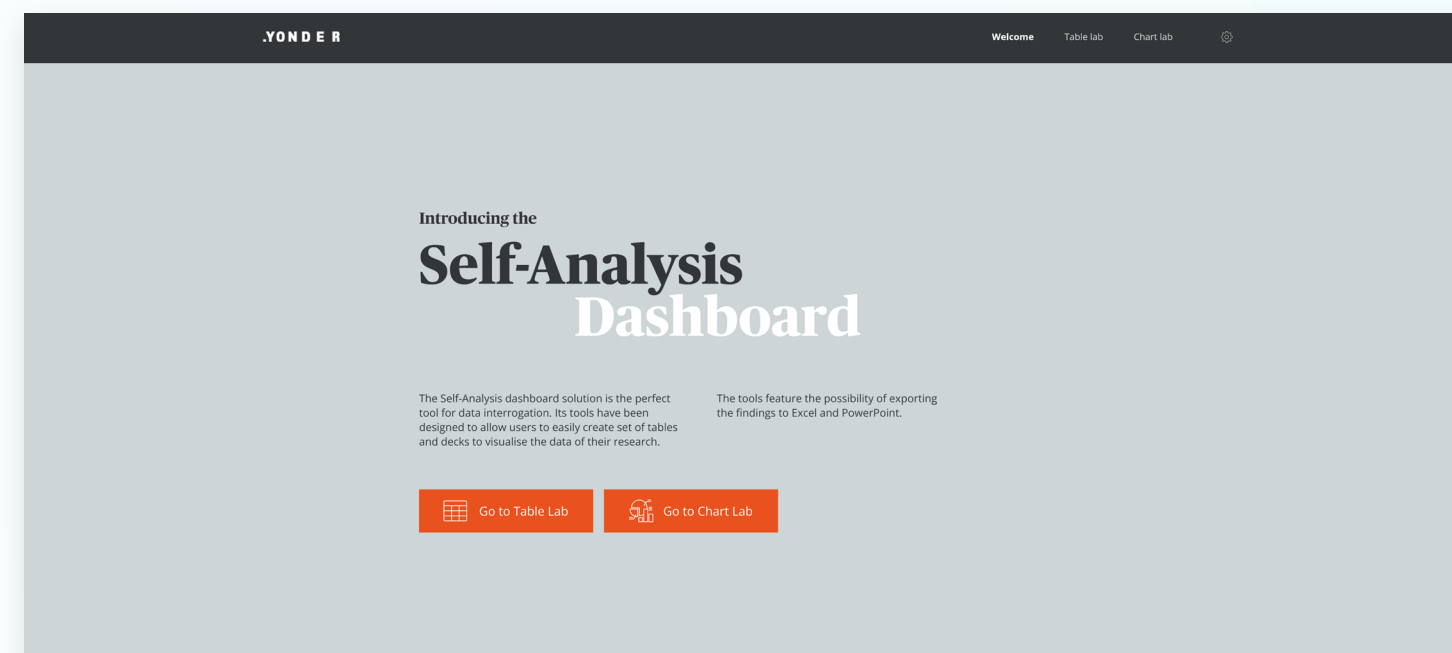
Getting Started in Table Lab

Introduction

Table Lab is more than a simple data table maker: it allows you to non-destructively slice-and-dice your data and combine it in any configuration. This can be used to quickly answer specific questions you have about your research data.

In this section you will learn everything you need to get up and running in Table Lab. This includes creating workbooks, creating basic tables, adding splits and filters to tables, and saving and exporting to Excel.

Getting Started in Table Lab

Setting Up a Workbook

In Table Lab you create tables in **Sheets** that are stored and organised in **Workbooks**.

When you start up Table Lab, you should be greeted by the pop-up menu shown below. To start a new workbook, simply select **'Create New Workbook'**. You can also create or open workbooks from the Workbooks panel on the left of the screen at any time.
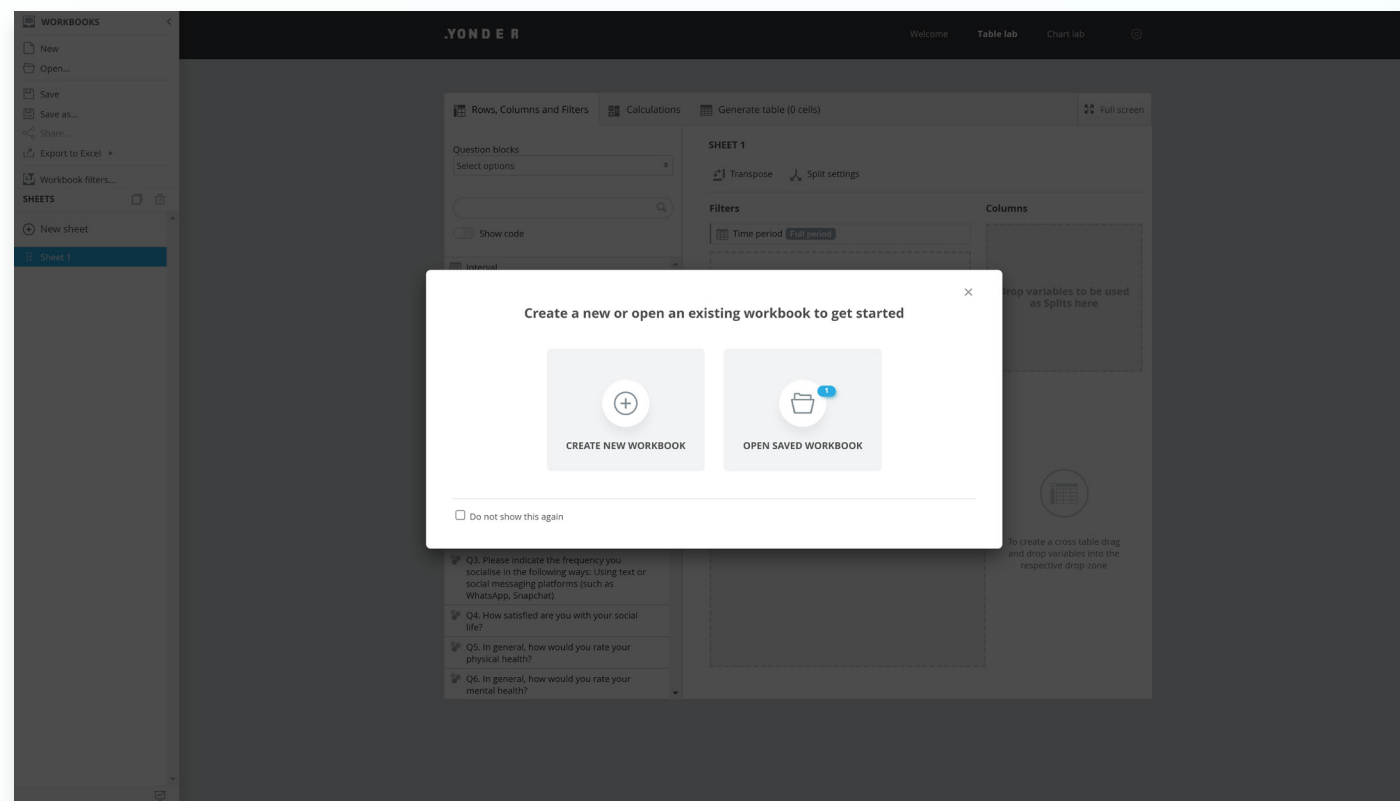
Now you have created a workbook, you will automatically have a sheet open, seen in the Workbook panel as **'Sheet 1'**, in which you can start creating tables. To create more tables, you do not need to start a new workbook, just click **'New Sheet'**. You will see the new sheet appear in the panel. Right click on the sheet in the panel to rename it.

To delete a sheet, make sure you have the correct sheet highlighted and click on the trash can icon in the top right of the Sheets panel.

You can reorder your sheets using the handles to the left of each sheet name.

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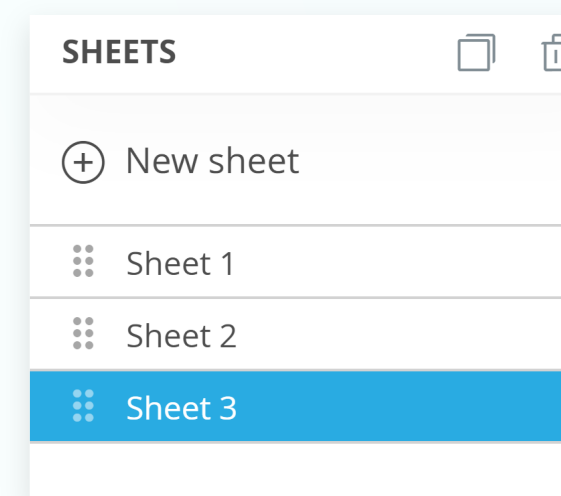
Getting Started in Table Lab

Creating Basic Tables

You can create a basic table in seconds using Table Lab's intuitive interface. Once you know how to create basic tables, the later pages will show you how to make them more complex and useful.

Step 1

Make sure you have the sheet you want to create a new table in selected in the **Sheets** panel to the left.
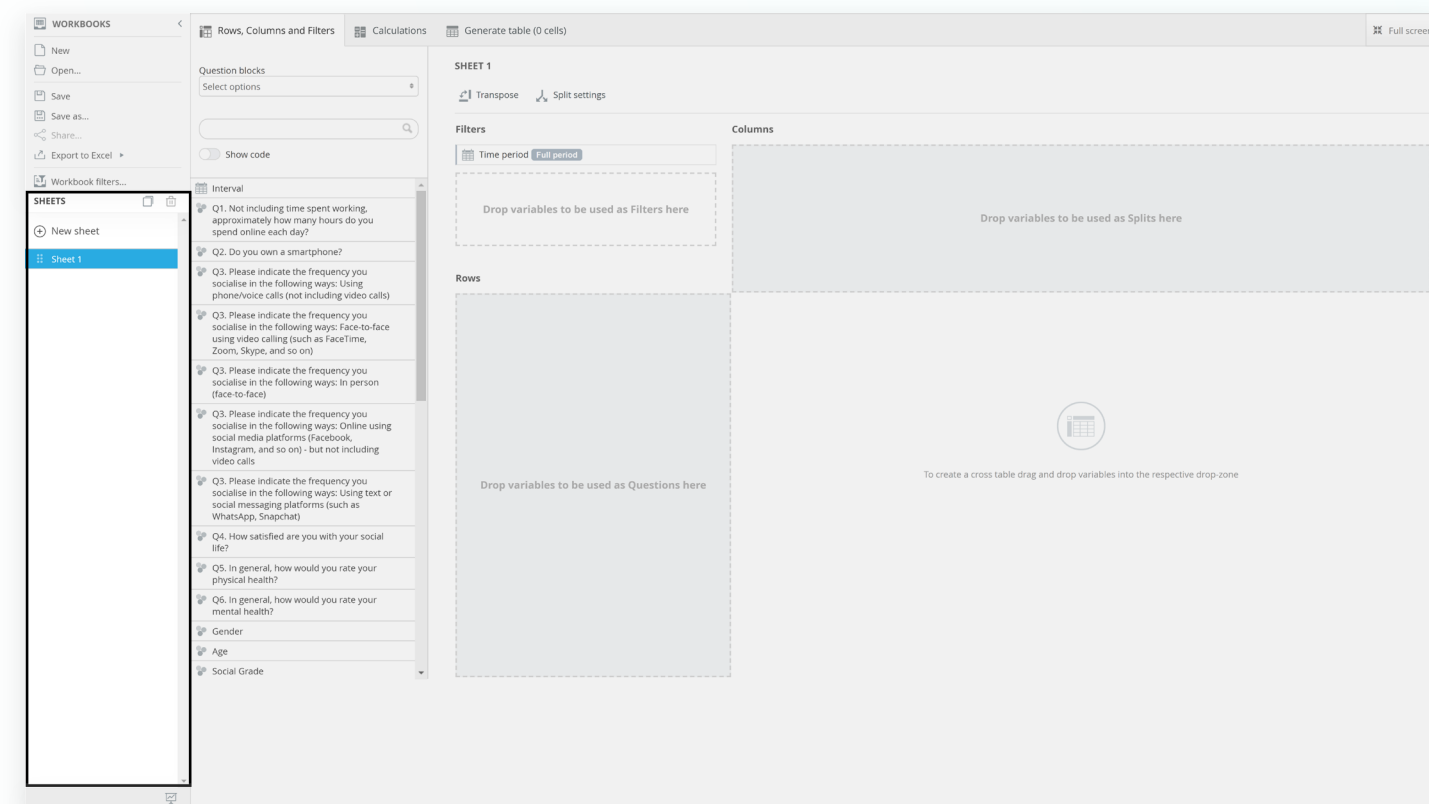
Step 2

