



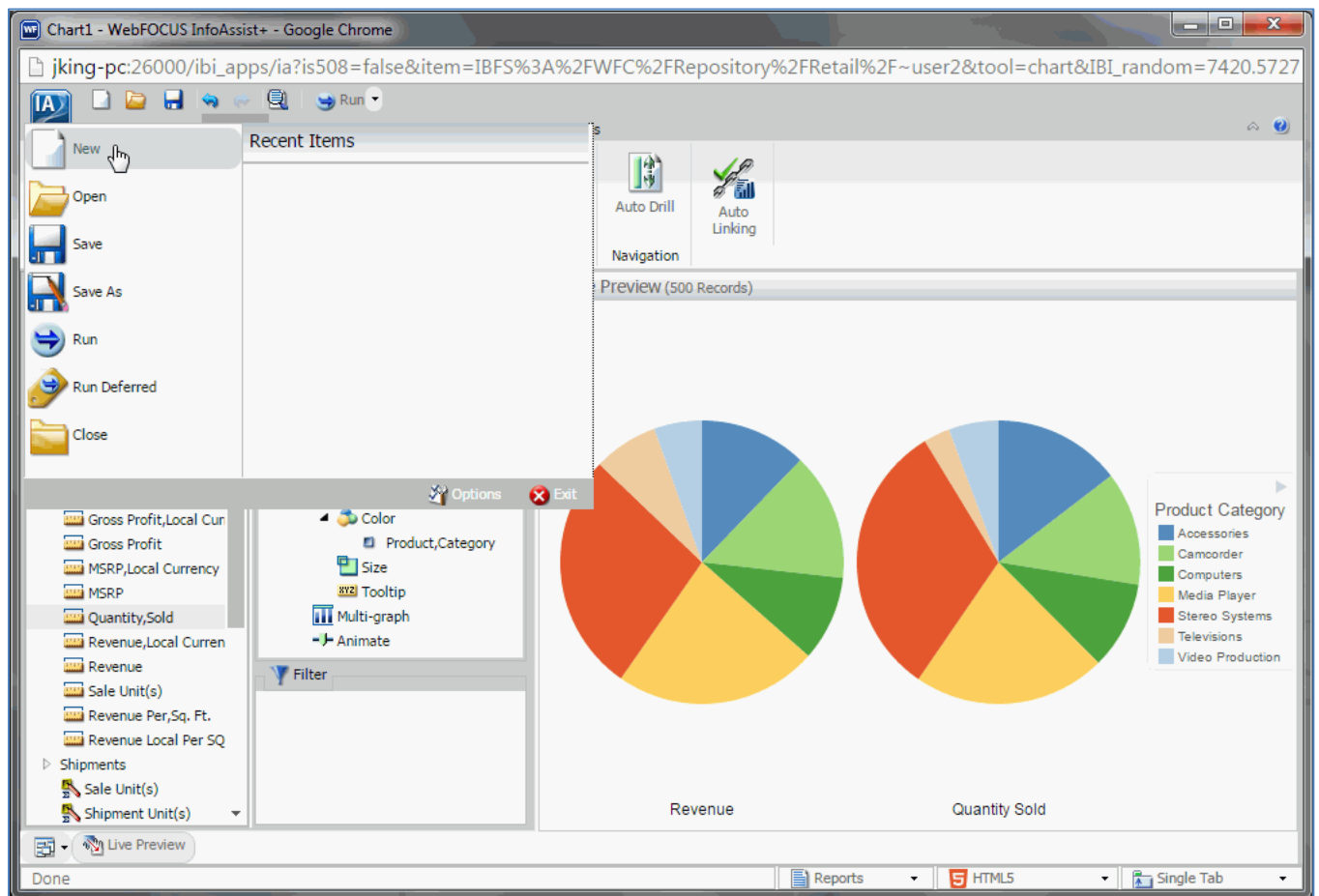
Module 4: Creating Content → Lesson 3: Creating Reports → Learn

Welcome to *Module 4, Lesson 3*. In this lesson, you will learn how to create, edit, and save new reports based on your uploaded data using InfoAssist+.

