Module 4: Creating Content → Lesson 6: Creating Documents → *Try Now!*

In this *Try Now!* exercise, you will be creating a document in your Sales domain by adding content you have already created, which is based on the data you uploaded from your Microsoft® Excel® spreadsheet (retail_data_extract.xlsx). You will also add sample content to this document that was automatically generated based on your data. The tutorial will also show you how to arrange the layout of your document and add additional content as required.

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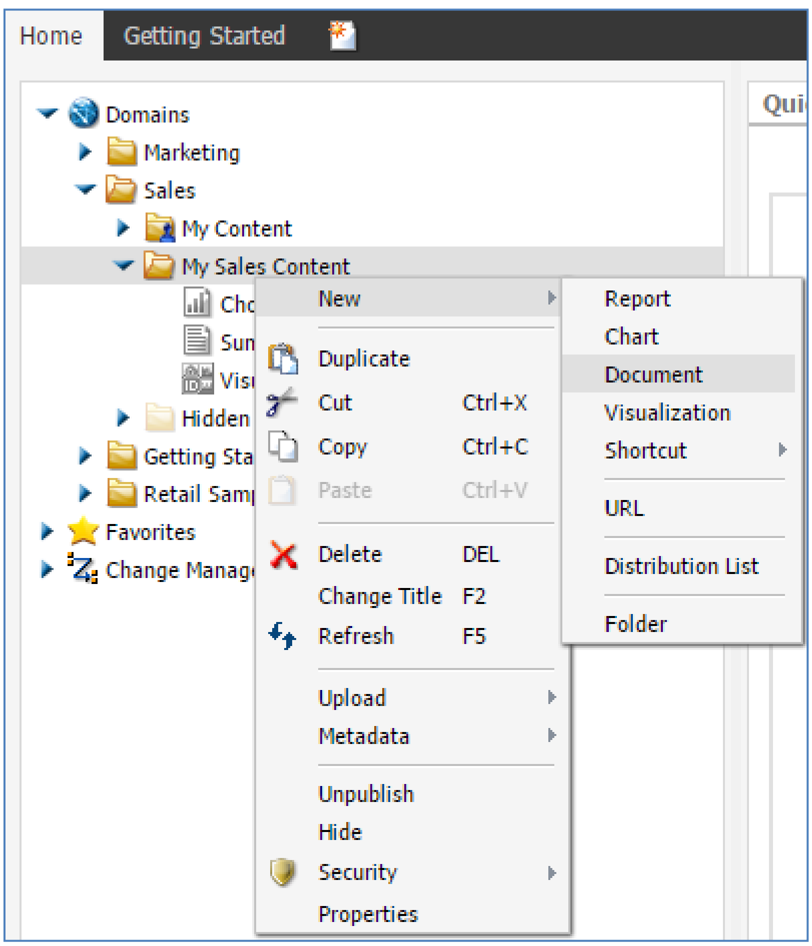
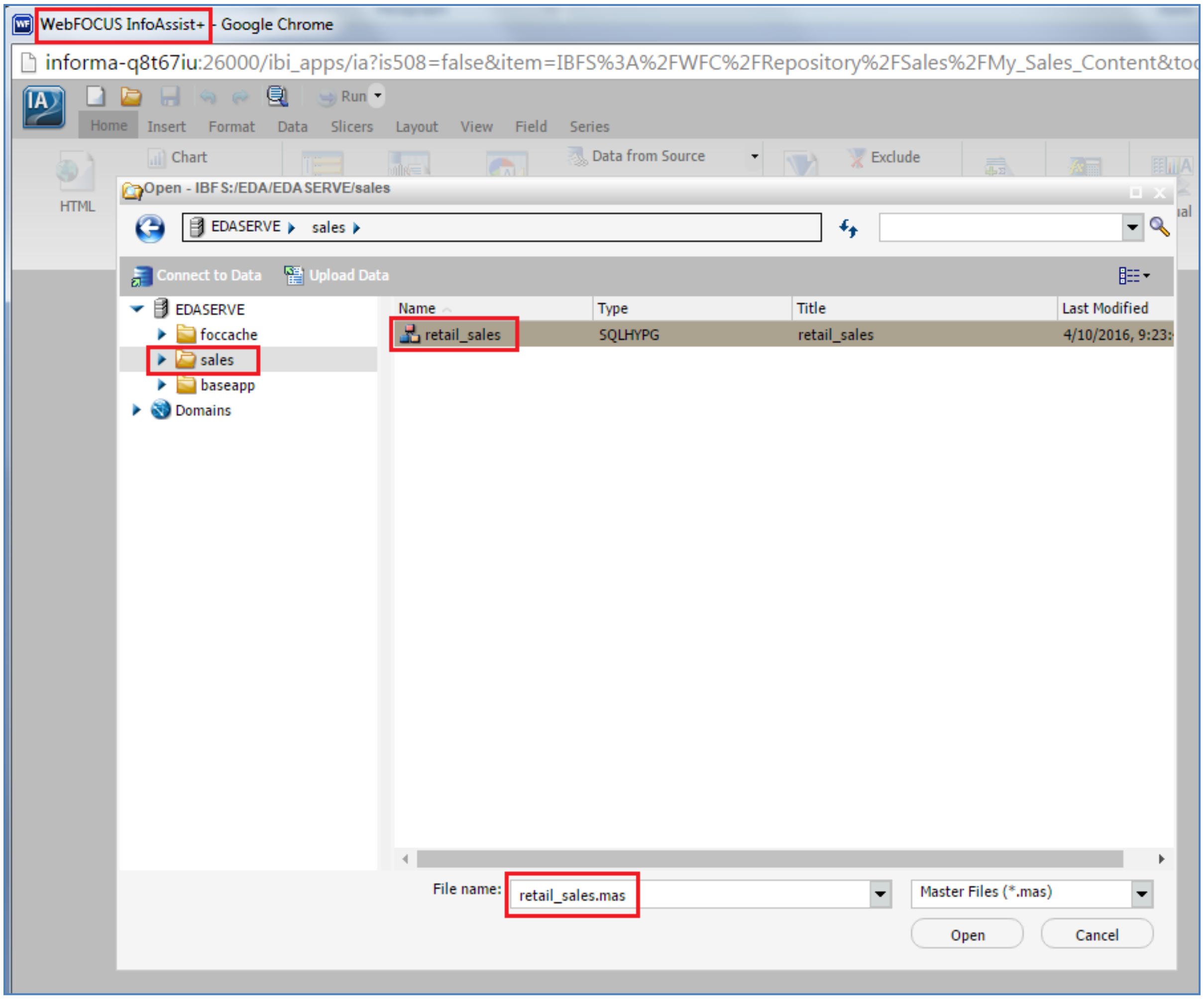
1. In the Resources tree on the Home page, right-click the published *My Sales Content* folder, select *New* from the context menu, and then click *Document*, as shown in the following image.



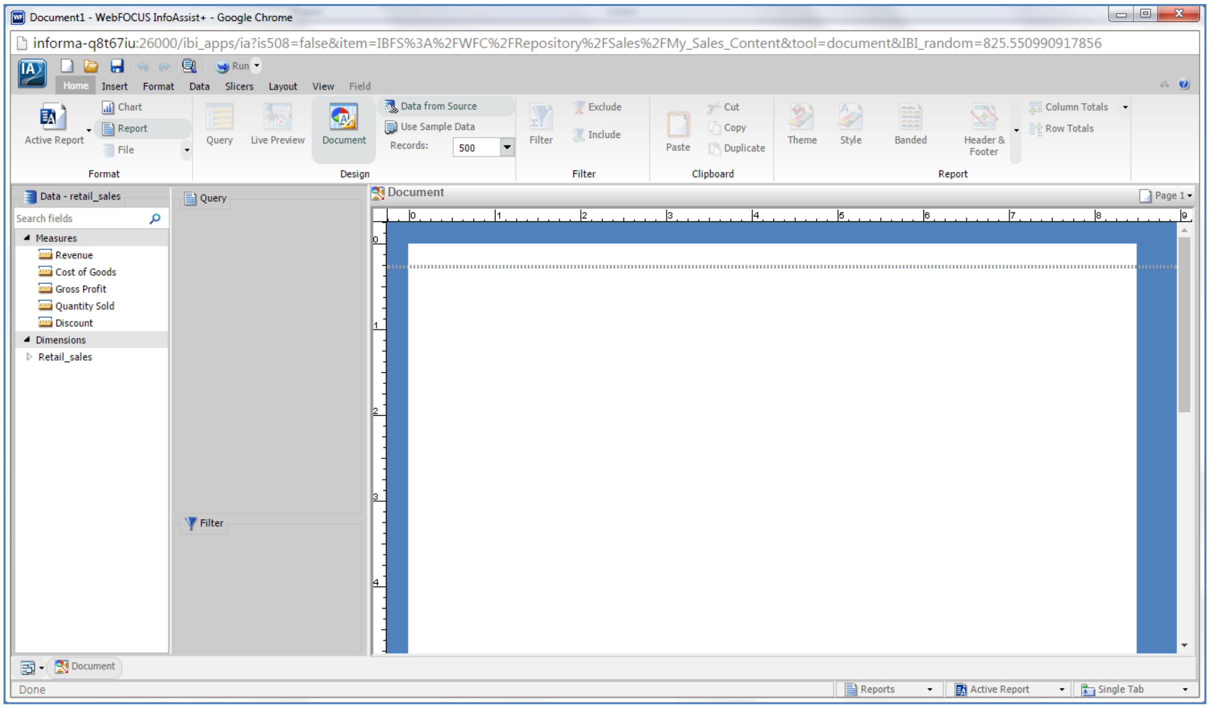
InfoAssist+ opens in the background and an Open dialog box is displayed in the foreground, as shown in the following image.