From the **'Rows, Columns and Filters'** tab, locate the variable you want to look at in the viewer on the left. Either click and drag that variable into the row section or select **'Add as Question'**.
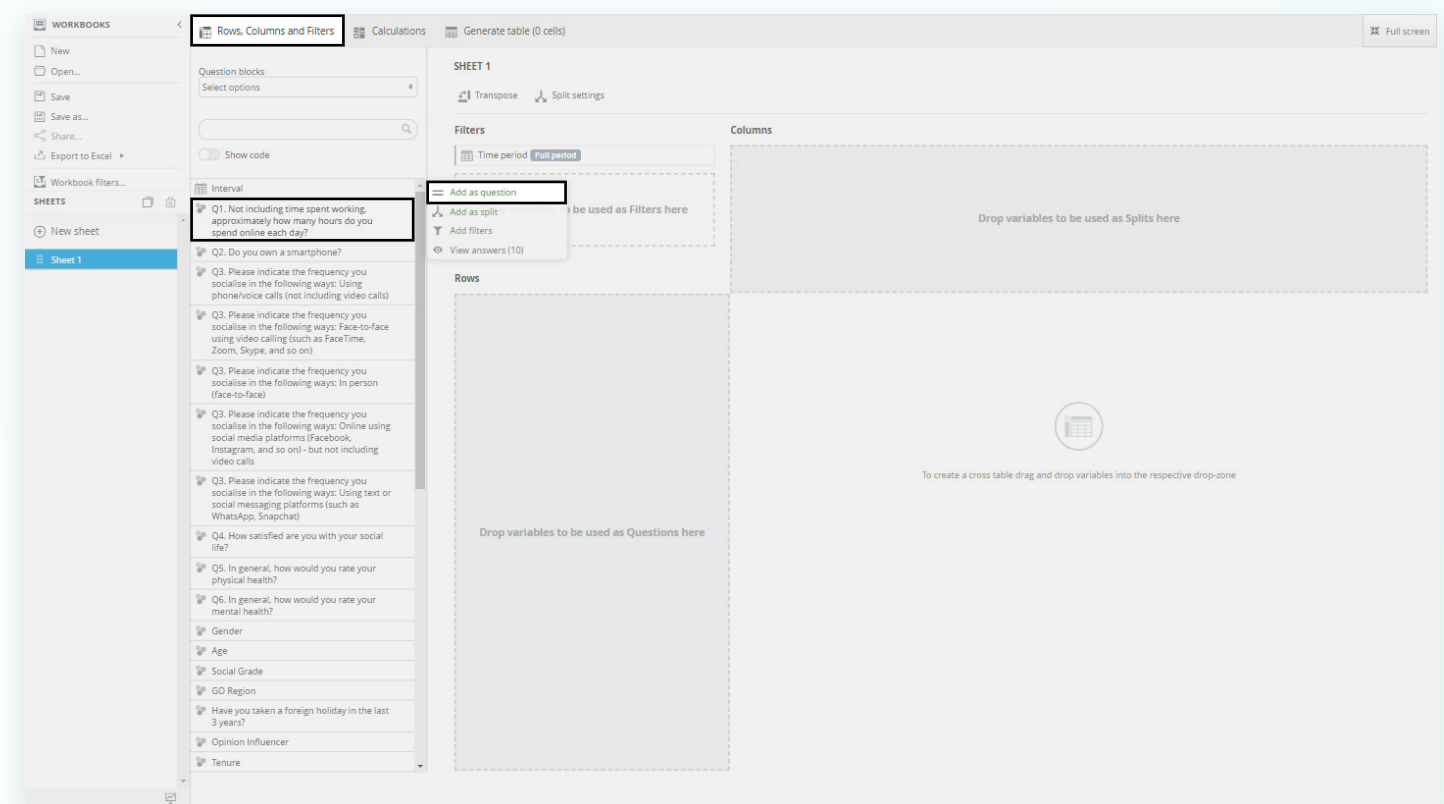
Quick Tip Use the 'Full Screen' feature in the top right to make using Table Lab easier.

⊟ Full screen

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Step 3

To see your table in its current state click on **'Generate Table'**.

Step 4

Depending on the size of the table, it may take a few seconds to generate. If you want to change the parameters of your table, just go back to the **'Rows, Columns and Filters'** tab. When navigating away, your table will not be deleted. You can add more questions to your table and add other parameters to make complex tables that we will explain in the next pages.

Quick Tip If you want to start over, select the **'Clear all'** button, underneath the Sheet name. Clicking on the '...' next to it will open a menu allowing you to clear a specific type of table parameter.

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Getting Started in Table Lab

Adding Table Splits

To make your basic data table more interesting, you can see how another
variable interacts with the main one you selected. You do this by adding a split:

Step 1

From the **'Rows, Columns and Filters'** screen, find the variable you want to add as a split in
the viewer on the left. Hover over it and select **'Add as split'**. The chosen variable will appear
in the **'Columns'** section at the top.
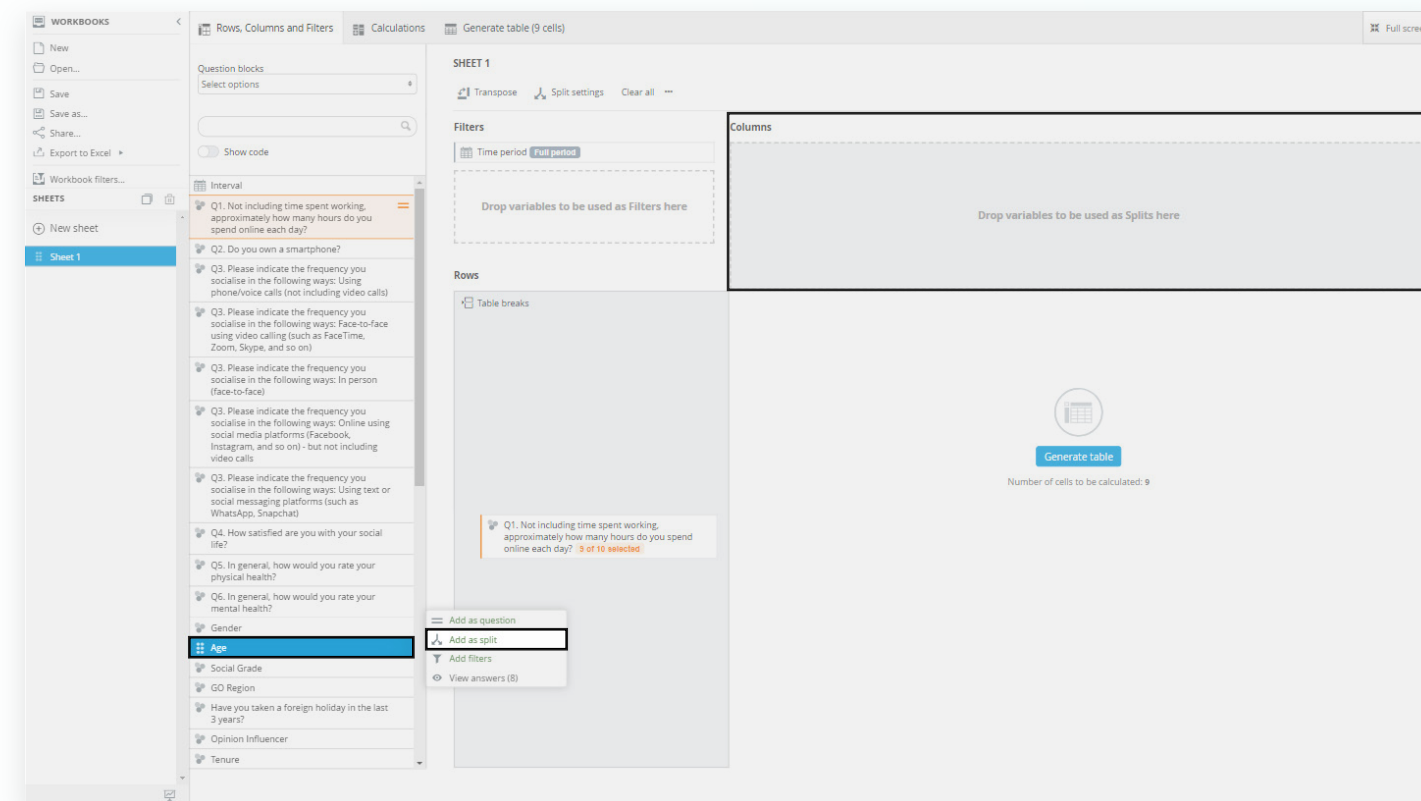
Step 2

You can choose which sub-variables to include by selecting the coloured area
where it says **'8 of 8 Selected'** (below left). You can click and drag to select
multiple adjacent sub-variables, or hold Ctrl/Cmd and select individual
sub-variables (below right).

When you are done, click on the x in the top right of the pop-up window and
select **'Generate Table'**.

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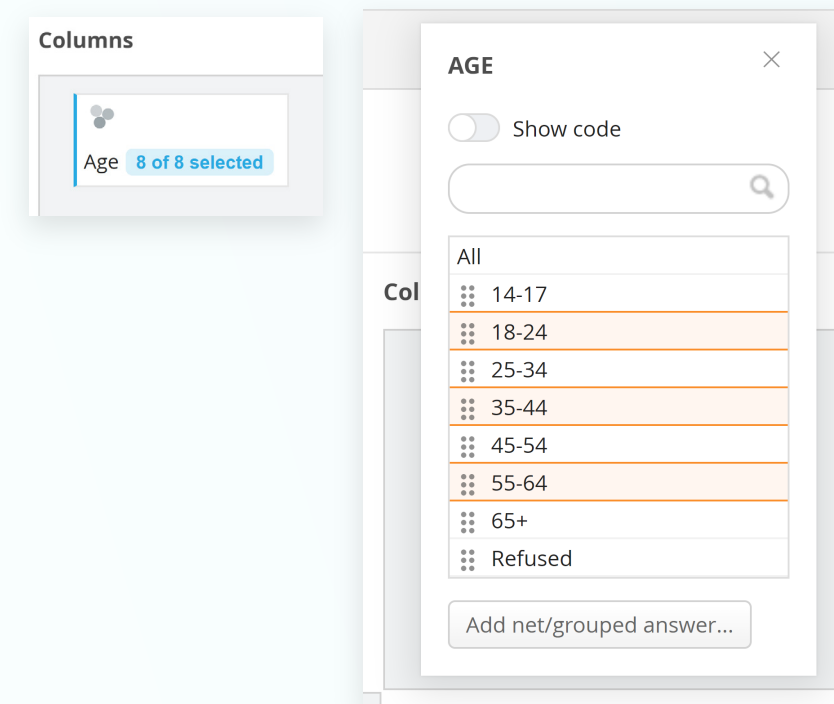
Step 3

