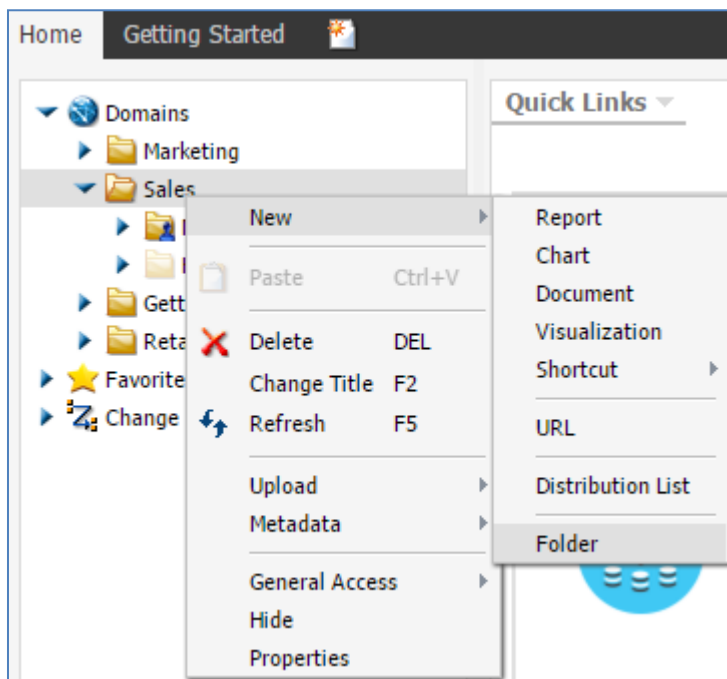




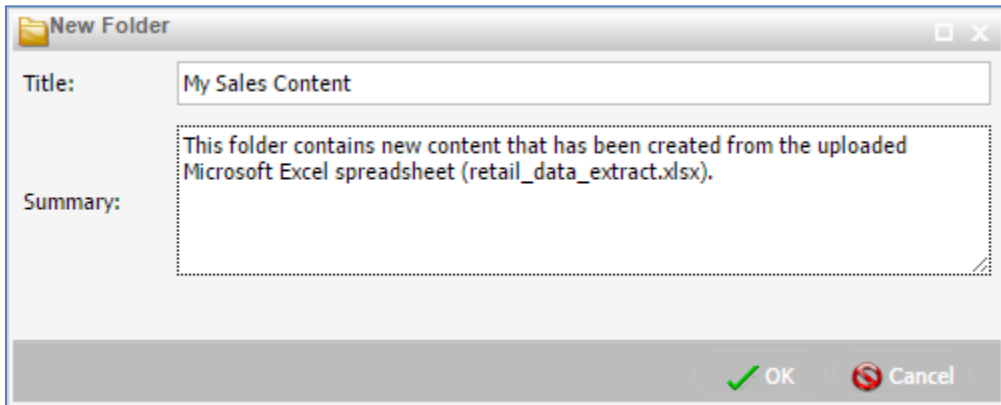
Module 4: Creating Content → Lesson 3: Creating Reports → *Try Now!*

In this *Try Now!* exercise, you will be creating a summary report in your Sales domain based on the data you uploaded from your Microsoft® Excel® spreadsheet (retail_data_extract.xlsx). This summary report will show the total revenue of the products sold (listed by product category).

1. In the Resources tree on the Home page, right-click the *Sales* domain, select *New* from the context menu, and then click *Folder*, as shown in the following image.

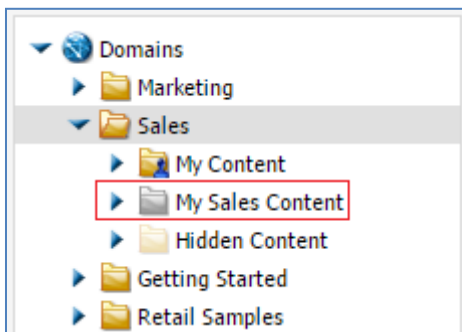


The New Folder dialog box opens, as shown in the following image.



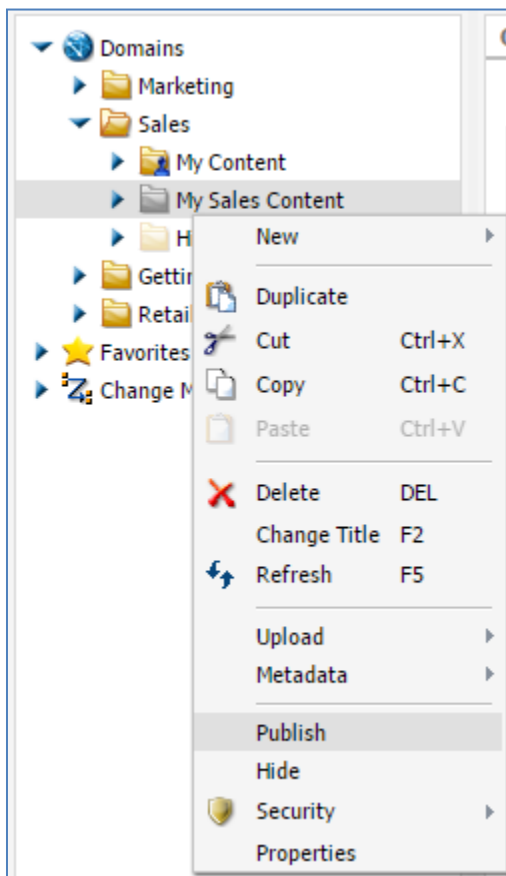
2. Type *My Sales Content* in the Title field, a summary (optional), and then click *OK*.

The new folder you created (*My Sales Content*) is now listed in your Sales domain, as shown in the following image.

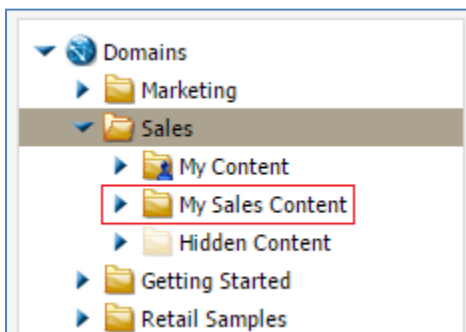


Notice that the color of the *My Sales Content* folder is gray, which indicates that the folder has not been published. You can publish this folder right away, or at a later time. You can continue to create new content in folders that have not been published. For the purposes of this example, we will publish the *My Sales Content* folder now.