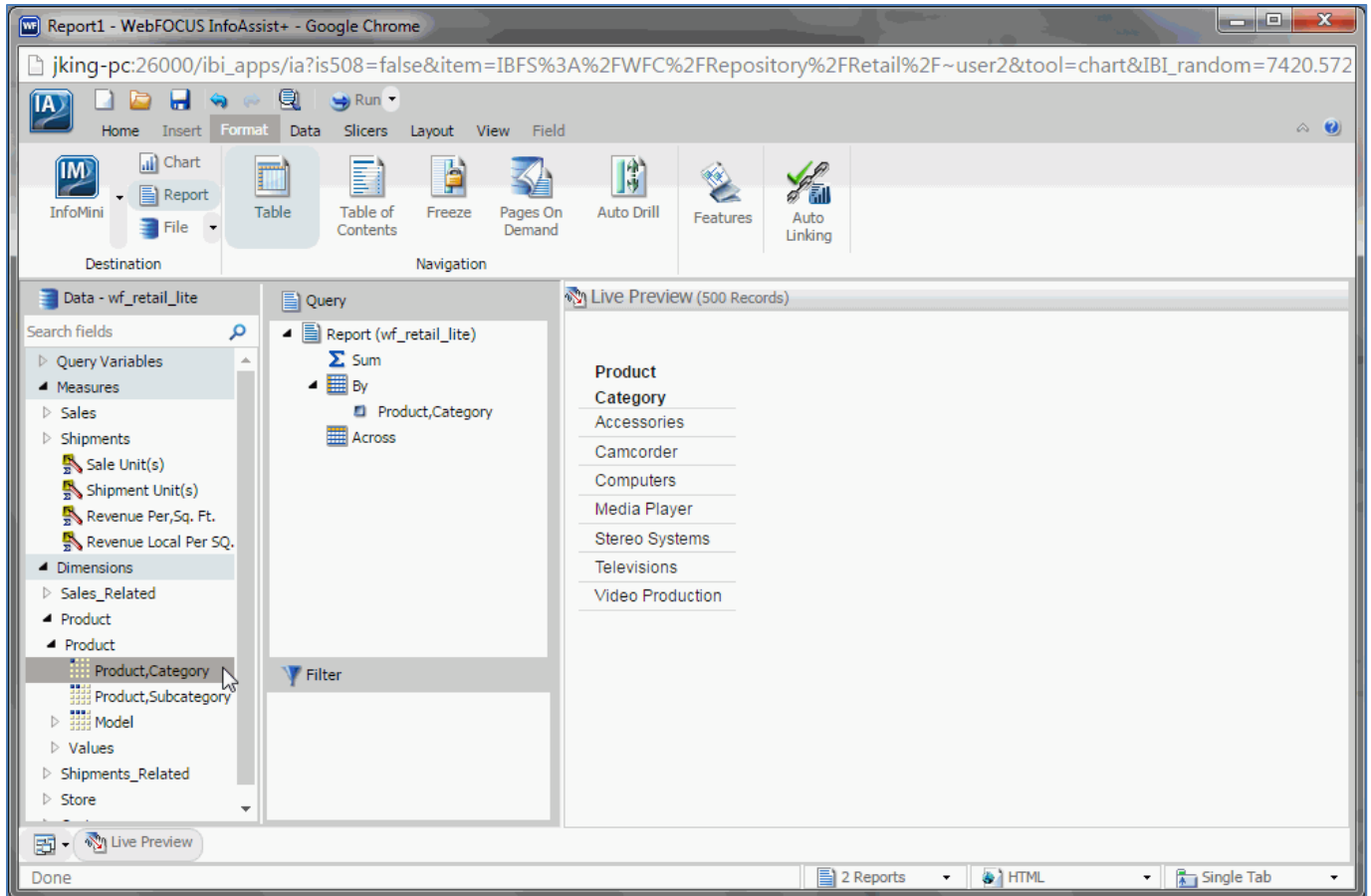
To create a report, you can either right-click the folder in which you want to create it, point to *New*, and click *Report*, or you can click *Report* from Quick Links on the Home page.

A screenshot of the WebFOCUS Business User Edition web application. The browser window shows the URL 'jking-pc:26000/ibi_apps/bip/portal/wfbue'. The application header includes 'WebFOCUS', 'Advanced User', 'Tools', 'Resources', 'Help', and 'Sign Out'. The main content area is titled 'Home' and shows a navigation tree on the left with folders like 'Retail', 'My Content', and 'Hidden'. A 'Quick Links' dropdown is visible. A context menu is open over the 'My Content' folder, showing options like 'New', 'Paste', 'Delete', 'Change Title', 'Refresh', 'Upload', 'Metadata', 'Share', 'Share with...', and 'Properties'. The 'New' sub-menu is open, displaying options: 'Report', 'Chart', 'Document', 'Visualization', 'Shortcut', 'URL', 'Distribution List', and 'Folder'. The 'Report' option is highlighted by the mouse cursor. The background content includes a 'Connect' section with 'Data' and 'Upload Data' buttons, and a 'Create' section with 'Report', 'Chart', 'Document', and 'Visualization' buttons. A 'VideoAssist' link is present in both sections. Text below the 'Create' buttons reads: 'Use InfoAssist+ to create tabular reports, individual charts, portable dashboards, multi-page PDF documents or to analyze data and patterns in visualization. Visit the Information Center for additional technical content and learning resources.'