If you want to combine sub-variables, you can set up a grouped answer. Click on **'Add net/grouped answer...'** and select the check boxes of the variables you want to include. Name your variable in the **'Label'** text box at the top and click **'Save'**.
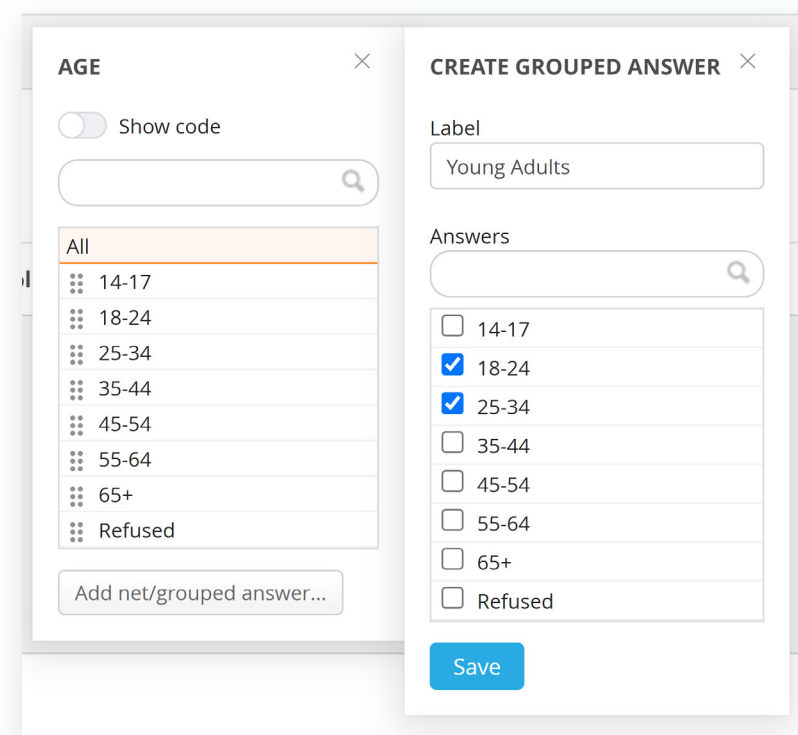
Step 2

Your new grouped answer should appear at the bottom of the pop up menu. When it is highlighted in orange, that means it's selected. You can edit or delete this using the pencil or trashcan icons to the right.

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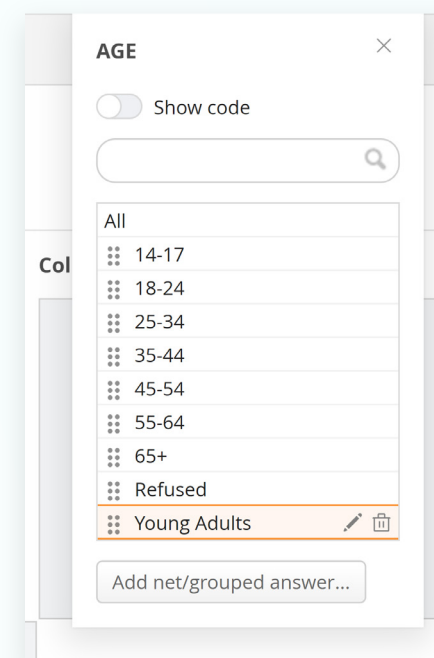
Getting Started in Table Lab

Adding Filters

You can drill down your data further by adding filters, giving your data tables even more specificity. When you add a filter, only the data that applies to the filtered variable is shown.

Step 1

From the **'Rows, Columns and Filters'** screen, find the variable you want to filter your data by in the viewer on the left. Hover over it and select **'Add filters'**. The added variable(s) will appear iin the **'Filters'** section in the top left of the main viewer.
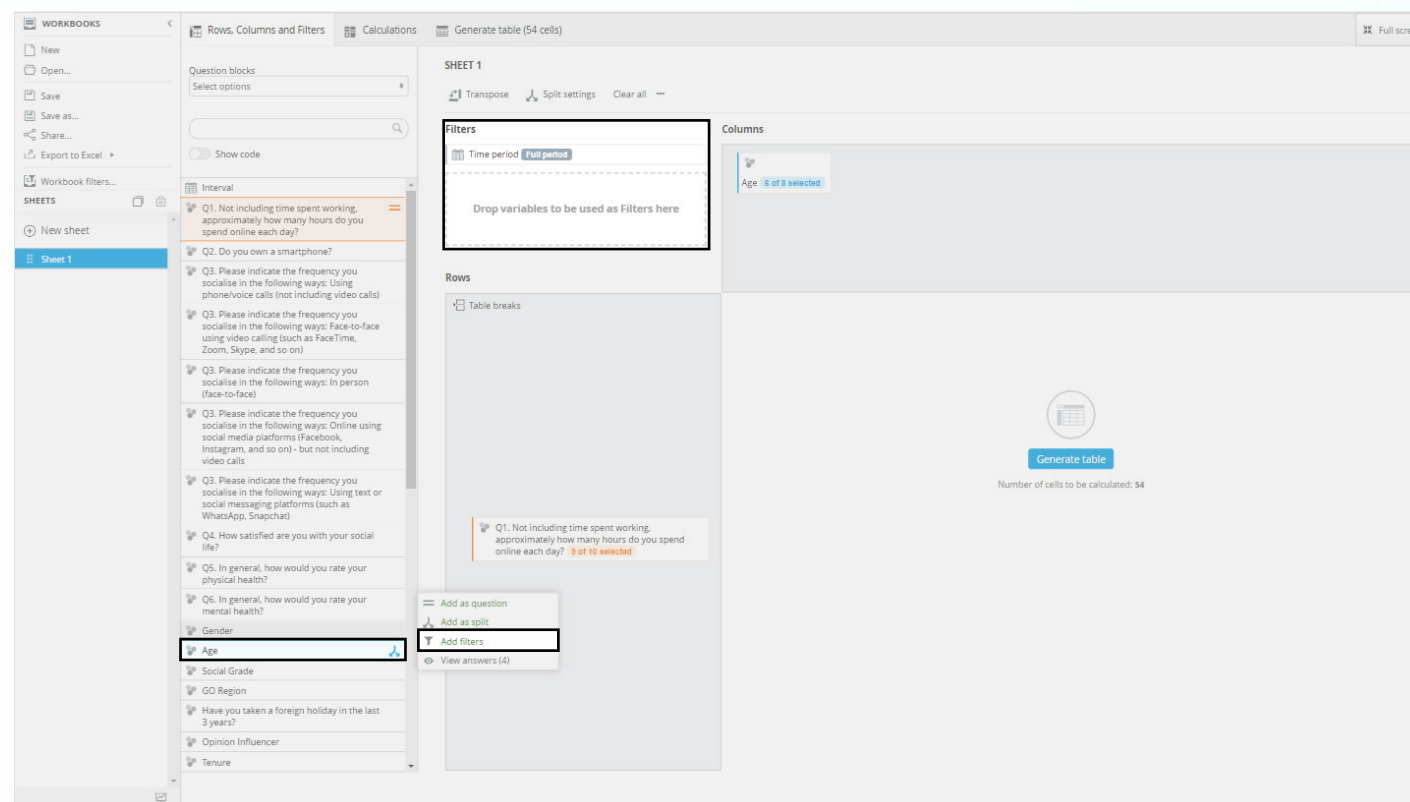
Step 2

You selection will appear in the 'Filters' section of the screen. Adding a filter means that only the responses linked to that variable will be shown. Click on the coloured part of the filter card to select a specific sub-variable to filter by. For example, selecting Gender as a filter will show all responses from everyone who answered the question on gender. You need to select a specific gender to filter by to make the results more useful. In the example below, choosing this will only show data for the respondents who identified their gender as male.

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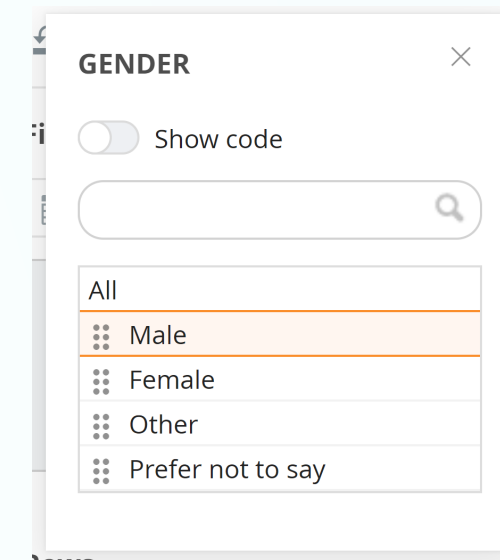
Step 3

When you are happy with your selection, select **'Generate Table'**. Your selected filter(s) will be automatically applied to your table. Table Lab will show what filters are active above the table, which you can go back and edit at any time.

WORKBOOKS
New
Open...
Save
Save as...
Share...
Export to Excel
Workbook filters...

| Rows, Columns and Filters | Calculations | Generate table (54 cells) |

Sheet 1

Time period: 2022-05-25 to 2022-05-26
Filter: Gender (Male)

|		Age					
		18-24	25-34	35-44	45-54	55-64	65+
		%	%	%	%	%	%
Q1. Not including time spent working, approximately how many hours do you spend online each day?	Less than 1 hour	4%	1%	3%	4%	8%	8%
	Between 1-2 hours	14%	13%	20%	26%	35%	39%
	Between 2-3 hours	22%	24%	30%	34%	20%	26%
	Between 3-4 hours	14%	18%	12%	15%	13%	13%
	Between 4-5 hours	17%	15%	10%	4%	12%	4%
	Between 5-6 hours	8%	7%	9%	7%	4%	6%
	Between 6-7 hours	5%	8%	5%	1%	4%	1%
	Between 7-8 hours	1%	4%	2%	1%	1%	0%
	More than 8 hours	12%	9%	7%	8%	3%	3%

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Getting Started in Table Lab

Saving and Exporting Tables

The great thing about Table Lab is that you can create extremely customised tables very quickly and save them to a library of tables that you can access at any time. You can also export your tables as fully editable Excel files.