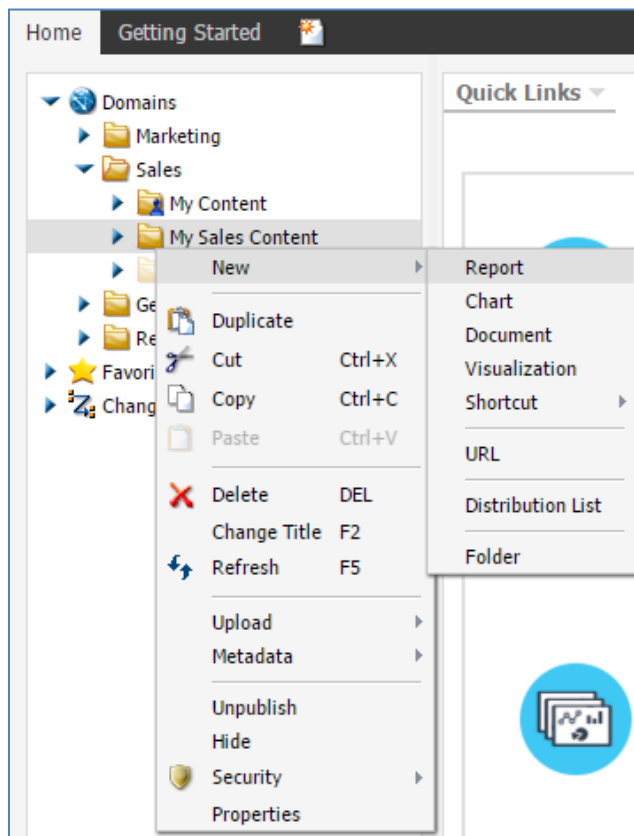
3. Right-click the *My Sales Content* folder and select *Publish* from the context menu, as shown in the following image.



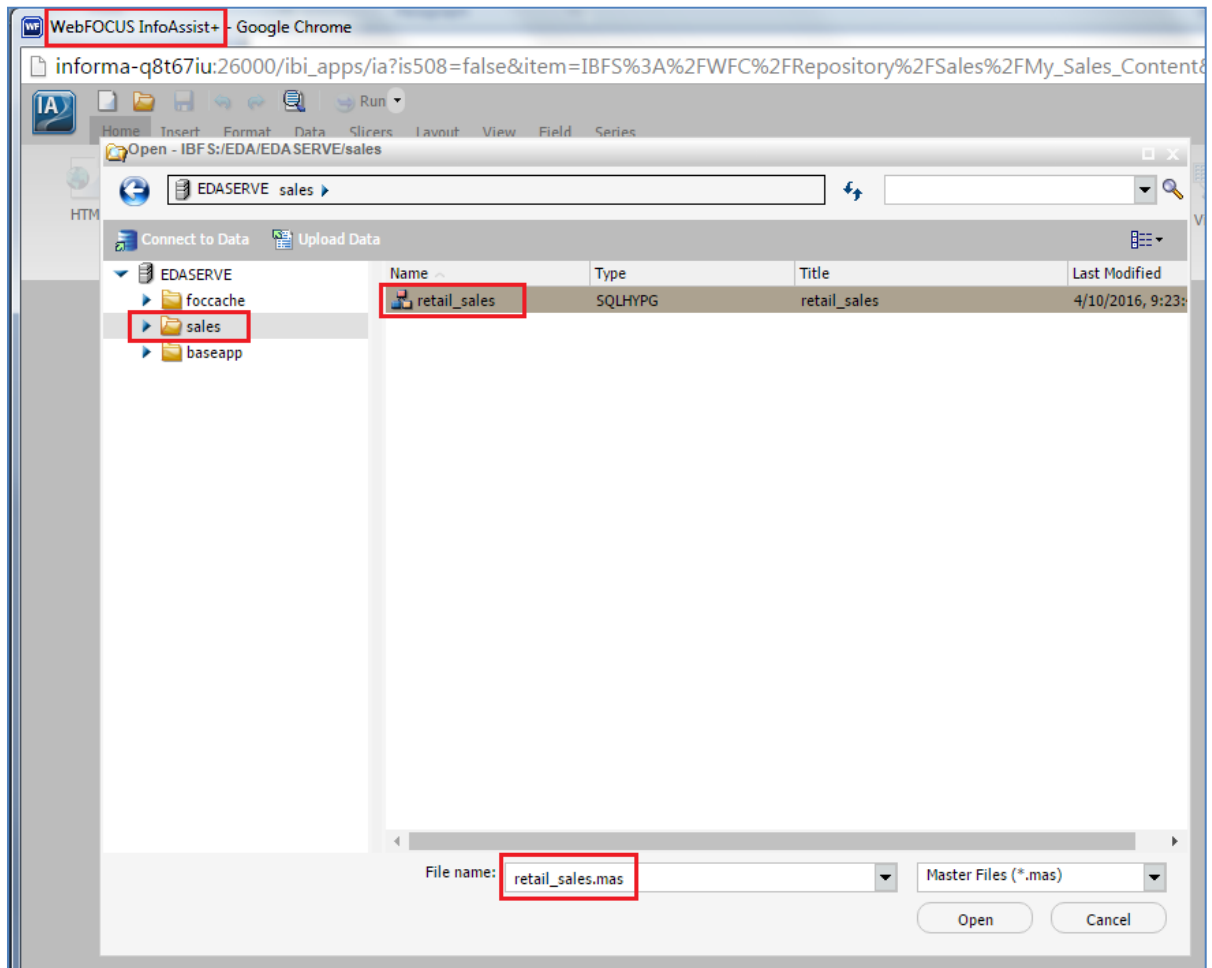
The color of the *My Sales Content* folder changes to yellow, indicating that this folder is published, as shown in the following image.



4. Right-click the published *My Sales Content* folder, select *New* from the context menu, and then click *Report*, as shown in the following image.



InfoAssist+ opens in the background and an Open dialog box appears in the foreground, as shown in the following image.

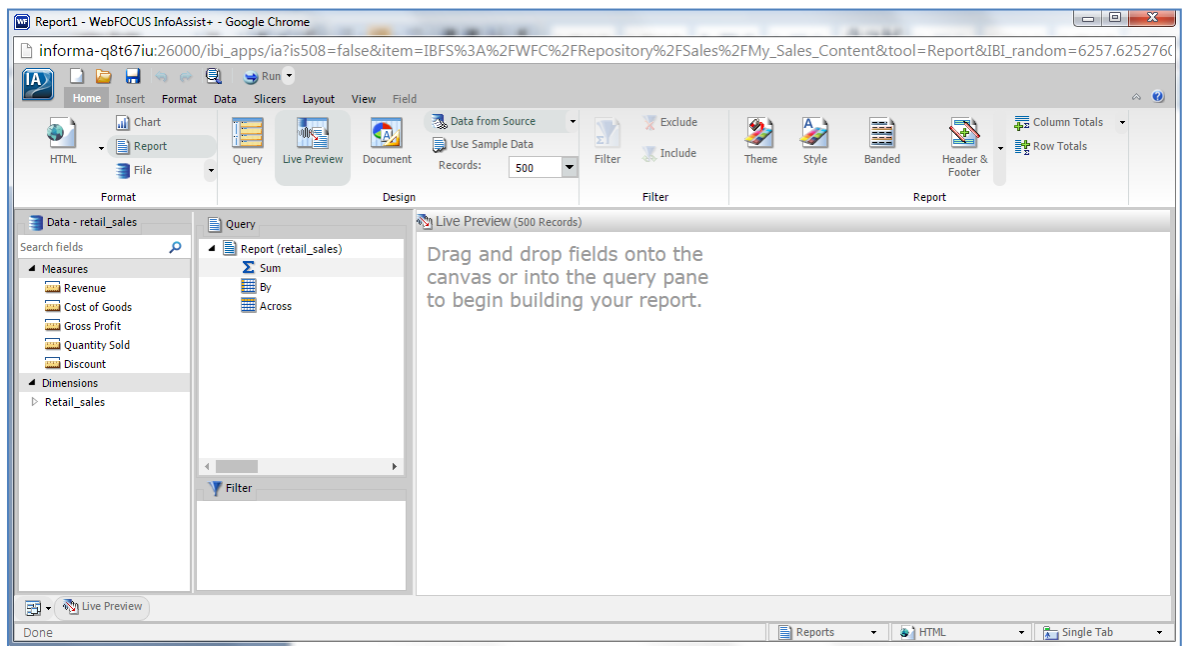


5. Select *sales* in the left pane and the *retail_sales* Synonym (also known as a Master File) in the right pane, which includes a .mas extension.