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

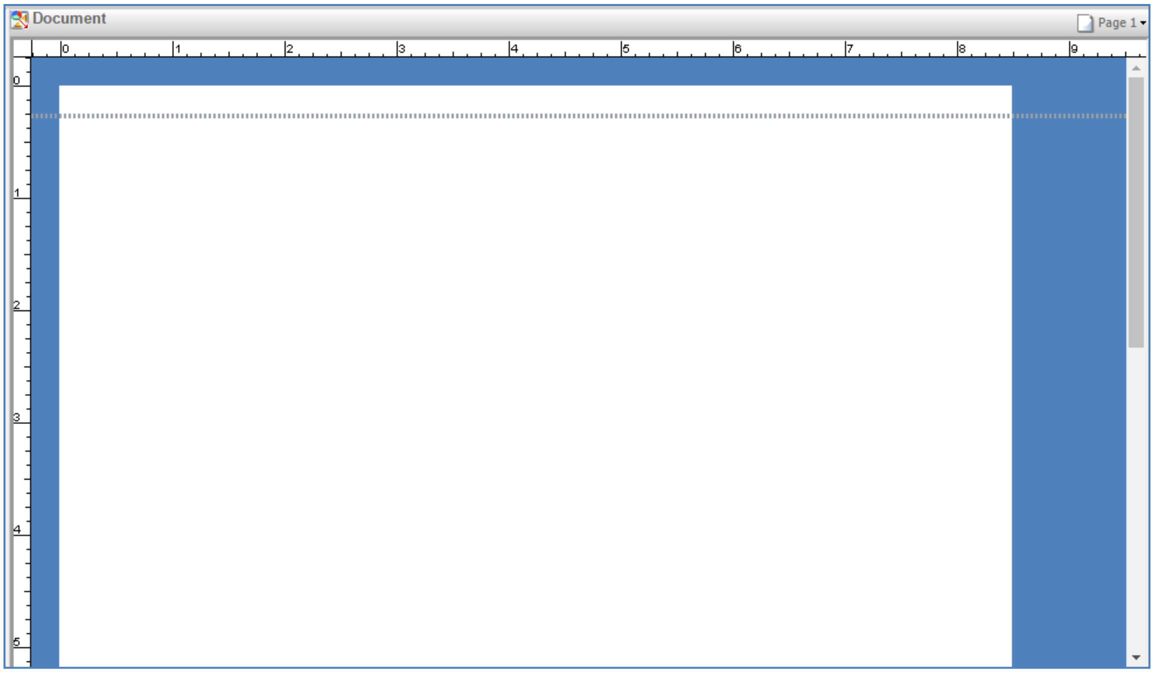
3. Click *Open*.

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



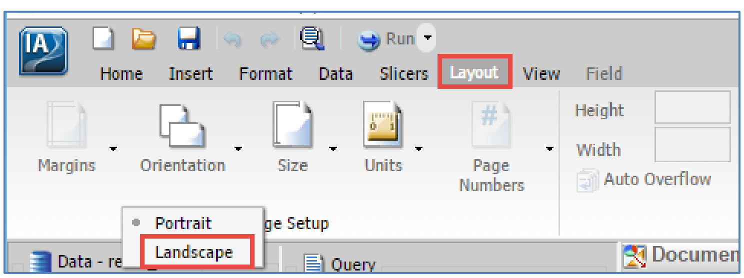
Note: Although you have selected a data source (*retail_sales.mas*), you do not need to create new reports and charts to populate your document. In this example, you are going to populate the document with existing content.

Notice that your document canvas is automatically formatted in a portrait layout that can be viewed on a screen or printed on a standard printer, as shown in the following image.

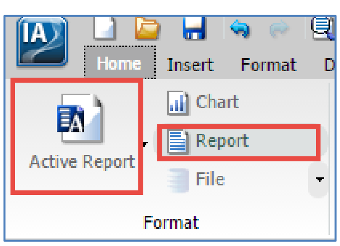


For this exercise, you are going to change the orientation of our document to landscape.

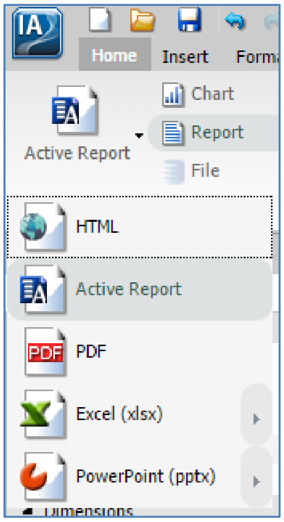
4. On the Layout tab in the Page Setup group, click the *Orientation* icon on the ribbon and select *Landscape*, as shown in the following image.



5. Click the *Home* tab and notice that the default output format for the document is active report and that Report is also selected by default, as shown in the following image.



Selecting the drop-down arrow next to the active report icon on the ribbon shows you a list of supported formats that can be selected and used on a document, as shown in the following image.

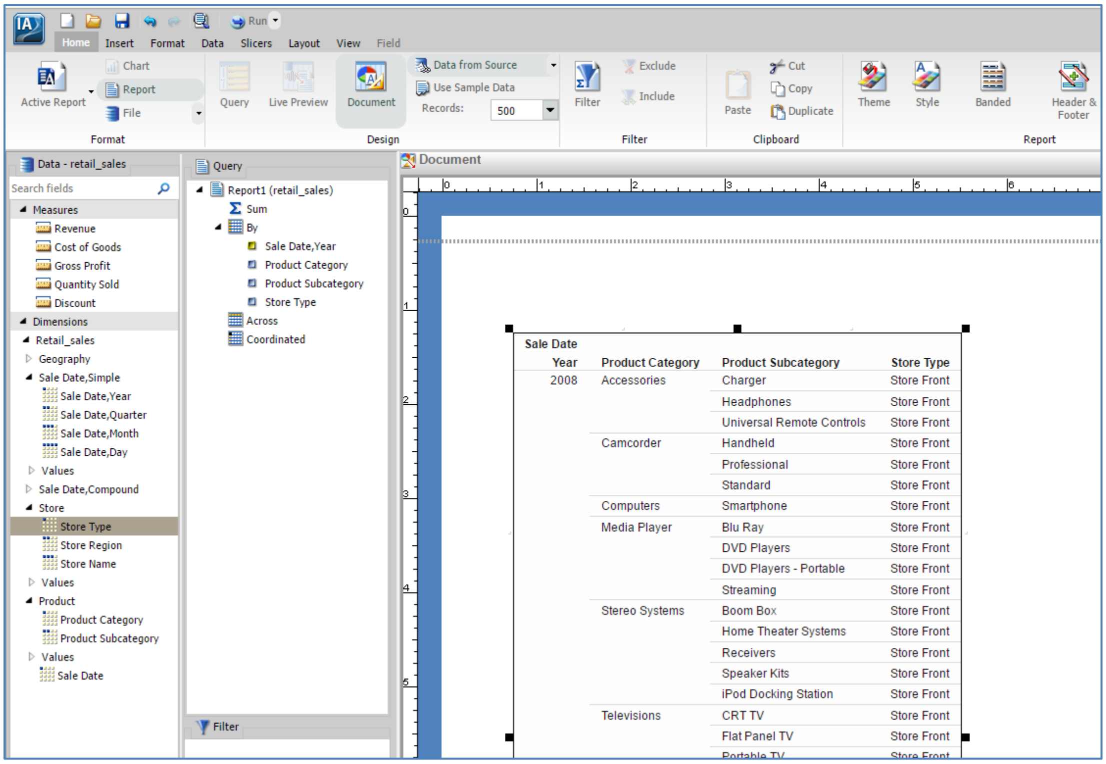


6. In the Data pane, expand the following dimensions:

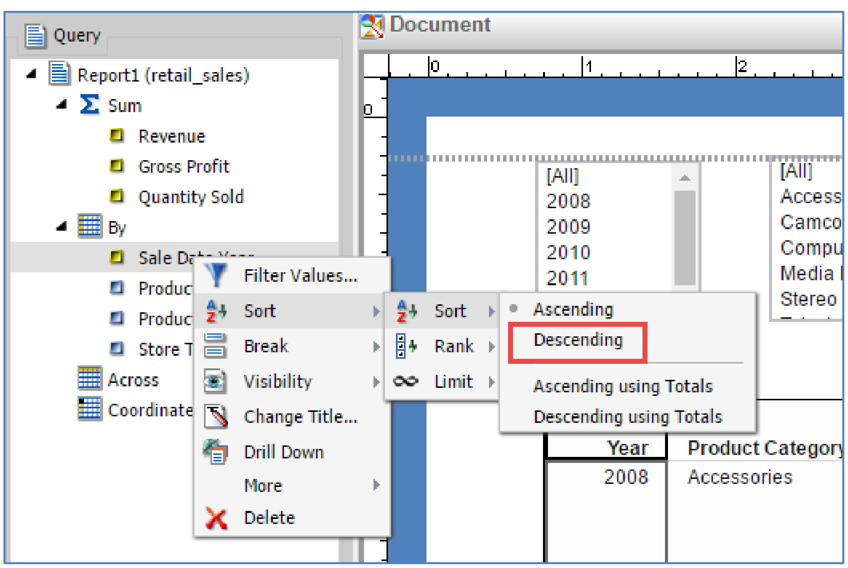
- *Retail_sales*
- *Sale Date, Simple*
- *Store*
- *Product*

Double click *Sale Date Year*, *Product Category*, *Product Subcategory*, and *Store Type*.

These dimensions are added to the Query pane as By fields and also to the Document canvas as a simple report, as shown in the following image.

