

## The Survey Template and Layout Options

In this video, I'm going to be talking in depth about the survey template, which is a unique template that Flourish has that doesn't really exist in any other visualization tool, so it definitely warrants an explanation.

So here is the survey template. The survey template is designed for survey data. So that means that each response is one row in the data. And I think I should talk first in-depth about the data structure because that makes everything else make much more sense.

So this is the data structure. It's a little bit confusing and a little bit daunting when you first look at it, but it's actually not so scary. So each row is one response to a survey data. Obviously, this doesn't just work with survey data. It also works with stuff like if you want to have a visualization of every single member of parliament, or every single member of Congress, or something like that, or every single country in the world.

It's really powerful, and it's a good way to visualize things like that, which don't always warrant a more traditional visualization type. So this is what it looks like. So imagine if instead of Layla Harvey, this was, you know, some MP or some member of Congress or country or something like that. Or if you do have survey data, this will work perfectly as well.

Like in other Flourish templates, we have all of these data column settings here. I'm going to mainly be talking about this data sheet because these are all more advanced features that I won't have time to talk about.

But, you have to understand the first data sheet before you can understand what these do. And most of the time you don't need to touch them, so I'm not really going to touch them right now. So the main thing to understand about the survey template is that you have categorical columns and continuous columns. And the categorical columns, if you imagine these are all of your rows, the categorical columns are the ones that you end up in this group by menu. So you can group by categorical columns like gender or favorite food. This was a survey. Or favorite animal.

And then they also generally will end up also in the shade by column, so I can shade all those people by the gender. And so you can see like males are yellow, and females are blue. And they're all grouped by these columns as well. So those end up in the group by column and the shade by column, and then your continuous columns are your numbers – so weight and height, in this example. I think those are the only two. Yes, indeed, weight and height. And that's what ends up in this size by column. So I can size by height, weight. So heavier, larger dot, so you can see heavier.

And then there's also these geographic columns, which are somewhat important to know because we have this option to throw everything onto a map as well. So the geographic column is these two columns, so we're looking at Nigeria for home country and Guernsey for favorite country. Just a weird example of a country. We can change it between home country and favorite country if you want, so you can see those dots move. You're getting a little glimpse right now into why this is such an interesting template, and why it's so different because everything sort of flying around. And it's really interesting to watch.

So that's the really basic data structure of the survey template. I do want to point something out really quickly, which is there's no real way to save any of this – so save any of these groupings, or colorings, or shavings, or whatever. So if I publish and embed and I go to the live preview, you can see that it's gone back to just one big blob of all the dots. And they're all the same color, and they're all the same size. In a later video, I talk about survey stories because the story editor and making a story is a way to save a view of this. It's a way to show favorite food and for that to be the view unload.

So I'm not going to talk about that right now, but know that that is the elephant in the room, if you will, in terms of using the survey template. Because, you know, the best way to really use the survey template is to use it in a story.

So some settings to be aware of. You can change the shape to square if you'd like, which is pretty cool. You can also put it in a more square view than in the circle view. You can also change to some sort of polygon. Hexagons look really nice, especially in the circle. Pretty cool. Colors will work the same as in other Flourish templates. It's quite nice to have a nice color palette because, you know, you get the different group bys and shade bys. There's options for group labels like if you want to put the labels around them, or on top of them, or above them, which makes the template really customizable. There's also options for pop ups and whether you want to show the pop up on hover or on click. So that's on hover. On click, you would actually have to click on it, but the default is hover.

There's also some options for the map, like how visible the map is. You can make the map more visible. You can make it lighter. There's animation options and stuff like that. There's options for the legend. There's lots things you can do. And I don't want to go just straight into them because this is a really complicated template, and I'm probably just going to end up confusing you.

But just know that this is what the data structure is like, and if you really want to make the most of this template, you should be using it as a story unless you're just doing some sort of data explorer. So, for example, just embedding this, so it will look like this. And sort of leaving this option right here and asking people to investigate it and discover it themselves. That's really a good way to do it. But if not, then you should be doing a story, and look out for a later video about survey stories.

So welcome back. In this video, I'm going to talk about my layout, and the different layout options that you have in Flourish and adding things like headers and footers. So the main thing to know is that every Flourish template has basically the same layout settings. They're usually these bottom three settings here: layout, header and footer. Almost every single template has the same ones. There's only one, I believe, that doesn't actually have this layout option, but they're basically in every template.

So all of them allow you to change the font, so that's the first setting here. The default font is always Sans Pro, but you can change it to, you know, a nice Serif font or some weird cursive-looking font.

And there are other options in this layout setting. So you can turn the background color to something else. You can actually add an image as a background, as well, and there's some options about filling and fitting. And then there's also this layout order option.

But I'm going to show you headers and footers first because it will make this make a bit more sense. So header and footer work as you normally think they would. In header, there's a title, subtitle and text, so like text below the subtitle options. So in this case, I'm going to add footer like, "Hello, I am a bar chart race." This is our nice, new bar chart race template. Watch it go. And a silly little subtitle as well. This really is a virtual race.

And each of these is also styleable, so you can change the color of these as well. You can change the size. You can make it bigger.

And then back in this layout tab, you also have a couple of different options for how the chart itself is laid out. So I chose the bar chart race because it has this control option, which is something you can move around with layout order setting. So this is the main one, where everything is kind of at the top. But you can also change it so the header and the control, this replay button, are both the bottom. You can change it so the controls at the bottom and the headers at the top, or the opposite. You can also change the amount of space in between these sections. You can also change the alignment of the header, and the control, and things like that.

And then there's also footer options as well, where you can add a source name. So I'm not exactly sure where this data is from, but Source Bank, a World Bank. And then some URL, and that actually becomes clickable. There's also some notes. You can add notes at the bottom as well. You can change the alignment of that.

And then for paying customers and newsrooms, we also allow them to upload their logo to the bottom right corner. Well, bottom right is the default, but you can also put it in the left corner. And you can change the alignment on that as well.