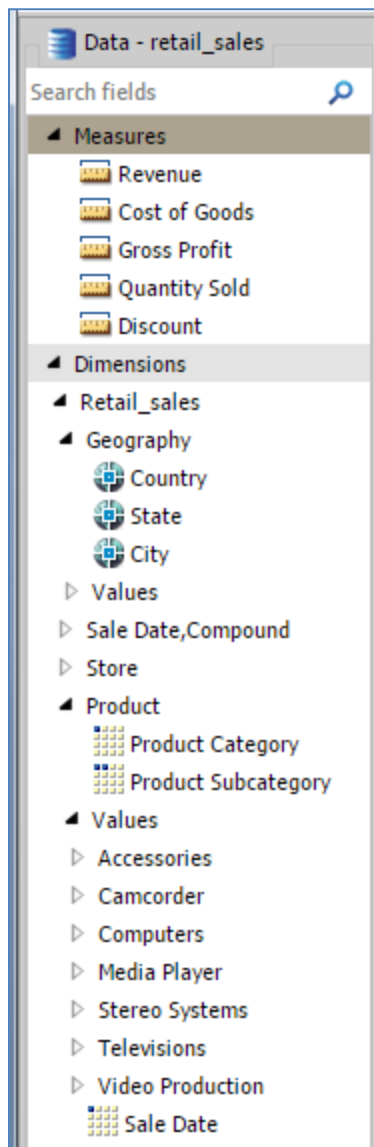
If you remember from Module 3, Lesson 1, *retail_sales* was the name of the worksheet in the Microsoft Excel spreadsheet (*retail_data_extract.xlsx*) that you uploaded.

6. Click *Open*.

The *retail_sales* Synonym is loaded into InfoAssist+, as shown in the following image.



7. In the Data pane located on the left, expand the *Retail_sales* dimension, followed by *Geography*, *Store*, and *Product*, as shown in the following image.

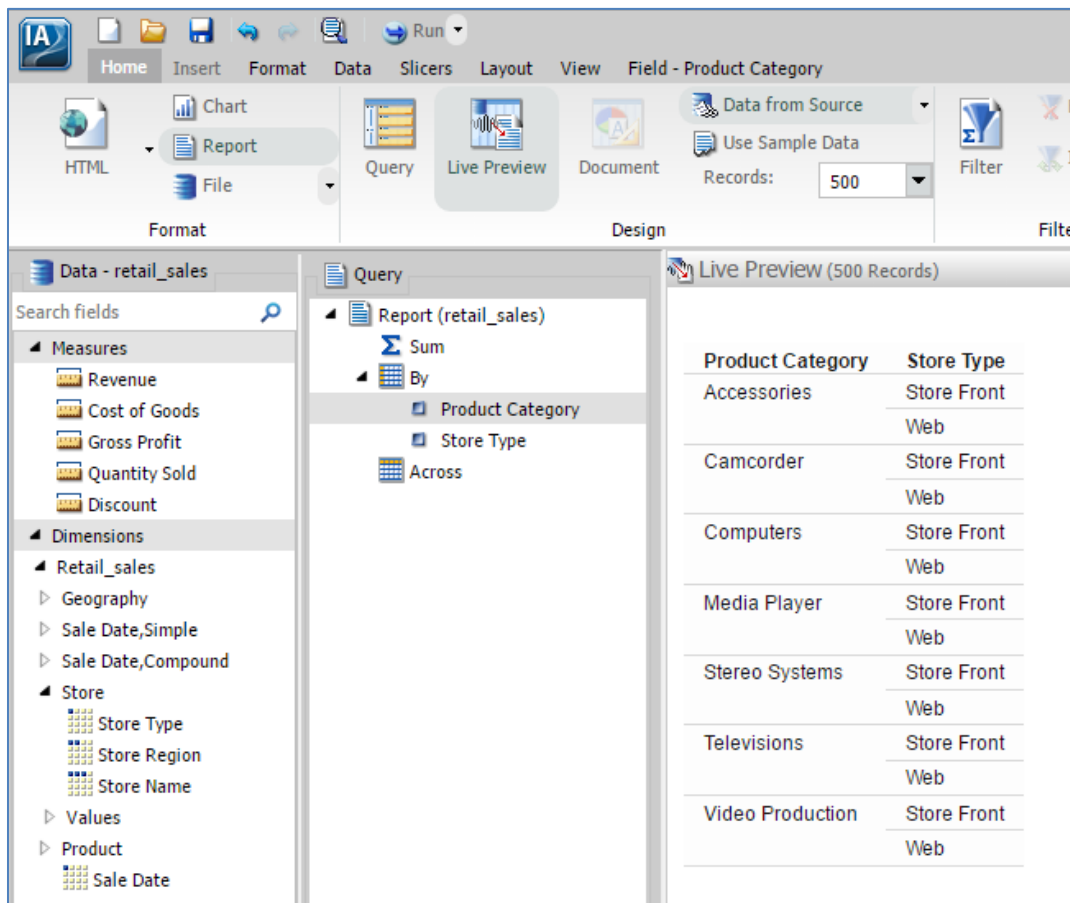


The Data pane provides you with access to all of the measures and dimensions that you defined in the Upload Wizard for your Microsoft Excel spreadsheet (retail_data_extract.xlsx). You can also see all of the various hierarchies that you defined. You can expand these hierarchies to see all of the available fields listed, based on the order that was defined in the Upload Wizard.

In this example, the fields we need are found under the *Store* and *Product* hierarchies.

8. If necessary (based on your screen size), adjust the Data pane to an appropriate width and height.
9. Double-click *Product Category*, and then double-click *Store Type* in the Data pane.

You can double-click a field, drag a field directly to your Live Preview pane, or drag a field to the Query pane. All three methods will place *Product Category* as the primary sort or By field in your new report, as shown in the following image.



10. Scroll to the top of the Data pane on the left, where you will see the Measures heading.

11. Double-click *Revenue* once and *Gross Profit* twice.

The measures are placed as the primary Sum fields in your report, as shown in the following image.

The screenshot shows the Microsoft Access interface with the 'retail_sales' database open. The 'Report' tab is selected in the ribbon, and the 'Live Preview' button is active. The 'Query' pane on the left shows the report structure with a primary Sum field for Revenue and Gross Profit. The 'Live Preview' pane on the right shows the resulting report data.