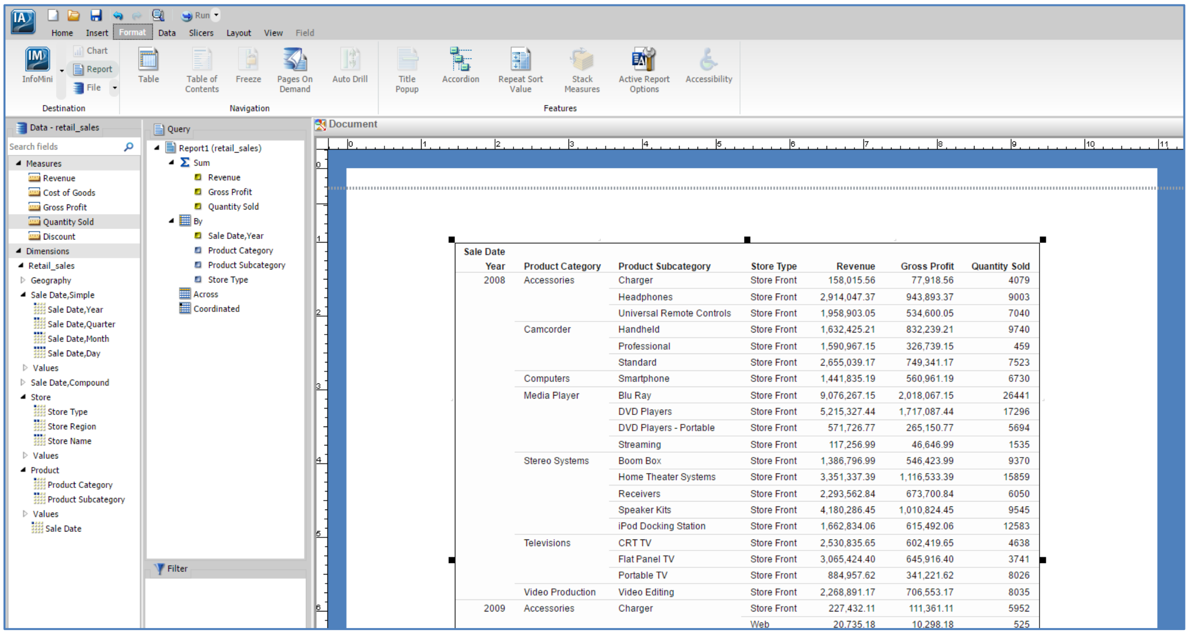


7. In the Query pane, right-click *Sale Date Year*, select *Sort*, select *Sort* again, and click *Descending*, as shown in the following image.

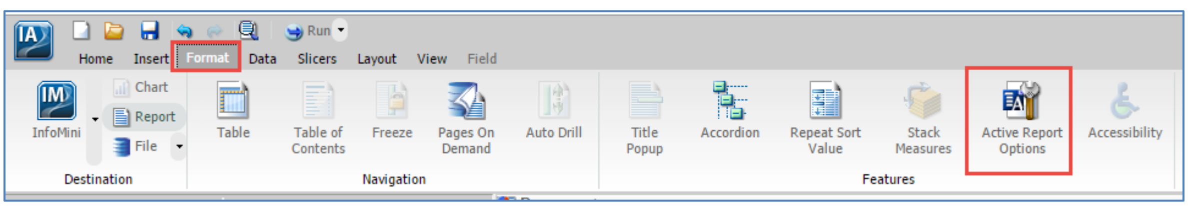


8. In the Data pane, under Measures, double-click *Revenue*, *Gross Profit*, and *Quantity Sold*.

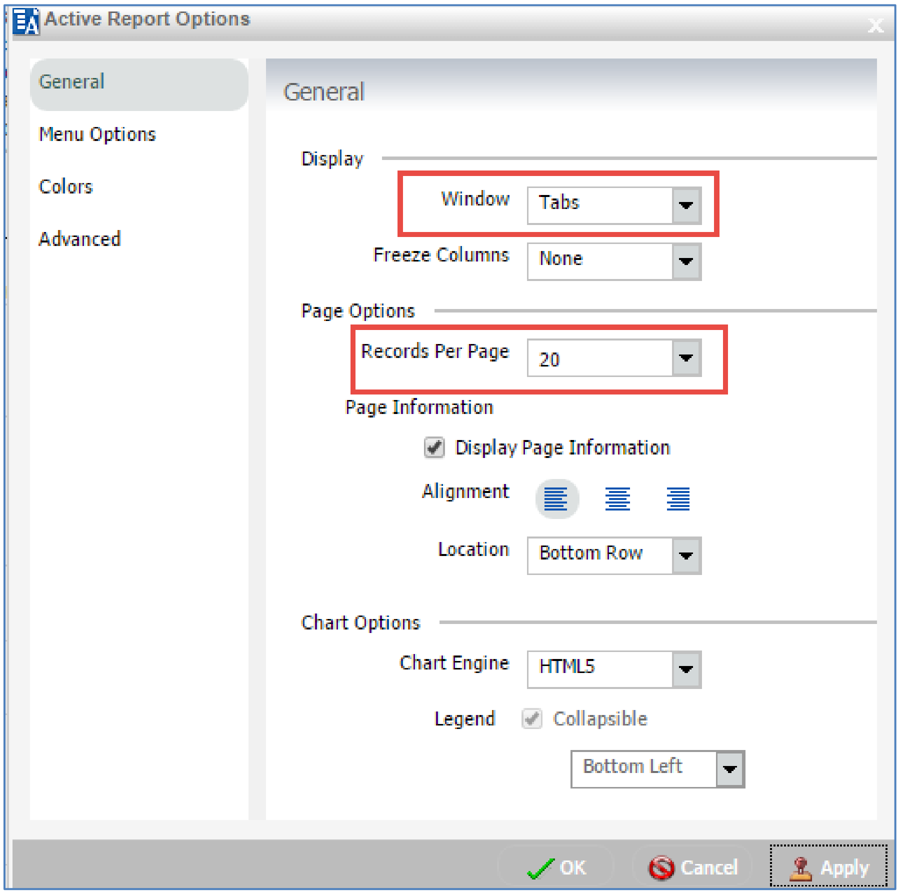
These measures are added to the Query pane as Sum fields and also to the Document canvas, as shown in the following image.



9. On the Format tab in the Features group, click the active report options icon on the ribbon, as shown in the following image.



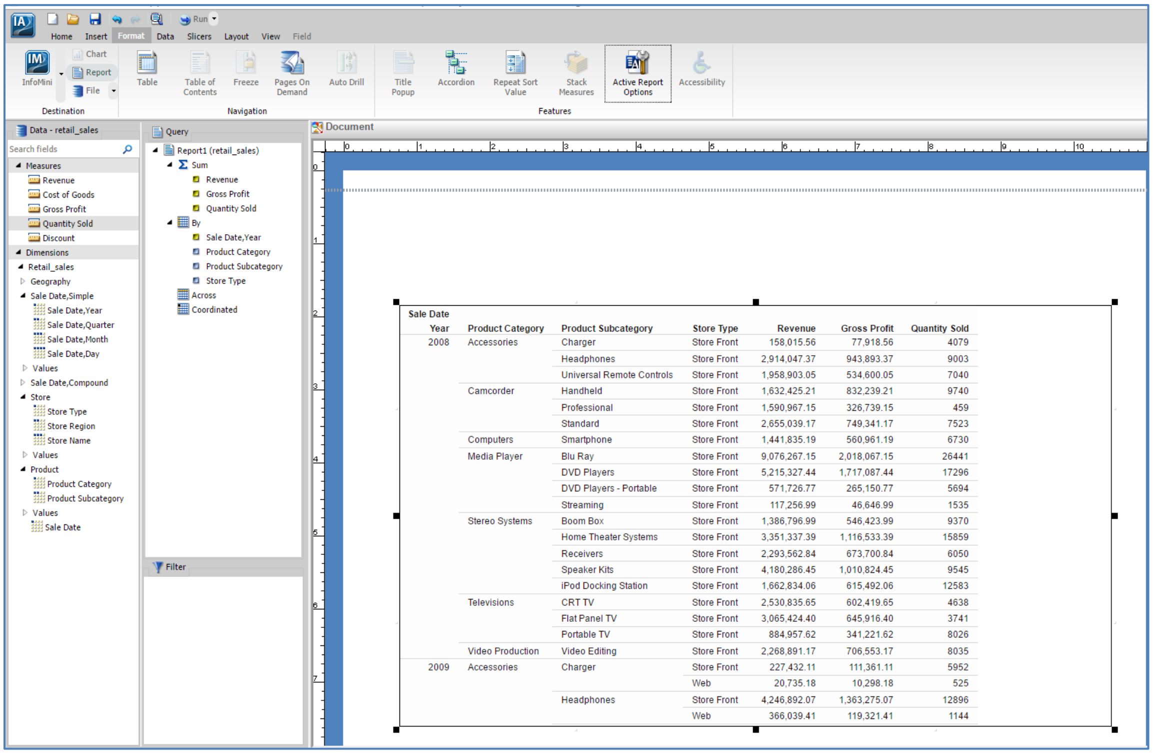
The active report options dialog box opens, as shown in the following image.



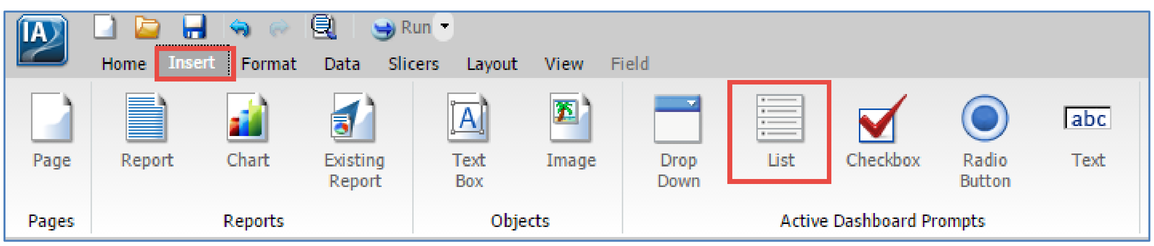
10. Change the Display Window from Cascade to *Tabs* and Records Per Page to 20.