If you are already in InfoAssist+, then you can create a new report by clicking *New* on the Quick Access Toolbar or Application menu. Once you choose a data source, you will be ready to create your content.



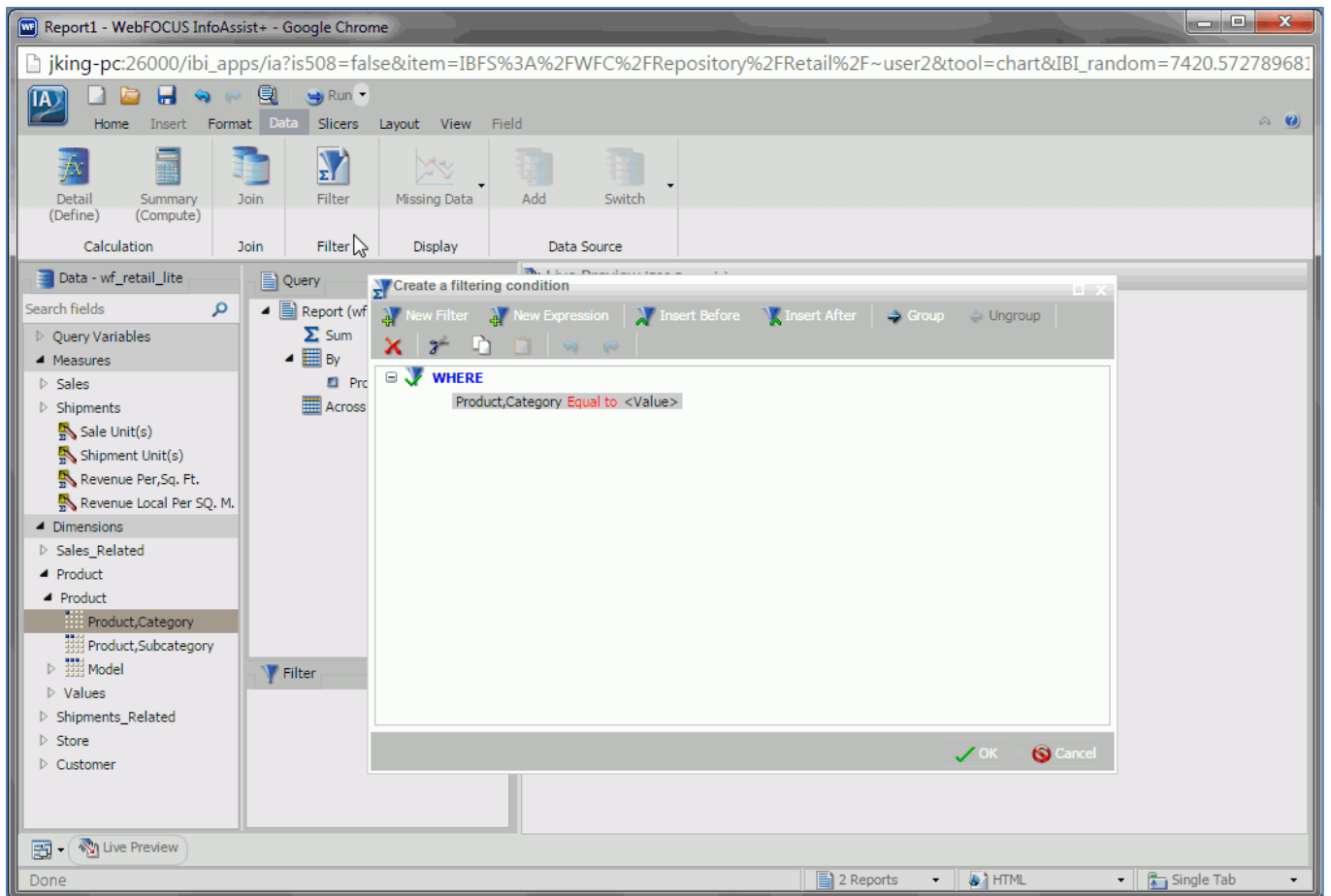
To add fields to a report, double-click them, drag them onto the canvas, or drag them into the appropriate field container in the Query pane. Fields in the By field container indicate the sorting of the rows of your report.