Product Category	Store Type	Revenue	Gross Profit	Gross Profit
Accessories	Store Front	111,975,840.08	34,445,649.08	34,445,649.08
	Web	17,476,213.55	5,367,945.55	5,367,945.55
Camcorder	Store Front	130,578,942.72	42,319,348.72	42,319,348.72
	Web	23,886,759.52	7,279,496.52	7,279,496.52
Computers	Store Front	93,129,068.02	29,775,763.02	29,775,763.02
	Web	10,187,414.10	3,733,055.10	3,733,055.10
Media Player	Store Front	214,107,446.55	48,700,521.55	48,700,521.55
	Web	31,965,612.81	7,132,056.81	7,132,056.81
Stereo Systems	Store Front	252,011,480.19	74,573,961.19	74,573,961.19
	Web	39,283,453.33	11,607,109.33	11,607,109.33
Televisions	Store Front	68,188,421.11	14,678,343.11	14,678,343.11
	Web	10,192,711.70	2,151,680.70	2,151,680.70
Video Production	Store Front	50,206,190.21	15,538,946.21	15,538,946.21
	Web	7,847,086.41	2,408,673.41	2,408,673.41

12. Right-click the second *Gross Profit* field, select *More*, *Aggregation Functions*, and then click *Percent* from the context menu, as shown in the following image.

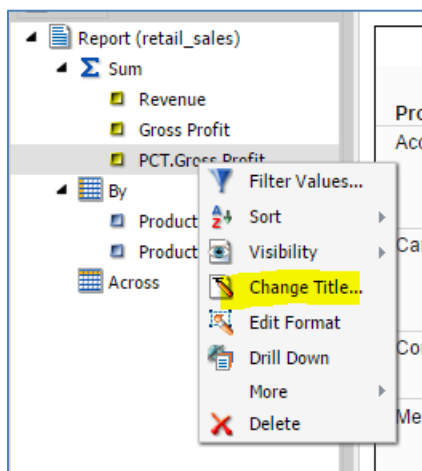
The screenshot shows the Microsoft Access interface with a table named 'Live Preview (500 Records)'. The table has columns: Product Category, Store Type, Revenue, Gross Profit, and Gross Profit. The second 'Gross Profit' column is selected, and a context menu is open. The menu path is: More > Aggregation Functions > Percent. The 'Percent' option is highlighted in yellow.

Product Category	Store Type	Revenue	Gross Profit	Gross Profit
Accessories	Store Front	111,975,840.08	34,445,649.08	34,445,649.08
	Web	17,476,213.55	5,367,945.55	5,367,945.55
Camcorder	Store Front	130,578,942.72	42,319,348.72	42,319,348.72
	Web	23,886,759.52	7,279,496.52	7,279,496.52
Computers	Store Front	93,129,068.02	29,775,763.02	29,775,763.02
	Web	10,187,414.10	3,733,055.10	3,733,055.10
Media Player	Store Front	214,107,446.55	48,700,521.55	48,700,521.55
	Web	31,965,612.81	7,132,056.81	7,132,056.81
	Store Front	252,011,480.19	74,573,961.19	74,573,961.19
		33.33	11,607,109.33	11,607,109.33
		21.11	14,678,343.11	14,678,343.11
		1.70	2,151,680.70	2,151,680.70
		0.21	15,538,946.21	15,538,946.21
		6.41	2,408,673.41	2,408,673.41

The value of this field changes to the percentage of gross profit, as shown in the following image.

Product Category	Store Type	Revenue	Gross Profit	PCT Gross Profit
Accessories	Store Front	111,975,840.08	34,445,649.08	11.49
	Web	17,476,213.55	5,367,945.55	1.79
Camcorder	Store Front	130,578,942.72	42,319,348.72	14.12
	Web	23,886,759.52	7,279,496.52	2.43
Computers	Store Front	93,129,068.02	29,775,763.02	9.93
	Web	10,187,414.10	3,733,055.10	1.25
Media Player	Store Front	214,107,446.55	48,700,521.55	16.25
	Web	31,965,612.81	7,132,056.81	2.38
Stereo Systems	Store Front	252,011,480.19	74,573,961.19	24.88
	Web	39,283,453.33	11,607,109.33	3.87
Televisions	Store Front	68,188,421.11	14,678,343.11	4.90
	Web	10,192,711.70	2,151,680.70	.72
Video Production	Store Front	50,206,190.21	15,538,946.21	5.18
	Web	7,847,086.41	2,408,673.41	.80

- Right-click the *PCT.Gross Profit* field and select *Change Title...* from the context menu, as shown in the following image.



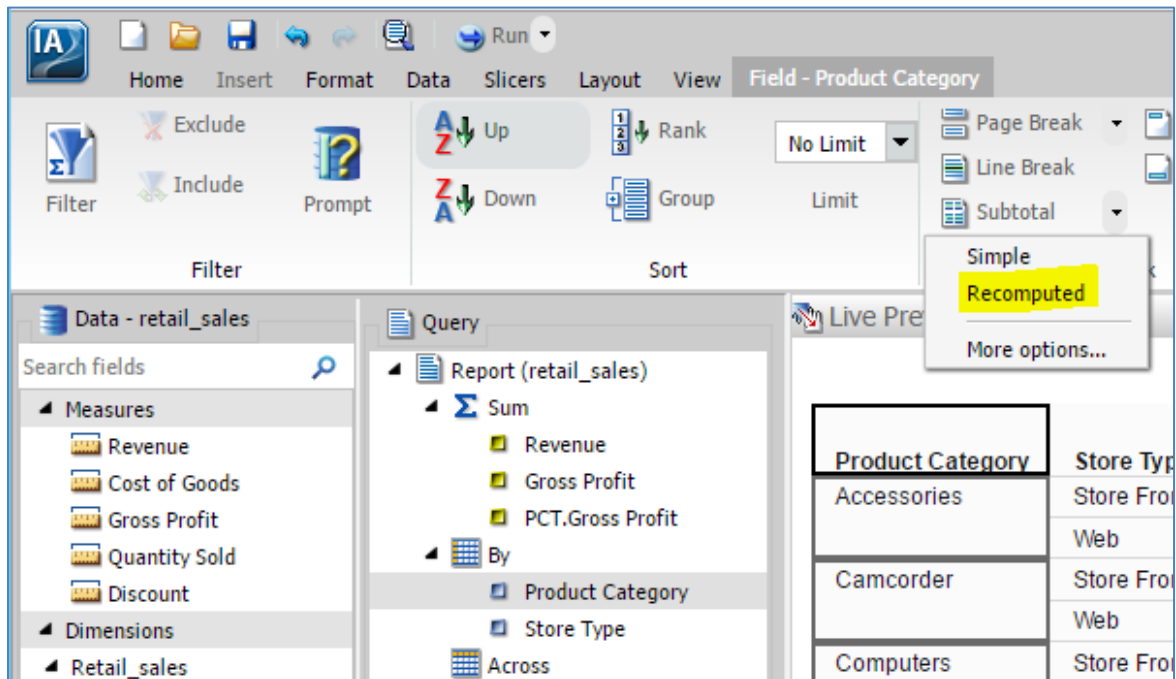
The Edit Title dialog box opens, as shown in the following image.