Step 1

To save your table for the first time, find the Workbooks panel on the left of the screen and select **'Save as'**. Table Lab will prompt you to name your table, add an optional description, and choose whether you want this workbook to load automatically when you start up Table Lab.
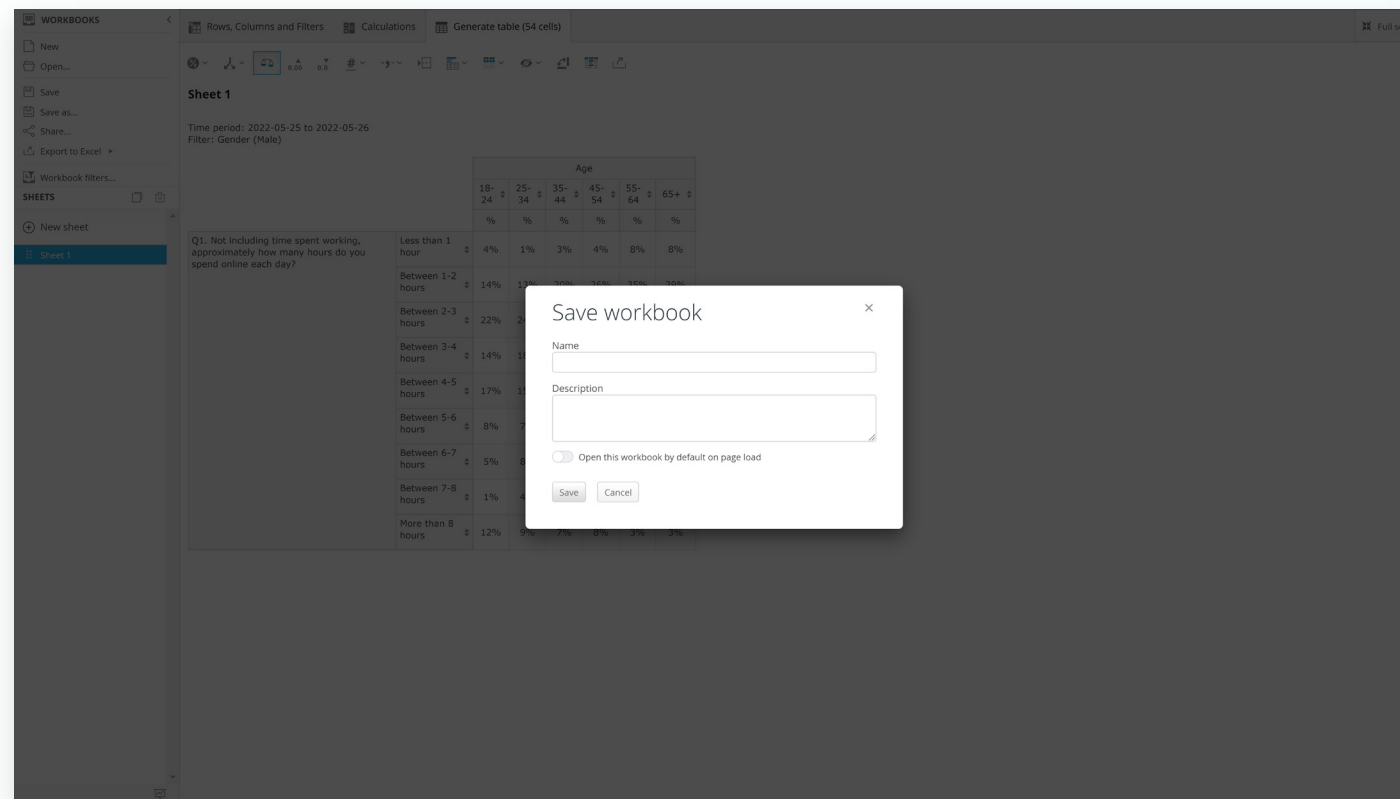
Step 2

If you want to make further changes to your table, go ahead. When finished you can update the existing save file by selecting **'Save'**, or save as a new table by selecting **'Save as'** just as you would in other programs.

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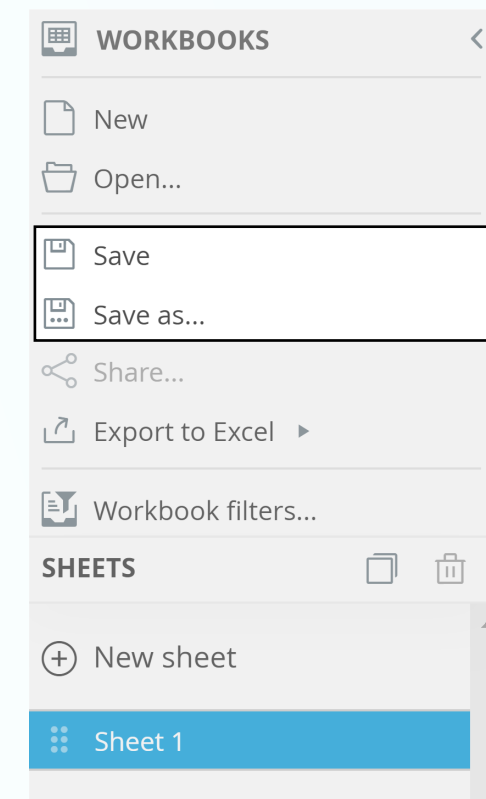
Step 3

To export your workbook, hover on the **'Export to Excel'** button in the Workbooks panel and select the option you want. Follow the prompts to save the Excel file to your system.

Getting Started in Chart Lab

Introduction

Chart Lab lets you visualise your data using custom charts that you add to presentation decks. You can create presentation decks from scratch in your portal or upload your own PowerPoint layout master templates to use.

Chart Lab is a powerful data visualisation tool that lets you combine different chart types, tables, and other elements to create engaging decks that can really be useful in telling the story of your data. These decks can also be exported to PowerPoint and PDF to share and present.

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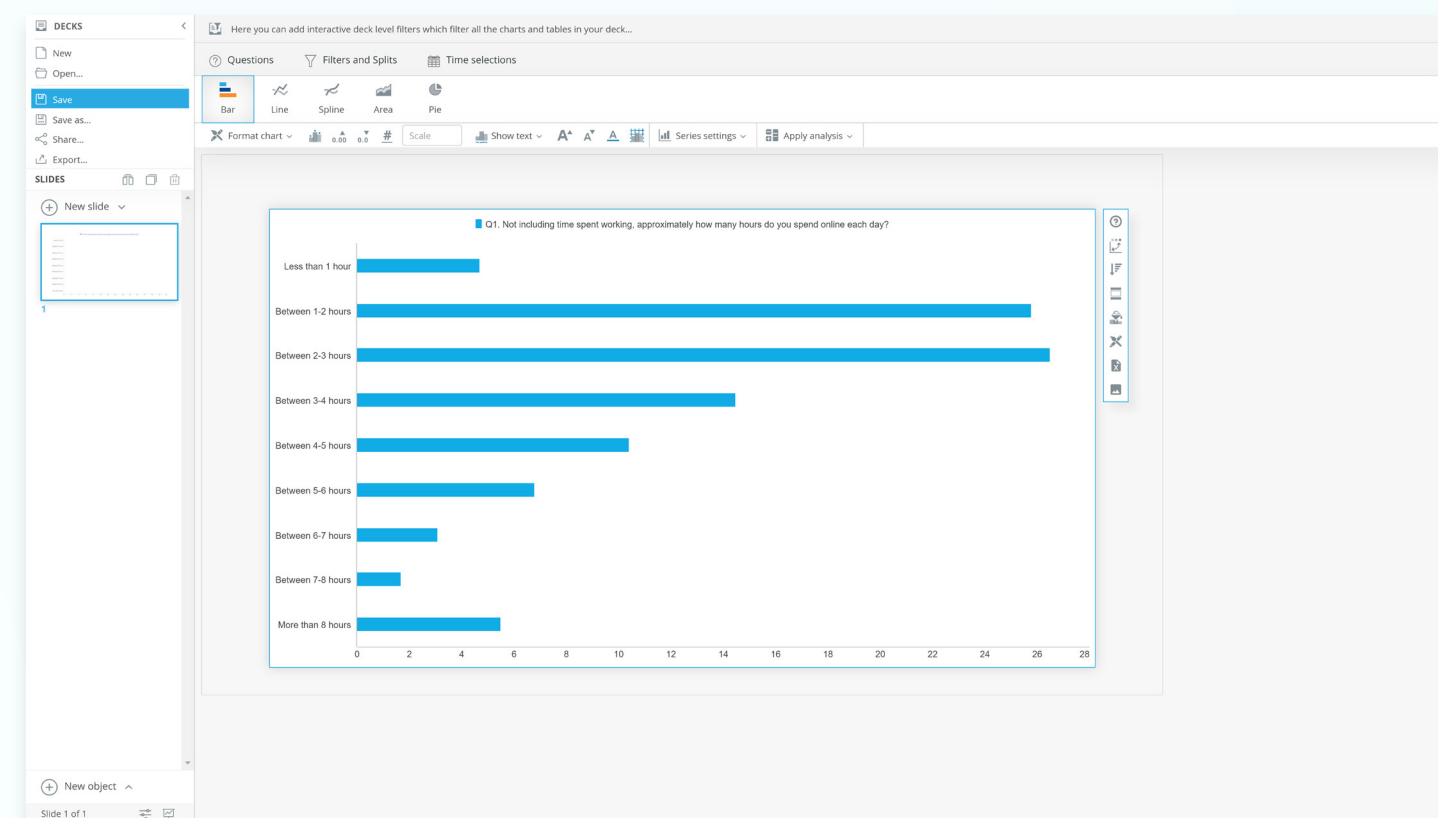
Getting Started in Chart Lab

Creating Charts
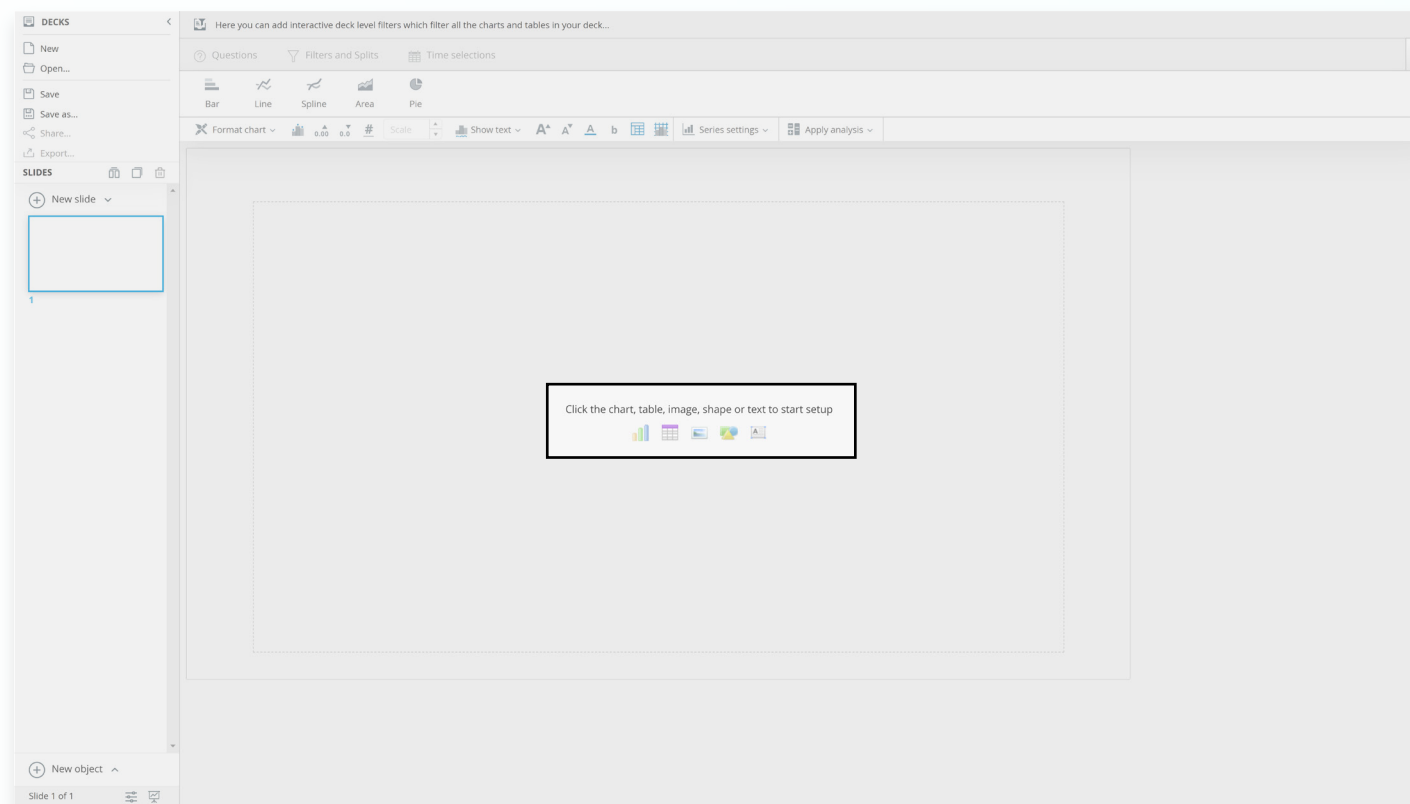
Creating charts in Chart Lab is quick and easy. Once you learn this, you can quickly put together different kinds of charts to create engaging presentation decks.