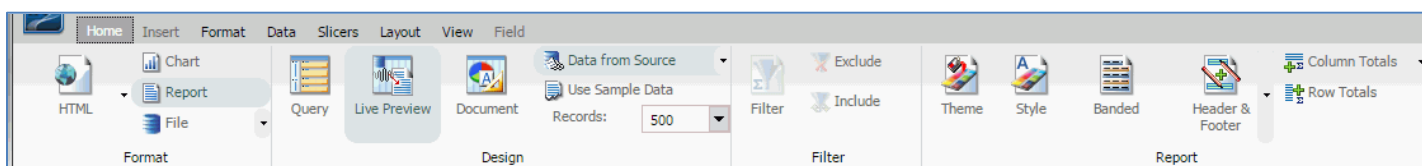
Similarly, fields in the Across field container dictate the grouping of the report into columns for each value of the specified field, and the Sum field container is used to aggregate the numeric measure data that exists for each field.

Sale,Quarter	1	2	3	4				
Product Category	Quantity Sold	Revenue	Quantity Sold	Revenue	Quantity Sold	Revenue	Quantity Sold	Revenue
Accessories	125,092	\$31,676,924.79	117,189	\$29,742,966.86	120,146	\$30,452,126.77	149,240	\$37,736,320.11
Camcorder	110,797	\$37,586,254.67	104,875	\$35,732,839.51	107,495	\$36,628,127.74	132,077	\$44,518,480.32
Computers	78,538	\$21,516,248.03	83,421	\$23,656,785.84	89,639	\$26,551,436.48	100,179	\$31,592,011.77
Media Player	187,768	\$60,355,251.64	176,776	\$56,111,219.39	182,289	\$57,817,992.97	225,101	\$71,788,595.36
Stereo Systems	272,423	\$70,752,895.47	256,598	\$67,016,061.39	260,811	\$68,284,662.61	324,500	\$85,241,314.05
Televisions	25,995	\$19,292,640.80	23,766	\$17,714,003.70	25,213	\$19,056,380.66	30,214	\$22,318,107.65
Video Production	48,126	\$14,003,132.97	46,115	\$13,378,113.78	47,020	\$13,651,067.29	58,488	\$17,020,962.58

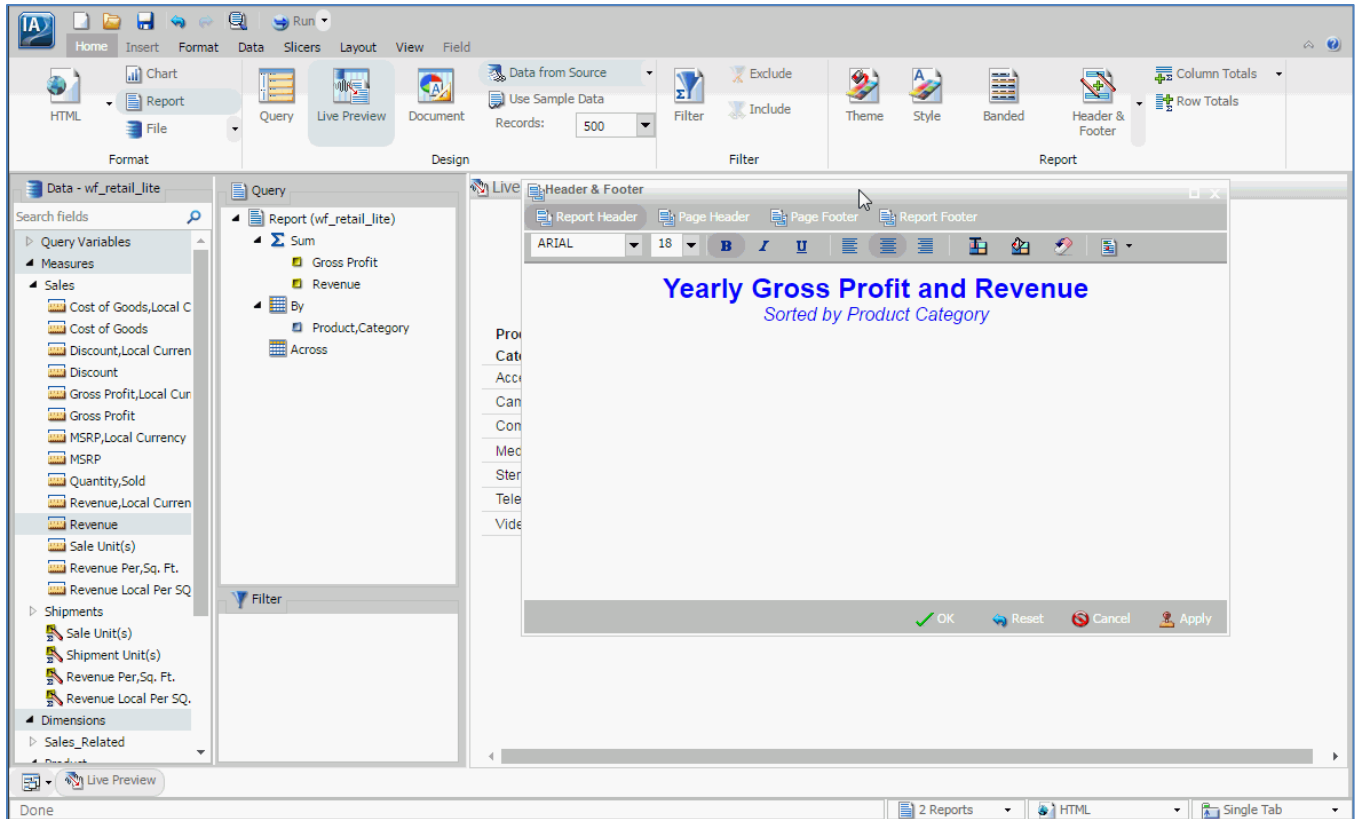
You can also add a filter to limit the amount of data in your report by selectively including or excluding certain field values. This option is available by dragging a field into the Filter pane or by creating a filter from scratch after clicking *Filter* in the Data tab.