14. Type % *Gross Profit* in the field and then click *OK*.

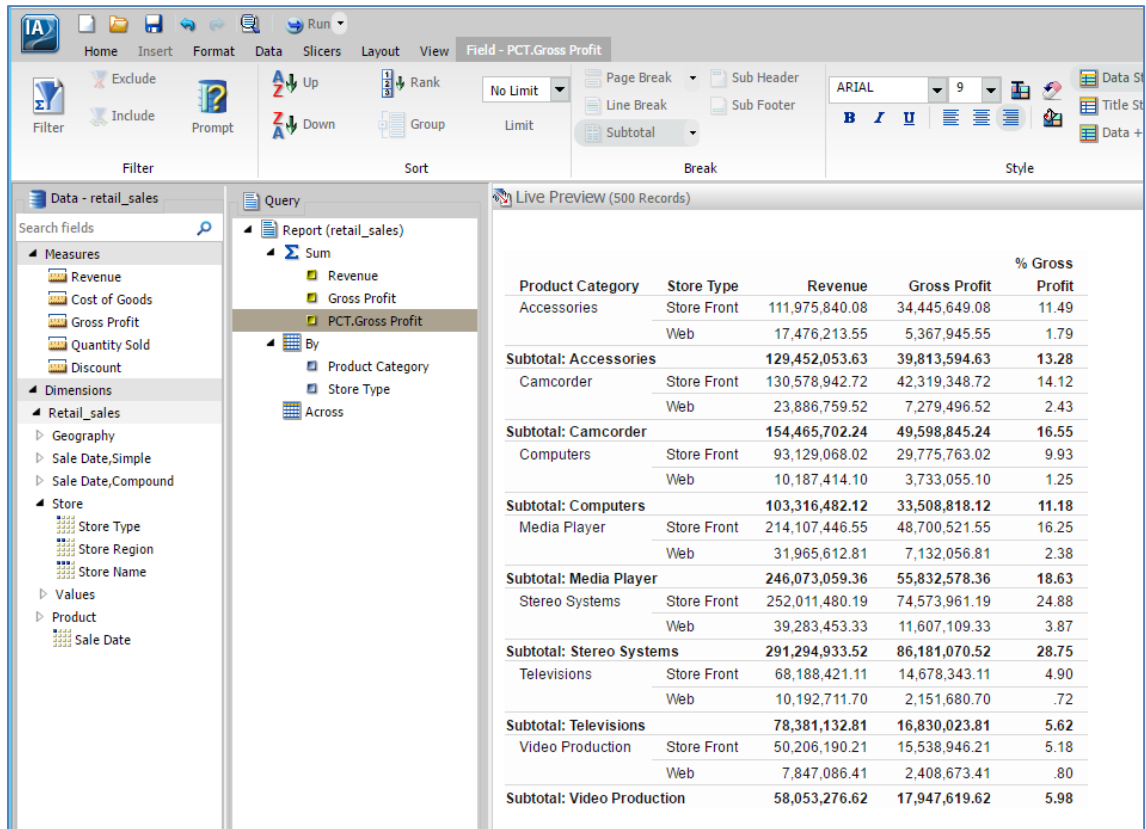
The comma places the title on two lines to save space.

Next, we want to add subtotals and grand totals to our report.

15. Select the *Product Category* field in the Query pane, click the *Subtotal* drop-down arrow on the ribbon, and then click *Recomputed*, as shown in the following image.



The % Gross Profit field is recalculated, as shown in the following image.

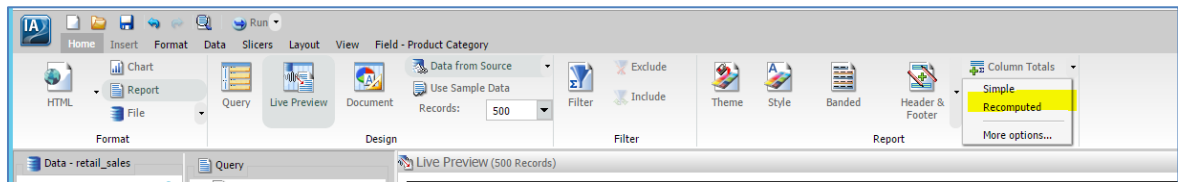


Product Category	Store Type	Revenue	Gross Profit	% Gross Profit
Accessories	Store Front	111,975,840.08	34,445,649.08	11.49
	Web	17,476,213.55	5,367,945.55	1.79
Subtotal: Accessories		129,452,053.63	39,813,594.63	13.28
Camcorder	Store Front	130,578,942.72	42,319,348.72	14.12
	Web	23,886,759.52	7,279,496.52	2.43
Subtotal: Camcorder		154,465,702.24	49,598,845.24	16.55
Computers	Store Front	93,129,068.02	29,775,763.02	9.93
	Web	10,187,414.10	3,733,055.10	1.25
Subtotal: Computers		103,316,482.12	33,508,818.12	11.18
Media Player	Store Front	214,107,446.55	48,700,521.55	16.25
	Web	31,965,612.81	7,132,056.81	2.38
Subtotal: Media Player		246,073,059.36	55,832,578.36	18.63
Stereo Systems	Store Front	252,011,480.19	74,573,961.19	24.88
	Web	39,283,453.33	11,607,109.33	3.87
Subtotal: Stereo Systems		291,294,933.52	86,181,070.52	28.75
Televisions	Store Front	68,188,421.11	14,678,343.11	4.90
	Web	10,192,711.70	2,151,680.70	.72
Subtotal: Televisions		78,381,132.81	16,830,023.81	5.62
Video Production	Store Front	50,206,190.21	15,538,946.21	5.18
	Web	7,847,086.41	2,408,673.41	.80
Subtotal: Video Production		58,053,276.62	17,947,619.62	5.98

- Ensure that the *Home* tab is selected on the ribbon.

The ribbon contains multiple functions and options you can select that apply to the report in its entirety.

- Click the *Column Totals* drop-down arrow in the Report group and then select *Recomputed*, as shown in the following image.

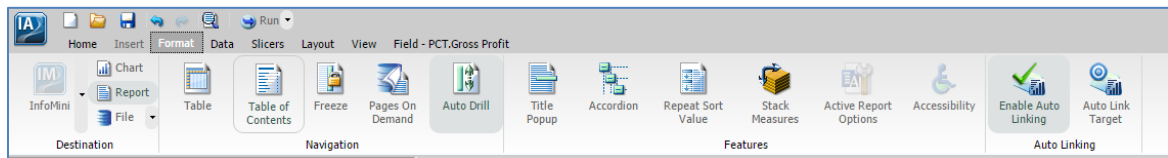


Notice that when you rest the pointer on an option (such as *Column Totals*), a tooltip also appears to provide you with some additional information.

Selecting *Column Totals* adds a grand total row to the bottom of your report to sum the numeric data in each column, as shown in the following image.

Product Category	Store Type	Revenue	Gross Profit	% Gross
				Profit
Accessories	Store Front	111,975,840.08	34,445,649.08	11.49
	Web	17,476,213.55	5,367,945.55	1.79
Subtotal: Accessories		129,452,053.63	39,813,594.63	13.28
Camcorder	Store Front	130,578,942.72	42,319,348.72	14.12
	Web	23,886,759.52	7,279,496.52	2.43
Subtotal: Camcorder		154,465,702.24	49,598,845.24	16.55
Computers	Store Front	93,129,068.02	29,775,763.02	9.93
	Web	10,187,414.10	3,733,055.10	1.25
Subtotal: Computers		103,316,482.12	33,508,818.12	11.18
Media Player	Store Front	214,107,446.55	48,700,521.55	16.25
	Web	31,965,612.81	7,132,056.81	2.38
Subtotal: Media Player		246,073,059.36	55,832,578.36	18.63
Stereo Systems	Store Front	252,011,480.19	74,573,961.19	24.88
	Web	39,283,453.33	11,607,109.33	3.87
Subtotal: Stereo Systems		291,294,933.52	86,181,070.52	28.75
Televisions	Store Front	68,188,421.11	14,678,343.11	4.90
	Web	10,192,711.70	2,151,680.70	.72
Subtotal: Televisions		78,381,132.81	16,830,023.81	5.62
Video Production	Store Front	50,206,190.21	15,538,946.21	5.18
	Web	7,847,086.41	2,408,673.41	.80
Subtotal: Video Production		58,053,276.62	17,947,619.62	5.98
TOTAL		1,061,036,640.30	299,712,550.30	99.99

18. Click the *Format* tab, click *Auto Drill*, and then click *Enable Auto Linking*, as shown in the following image.



19. Run the report.

You can see the Auto Drill hyperlinks based on the hierarchies that were established in the metadata, as shown in the following image.