Step 1

When you first open Chart Lab, you will see a blank slide with 5 icons in the centre of the screen. Click on the first icon to start creating a new chart.

Quick Tip The icons in order are for: Charts, Tables, Importing Images, Creating Shapes, and Text Boxes.
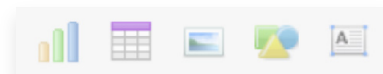
Step 2

The **Questions** panel should automatically open. Select the question you want to visualise and the specific answers you want to include. Not selecting any answers will default to all of them being included. When you are happy, click on **'Calculate result'** in the centre of the screen.
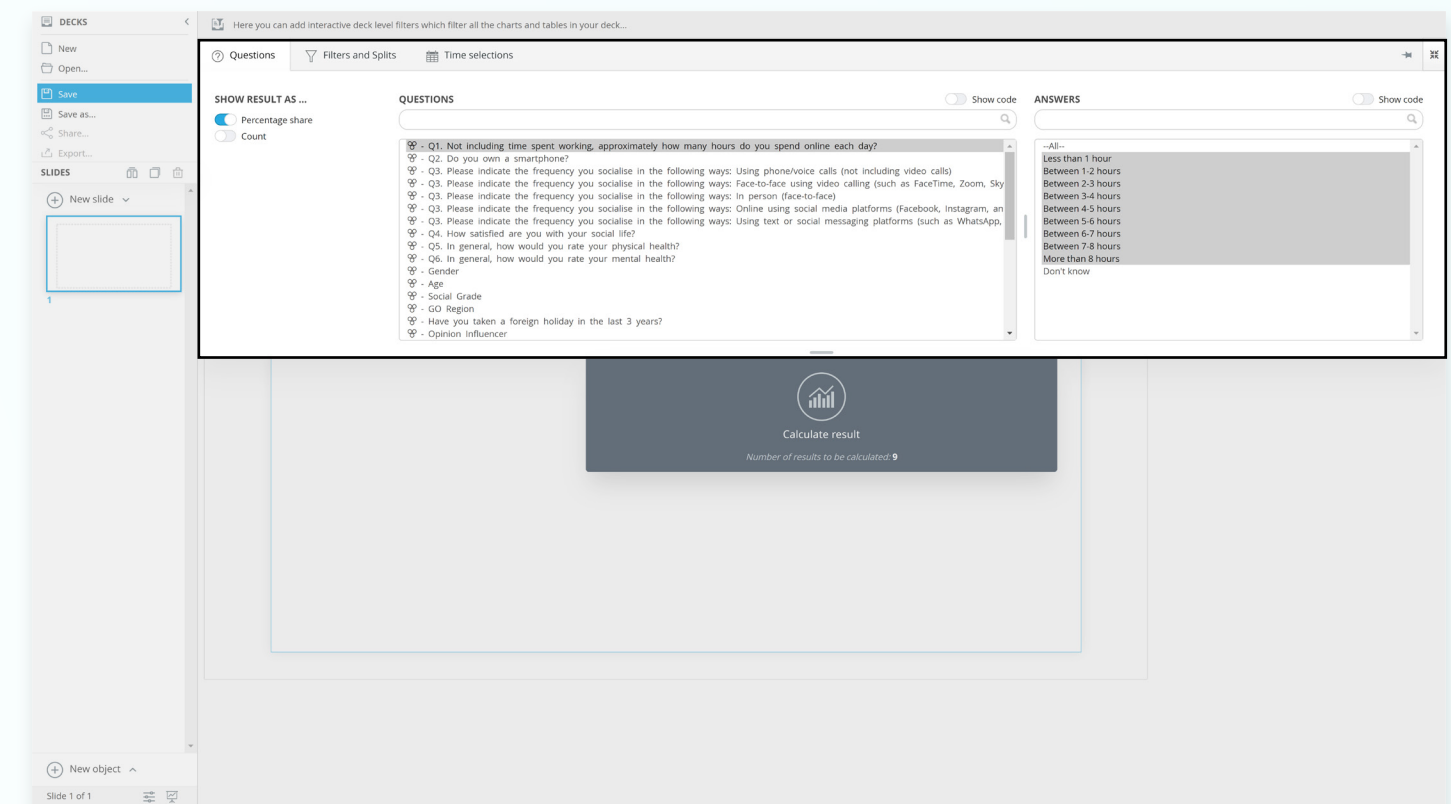
Quick Tip To select multiple Questions or Answers, you can click and drag to quickly select adjacent options, or hold Ctrl/Cmd while clicking to select multiple non-adjacent options.

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Step 3

The default chart is a horizontal bar chart (shown below). You can change the chart type using the buttons near the top of the window. Click on a button to see a context menu open with chart variations.
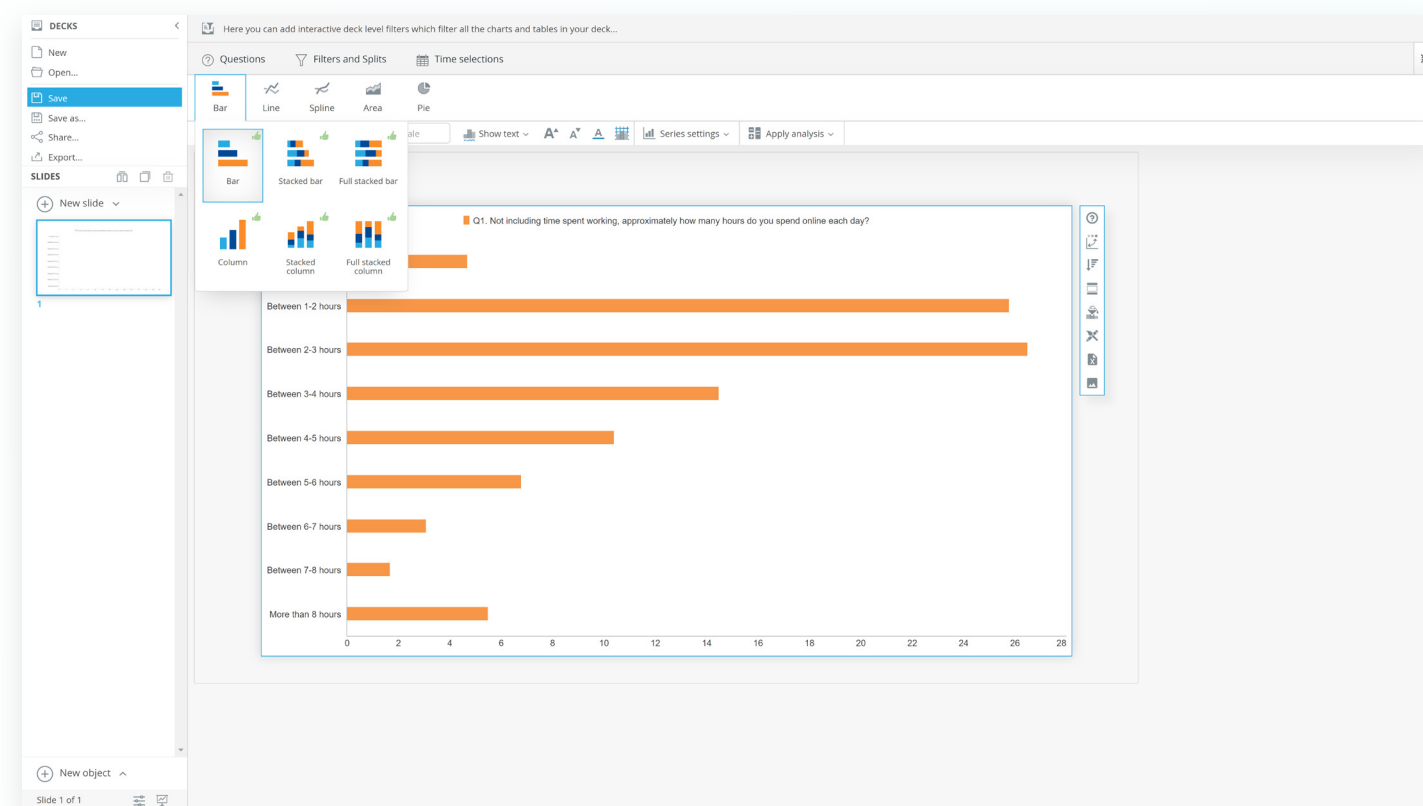
Shown below is the same data but as an area chart. Other charts you can make include, stacked bar charts, pie and donut charts, and line charts.
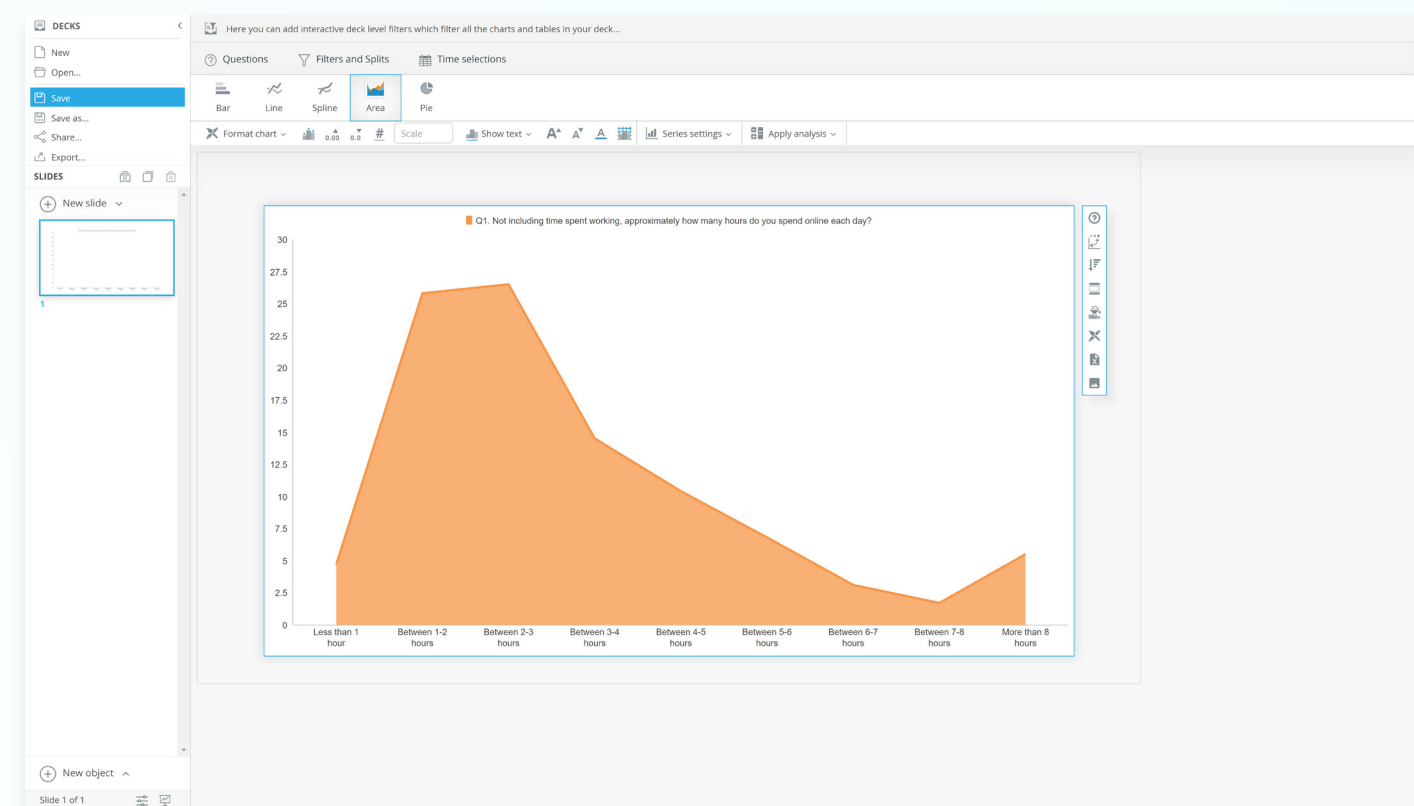
Quick Tip You can change the question being visualised at any time without deleting the existing chart by selecting the 'Questions' tab again.