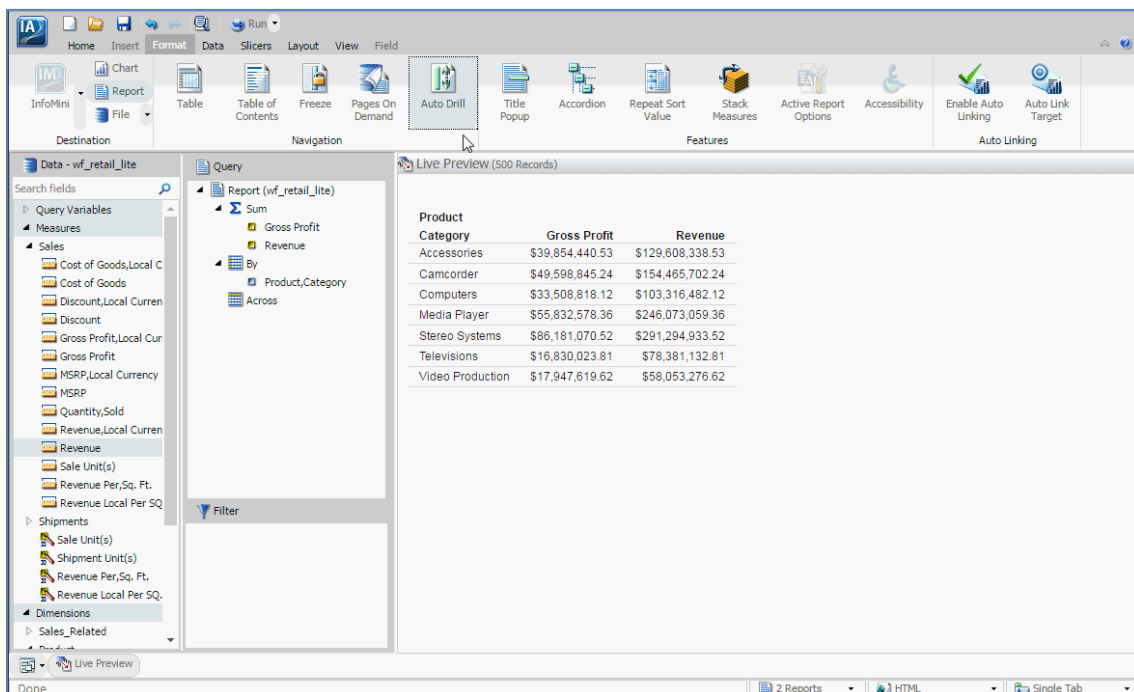
Creating a report is simple, but there are many options for customizing it. From the Home tab, you can change the StyleSheet or add bands to make it easier to read.



You can also change the output format. Options include familiar file formats like PDF or Excel, as well as the Active Report format, which gives you numerous filtering and viewing options at run time. It is also possible to add a header or footer to provide some context for your report.