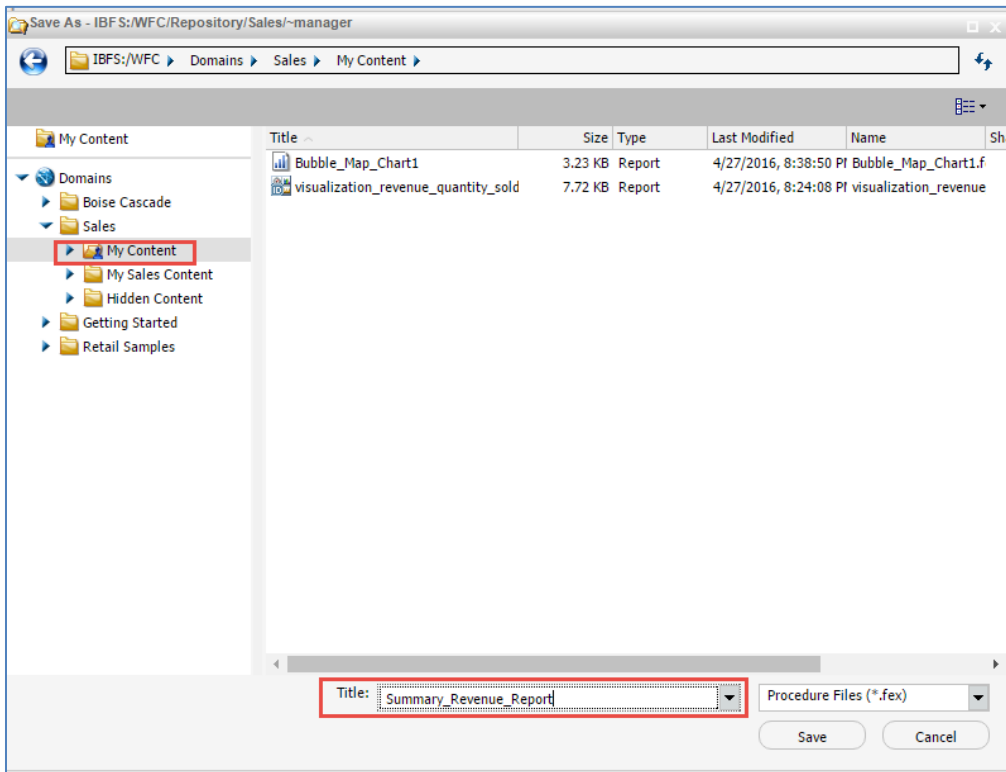
Product Category	Store Type	Revenue	Gross Profit	% Gross Profit
Accessories		129,452,053.63	34,445,649.08	11.49
		55	5,367,945.55	1.79
Subtotal: Accessories		129,452,053.63	39,813,594.63	13.28
Camcorder	Store Front	130,578,942.72	42,319,348.72	14.12
	Web	23,886,759.52	7,279,496.52	2.43
Subtotal: Camcorder		154,465,702.24	49,598,845.24	16.55
Computers	Store Front	93,129,068.02	29,775,763.02	9.93
	Web	10,187,414.10	3,733,055.10	1.25
Subtotal: Computers		103,316,482.12	33,508,818.12	11.18
Media Player	Store Front	214,107,446.55	48,700,521.55	16.25
	Web	31,965,612.81	7,132,056.81	2.38
Subtotal: Media Player		246,073,059.36	55,832,578.36	18.63
Stereo Systems	Store Front	252,011,480.19	74,573,961.19	24.88
	Web	39,283,453.33	11,607,109.33	3.87
Subtotal: Stereo Systems		291,294,933.52	86,181,070.52	28.75
Televisions	Store Front	68,188,421.11	14,678,343.11	4.90
	Web	10,192,711.70	2,151,680.70	.72
Subtotal: Televisions		78,381,132.81	16,830,023.81	5.62
Video Production	Store Front	50,206,190.21	15,538,946.21	5.18
	Web	7,847,086.41	2,408,673.41	.80
Subtotal: Video Production		58,053,276.62	17,947,619.62	5.98
TOTAL		1,061,036,640.30	299,712,550.30	99.99

In addition, when you click on a product category value, you will see other reports that you can run that have the Product Category field auto link enabled.

