



Making your InstantAtlas™ Map Zoom to Filters

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1. Introduction

InstantAtlas™ is award-winning software for publishing eye-catching, stand-alone, dynamic web reports that make the regional and local patterns in your data easy to see. You can create interactive atlases, dashboards, profiles, or key indicator reports that allow information professionals, analysts, policy advisors and management executives to view and explore patterns, monitor key indicators, present trends and support decision-making. For more information about InstantAtlas dynamic reports, please visit www.instantatlas.com.

InstantAtlas dynamic reports support filtering. By clicking an item in the 'Filter' drop down list, you can filter the data displayed in the report. Imagine for example that you have published a report showing statistics for community districts in New York City. You could include New York boroughs as filters (community districts are grouped into boroughs). Clicking the name of a borough in the Filter drop down list would filter the data in the report. For example, if you clicked 'Manhattan' in the Filter drop down list, data for community districts in Manhattan only would be displayed. Optionally, the map would automatically zoom to the borough selected.

Setting up filters in InstantAtlas is described in the user guide for the Data Manager (Excel or Access format) that you have purchased. However, making the map zoom can be considered an advanced use of InstantAtlas and this guide has been created to illustrate the process.

The objective of this guide is to describe the process for making an InstantAtlas dynamic report zoom to a filter. It is assumed that the

InstantAtlas software has been installed on the hard drive of your computer and that you have read the Getting Started, Publisher and Data Manager user guides (pdf) supplied with the software.

2. How a Filter Map Zoom Works

The dynamic report must include a contextual geography that contains the areas in the Filter drop down list. Otherwise the report cannot know which area to zoom into when you apply a filter. Assuming that an appropriate contextual geography has been included, the report then simply needs to know which geographic feature to zoom into when each filter item is clicked.



Please note that if you do not want your map to zoom to a filter but your report is set up so that it zooms, you can disable this functionality in the properties of the Data Explorer in the Designer.

3. Worked Example (no Comparison Geographies)

In this worked example, a dynamic report will be published for the state of Louisiana (USA). The aim of the report is to present data for parishes in Louisiana. There are 64 parishes in Louisiana. The parishes are grouped into 5 regions. The report will have a 'Region' filter. When the name of a region is clicked in the Filter drop down list, the map will zoom to the region in question. There is no requirement to display any comparison geographies in the report.

First the InstantAtlas Publisher is started.

Choose Your Template

For the purpose of this worked example, the Single Map template is selected. Note that all templates support filter map zoom functionality.

Choose Your Base Geography

The base geography chosen is a digital map file with Louisiana parish boundaries. The appropriate fields are chosen in the 'Feature code field' and 'Feature name field' drop down lists.

Choose Your Data

At this stage you can generate a data file to upload on this screen. In this example, an Excel Data Manager is used to generate the data file. The screenshots below show the relevant worksheets of the Excel Data Manager. Window splits have been added simply to allow you to see both the top and bottom of the worksheet. Note in Figure 1 that a Regions filter has been created (column D).

Figure 1

	A	B	C	D	E
1	polygon			filter	
2		Louisiana Parishes	Link	Regions	
3	22001	Acadia	notes.htm	Cajun	
4	22003	Allen	notes.htm	Cajun	
5	22005	Ascension	notes.htm	Plantation	
6	22007	Assumption	notes.htm	Cajun	
7	22009	Avoyelles	notes.htm	Central Louisiana	
8	22011	Beauregard	notes.htm	Central Louisiana	
9	22013	Bienville	notes.htm	Northern Louisiana	
10	22015	Bossier	notes.htm	Northern Louisiana	
11	22017	Caddo	notes.htm	Northern Louisiana	
12	22019	Calcasieu	notes.htm	Cajun	
62	22119	Webster	notes.htm	Northern Louisiana	
63	22121	West Baton Rouge	notes.htm	Plantation	
64	22123	West Carroll	notes.htm	Northern Louisiana	
65	22125	West Feliciana	notes.htm	Plantation	
66	22127	Winn	notes.htm	Central Louisiana	

Figure 2

	A	B	C	D	E	F	G
1			Population				
2			Population per Square Mile				
3			notes.htm	notes.htm	notes.htm	notes.htm	notes.htm
4			numeric	numeric	numeric	numeric	numeric
5	Codes	Names	1960	1970	1980	1990	2000
6	22001	Acadia	76.20	79.52	86.11	85.28	89.82
7	22003	Allen	25.98	27.20	27.98	27.76	33.27
8	22005	Ascension	95.77	127.18	171.70	199.64	262.78
9	22007	Assumption	53.12	58.03	65.20	67.18	69.05
10	22009	Avoyelles	45.17	45.35	49.72	47.04	49.83
11	22011	Beauregard	16.54	19.73	25.59	25.93	28.43
12	22013	Bienville	20.63	19.77	20.21	19.71	19.43
65	22119	Webster	66.62	67.02	73.22	70.46	70.20
66	22121	West Baton Rouge	77.38	88.20	99.82	101.56	112.98
67	22123	West Carroll	39.45	36.25	35.95	33.65	34.26
68	22125	West Feliciana	30.53	28.02	30.01	31.81	37.22
69	22127	Winn	16.87	17.22	18.15	17.11	17.77

The 'Export' button is clicked to generate the data file (data.xml), which is then uploaded into the Publisher.