Questions

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Getting Started in Chart Lab

Formatting Charts

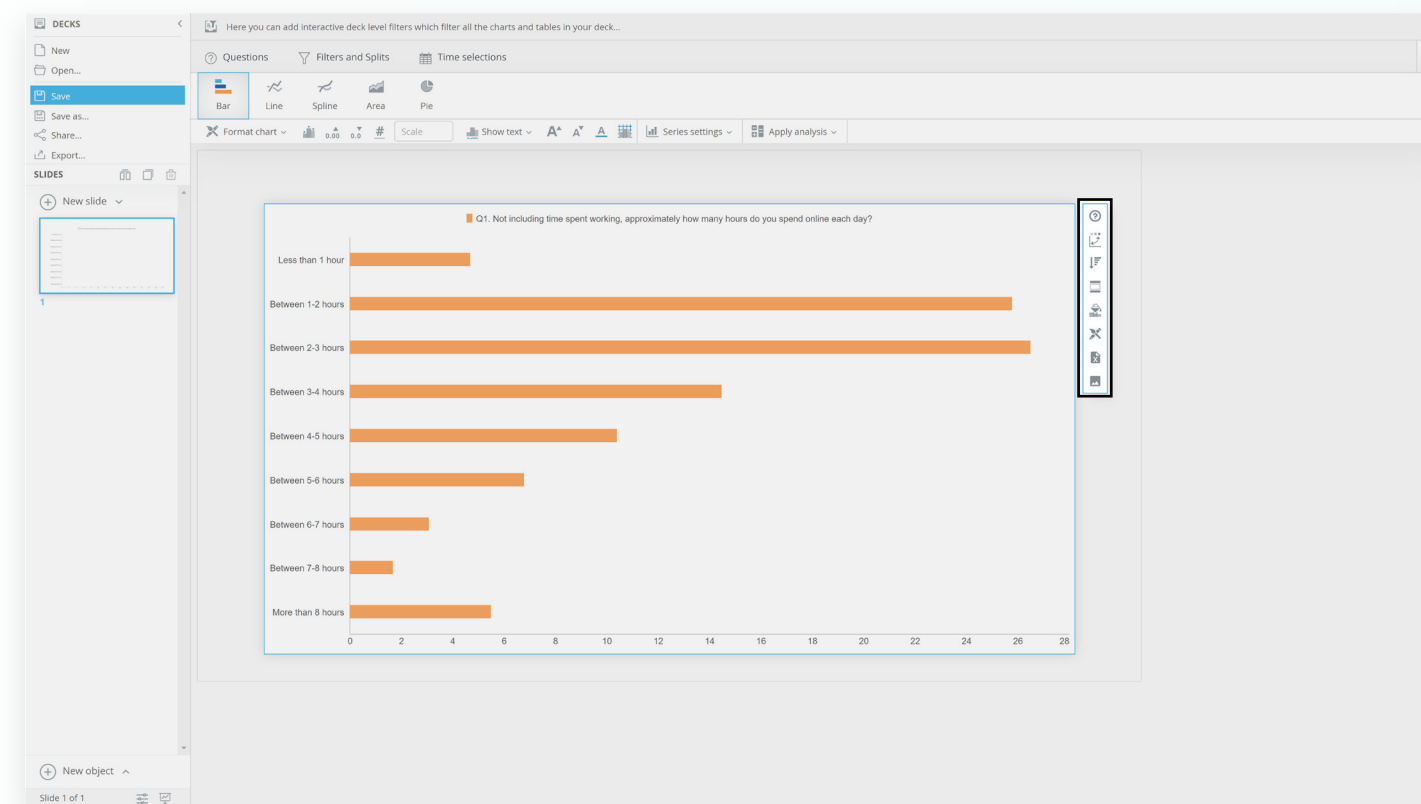Once you have the structure of your chart set up, you can format almost every part of it. This is extremely useful if you want your visualisations to conform to any existing branding or presentation template.

Step 1

Click on the chart you want to format to open up the chart menu to the right.

'Axis and legend' and **'Sorting'** are **'Series settings'** that allow you to play with the structure of the chart like swapping axes, rearranging the order that the data is shown, and more.

'Chart Title and Footer' and **'Series Colours'** open up a detailed formatting menu where you can change almost any cosmetic aspect of your chart. This includes formatting the axis scale, adding legends, adding gridlines, changing fonts, and more.

Axis and legend

Sorting

Chart Title and Footer

Series Colours

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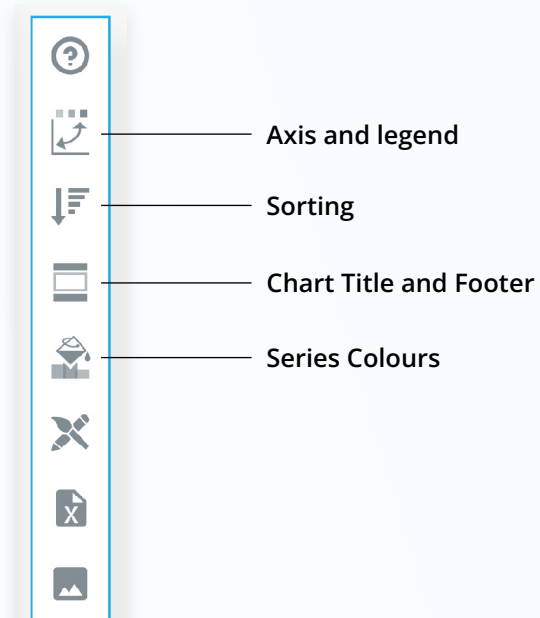
Step 2

Click on **'Series Colours'** to open up the complete menu on formatting the colours of your chart. There are several ways to set the colours of your chart. To quickly set it to a single colour of your choice, 'Select colour' and choose from the palette, or enter the colour code.
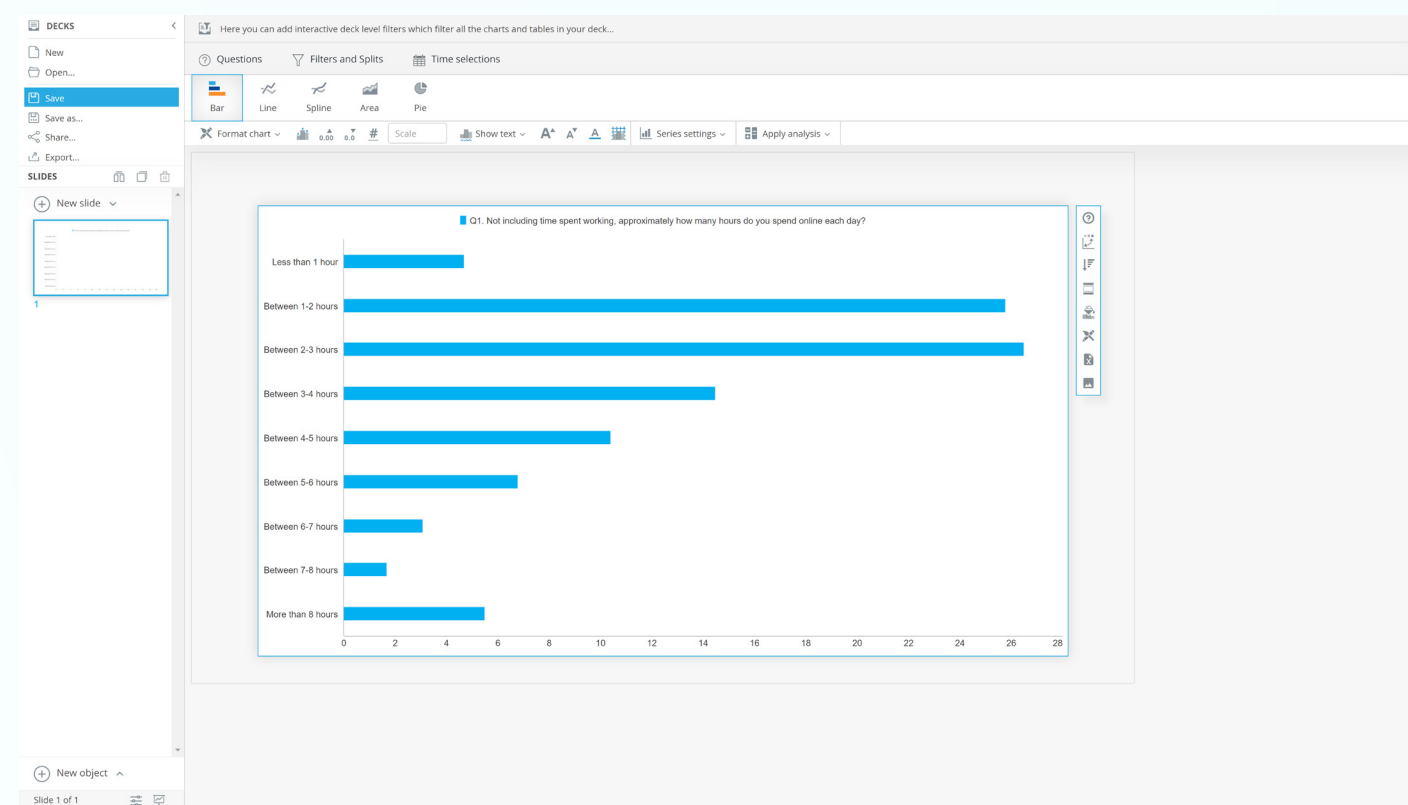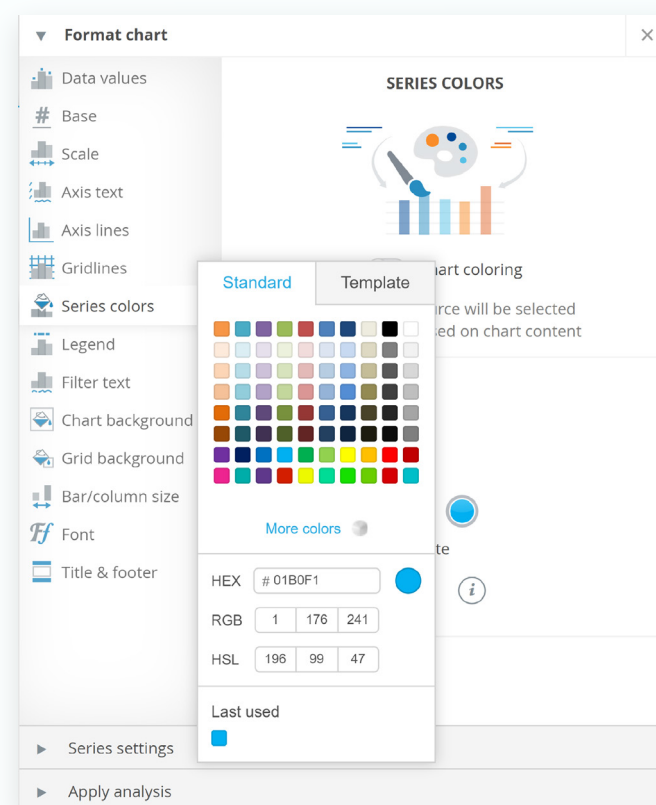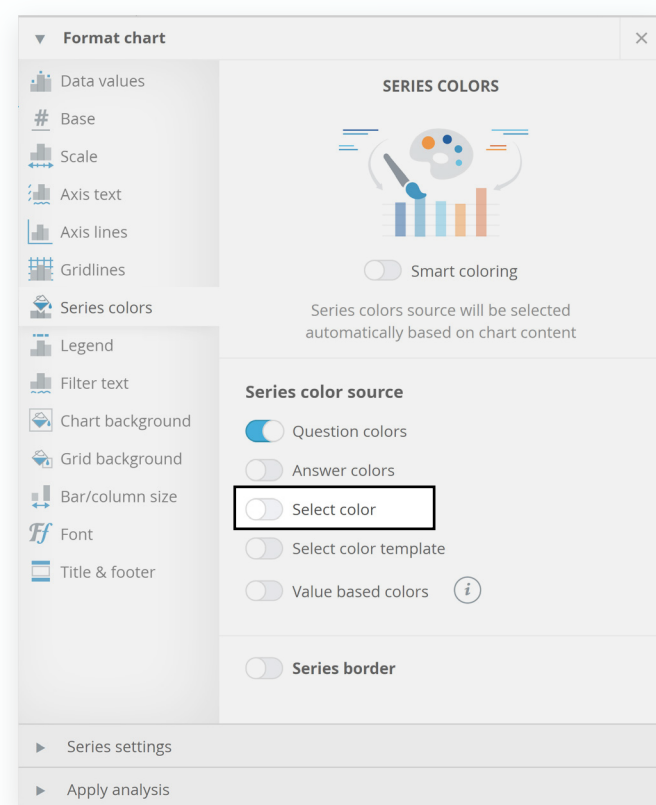
Quick Tip Selecting 'Value based colours' lets you set up parameters where the bars will change colour if they go above or below a certain value. This is useful for drawing attention to outliers.