11. Click *OK*.

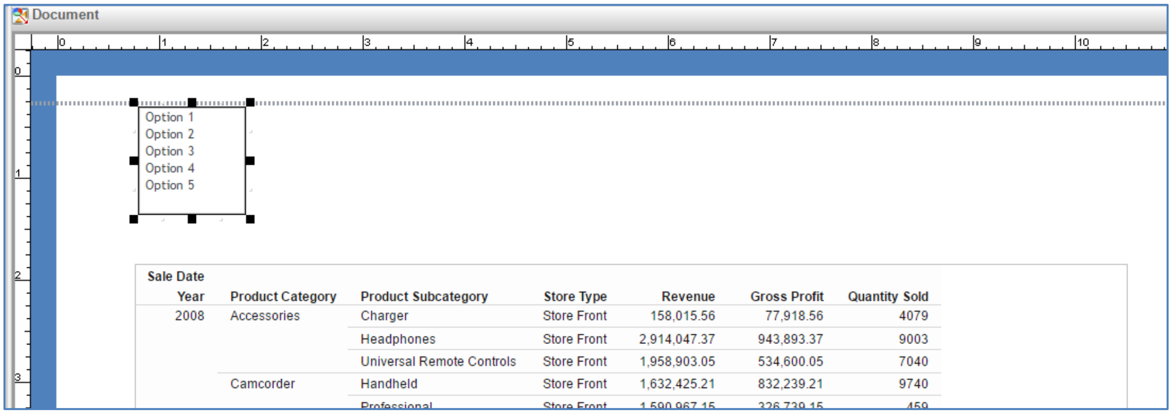
12. Resize the report and move it down on the page to allow room for several filtering list boxes to be added, as shown in the following image.



13. On the Insert tab in the Active Dashboard Prompts group, click the *List* icon on the ribbon, as shown in the following image.

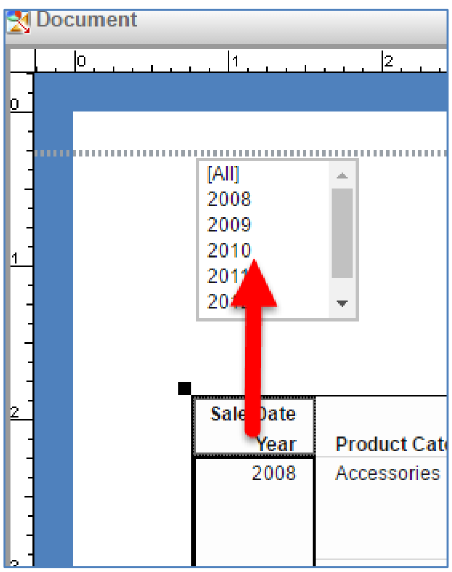


A list box is added to the Document canvas, as shown in the following image.

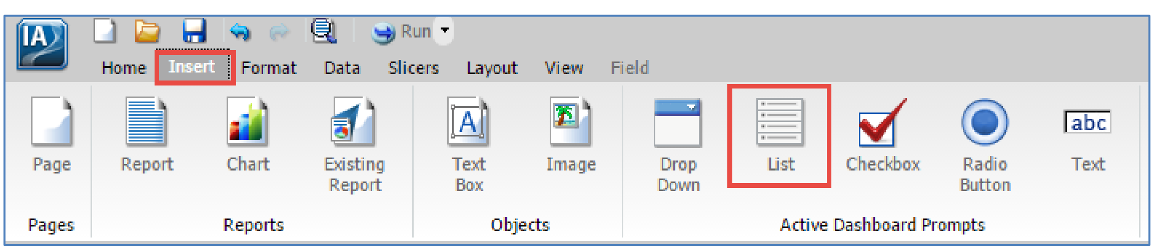


14. Move the list box to the top of the document.

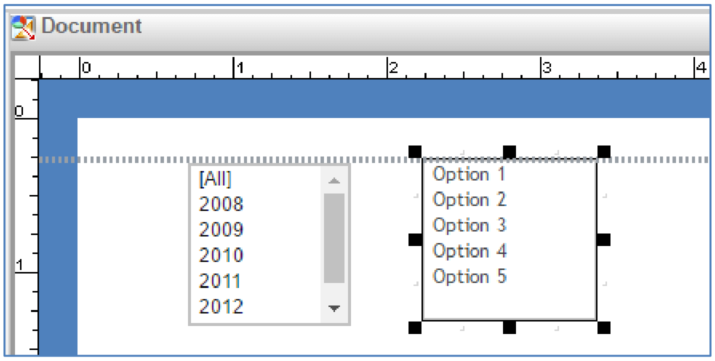
15. From the report, click the *Sale Date Year* field and drag it to the list box, where those values will be listed.



16. On the Insert tab in the Active Dashboard Prompts group, click the *List* icon on the ribbon, as shown in the following image.

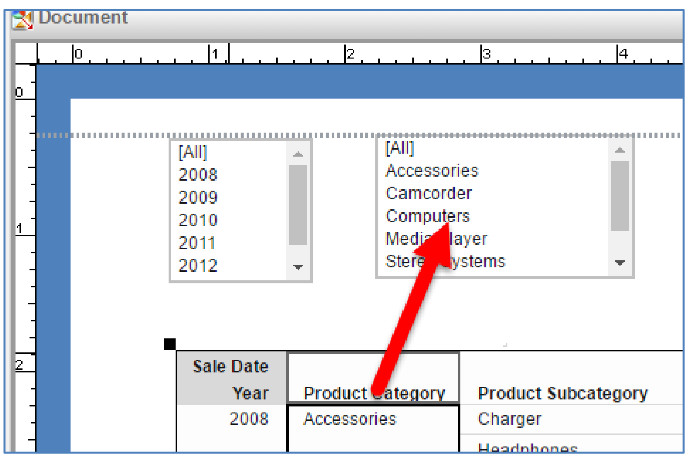


A second list box is added to the Document canvas, as shown in the following image.

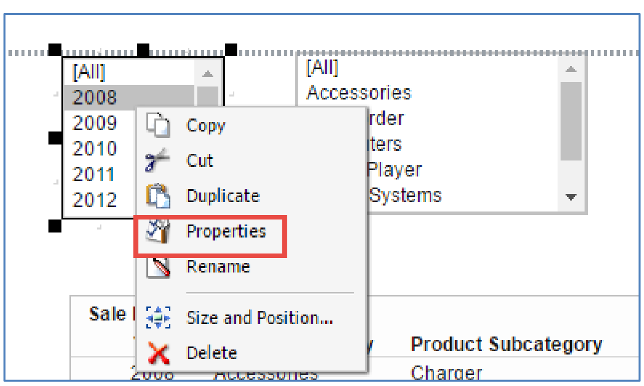


17. Move this list box next to the first one.

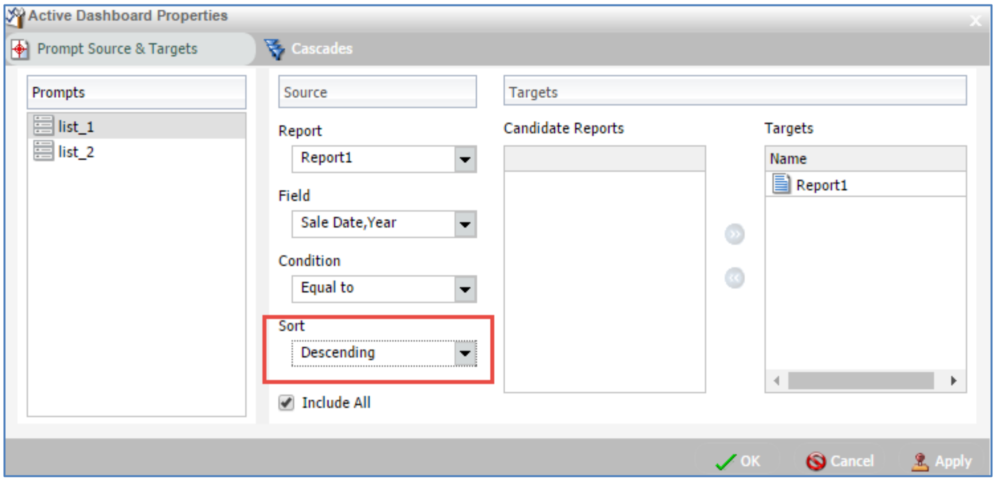
18. From the report, click the *Product Category* field and drag it to the second list box, where those values will be listed, as shown in the following image.



19. Right-click on the first list box and select *Properties* from the context menu, as shown in the following image.



The Active Dashboard Properties dialog box opens, as shown in the following image.

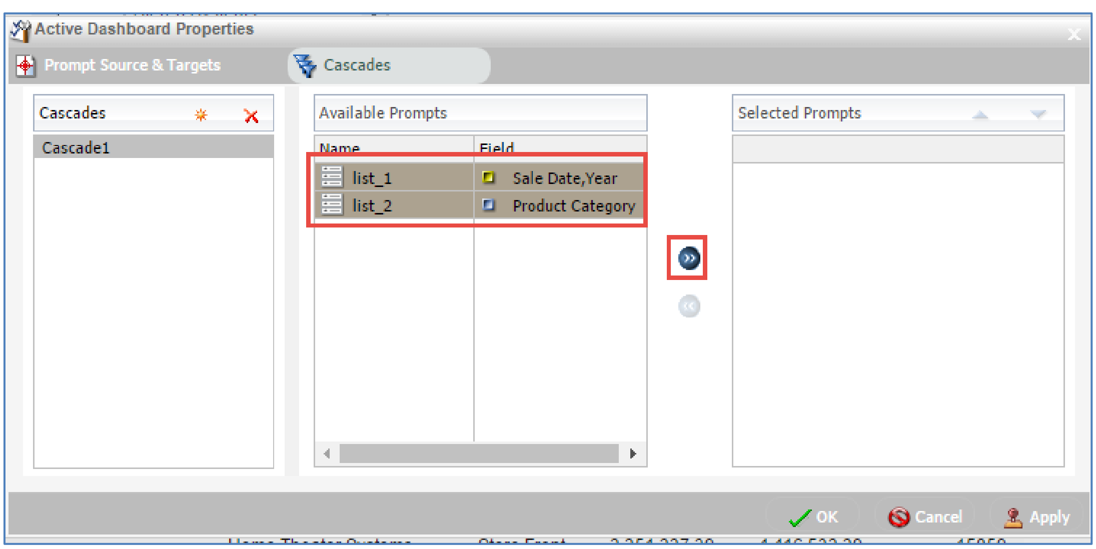


In the Prompt Source & Targets tab, the two list boxes that you added are shown, along with their corresponding properties. Currently, the only available target report is Report1. As you add more reports, each report will also be available for selection from the Report drop-down list.