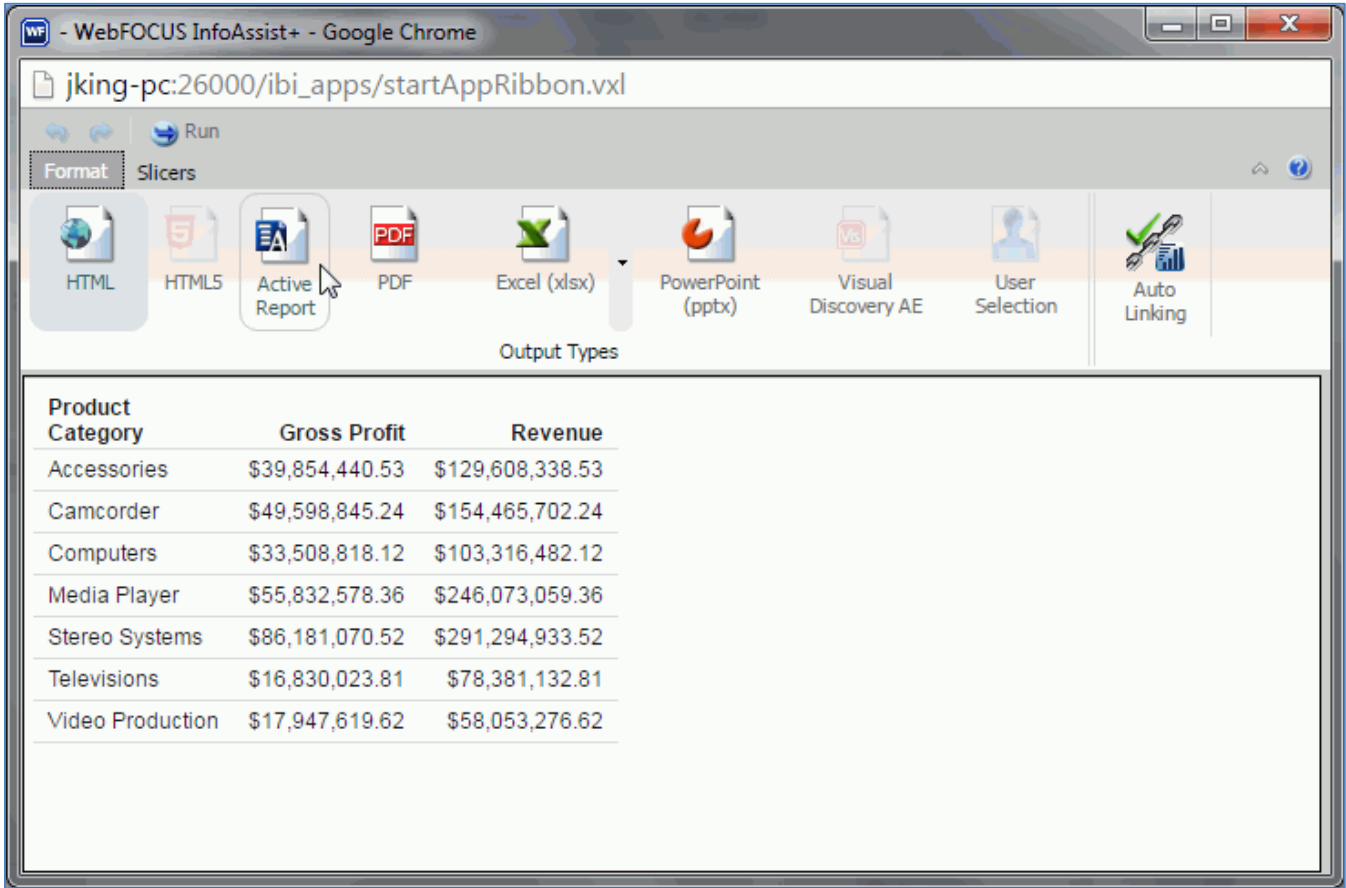
The Format tab provides additional ways to view your report when it is run. You can save space by using a collapsible accordion. You can navigate the report more easily by using a table of contents or Pages on Demand. You can allow users to view additional information using Auto Drill or Auto Linking.



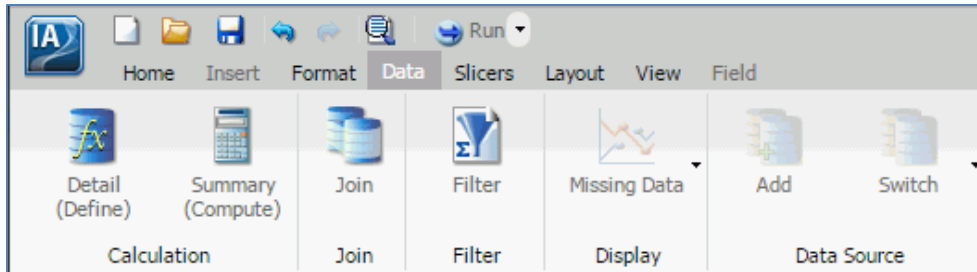
Auto Drill provides links to explore data hierarchies at run time. Auto Linking allows you to configure links to other charts and reports by using parameters that match the original report's primary sort field.

