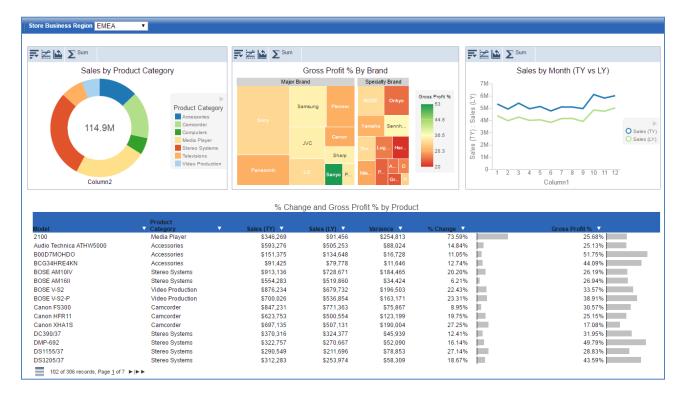


Module 4: Creating Content \rightarrow Lesson 6: Creating Documents \rightarrow Learn

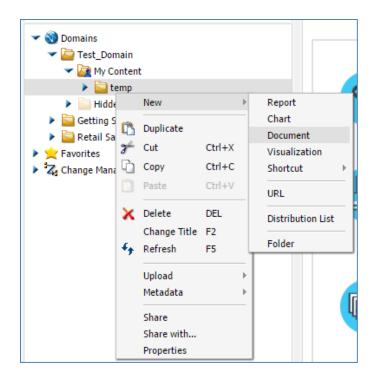
Welcome to *Module 4, Lesson 6*. In this lesson, you will learn how to create, edit, and save new documents based on your uploaded data using InfoAssist+.

Documents allow you to create pages containing multiple charts and reports that can be saved in a variety of formats.



To create a document, you can:

• Right-click the folder in which you want to create the document, point to *New*, and then click *Document*.

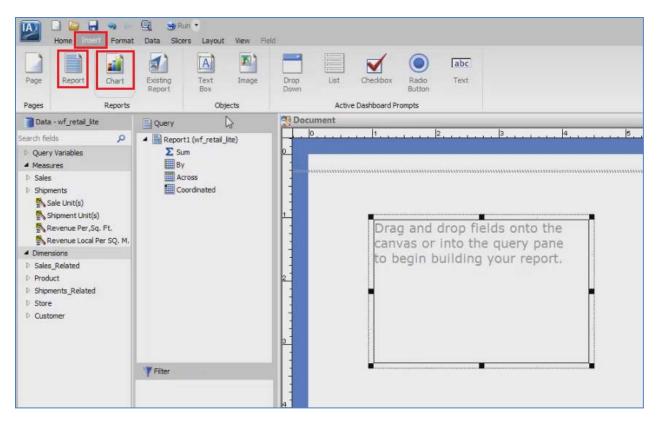


• Click *Document* from the Quick Links on the Home page.

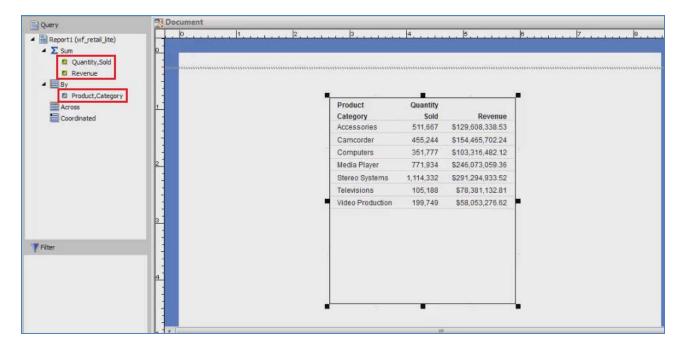
Quick Links 🔻		
	Current Domain:	Test_Domain
•	Manage New Domain Manage Users Configure System	VideoAssist
	Use these options to organize content, manage users and groups, and configure the system.	
	Connect	
	Connect to Data Upload Data Use these options to connect to an existing data source, such as Microsoft SQL Server, or upload an Excel or file for reporting and analysis.	VideoAssist CSV
	Create	
	Report Chart <u>Document</u> Visualization	VideoAssist
	Use InfoAssist+ to create tabular reports, individual charts, portable dashboards, multi-page PDF documents to analyze data and patterns in visualization.	s or
	Visit the Information Center for additional technical content and learning resources.	

