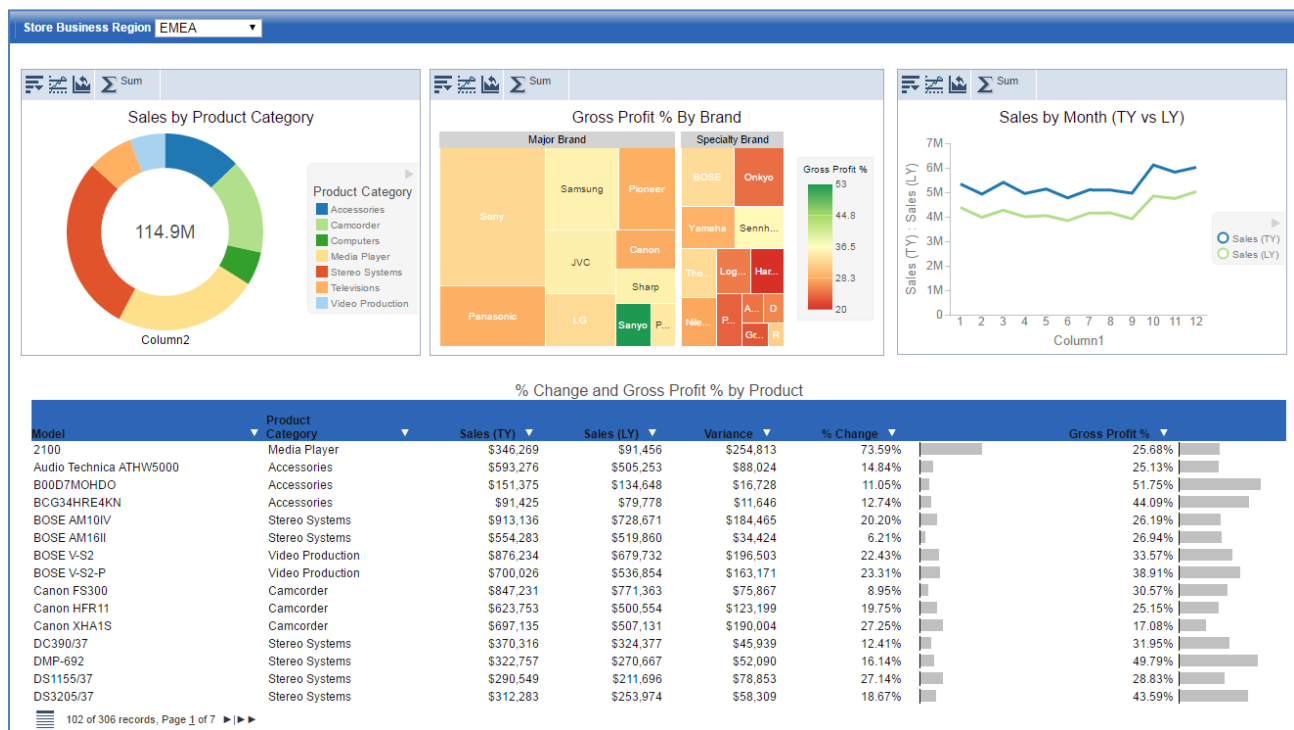## Module 4: Creating Content → Lesson 6: Creating Documents → *Learn*
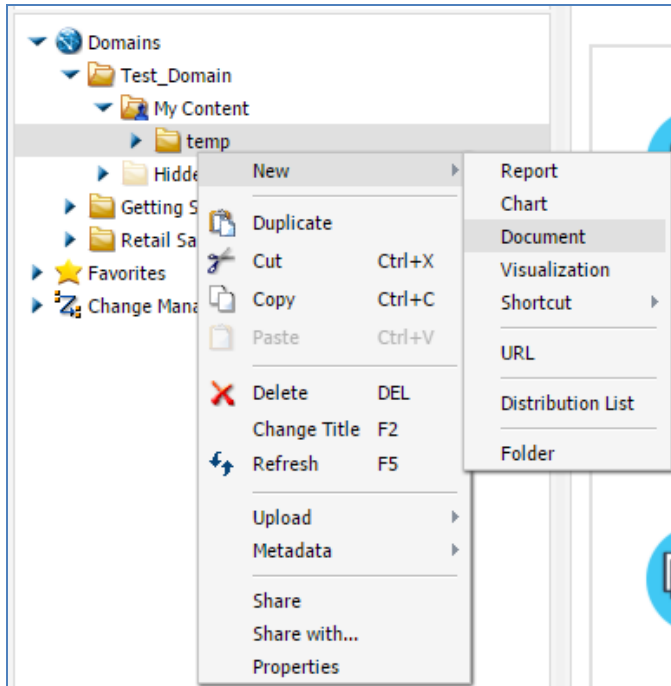
Welcome to *Module 4, Lesson 6*. In this lesson, you will learn how to create, edit, and save new documents based on your uploaded data using InfoAssist+.

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



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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.