Product Category	Gross Profit	Revenue
Accessories	\$39,854,440.53	\$129,608,338.53
Camcorder	\$49,598,845.24	\$154,465,702.24
Computers	\$33,508,818.12	\$103,316,482.12
Media Player	\$55,832,578.36	\$246,073,059.36
Stereo Systems	\$86,181,070.52	\$291,294,933.52
Televisions	\$16,830,023.81	\$78,381,132.81
Video Production	\$17,947,619.62	\$58,053,276.62

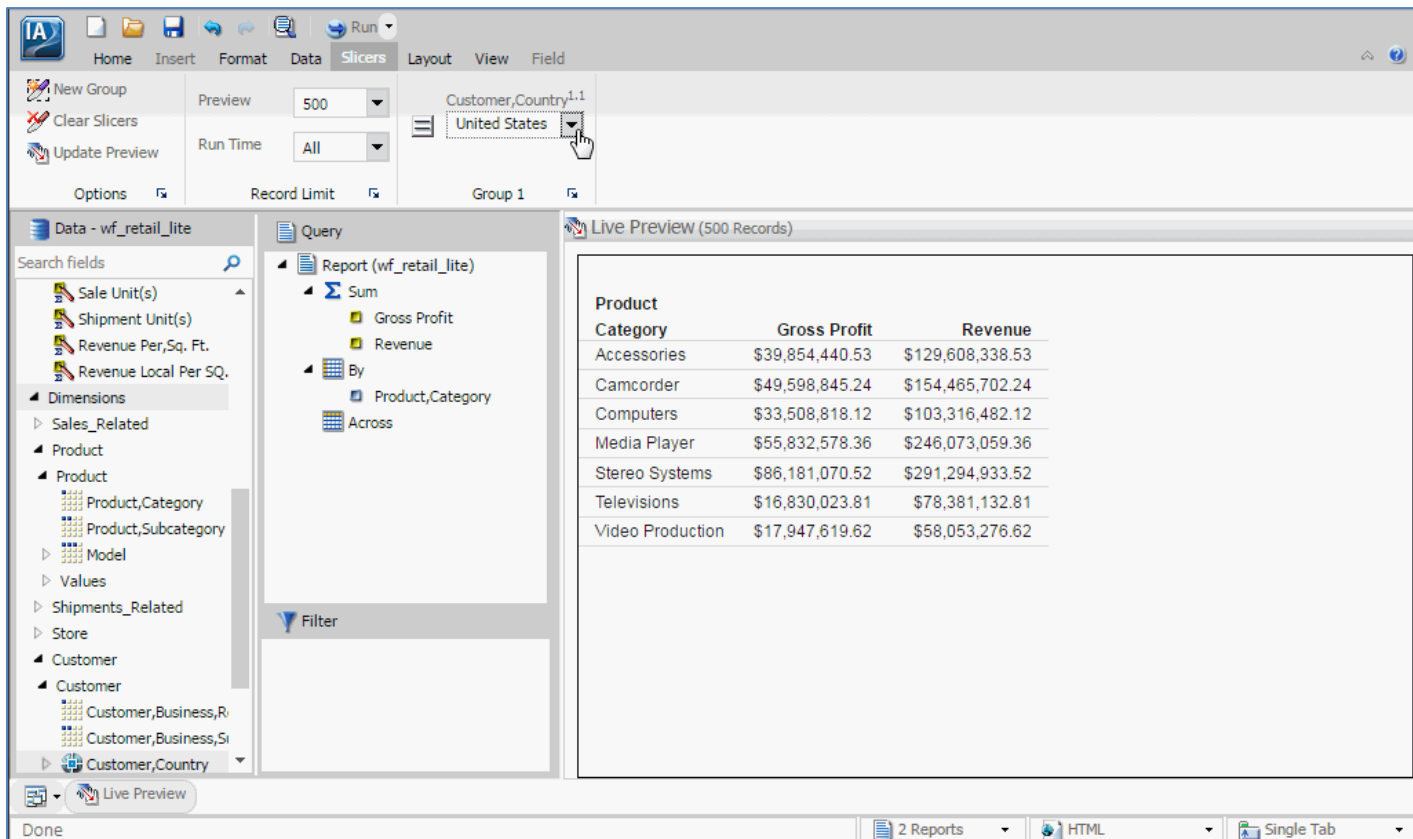
You can also set the report to run in InfoMini mode, which allows users to modify their view of the report at run time by filtering it with slicers or saving it as a different output type. You have the option of enabling the Slicers tab and the Format tab for InfoMini use.



In addition to filtering, the Data tab allows you to modify fields for use in your report by joining additional data sources to make more fields available, or by calculating a new field from existing fields with a compute or a define.