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Getting Started in Chart Lab

Setting Up Decks

Now you know how to create charts, this is how to set up slide decks in Chart Lab.

Step 1

The panel on the left side of the screen contains the **Decks** and **Slides** menus. These contain everything you need to create, format, and save your decks. When you start a new deck, it will contain one slide. Click on **'New slide'** to add more. Use the slide viewer to navigate between slides.
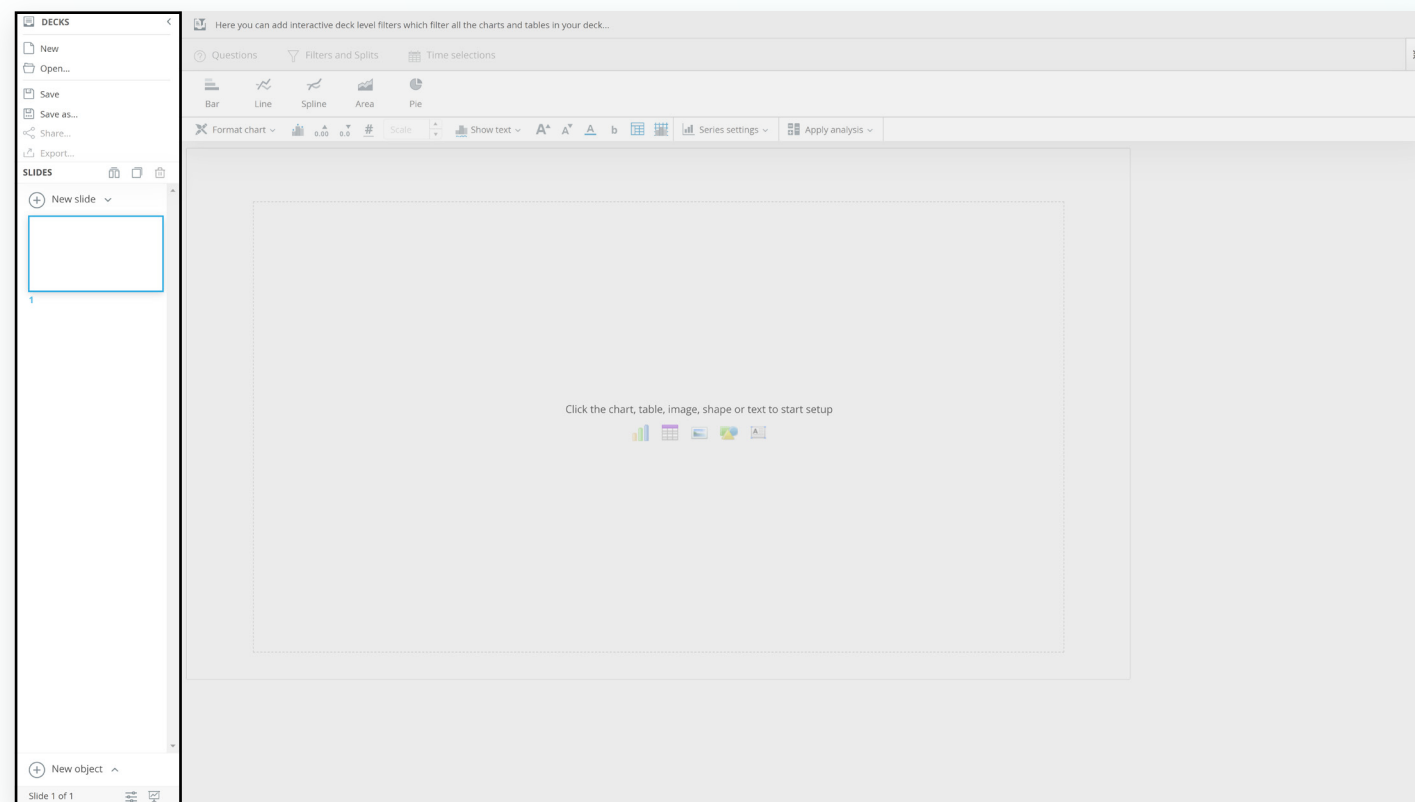

Right clicking on a slide thumbnail opens up more options, including the ability to rename, duplicate, and delete slides. Be careful when deleting slides as you cannot undo it. Make sure you save your work before making big changes.


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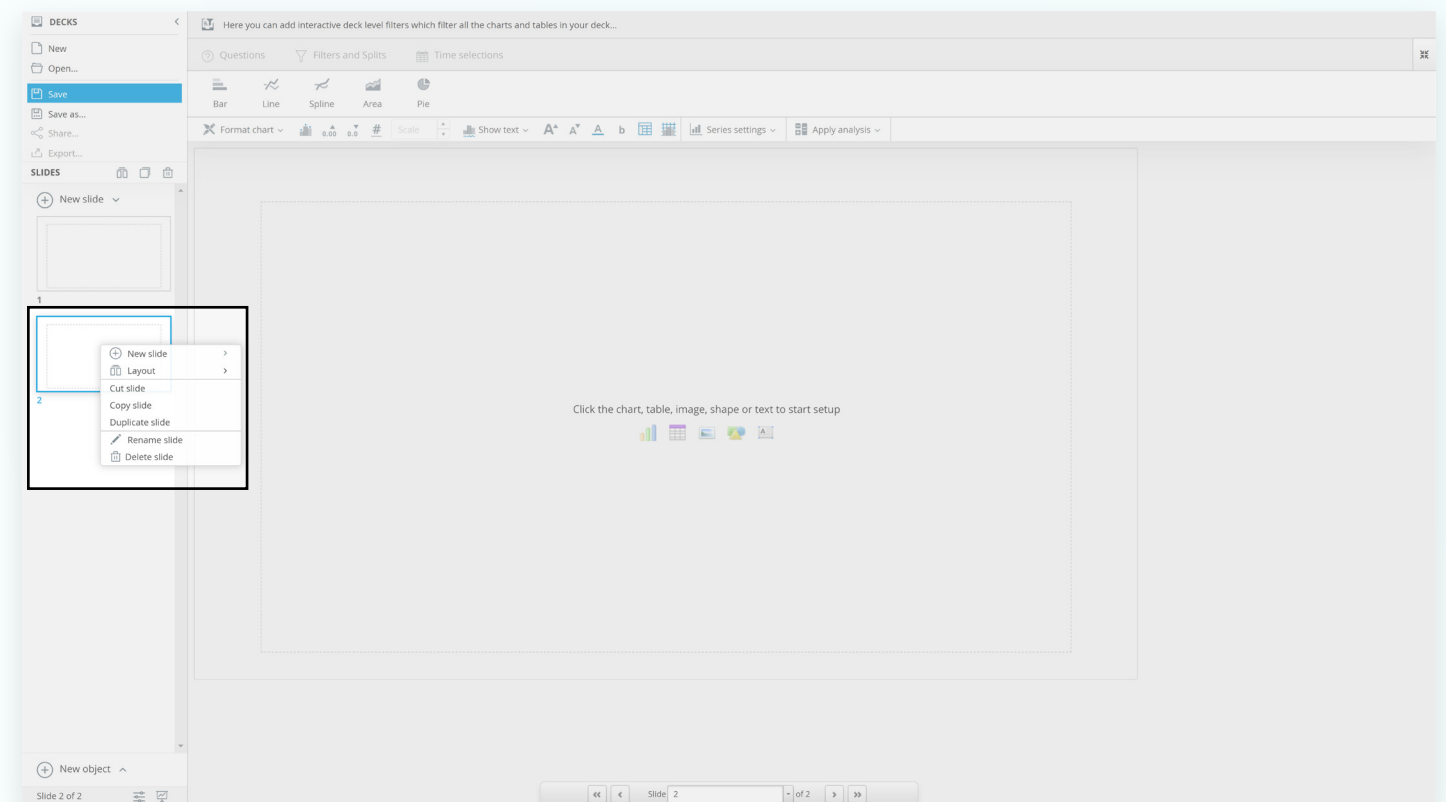
Step 2

At the top of the Slides panel, there are 3 icons: **'Slide layout'**, **'Duplicate selected slide(s)'** and **'Delete selected slide(s)'**. Clicking on **'Slide layout'** opens up the pop up menu shown below.
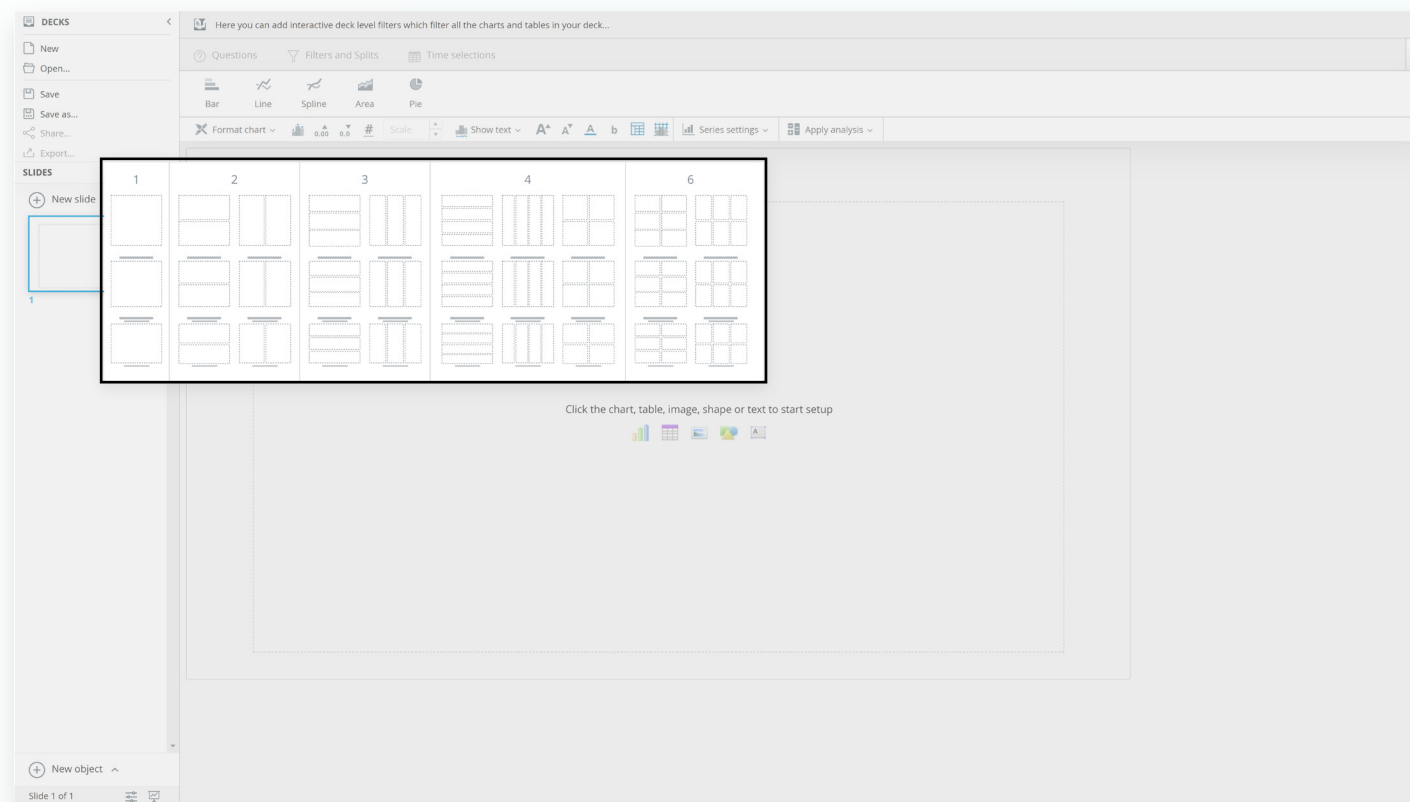
Step 3