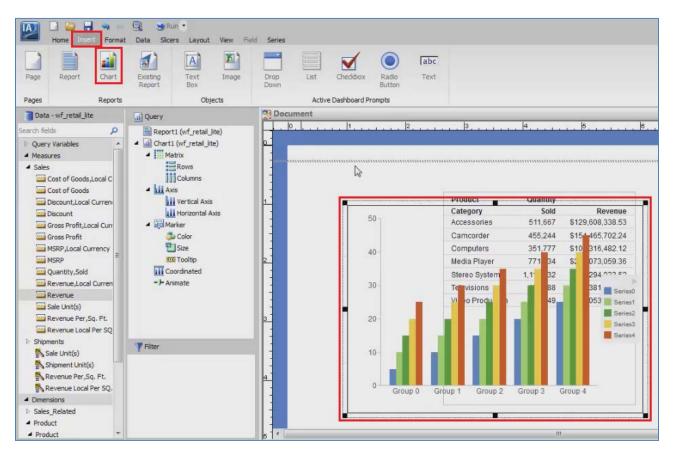
Once you select a Synonym (also known as a Master File) to use as a data source, you can begin creating your document.

Since documents contain multiple types of content, you add and format each individual component separately. Using the Report or Chart options on the Insert tab creates placeholder content.



You can then add fields to the component, reposition the object on the page, and format the content.





The ribbon changes depending on the type of content that you select.

For example, select a chart in the Document canvas.

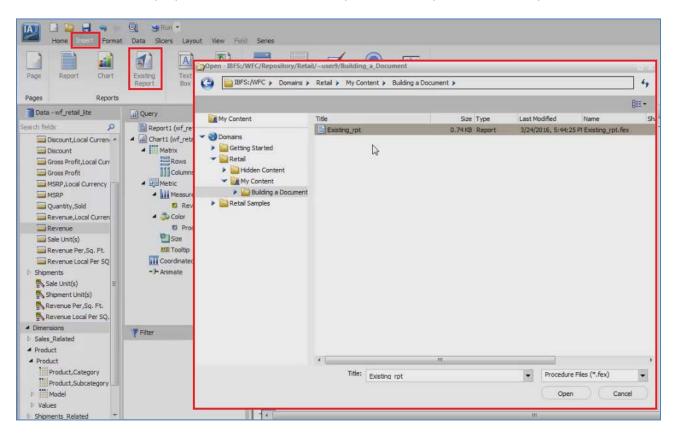
Home Insert Format Home Insert Format Chart Report InfoMini File - Bar	Pie Line Area	Field Series		Labels Auto Dr		
Destination Desta - wf_retail_lite		Document		Navigati	on	
arch fields	Query			3	. 4	6
	Report ((wf_retail_lite) Ghart 1 (wf_retail_lite)			Category	Sold	Revenue
	 Matrix 			Accessories	511,667	\$129,608,338.53
Measures Sales	Rows			Camcorder	455,244	\$154,465,702.24
Cost of Goods,Local C	Columns			Computers	351,777	\$103,316,482.12
Cost of Goods	A Metric	2		Media Player	771,934	\$246,073,059.36
Discount.Local Curren	Measure			Stereo Systems	1,114,332	\$291,294,933.52
Discount	Color			Televisions	105,188	\$78,381,132,81
Gross Profit,Local Curr	C Size			Video Production	199,749	\$58,053,276.62
Gross Profit MSRP,Local Currency MSRP Quantity,Sold Revenue,Local Curren Revenue Sale Unit(s) Revenue Per,Sq. Ft. Revenue Local Per Sq.	axal Tooltip III Coordinated ~')⊢ Animate	Group 0 Group Group 3 Group	Series2 Series3 Series4			
Shipments	Filter					
Sale Unit(s)						
Shipment Unit(s) Revenue Per, Sg. Ft.						
Revenue Local Per SQ.						
Dimensions						
Sales_Related						
Product		8				
Product		1				

You can change it using the same options you will have in the Chart canvas.