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.
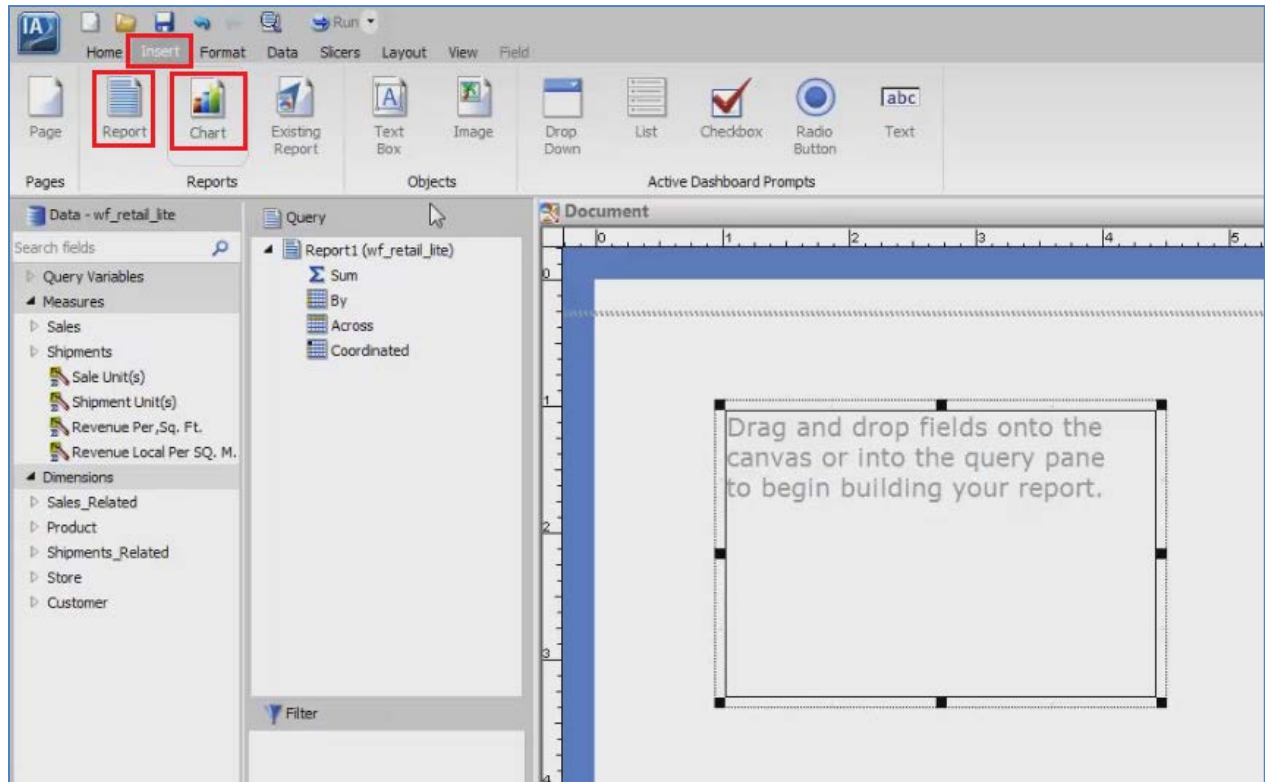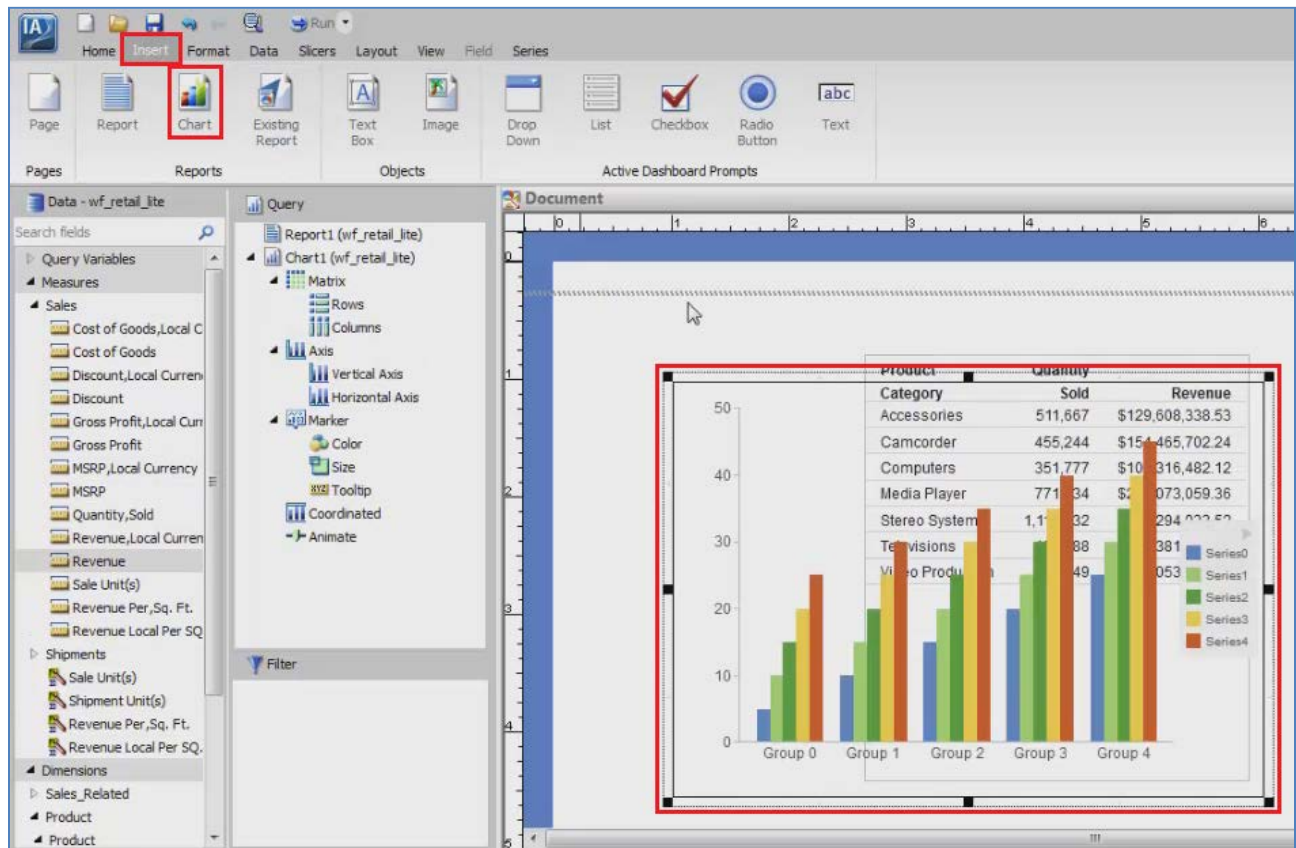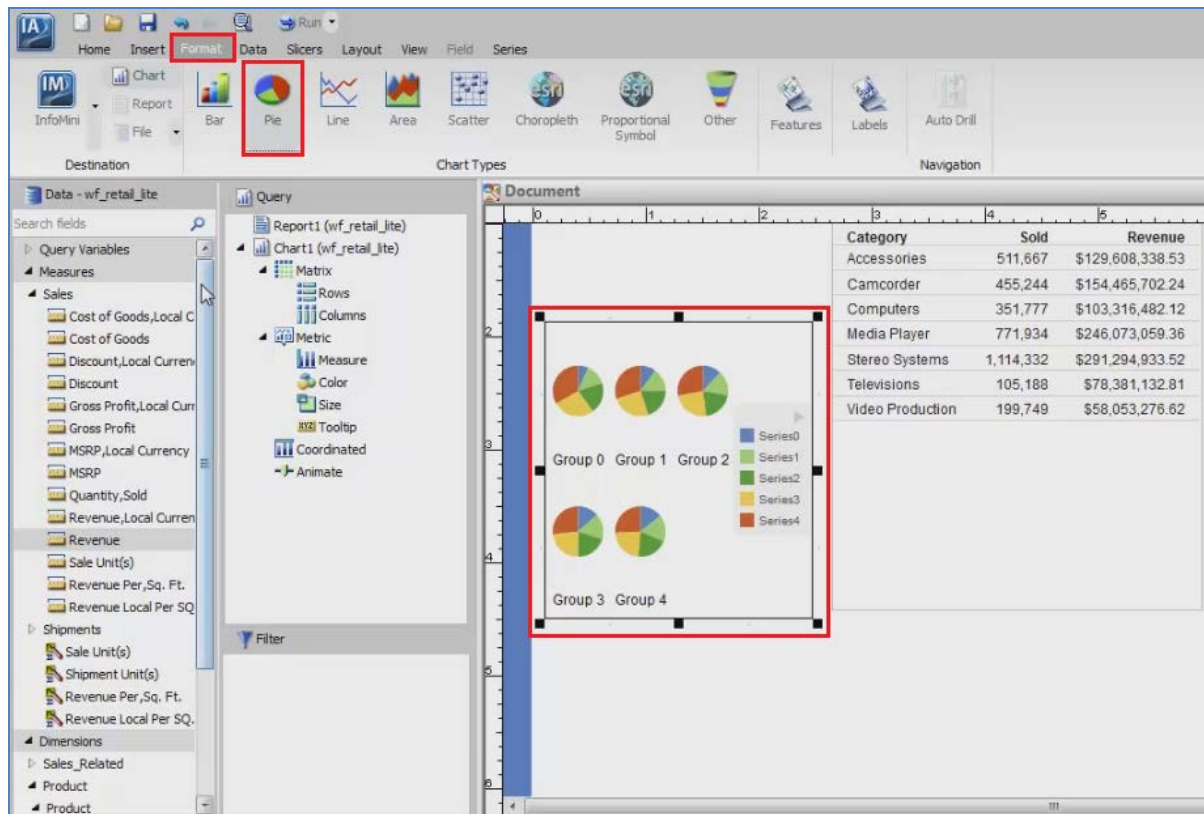