Choose Your Map Features

All parishes in the state of Louisiana are selected.

Choose Your Contextual Geographies

A digital map file containing Louisiana region boundaries must be added to the report at this stage. Otherwise, there will be no geography for the map to zoom to when a filter is applied. Figure 3 shows that a shapefile called 'louisiana_regions.shp' has been added.

Figure 3

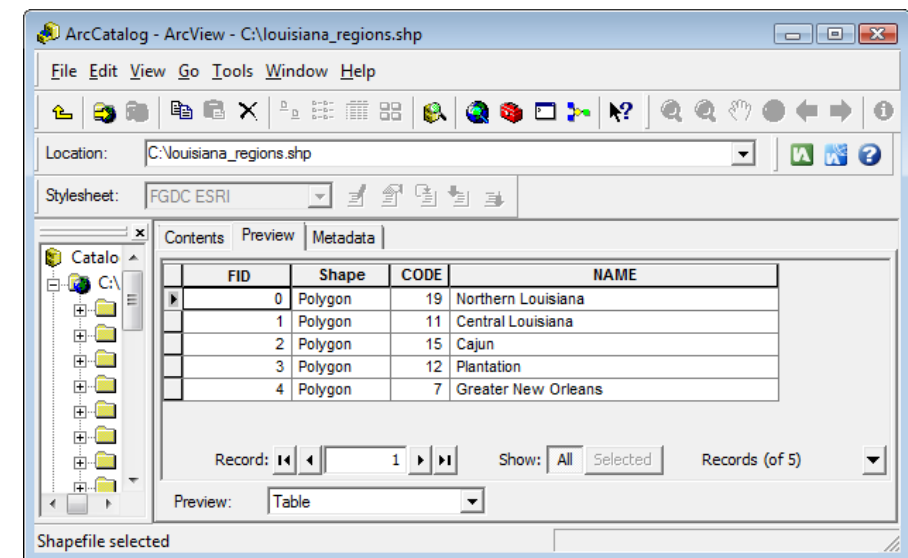


By default this will only include the features which overlap the base Geography. If you wish this to be a different feature subset, you can click the 'Properties' button for further options.

Once the Louisiana region boundaries digital map file has been added as a contextual layer, the contents of the field chosen as 'Feature code field' must contain entries that exactly match the data entries of column D in Figure 1.

In Figure 3, the field chosen as the Feature code field is called 'NAME'. It contains the same filter entries as those supplied in the Excel Data Manager. If the digital map file is opened using a desktop GIS package such as ArcView, this can be confirmed (see the attribute table of the Louisiana regions digital map file in Figure 4).

Figure 4



Choose Your Background Images

Any required index files for background mapping are added at this stage. Background mapping has no bearing whatsoever on filter map zoom functionality.

Choose Settings For Your Dynamic Report

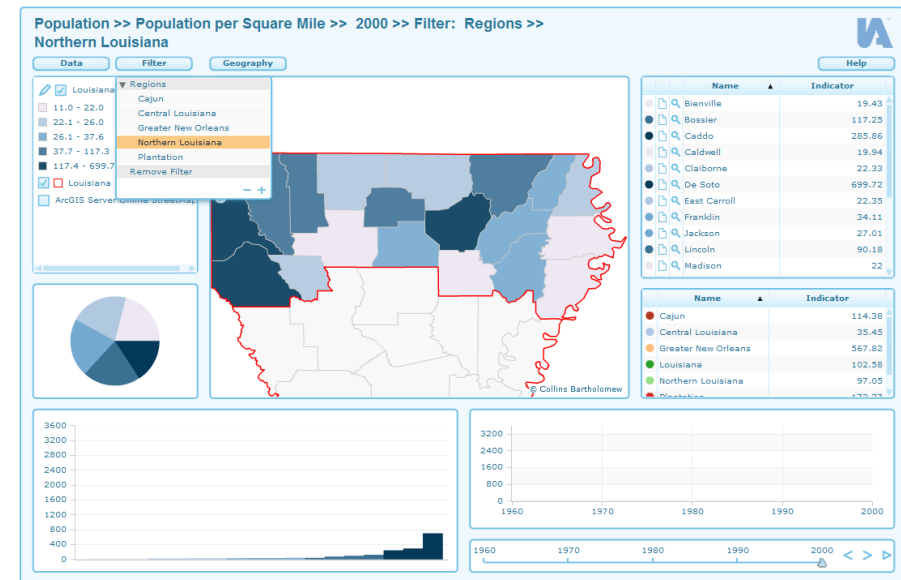
Any required settings are entered at this stage. None of these settings have any bearing on filter map zoom functionality.