20. Save your report by clicking the *Save* icon in the Quick Access Toolbar, as shown in the following image.

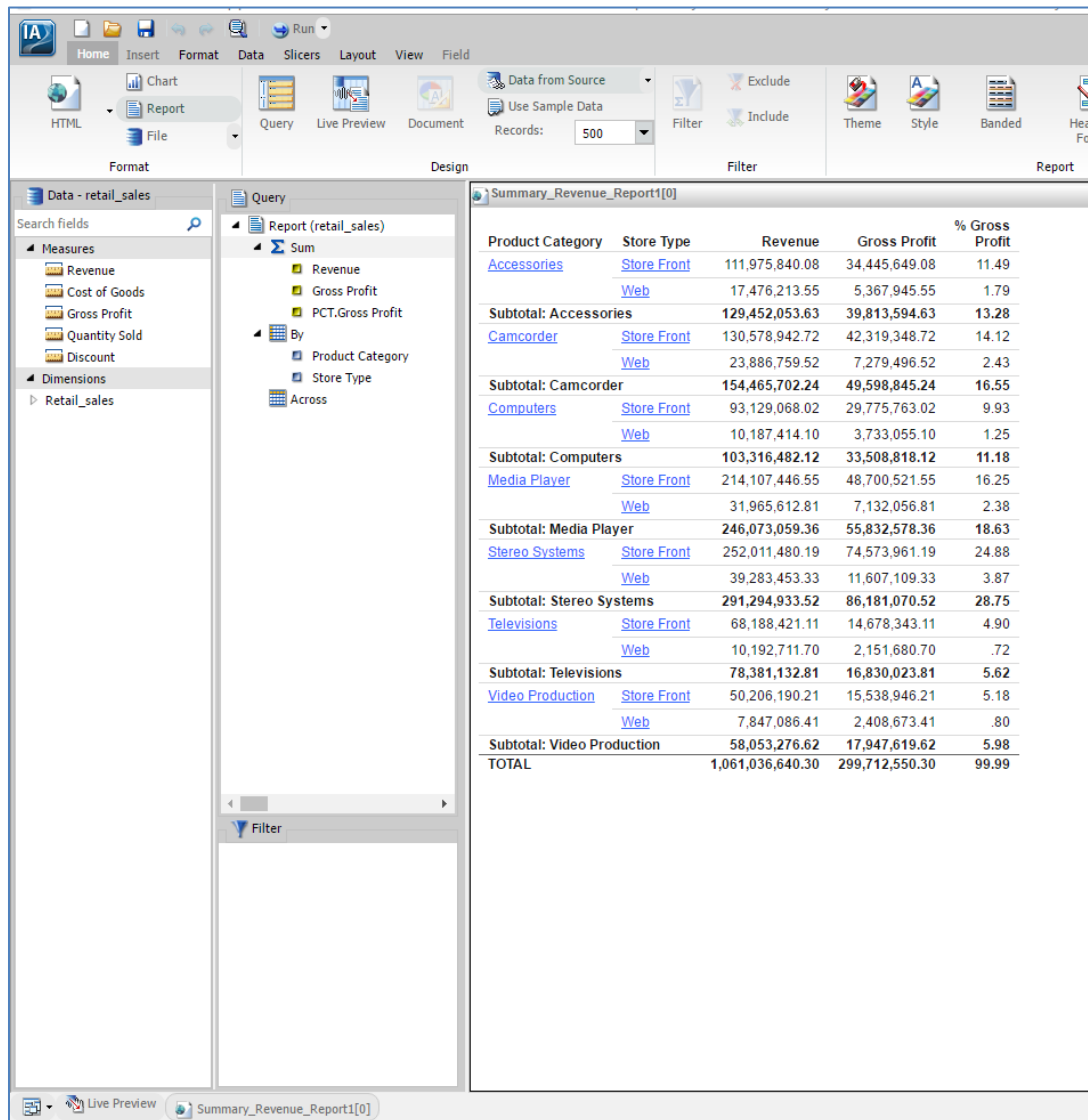


The Save As dialog box opens, as shown in the following image.



Notice that your *Sales* domain and the *My Content* folder are automatically selected in the left pane.

21. Name your new report as *Summary_Revenue_Report* and then click *Save*.

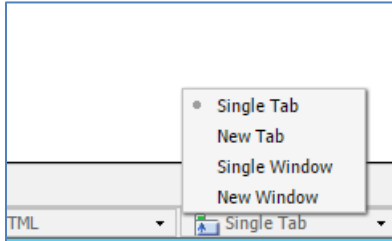


The screenshot shows the Microsoft Access interface with the 'Summary_Revenue_Report1[0]' report in design view. The report is based on the 'retail_sales' table. The design view shows a table with columns: Product Category, Store Type, Revenue, Gross Profit, and % Gross Profit. The data is grouped by Product Category and Store Type. The report is currently in design view, but the results view is also visible in the background.

Product Category	Store Type	Revenue	Gross Profit	% Gross Profit
Accessories	Store Front	111,975,840.08	34,445,649.08	11.49
	Web	17,476,213.55	5,367,945.55	1.79
Subtotal: Accessories		129,452,053.63	39,813,594.63	13.28
Camcorder	Store Front	130,578,942.72	42,319,348.72	14.12
	Web	23,886,759.52	7,279,496.52	2.43
Subtotal: Camcorder		154,465,702.24	49,598,845.24	16.55
Computers	Store Front	93,129,068.02	29,775,763.02	9.93
	Web	10,187,414.10	3,733,055.10	1.25
Subtotal: Computers		103,316,482.12	33,508,818.12	11.18
Media Player	Store Front	214,107,446.55	48,700,521.55	16.25
	Web	31,965,612.81	7,132,056.81	2.38
Subtotal: Media Player		246,073,059.36	55,832,578.36	18.63
Stereo Systems	Store Front	252,011,480.19	74,573,961.19	24.88
	Web	39,283,453.33	11,607,109.33	3.87
Subtotal: Stereo Systems		291,294,933.52	86,181,070.52	28.75
Televisions	Store Front	68,188,421.11	14,678,343.11	4.90
	Web	10,192,711.70	2,151,680.70	.72
Subtotal: Televisions		78,381,132.81	16,830,023.81	5.62
Video Production	Store Front	50,206,190.21	15,538,946.21	5.18
	Web	7,847,086.41	2,408,673.41	.80
Subtotal: Video Production		58,053,276.62	17,947,619.62	5.98
TOTAL		1,061,036,640.30	299,712,550.30	99.99

You can switch between the design view (Live Preview pane) and the results view (*Summary_Revenue_Report[0]*) by selecting the appropriate tab. Instead of having two tabs open, for now, close the results view.

This will leave only the Live Preview pane open. You can close *Summary_Revenue_Report[0]* by clicking the Close button (X) in the upper-right corner. If you want your report to run in a separate browser window, click *Single Tab* in the lower-right corner, and then select *New Window*, as shown in the following image.



Now, let's add some formatting to the Revenue column.

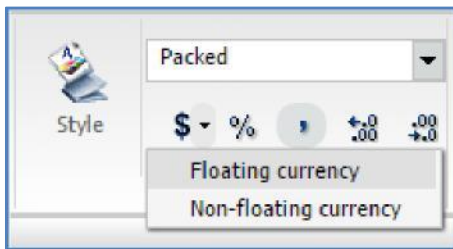
22. Click the *Revenue* field in the Live Preview pane, as shown in the following image.

Product Category	Store Type	Revenue	Gross Profit	% Gross Profit
Accessories	Store Front	111,975,840.08	34,445,649.08	11.49
	Web	17,476,213.55	5,367,945.55	1.79
Subtotal: Accessories		129,452,053.63	39,813,594.63	13.28
Camcorder	Store Front	130,578,942.72	42,319,348.72	14.12
	Web	23,886,759.52	7,279,496.52	2.43
Subtotal: Camcorder		154,465,702.24	49,598,845.24	16.55
Computers	Store Front	93,129,068.02	29,775,763.02	9.93
	Web	10,187,414.10	3,733,055.10	1.25
Subtotal: Computers		103,316,482.12	33,508,818.12	11.18
Media Player	Store Front	214,107,446.55	48,700,521.55	16.25
	Web	31,965,612.81	7,132,056.81	2.38
Subtotal: Media Player		246,073,059.36	55,832,578.36	18.63
Stereo Systems	Store Front	252,011,480.19	74,573,961.19	24.88
	Web	39,283,453.33	11,607,109.33	3.87
Subtotal: Stereo Systems		291,294,933.52	86,181,070.52	28.75
Televisions	Store Front	68,188,421.11	14,678,343.11	4.90
	Web	10,192,711.70	2,151,680.70	.72
Subtotal: Televisions		78,381,132.81	16,830,023.81	5.62
Video Production	Store Front	50,206,190.21	15,538,946.21	5.18
	Web	7,847,086.41	2,408,673.41	.80
Subtotal: Video Production		58,053,276.62	17,947,619.62	5.98
TOTAL		1,061,036,640.30	299,712,550.30	99.99

You are going to format this field with commas and dollar signs.

When you select the Revenue field, the ribbon becomes field-specific. Some of the groupings may already be expanded, depending on the width of your screen. In this case, you may need to expand the Format group by clicking the *Format* icon on the ribbon.

23. Click the currency symbol arrow and then select *Floating currency* from the drop-down list, as shown in the following image.



The Revenue column now includes dollar signs for all of the revenue totals, as shown in the following image.