You can then add fields to the component, reposition the object on the page, and format the content.
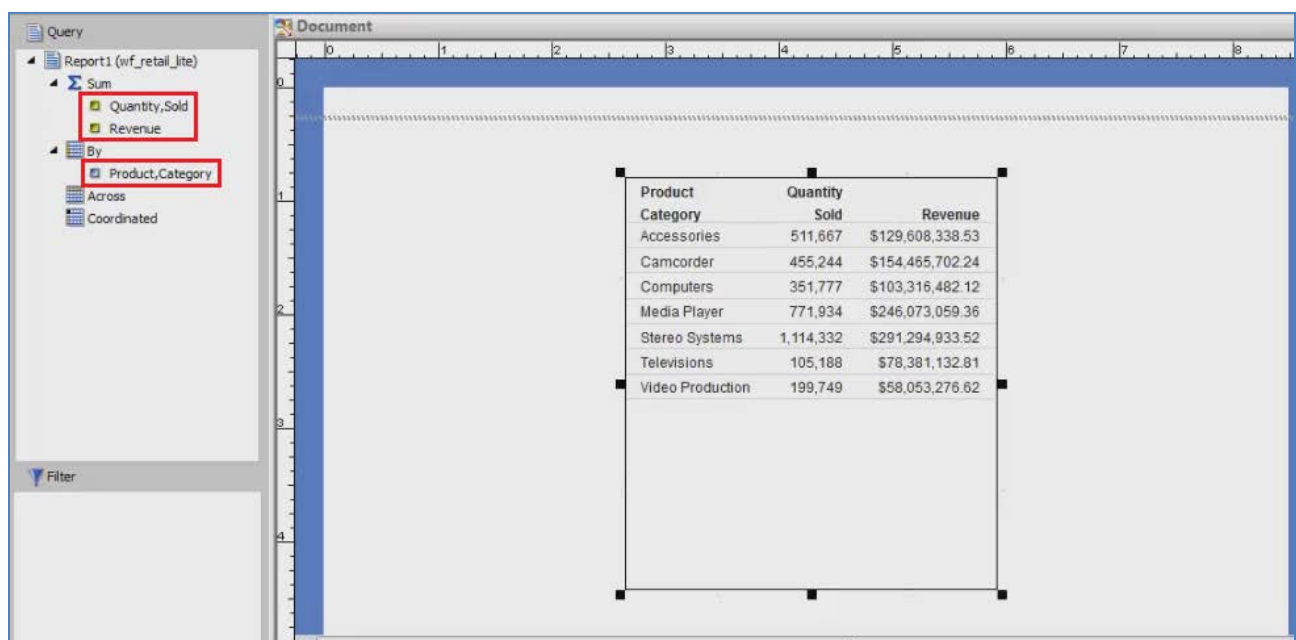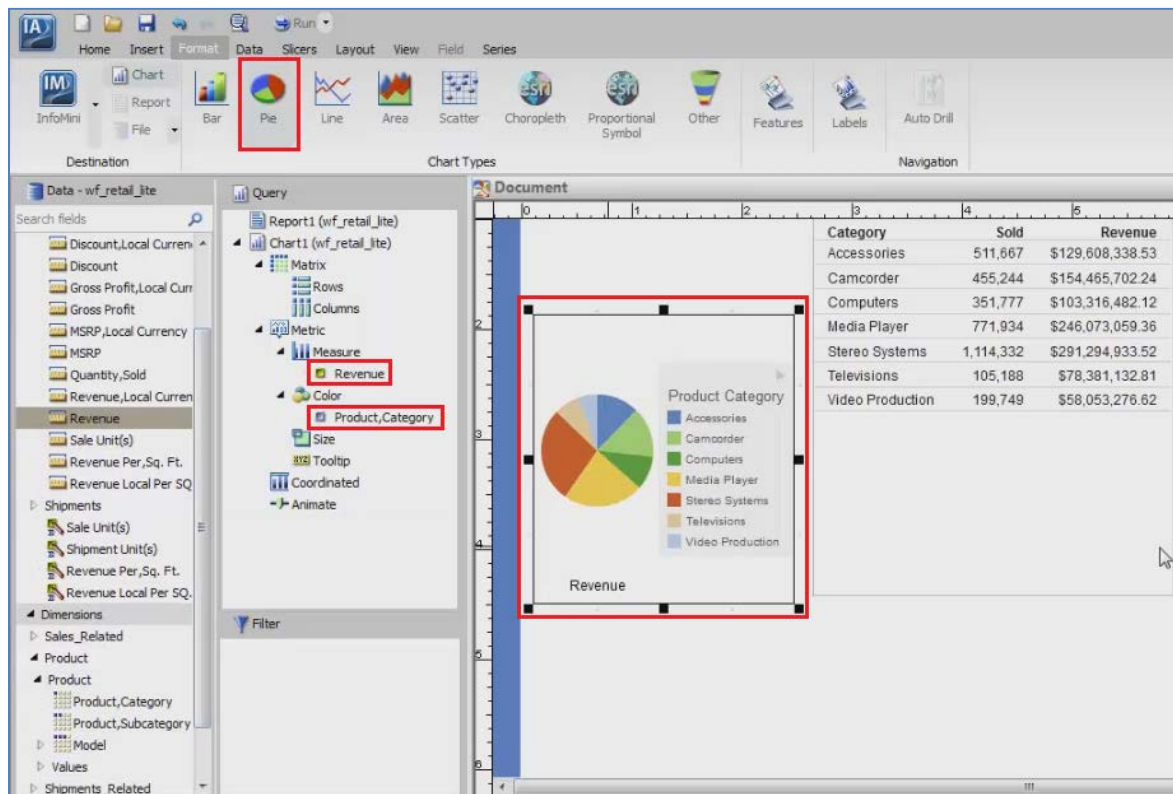
The ribbon changes depending on the type of content that you select.