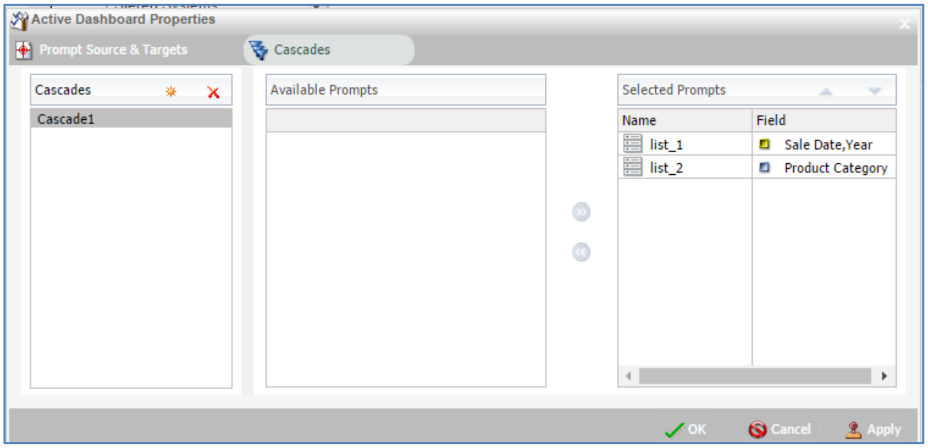
20. Click *list_1* (the first list box you added) in the Prompts area and then select *Descending* from the Sort drop-down list.

21. Click the *Cascades* tab.

22. In the Available Prompts area, select *list_1* and *list_2*, and then move them to the Selected Prompts area.



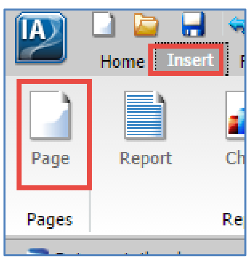
This action will chain the values together at run time.



23. Click *OK*.

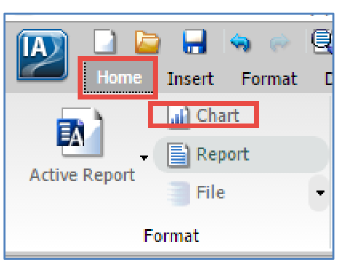
Let's add a second page to your document.

24. On the Insert tab, click the *Page* icon on the ribbon, as shown in the following image.

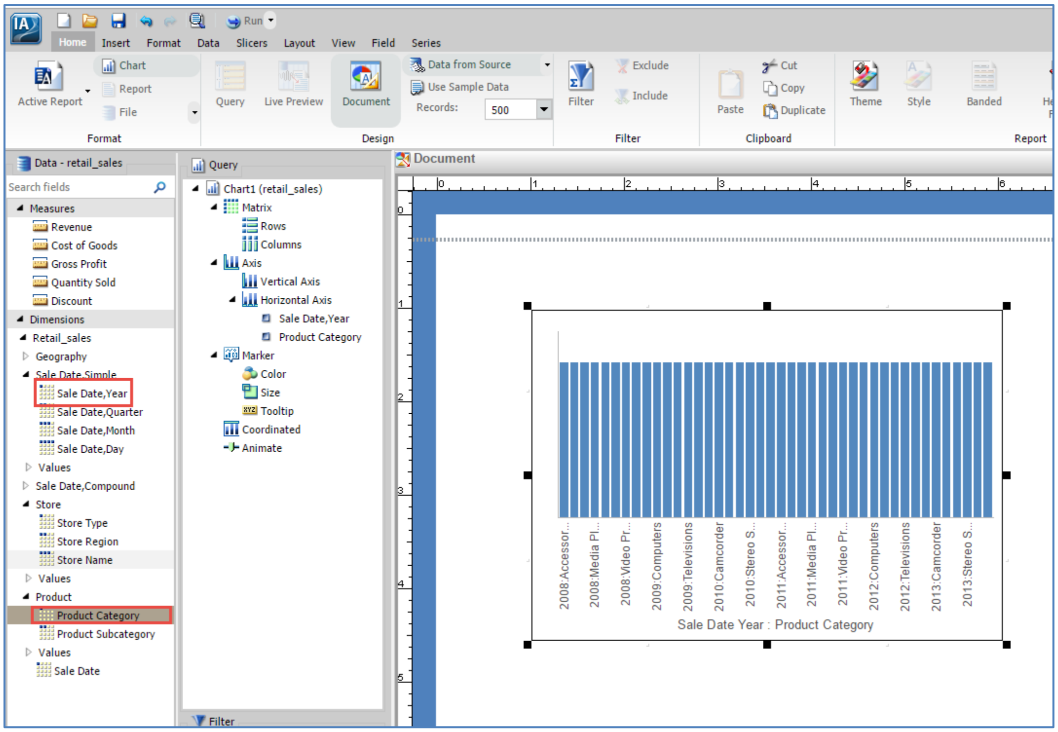


You are now going to create a new chart on the second page of your document.

25. From the Home tab in the Format group, click *Chart* on the ribbon, as shown in the following image.



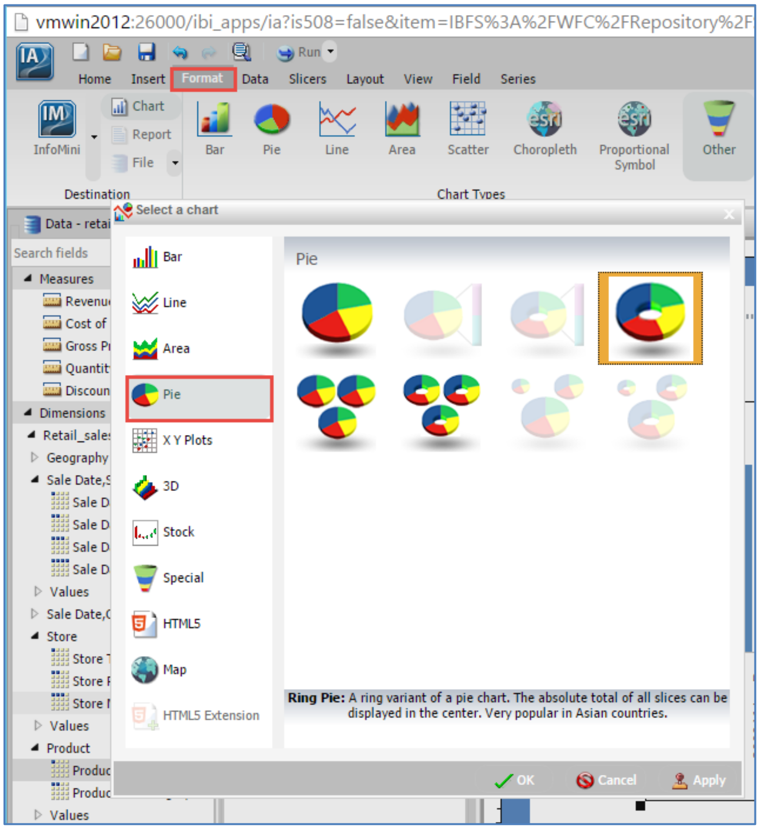
26. In the Data pane, double-click *Sale Date,Year* under the Sale Date,Simple dimension, then double-click *Product Category* under the Product dimension, as shown in the following image.



27. On the Format tab in the Chart Types group, click the *Other* icon on the ribbon.

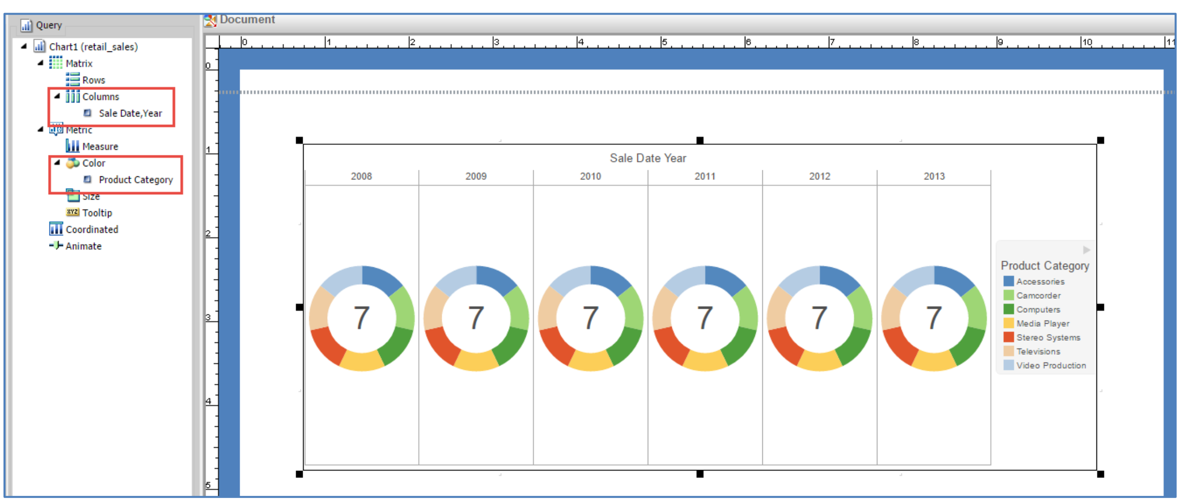
The Select a chart dialog box opens, as shown in the following image.