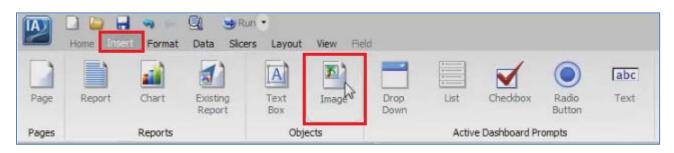
InfoMini File •	Pie Line Area	Scatter Choro	pleth Proportiona Symbol	l Other	Features	Labels	Auto Dril		
Destination		hart Types			1		Navigatio	n	
Data - wf_retail_lite	iii) Query	Docum	nent		2	3		4	6
arch fields P	 Report1 (wf_retail_lite) Chart1 (wf_retail_lite) 				<u> </u>	Category		Sold 511,667	Revenue \$129.608,338.53
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Product, Subcategory									
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A report, similarly, uses the ribbon that appears when creating a report.

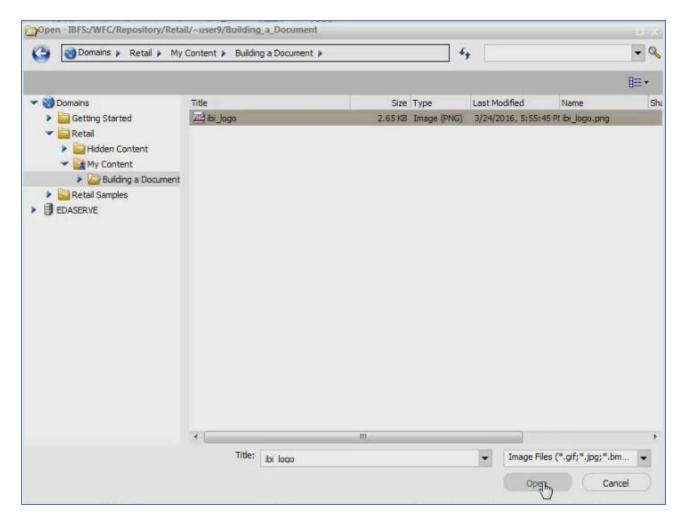
If you insert an existing report, it uses the formatting used in the original file. It cannot be modified within the document. For this purpose, InfoAssist+ takes a snapshot of the report as it currently exists.



You can also add a text box or an image to the document to add context or style to your document.



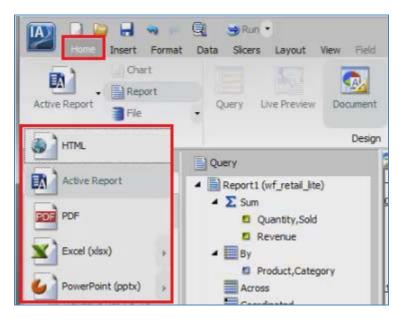
Images have to be uploaded to your domain in the portal before they can be added to a document.



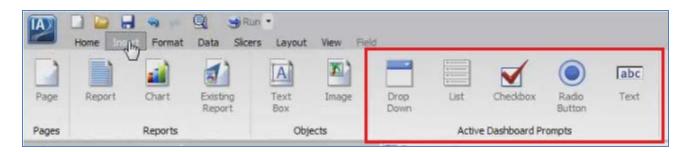
You can move or delete the objects in your document at any time. To line them up precisely, you can hold down the Shift key and select two or more components, then right-click an object, point to Align, and select one of the available alignment options.

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Information		Product Category		Size and Position.			Revenue	
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	in I	Camcorder		Delete		-	Align Right	
	_1	Computers		351,777	\$10	T	Alightop	
		Media Player		771,934	\$24	la	Align Bottom	
		Stereo Syster	ms	1,114,332	\$29	1.29	94,933.52	
		Televisions		105,188	\$7	8,38	81,132.81	
Product Category	5	Video Produc	tion	199,749	\$5	68,05	53,276.62	
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Computers								
Media Player								
Stereo Systems							-	
Televisions								
Video Production								

Your document can be converted to a number of output formats, including PDF or PowerPoint, making it easy to distribute your documents.