For example, select a chart in the Document canvas.

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

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.
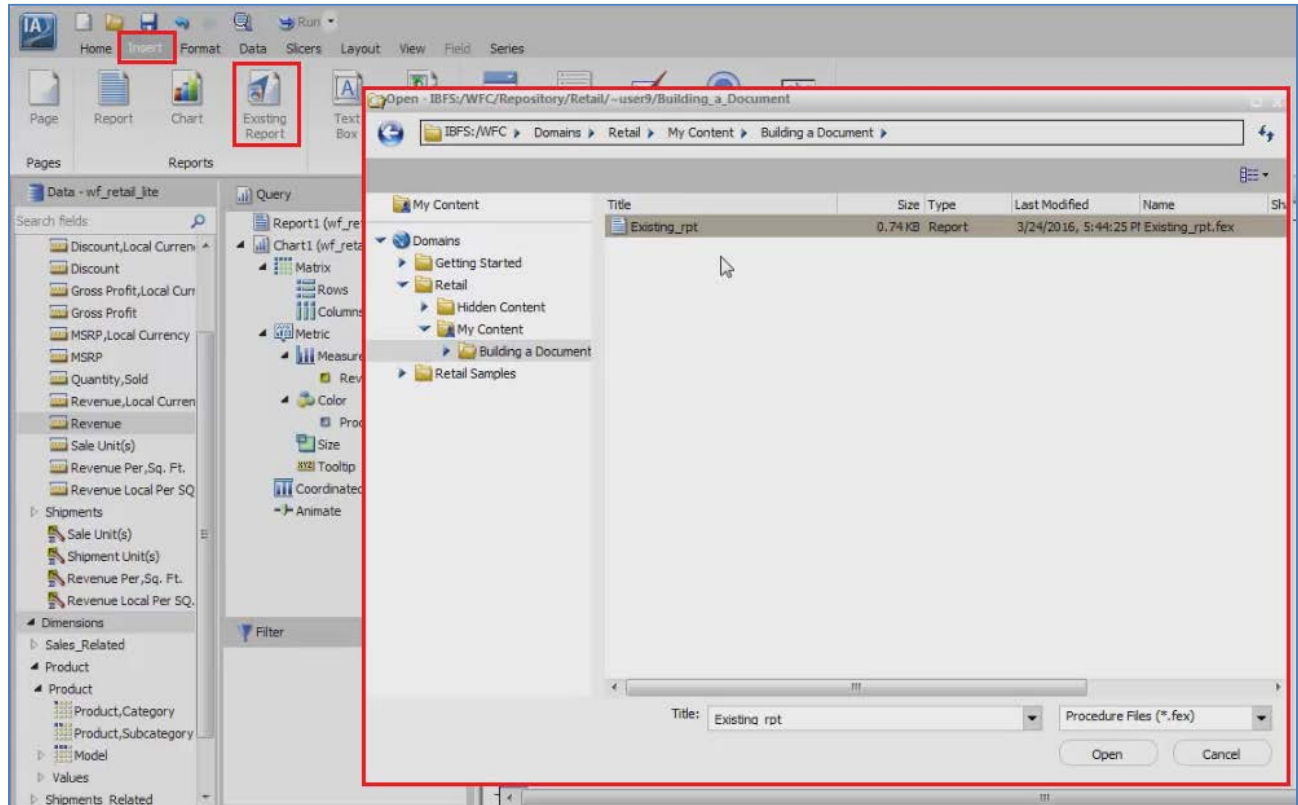