Product Category	Store Type	Revenue	Gross Profit	% Gross Profit
Accessories	Store Front	\$111,975,840.08	\$34,445,649.08	11.49%
	Web	\$17,476,213.55	\$5,367,945.55	1.79%
Subtotal: Accessories		\$129,452,053.63	\$39,813,594.63	13.28%
Camcorder	Store Front	\$130,578,942.72	\$42,319,348.72	14.12%
	Web	\$23,886,759.52	\$7,279,496.52	2.43%
Subtotal: Camcorder		\$154,465,702.24	\$49,598,845.24	16.55%
Computers	Store Front	\$93,129,068.02	\$29,775,763.02	9.93%
	Web	\$10,187,414.10	\$3,733,055.10	1.25%
Subtotal: Computers		\$103,316,482.12	\$33,508,818.12	11.18%
Media Player	Store Front	\$214,107,446.55	\$48,700,521.55	16.25%
	Web	\$31,965,612.81	\$7,132,056.81	2.38%
Subtotal: Media Player		\$246,073,059.36	\$55,832,578.36	18.63%
Stereo Systems	Store Front	\$252,011,480.19	\$74,573,961.19	24.88%
	Web	\$39,283,453.33	\$11,607,109.33	3.87%
Subtotal: Stereo Systems		\$291,294,933.52	\$86,181,070.52	28.75%
Televisions	Store Front	\$68,188,421.11	\$14,678,343.11	4.90%
	Web	\$10,192,711.70	\$2,151,680.70	.72%
Subtotal: Televisions		\$78,381,132.81	\$16,830,023.81	5.62%
Video Production	Store Front	\$50,206,190.21	\$15,538,946.21	5.18%
	Web	\$7,847,086.41	\$2,408,673.41	.80%
Subtotal: Video Production		\$58,053,276.62	\$17,947,619.62	5.98%
TOTAL		\$1,061,036,640.30	\$299,712,550.30	99.99%

Repeat this for Gross Profit. Click the *% Gross Profit* field and then select %.

The % Gross Profit column now includes percent signs for all of the values, as shown in the following image.

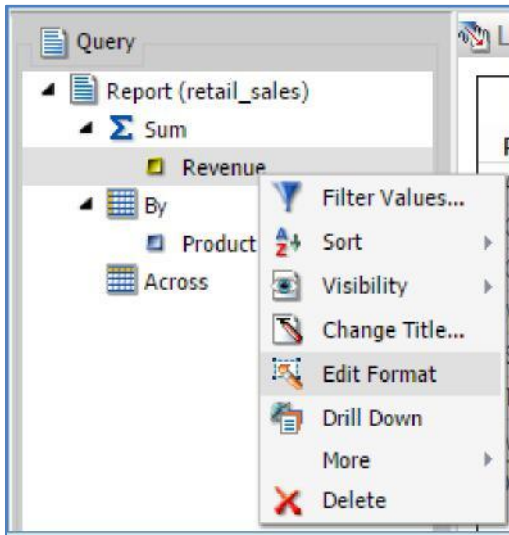
Product Category	Store Type	Revenue	Gross Profit	% Gross Profit
Accessories	Store Front	\$111,975,840.08	\$34,445,649.08	11.49%
	Web	\$17,476,213.55	\$5,367,945.55	1.79%
Subtotal: Accessories		\$129,452,053.63	\$39,813,594.63	13.28%
Camcorder	Store Front	\$130,578,942.72	\$42,319,348.72	14.12%
	Web	\$23,886,759.52	\$7,279,496.52	2.43%
Subtotal: Camcorder		\$154,465,702.24	\$49,598,845.24	16.55%
Computers	Store Front	\$93,129,068.02	\$29,775,763.02	9.93%
	Web	\$10,187,414.10	\$3,733,055.10	1.25%
Subtotal: Computers		\$103,316,482.12	\$33,508,818.12	11.18%
Media Player	Store Front	\$214,107,446.55	\$48,700,521.55	16.25%
	Web	\$31,965,612.81	\$7,132,056.81	2.38%
Subtotal: Media Player		\$246,073,059.36	\$55,832,578.36	18.63%
Stereo Systems	Store Front	\$252,011,480.19	\$74,573,961.19	24.88%
	Web	\$39,283,453.33	\$11,607,109.33	3.87%
Subtotal: Stereo Systems		\$291,294,933.52	\$86,181,070.52	28.75%
Televisions	Store Front	\$68,188,421.11	\$14,678,343.11	4.90%
	Web	\$10,192,711.70	\$2,151,680.70	.72%
Subtotal: Televisions		\$78,381,132.81	\$16,830,023.81	5.62%
Video Production	Store Front	\$50,206,190.21	\$15,538,946.21	5.18%
	Web	\$7,847,086.41	\$2,408,673.41	.80%
Subtotal: Video Production		\$58,053,276.62	\$17,947,619.62	5.98%
TOTAL		\$1,061,036,640.30	\$299,712,550.30	99.99%

There are many ways to perform the same action in InfoAssist+. This means that wherever you are in the application, you always have quick access to the functionality you need.

For example, right-click the *Revenue* field in the Live Preview pane to view the corresponding context menu, as shown in the following image.

Product Category	Store Type	Revenue	Gross Profit
Accessories	Store Front	\$111,975,840.08	\$34,445,649.08
	Web	\$17,476,213.55	\$5,367,945.55
Subtotal: Accessories		\$129,452,053.63	\$39,813,594.63
Camcorder	Store Front	\$130,578,942.72	\$42,319,348.72
	Web	\$23,886,759.52	\$7,279,496.52
Subtotal: Camcorder		\$154,465,702.24	\$49,598,845.24
Computers	Store Front	\$93,129,068.02	\$29,775,763.02
	Web	\$10,187,414.10	\$3,733,055.10
Subtotal: Computers		\$103,316,482.12	\$33,508,818.12
Media Player	Store Front	\$214,107,446.55	\$48,700,521.55
	Web	\$31,965,612.81	\$7,132,056.81
Subtotal: Media Player		\$246,073,059.36	\$55,832,578.36
Stereo Systems	Store Front	\$252,011,480.19	\$74,573,961.19
	Web	\$39,283,453.33	\$11,607,109.33
Subtotal: Stereo Systems		\$291,294,933.52	\$86,181,070.52
Televisions	Store Front	\$68,188,421.11	\$14,678,343.11
	Web	\$10,192,711.70	\$2,151,680.70
Subtotal: Televisions		\$78,381,132.81	\$16,830,023.81
Video Production	Store Front	\$50,206,190.21	\$15,538,946.21
	Web	\$7,847,086.41	\$2,408,673.41
Subtotal: Video Production		\$58,053,276.62	\$17,947,619.62
TOTAL		\$1,061,036,640.30	\$299,712,550.30

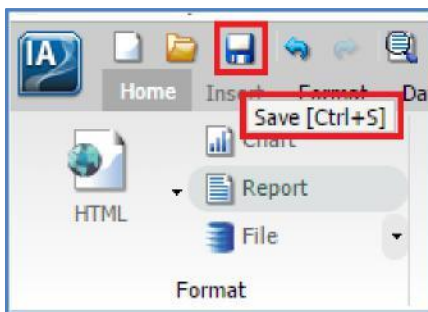
Now, right-click the *Revenue* field in the Query pane, as shown in the following image.



Notice that there is also an *Edit Format* option in this context menu that you could have used to format this column.

Click the white space area anywhere outside the context menu to exit this menu.

24. Save your report by clicking the *Save* icon in the Quick Access Toolbar, as shown in the following image.



You are now ready to move on to *Module 4, Lesson 4*, where you will learn how to create, edit, and save new charts using InfoAssist+.