If you change the output format to active report, you can add controls from the Insert tab.



These controls can be used to filter content in the document at run time. You can choose control options such as a drop-down menu or radio buttons.

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	Builders			and the second se		10 I
1.		Camcorder	455,244	\$154,465,702.24	Option	3
		Computers	351,777	\$103,316,482.12	Option	4
		Media Player	771,934	\$246,073,059.36		
		Stereo Systems	1,114,332	\$291,294,933.52	-	
	10	Televisions	105,188	\$78,381,132.81		
	Product Category	Video Production	199,749	\$58,053,276.62		
	Accessories					
	Camcorder					
	Computers					
	Media Player					
	Stereo Systems					
	Televisions					

To link the control to a chart or report and choose the field that populates it, right-click the control and click Properties.

Option 1	
Option 2	
Option 3	
Option 4	1
Option 5	
	-
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	3 ⁴ Out
1	Duplicate
	Properties
	S Renamed
	Second

Any of the fields in the chart or report can be used to populate the control with available filter values.

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Source		Targets		
Report		Candidate Reports		Targets
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Field		IncludeTable_1		(hart1
Product,Category	-			Reporti
Condition				
Equal to	-			
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Ascending	•			
V Include All		•		< III
	Source Report Chart1 Field Product,Category Condition Equal to Sort Ascending	Source Report Chart1 • Field Product,Category • Condition Equal to • Sort Ascending •	Source Targets Report Candidate Reports Chart1 IncludeTable_1 Field IncludeTable_1 Product,Category IncludeTable_1 Sort IncludeTable_1	Source Targets Report Candidate Reports Chart1 IncludeTable_1 Field IncludeTable_1 Product,Category IncludeTable_1 Equal to IncludeTable_1 Sort IncludeTable_1

When the document is run, selecting a value in the control will filter the target chart or report.



Documents can be as many pages as you wish. To add a new page, either use the option on the Insert tab or add a new page using the page menu located at the top right of the screen.

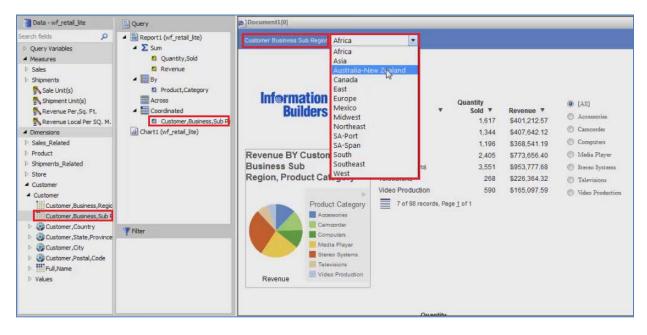
				6		Page
					alaa kaana kaana kaana 🖌 🧰	Page
					-	
Information	Product	Quantity				
Builders	Category Accessories	Sold 511,667	Revenue \$129.608.338.53	Accessories		
Dulluers	Camcorder	455,244	\$154,465,702.24	Camcorder		
	Computers	351,777	\$103,316,482.12	Computers	1.2	
	Media Player	771,934	\$246,073,059.36	Media Player		
	Stereo Systems	1,114,332	\$291,294,933.52	Stereo Systems		
	Televisions	105,188	\$78,381,132.81	Televisions		
Product Category	Video Production	199,749	\$58,053,276.62	Video Production		
Accessories						
Camcorder						
Computers Media Player						
Stereo Systems						
Televisions						
Video Production						
Revenue						

The Page Options button in this menu allows you to rename or duplicate a page in your document.



If you select a chart or report in the document and drag a field into the Coordinated field container, new pages are automatically created for each value in that field.

When the document is run, content is replicated onto each page and filtered for each respective coordinated field value.



If the format is set to active report, there is a menu at the top instead of separate pages at run time.

Overall, documents can be a great way to show lots of information together in a single file. You can save your document in a traditional format like a PDF, or you can use the active report format to add some interactivity to your document.

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