You can also add a text box or an image to the document to add context or style to your document.
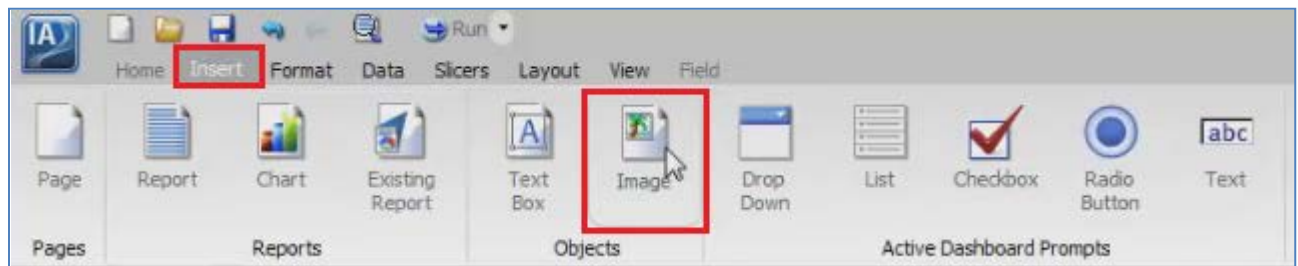


Images have to be uploaded to your domain in the portal before they can be added to a document.
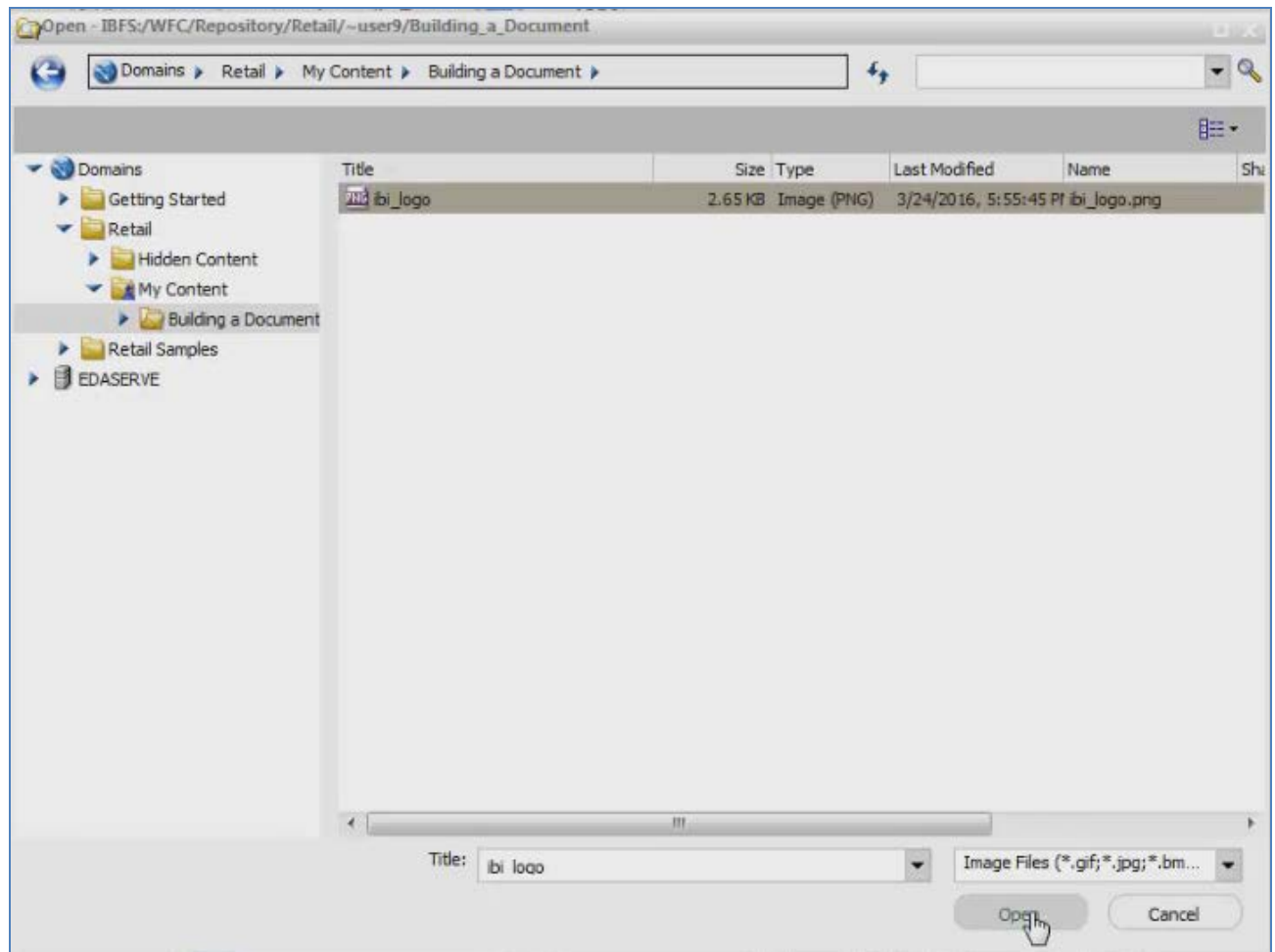
You can move or delete the objects in your document at any time.  To line them up precisely, you can hold down the Shift key and select two