28. Select the *Pie* category and then click *Ring Pie*, as shown in the following image.



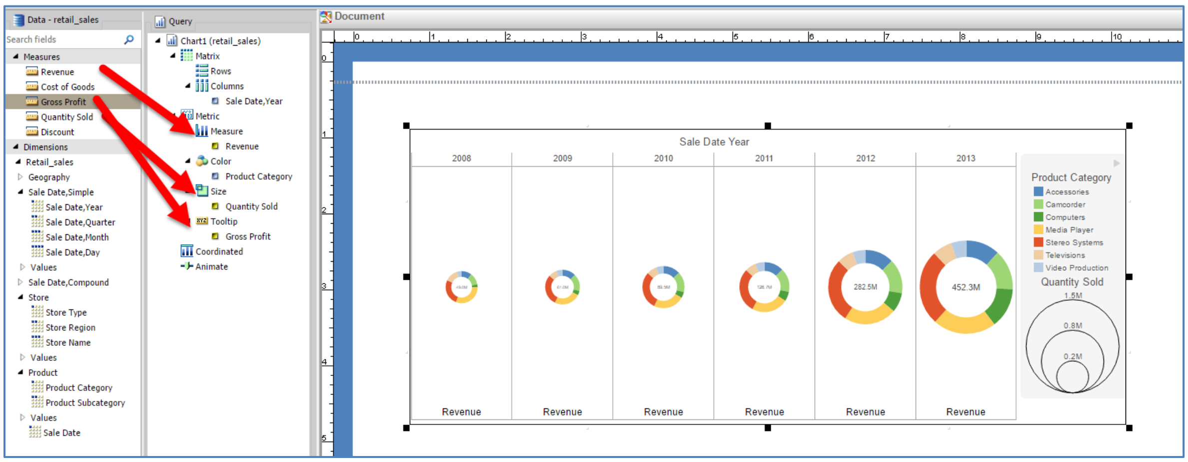
29. Click *OK*.

30. Resize the chart, as shown in the following image.



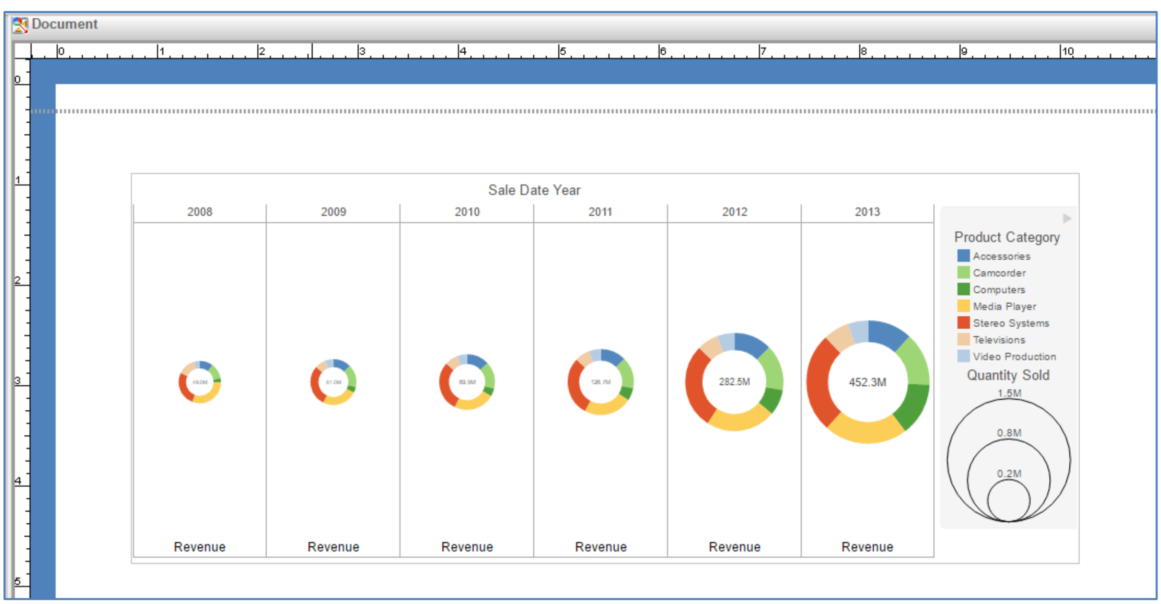
In the Query pane, notice that the Sale Date,Year dimension has been added to the Columns field, and that the Product Category dimension has been added to the Color field.

31. In the Data pane, drag the *Revenue* measure to the Measure field in the Query pane, the *Quantity Sold* measure to the Size field, and the *Gross Profit* measure to the Tooltip field, as shown in the following image.



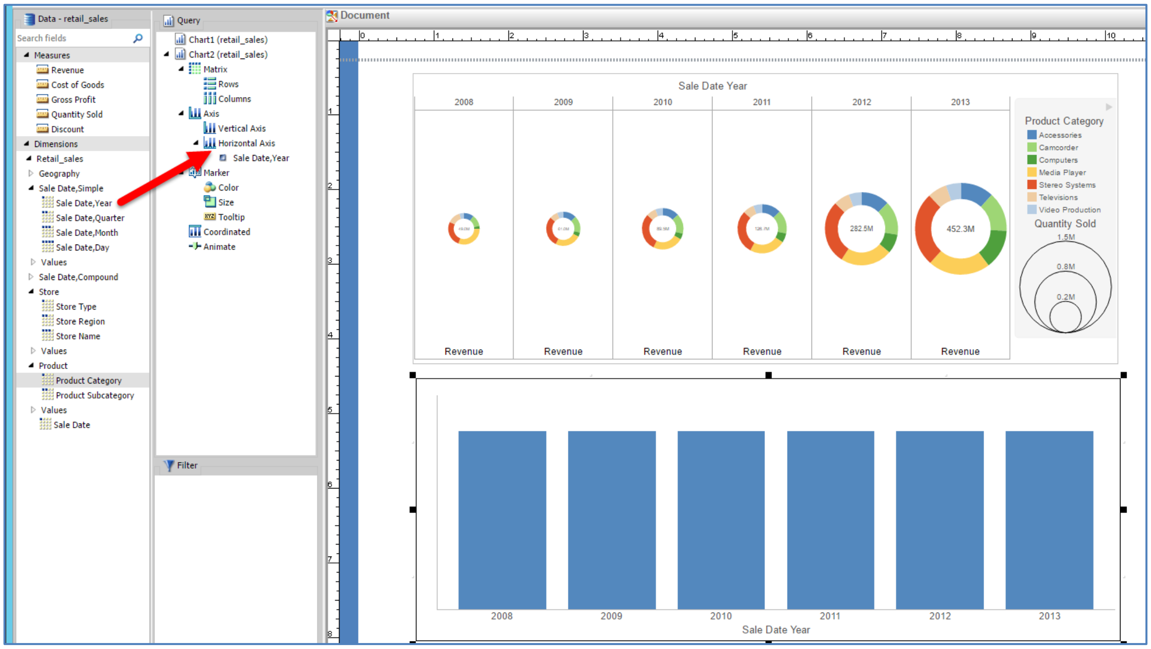
32. Click anywhere in the white space area below the existing chart so you can create a second chart.

    Notice that the first chart is no longer selected, as shown in the following image.

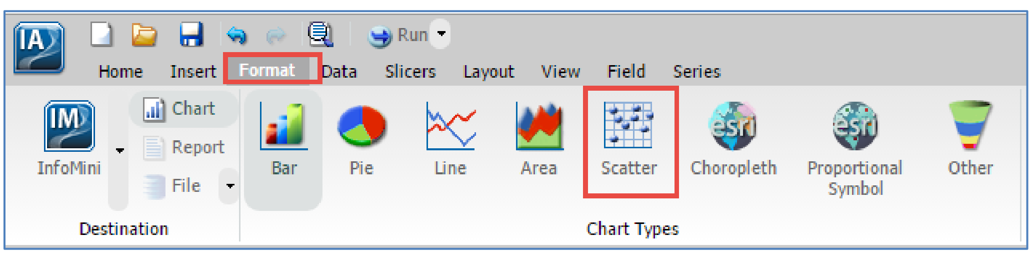


33. In the Data pane, double-click *Sale Date,Year* under the Sale Date,Simple dimension.

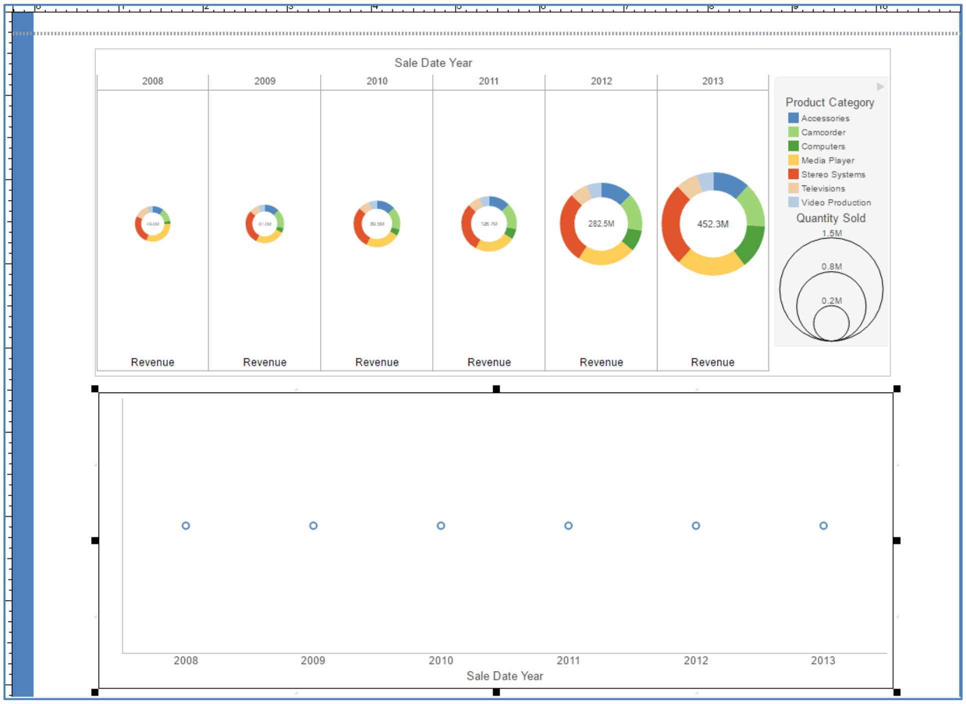
34. Move the chart and resize it, as shown in the following image.