Choose Your Output Folder

An output folder is chosen at this stage. Once this has been done, the 'Publish' button is clicked and the dynamic report is published.

In the published report, tick the box of the contextual layer the filter zoom shall use, to make it visible in the map. The Filter drop down list displays the names of the regions in Louisiana. Clicking a region name will cause the map to zoom to the region (see Figure 5).

Figure 5



4. Worked Example (with Comparison Geographies)

Imagine that you have data values for Louisiana regions and you wish to display these as comparison geographies in the dynamic report. Comparison geographies and their data values are displayed in a dedicated table of the dynamic report.

If the names of your comparison geographies do not contain any spaces, you may simply add these to the Excel Data Manager as normal (see Figure 6). As long as the names in your filter exactly match the names in column A (excluding the # prefix), the map will zoom when you click a filter.

Figure 6

	A	B	C	D	E	F	G
1			Population				
2			Population per Square Mile				
3			notes.htm	notes.htm	notes.htm	notes.htm	notes.htm
4			numeric	numeric	numeric	numeric	numeric
5	Codes	Names	1960	1970	1980	1990	2000
6	22001	Acadia	76.20	79.52	86.11	85.28	89.82
7	22003	Allen	25.98	27.20	27.98	27.76	33.27
8	22005	Ascension	95.77	127.18	171.70	199.64	262.78
9	22007	Assumption	53.12	58.03	65.20	67.18	69.05
10	22009	Avoyelles	45.17	45.35	49.72	47.04	49.83
11	22011	Beauregard	16.54	19.73	25.59	25.93	28.43
12	22013	Bienville	20.63	19.77	20.21	19.71	19.43
65	22119	Webster	66.62	67.02	73.22	70.46	70.20
66	22121	West Baton Rouge	77.38	88.20	99.82	101.56	112.98
67	22123	West Carroll	39.45	36.25	35.95	33.65	34.26
68	22125	West Feliciana	30.53	28.02	30.01	31.81	37.22
69	22127	Winn	16.87	17.22	18.15	17.11	17.77
70	#Cajun	Cajun					
71	#C.Louisiana	C.Louisiana					
72	#N.Orleans	N.Orleans					
73	#Plantation	Plantation					
74	#N.Louisiana	N.Louisiana					
75	#Louisiana	Louisiana					

If the names of your comparison geographies do contain spaces, however, you will need an alternative approach. This is because the InstantAtlas Data Managers will not allow you to enter codes for geographic features that contain spaces (to comply with the rules of XML).

The following steps illustrate the approach if the names of your comparison geographies contain spaces. First the InstantAtlas Publisher is started.

Choose Your Template

For the purpose of this worked example, the Single Map template is selected. Note that all templates support filter map zoom functionality.

Choose Your Base Geography

The base geography chosen is a digital map file with Louisiana county boundaries. The appropriate fields are chosen in the 'Feature code field' and 'Feature name field' drop down lists.

Choose Your Data

At this stage you can generate a data file to upload on this screen. In this example, an Excel Data Manager is used to generate this. The screenshots below show the relevant worksheets of the Excel Data Manager. Note that the window splits have been added simply to allow you to see both the top and bottom of the worksheet.

Figure 7

	A	B	C	D
1	polygon			filter
2		Louisiana Parishes	Link	Regions
3	22001	Acadia	notes.htm	Cajun
4	22003	Allen	notes.htm	Cajun
5	22005	Ascension	notes.htm	Plantation
6	22007	Assumption	notes.htm	Cajun
7	22009	Avoyelles	notes.htm	Central Louisiana
8	22011	Beauregard	notes.htm	Central Louisiana
9	22013	Bienville	notes.htm	Northern Louisiana
10	22015	Bossier	notes.htm	Northern Louisiana
11	22017	Caddo	notes.htm	Northern Louisiana
12	22019	Calcasieu	notes.htm	Cajun
62	22119	Webster	notes.htm	Northern Louisiana
63	22121	West Baton Rouge	notes.htm	Plantation
64	22123	West Carroll	notes.htm	Northern Louisiana
65	22125	West Feliciana	notes.htm	Plantation
66	22127	Winn	notes.htm	Central Louisiana
67	#15	Cajun		
68	#11	Central Louisiana		
69	#7	Greater New Orleans		
70	#12	Plantation		
71	#19	Northern Louisiana		
72	#Louisiana	Louisiana		



In Figure 7 you can see that the names of regions in the Filter (column D) exactly match the names of regions in column B of the Geography and Filters worksheet. This is essential if you wish the map to zoom to a region when you apply a filter. If the names do not exactly match, the map will not zoom to the filters.