or more components, then right-click an object, point to Align, and select one of the available alignment options.
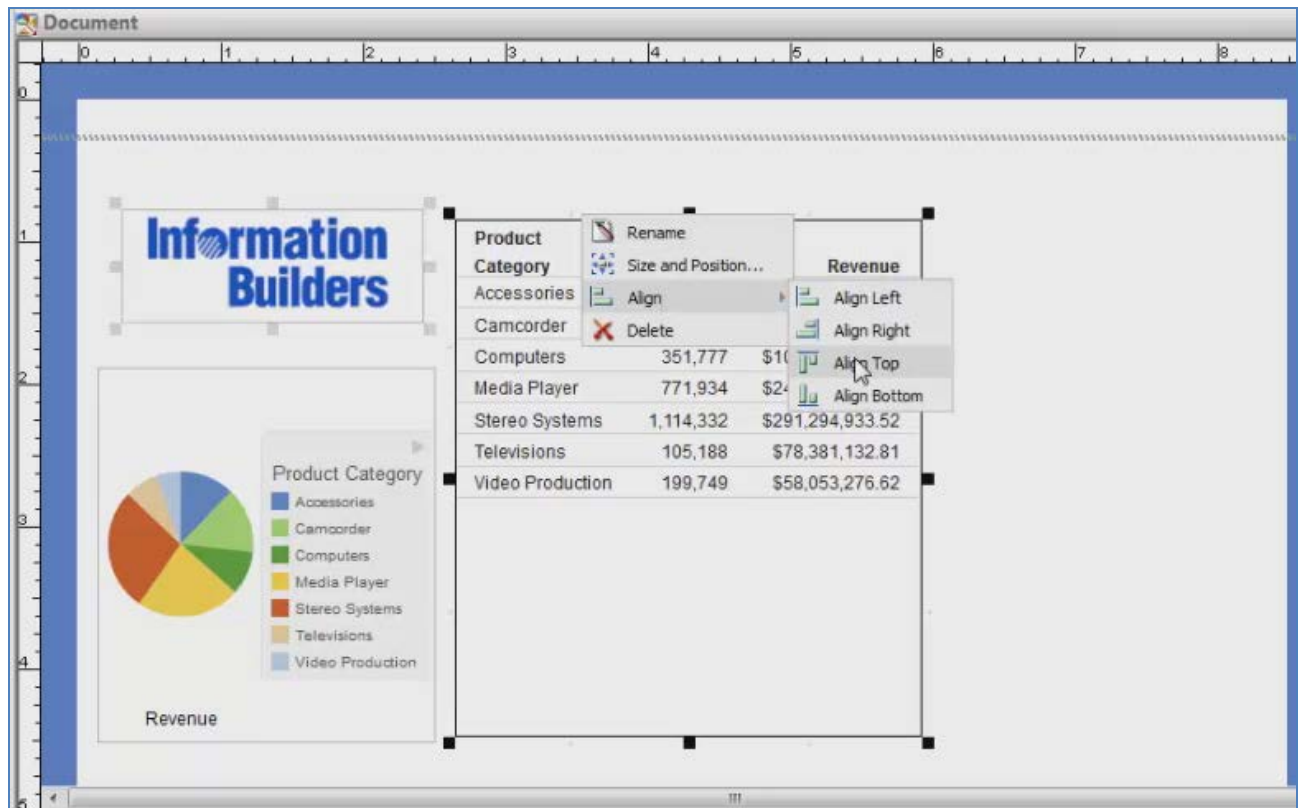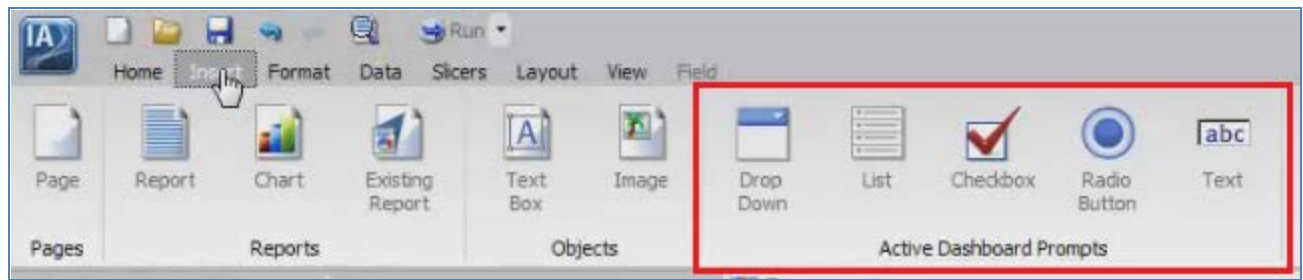
Your document can be converted to a number of output formats, including PDF or PowerPoint, making it easy to distribute your documents.
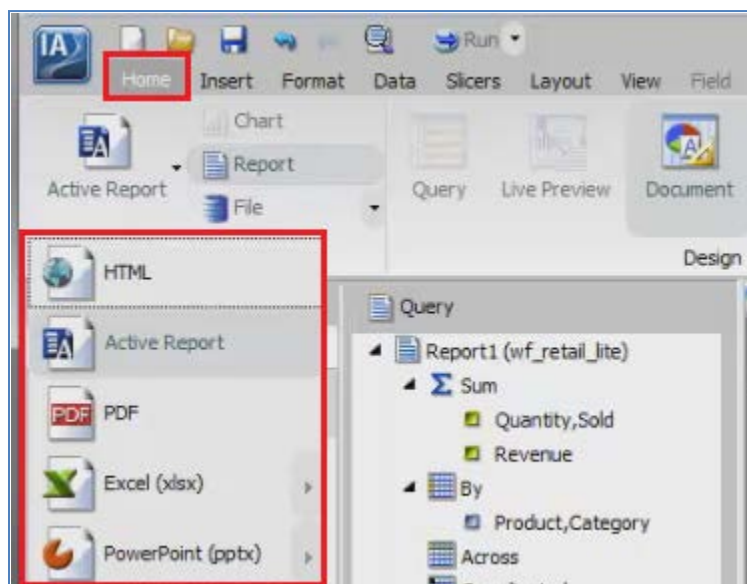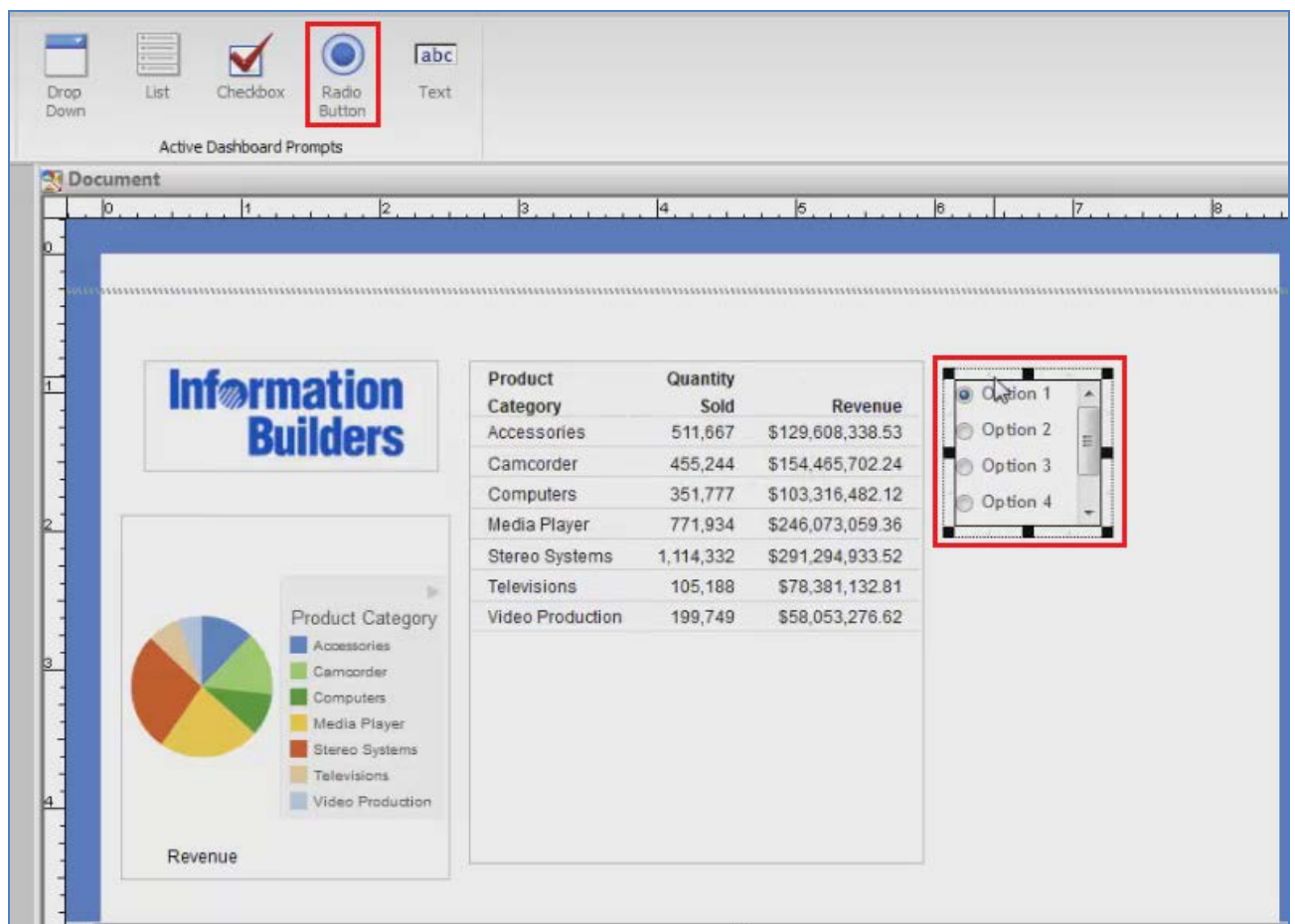