35. On the Format tab in the Chart Types group, click the *Scatter* icon on the ribbon, as shown in the following image.

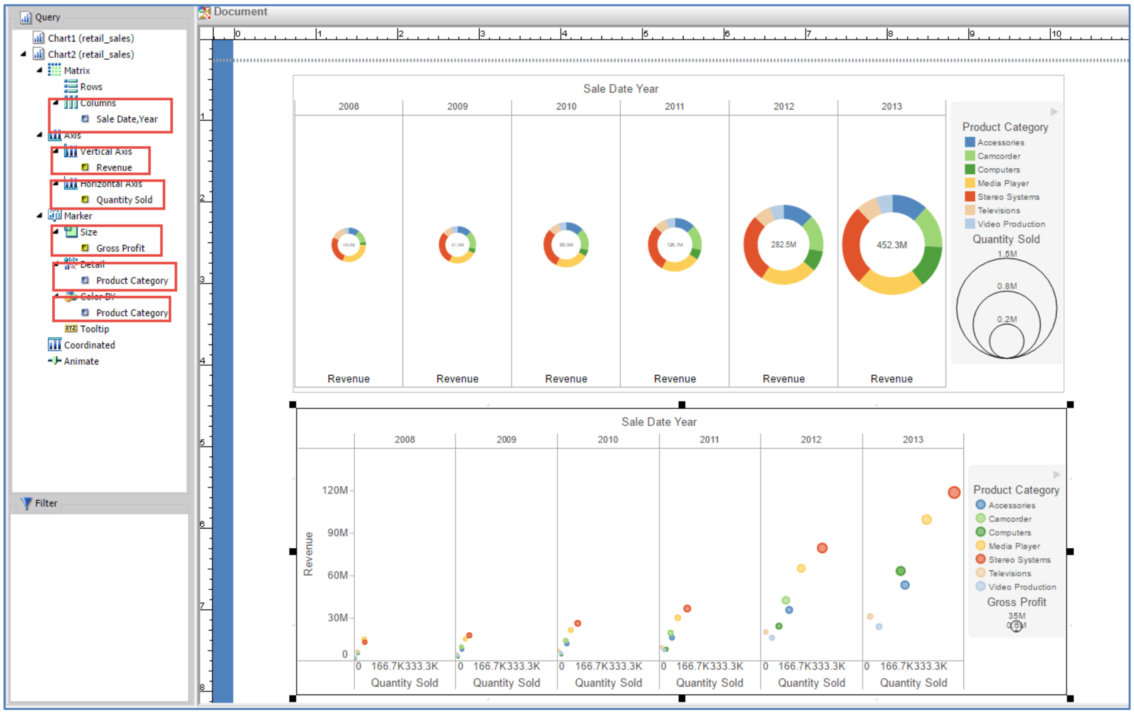


The chart is refreshed, as shown in the following image.



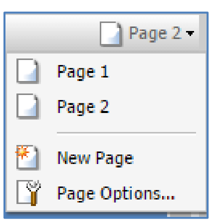
36. In the Query pane, move *Sale Date,Year* from the Detail field to the Columns field under Matrix.

37. From the Data pane, drag *Revenue* to the Vertical Axis field in the Query pane, *Quantity Sold* to the Horizontal Axis field, *Gross Profit* to the Size field, and *Product Category* to the Detail field and Color field, as shown in the following image.

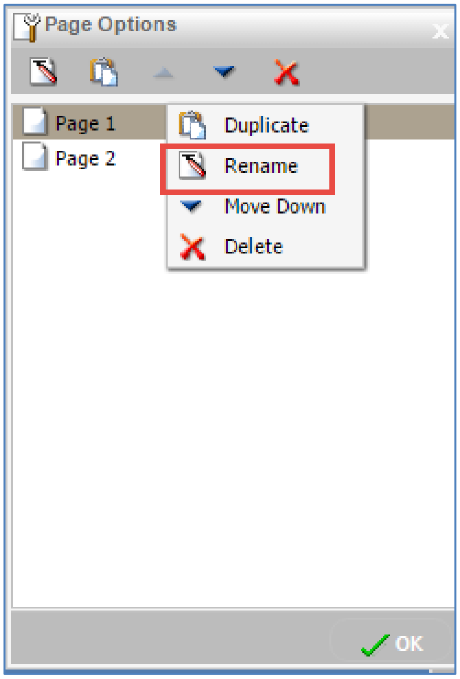


Let's customize your page settings.

38. In the upper-right corner of your document, click the drop-down arrow to the right of Page 2 and select *Page Options...* from the context menu, as shown in the following image.



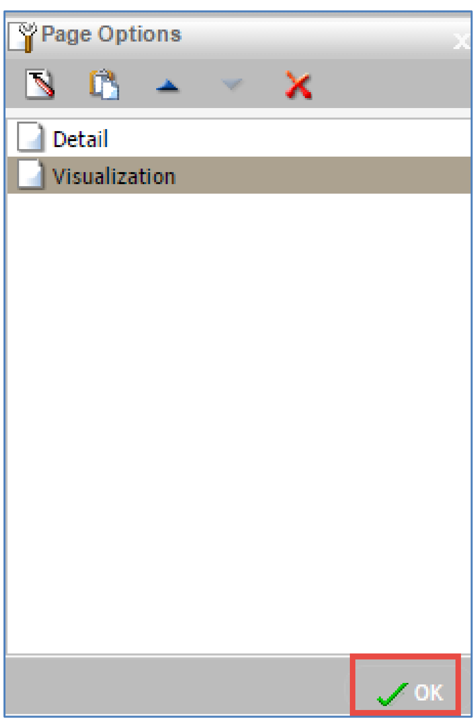
39. Right-click *Page 1* and select *Rename* from the context menu, as shown in the following image.



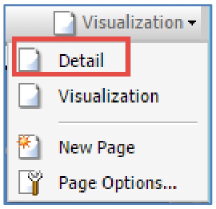
40. Rename Page 1 to *Detail* and click *OK*.

41. Right-click *Page 2* and select *Rename* from the context menu.

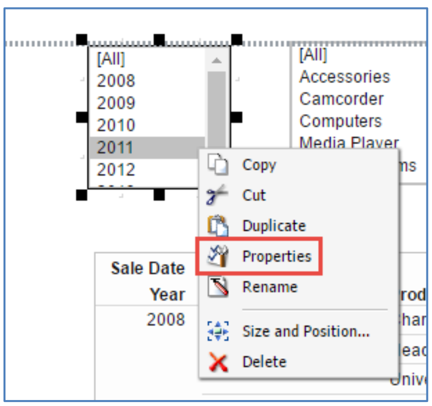
42. Rename Page 2 to *Visualization* and click *OK*, as shown in the following image.



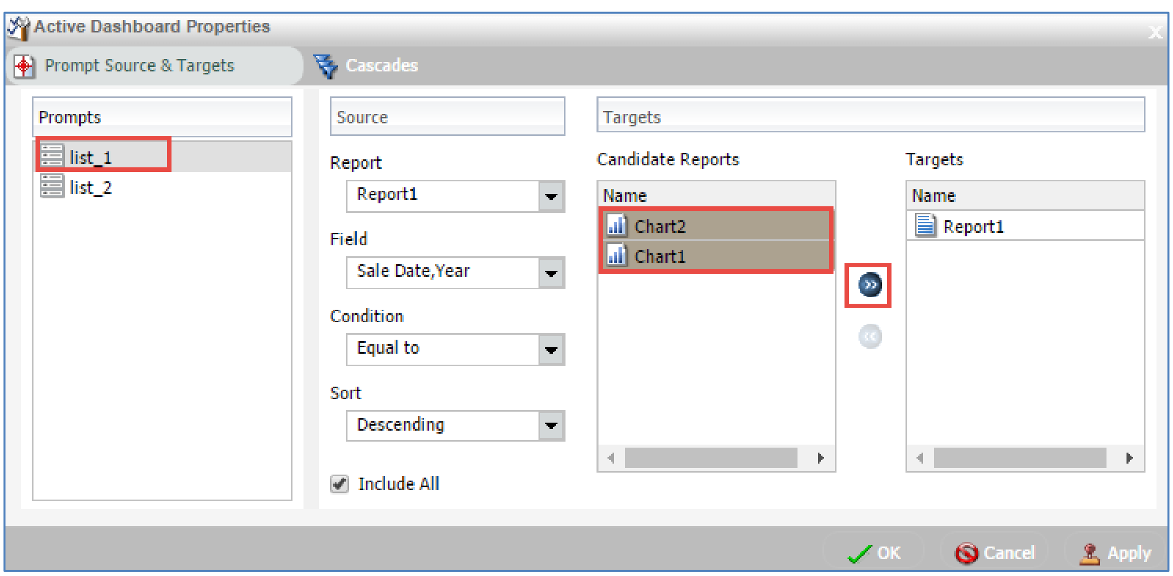
43. In the upper-right corner of your document, click the drop-down arrow to the right of Visualization and select *Detail* from the context menu to switch to the Detail page of your document.