Figure 8

	A	B	C	D	E	F	G
1			Population				
2			Population per Square Mile				
3			notes.htm	notes.htm	notes.htm	notes.htm	notes.htm
4			numeric	numeric	numeric	numeric	numeric
5	Codes	Names	1960	1970	1980	1990	2000
6	22001	Acadia	76.20	79.52	86.11	85.28	89.82
7	22003	Allen	25.98	27.20	27.98	27.76	33.27
8	22005	Ascension	95.77	127.18	171.70	199.64	262.78
9	22007	Assumption	53.12	58.03	65.20	67.18	69.05
10	22009	Avoyelles	45.17	45.35	49.72	47.04	49.83
11	22011	Beauregard	16.54	19.73	25.59	25.93	28.43
12	22013	Bienville	20.63	19.77	20.21	19.71	19.43
65	22119	Webster	66.62	67.02	73.22	70.46	70.20
66	22121	West Baton Rouge	77.38	88.20	99.82	101.56	112.98
67	22123	West Carroll	39.45	36.25	35.95	33.65	34.26
68	22125	West Feliciana	30.53	28.02	30.01	31.81	37.22
69	22127	Winn	16.87	17.22	18.15	17.11	17.77
70	#15	Cajun					
71	#11	Central Louisiana					
72	#7	Greater New Orleans					
73	#12	Plantation					
74	#19	Northern Louisiana					
75	#Louisiana	Louisiana					

The 'Export button' is clicked to generate the data file (data.xml), which is then uploaded into the Publisher.

Choose Your Map Features

All parishes in the state of Louisiana are selected.

Choose Your Contextual Geographies

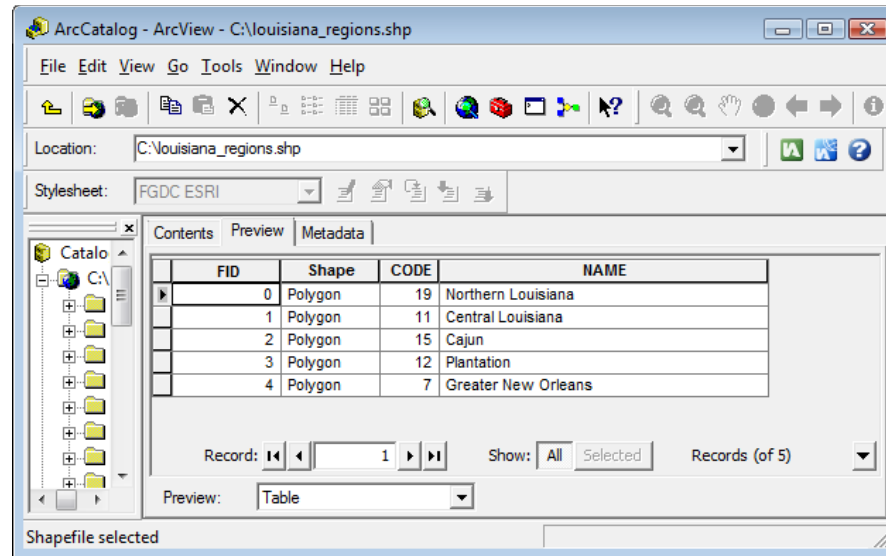
A digital map file containing Louisiana region boundaries must be added to the report at this stage. Otherwise, there will be no geography for the map to zoom into when a filter is applied. The field selected as the 'Feature code field' is called 'CODE'. The entries in this field match the codes used for the regions in the Excel Data Manager.

Figure 9



This can be confirmed by viewing the digital map using a desktop GIS package such as ArcGIS (see Figure 10).

Figure 10



Choose Your Background Images

Any required index files for background mapping are added at this stage. Background mapping has no bearing whatsoever on filter map zoom functionality.

Choose Settings For Your Dynamic Report

Any required settings are entered at this stage. None of these settings have any bearing on filter map zoom functionality.

Choose Your Output Folder

An output folder is chosen at this stage. Once this has been done, the 'Publish' button is clicked and the dynamic report is published.

In the published report, tick the box of the contextual layer the filter zoom shall use, to make it visible in the map. The Filter drop down list displays the names of the regions in Louisiana. Clicking a region name will cause the map to zoom to the region.

5. InstantAtlas Support

You can find all core user guides and a wide range of other InstantAtlas support resources at www.instantatlas.com/support.xhtml. InstantAtlas customers can login to their My InstantAtlas account and download a wide range of support resources and access a searchable knowledgebase. If these resources do not provide a solution, please contact your support provider.