If you change the output format to active report, you can add controls from the Insert tab.
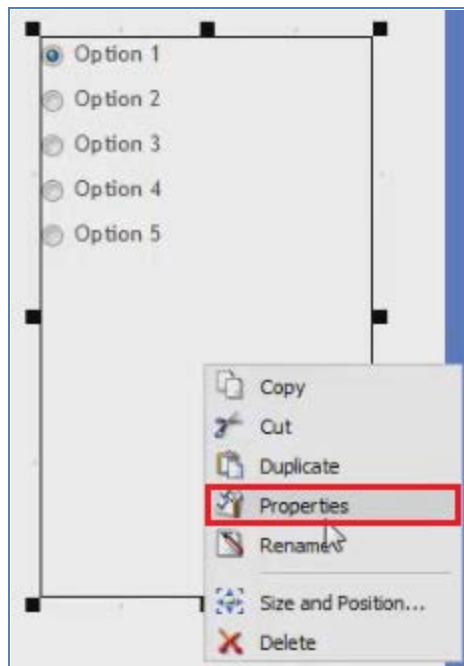
These controls can be used to filter content in the document at run time.  You can choose control options such as a drop-down menu or radio buttons.



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

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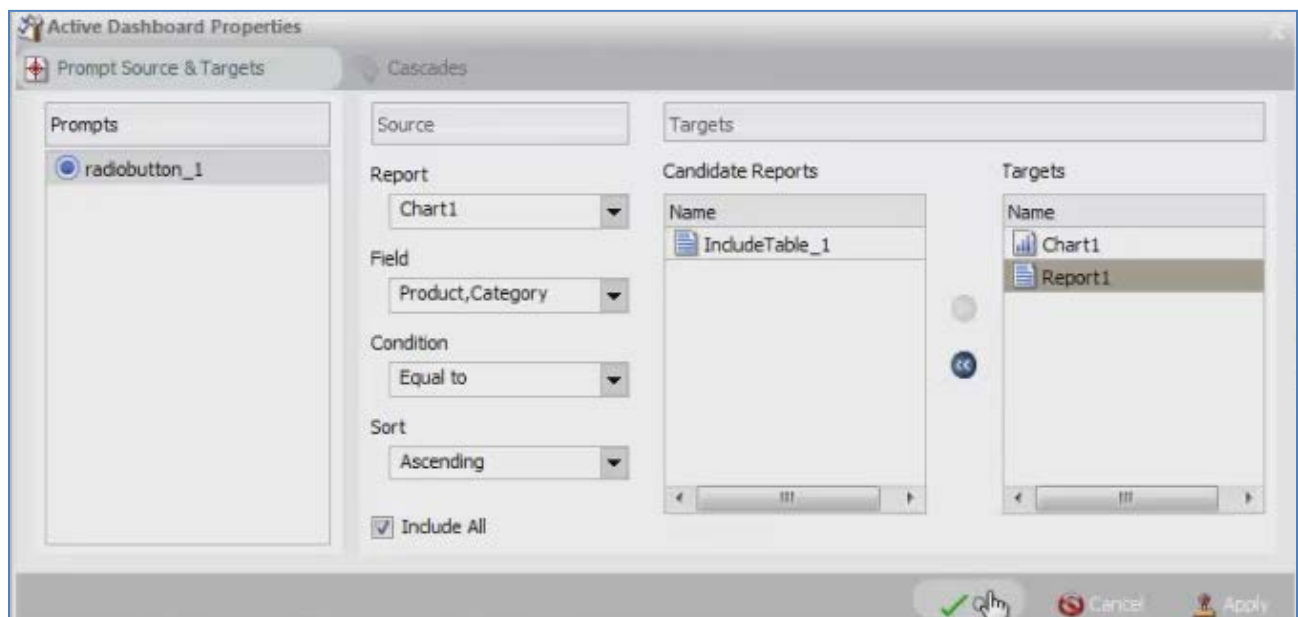


When the document is run, selecting a value in the control will filter the target chart or report.