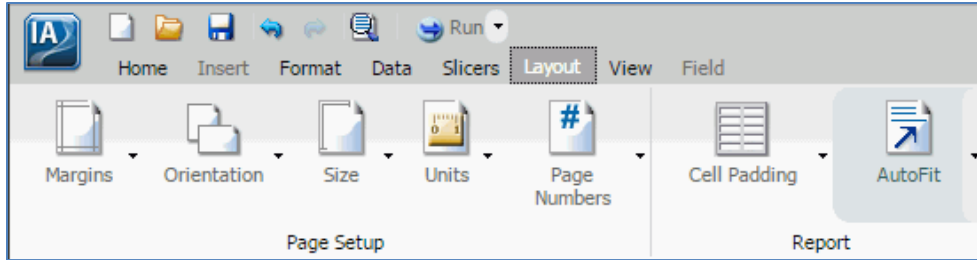
You can use slicers to filter data as you create your content. You can add a slicer on the Slicers tab. A slicer is a filter that can be dynamically modified by making a selection from a list.



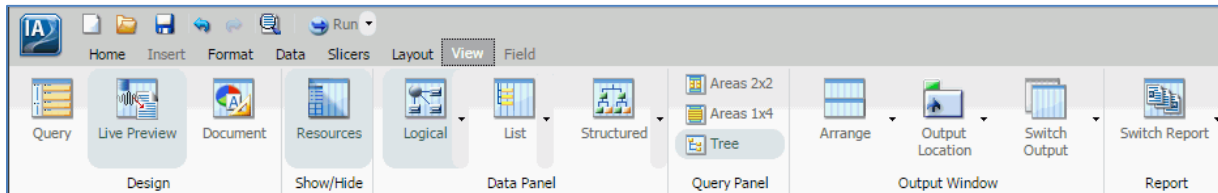
Slicers enable you to indicate filter values at design time, which narrows the display of data accordingly at run time.

If InfoMini is enabled with the Slicers tab selected, you can access these Slicer options there as well to add a filter that can be modified at run time.

The Layout tab allows you to determine how the report will be oriented on the page.

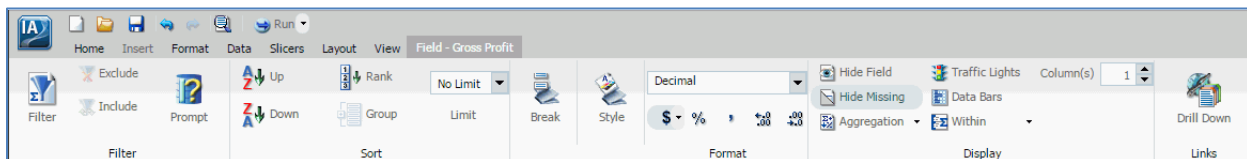


The Layout View tab allows you to determine how the display of your user interface is configured.



Finally, clicking on a field in the Query pane or a column of the report opens the Field tab. Here you can set formatting for that specific field.

For instance, you can add monetary symbols to currency fields, or you can add a Traffic Light to highlight values that exceed or fall below a certain measure amount that you set.



Once you are done creating and styling your report, you can save it and run it from the Quick Access Toolbar to see how the finished product looks.

The screenshot displays the InfoAssist+ application window. The top ribbon includes tabs for Home, Insert, Format, Data, Slicers, Layout, View, and Field. The 'Format' tab is active, showing options like Chart, Report, File, Navigation, Title Popup, Accordion, Repeat Sort Value, Stack Measures, Active Report Options, Accessibility, Enable Auto Linking, and Auto Link Target. The main workspace is divided into three panes: 'Data - wf_retail_lite' on the left with search fields and dimensions; 'Query' in the center showing a report structure with 'Sum' measures (Gross Profit, Revenue) grouped by 'Product,Category'; and 'Live Preview (500 Records)' on the right showing a table of data.

Product Category	Gross Profit	Revenue
Accessories	\$12,493,144.13	\$40,609,265.13
Camcorder	\$15,502,621.43	\$48,343,051.43
Computers	\$11,251,083.21	\$35,377,769.21
Media Player	\$17,167,318.82	\$76,296,604.82
Stereo Systems	\$26,909,102.14	\$90,973,299.14
Televisions	\$5,115,966.48	\$23,819,244.48
Video Production	\$5,594,750.45	\$18,095,711.45

You are now ready to create a report on your own as described by the *Try Now!* exercise that is provided for this lesson.

After you complete the exercise, you can move on to *Module 4, Lesson 4*, where you will learn how to create, edit, and save new charts using InfoAssist+.