When you select one of these options, the current slide you have selected will change to that layout. This saves you from having to make layouts manually. You can also create your own elements by selecting **'New object'** at the bottom left of the screen.
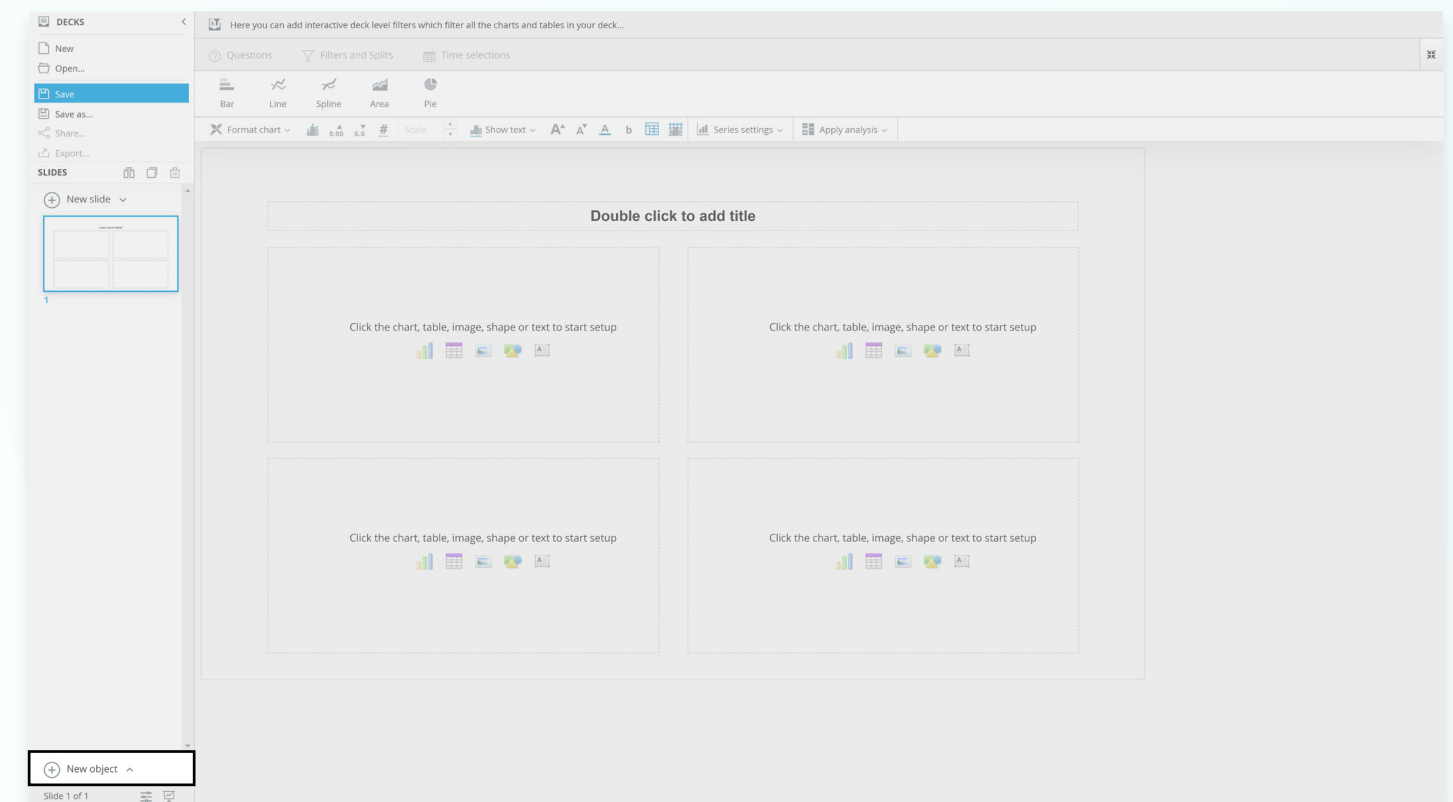
Quick Tip You can edit your layouts at any time. Click and drag elements to reposition them. Click and drag on the outlines of the elements to resize them.

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Getting Started in Chart Lab

Saving and Exporting Decks

Once you have created your deck, don't forget to save it for future use. You can present your decks in the Self-analysis Portal or export to PowerPoint, PDF, or PNG.

Step 1

You can save your work at any time. When saving your work for the first time, you will need to name your project and you have the option to write a description. You can also choose to have this project automatically load when you open Chart Lab next time.
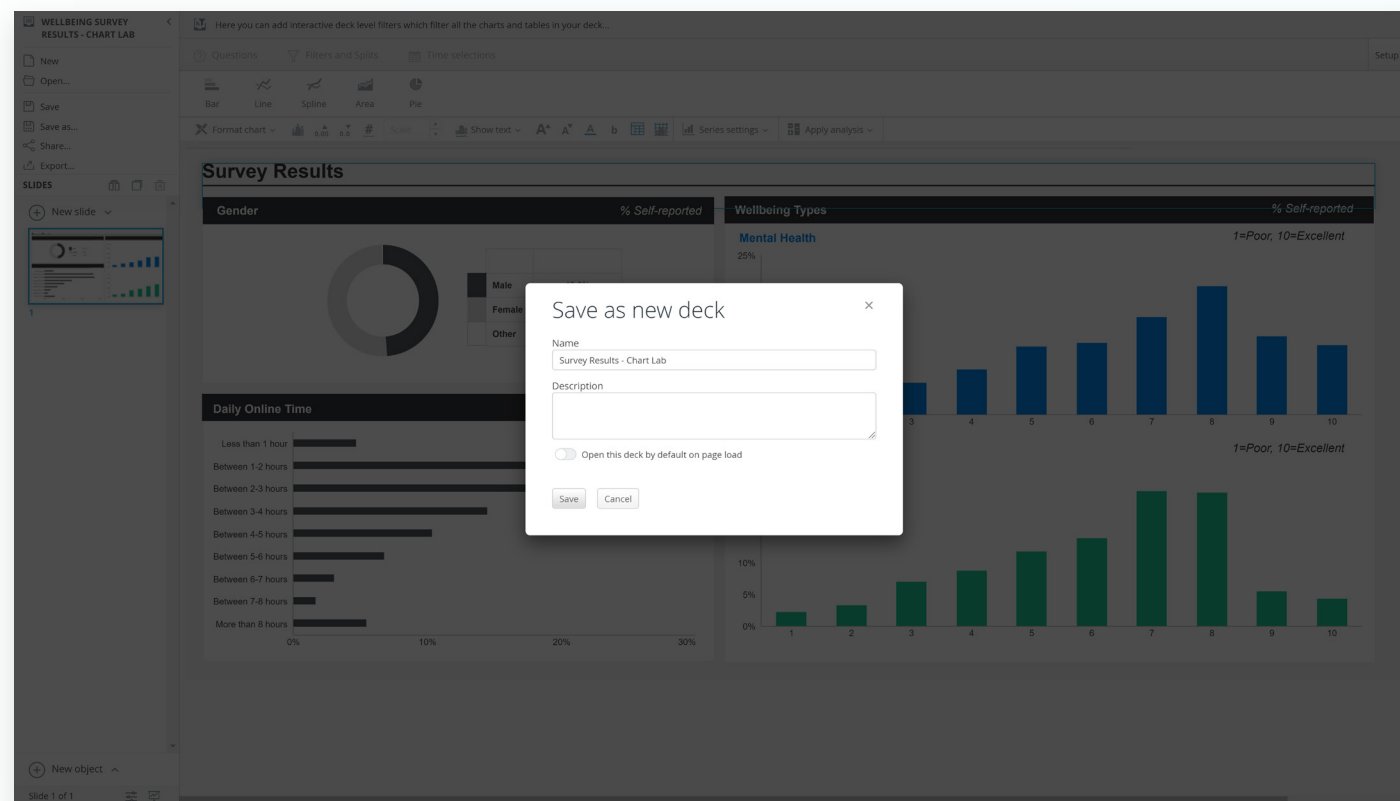
Step 2

If you want to edit a deck whilst keeping an undedited version, click on **'Save as'** to fork the project a create a new named deck. Once you make changes, click **'Save'** to keep them.

Step 2

Click on 'Export' to open up the menu seen below. From here, you can select what format to export your deck in. When your deck is ready to download, it will appear under **'Latest Exports'**.

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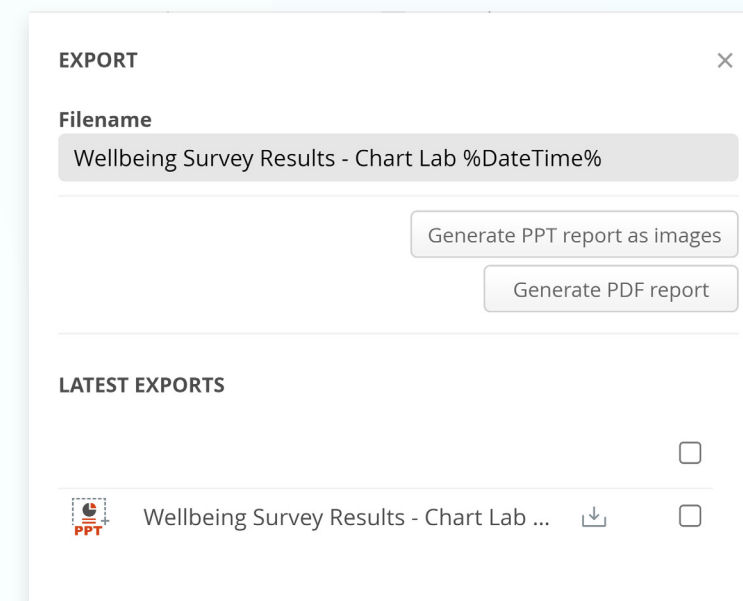
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At Yonder Data Solutions, our purpose is in our name. We exist to help our clients go further with focus.

We are a trusted fieldwork and data collection company. We partner with out clients to provide high-quality data capture and analytics solutions that unlock opportunity and drive business success.

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