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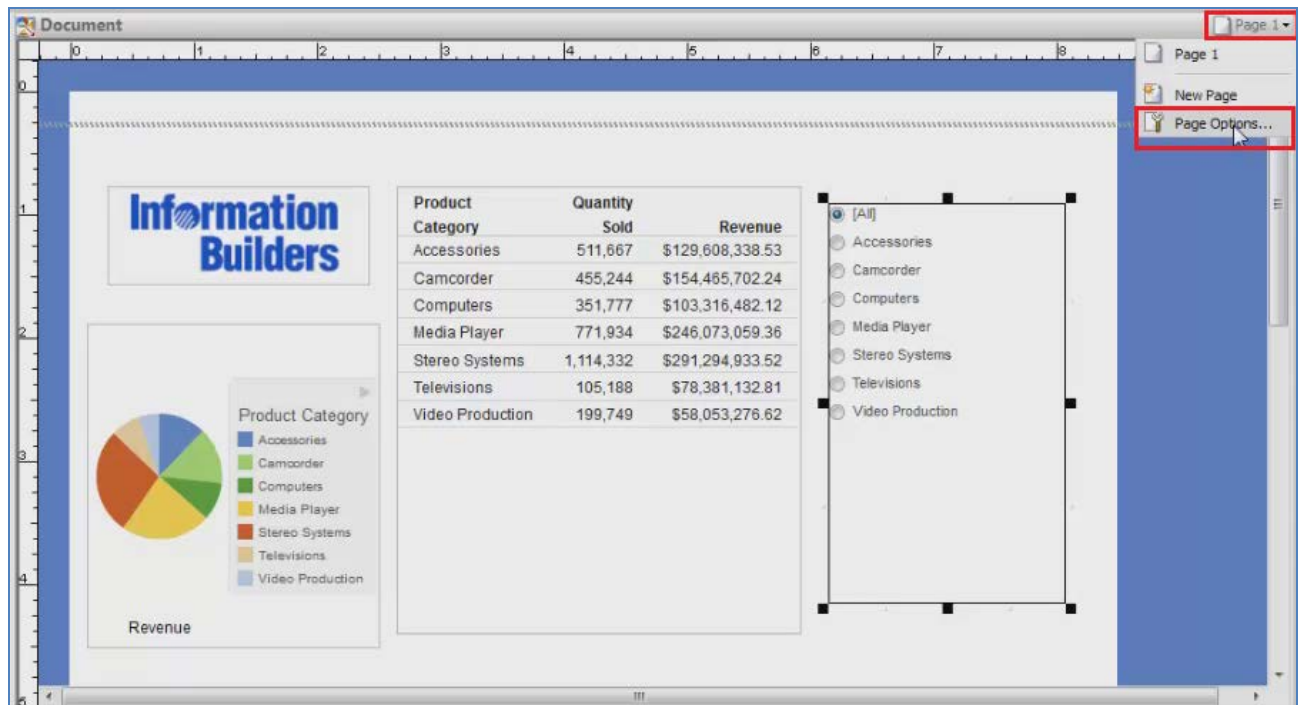
The Page Options button in this menu allows you to rename or duplicate a page in your document.



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.
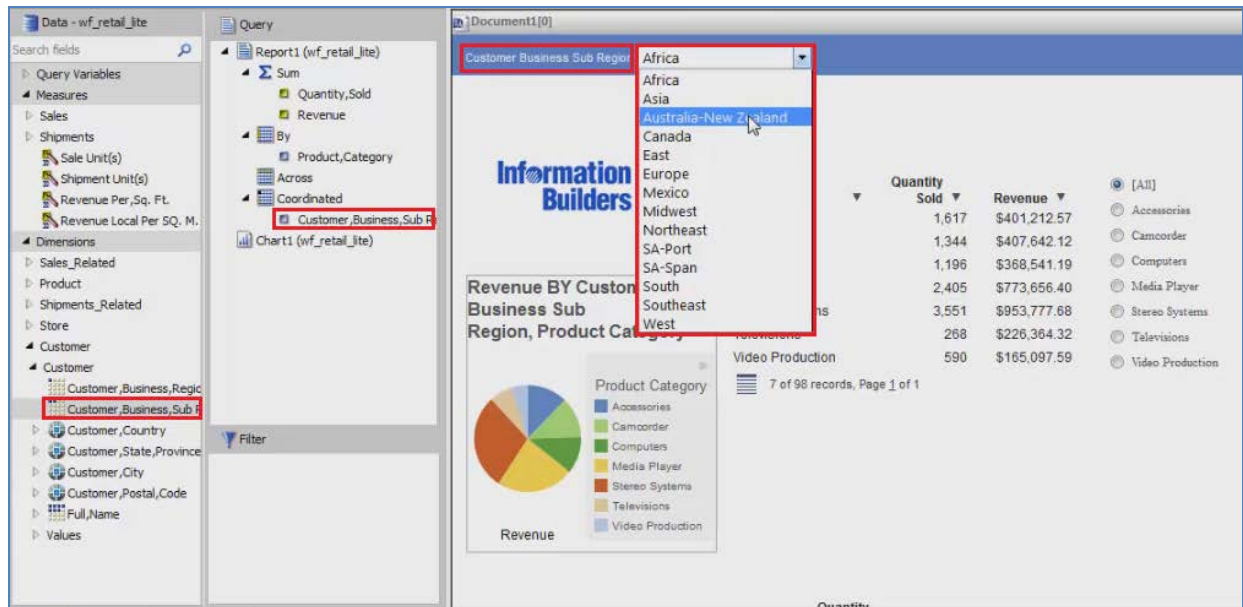


If the format is set to active report, there is a menu at the top instead of separate pages at run time.

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.