44. Right-click the first list box and select *Properties* from the context menu, as shown in the following image.

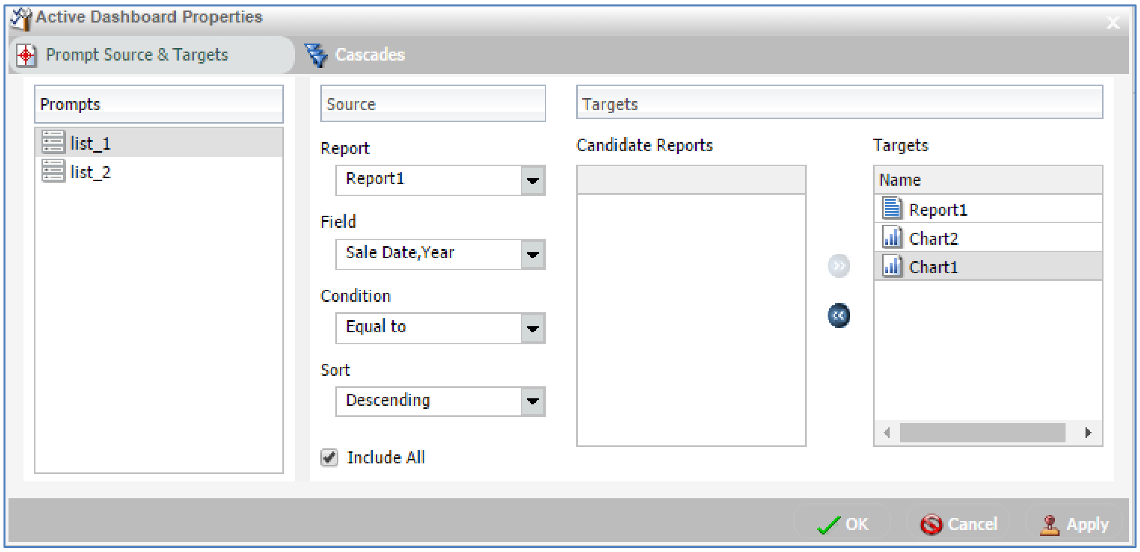


The Active Dashboard Properties dialog box opens, as shown in the following image.



45. Click *list_1* in the Prompts area, select *Chart2* and *Chart1* in the Candidate Reports area, and move them to the Targets area, as shown in the following image.

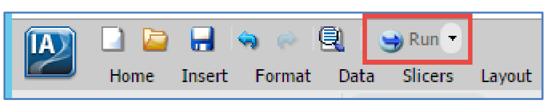
    This ensures that when list_1 is changed, it will affect all three objects on the document.



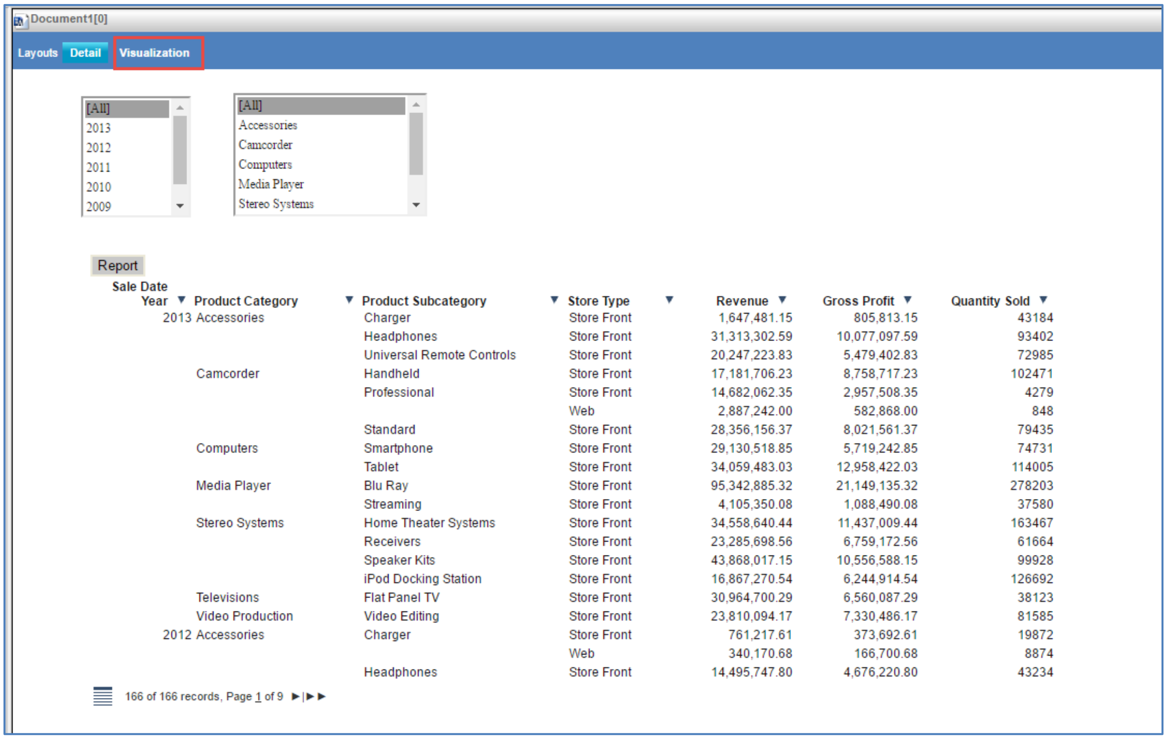
46. Click *OK*.

47. Repeat Step 45 for the *list_2* prompt.

48. Run your document by clicking the *Run* icon on the Quick Access Toolbar, as shown in the following image.

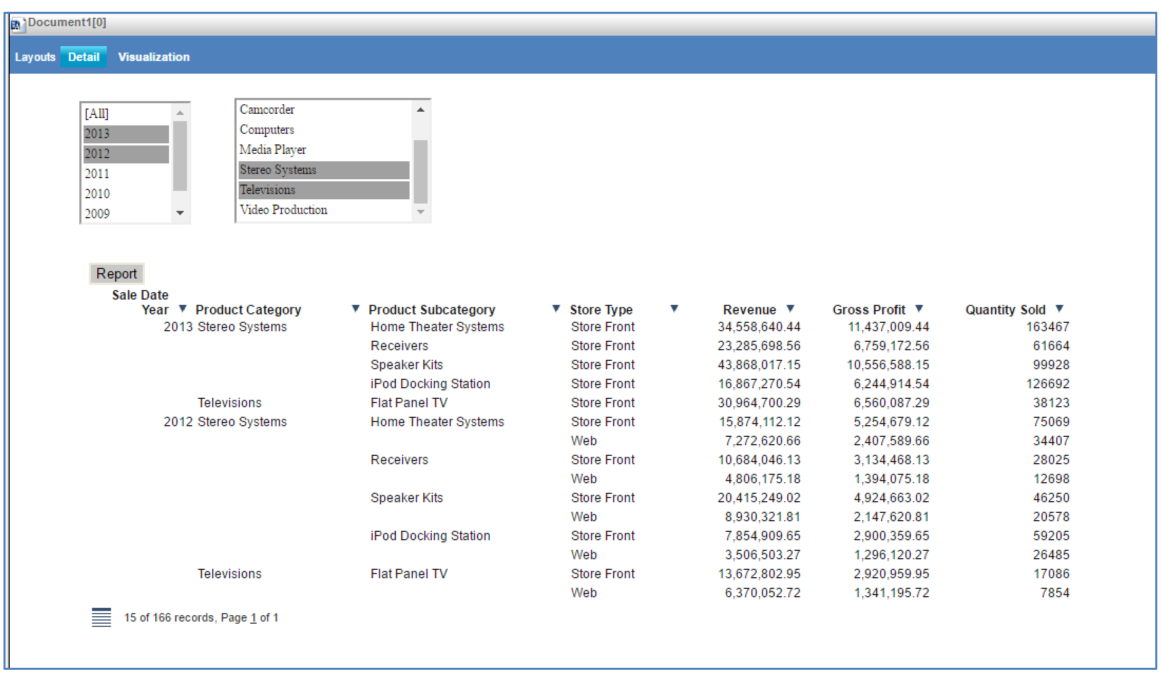


49. Click the *Visualization* tab on your document to switch to that page, as shown in the following image.



Sale Date Year	Product Category	Product Subcategory	Store Type	Revenue	Gross Profit	Quantity Sold
2013	Accessories	Charger	Store Front	1,647,481.15	805,813.15	43184
		Headphones	Store Front	31,313,302.59	10,077,097.59	93402
		Universal Remote Controls	Store Front	20,247,223.83	5,479,402.83	72985
	Camcorder	Handheld	Store Front	17,181,706.23	8,758,717.23	102471
		Professional	Store Front	14,682,062.35	2,957,508.35	4279
			Web	2,887,242.00	582,868.00	848
		Standard	Store Front	28,356,156.37	8,021,561.37	79435
	Computers	Smartphone	Store Front	29,130,518.85	5,719,242.85	74731
		Tablet	Store Front	34,059,483.03	12,958,422.03	114005
	Media Player	Blu Ray	Store Front	95,342,885.32	21,149,135.32	278203
		Streaming	Store Front	4,105,350.08	1,088,490.08	37580
	Stereo Systems	Home Theater Systems	Store Front	34,558,640.44	11,437,009.44	163467
		Receivers	Store Front	23,285,698.56	6,759,172.56	61664
		Speaker Kits	Store Front	43,868,017.15	10,556,588.15	99928
		iPod Docking Station	Store Front	16,867,270.54	6,244,914.54	126692
	Televisions	Flat Panel TV	Store Front	30,964,700.29	6,560,087.29	38123
	Video Production	Video Editing	Store Front	23,810,094.17	7,330,486.17	81585
2012	Accessories	Charger	Store Front	761,217.61	373,692.61	19872
			Web	340,170.68	166,700.68	8874
		Headphones	Store Front	14,495,747.80	4,676,220.80	43234

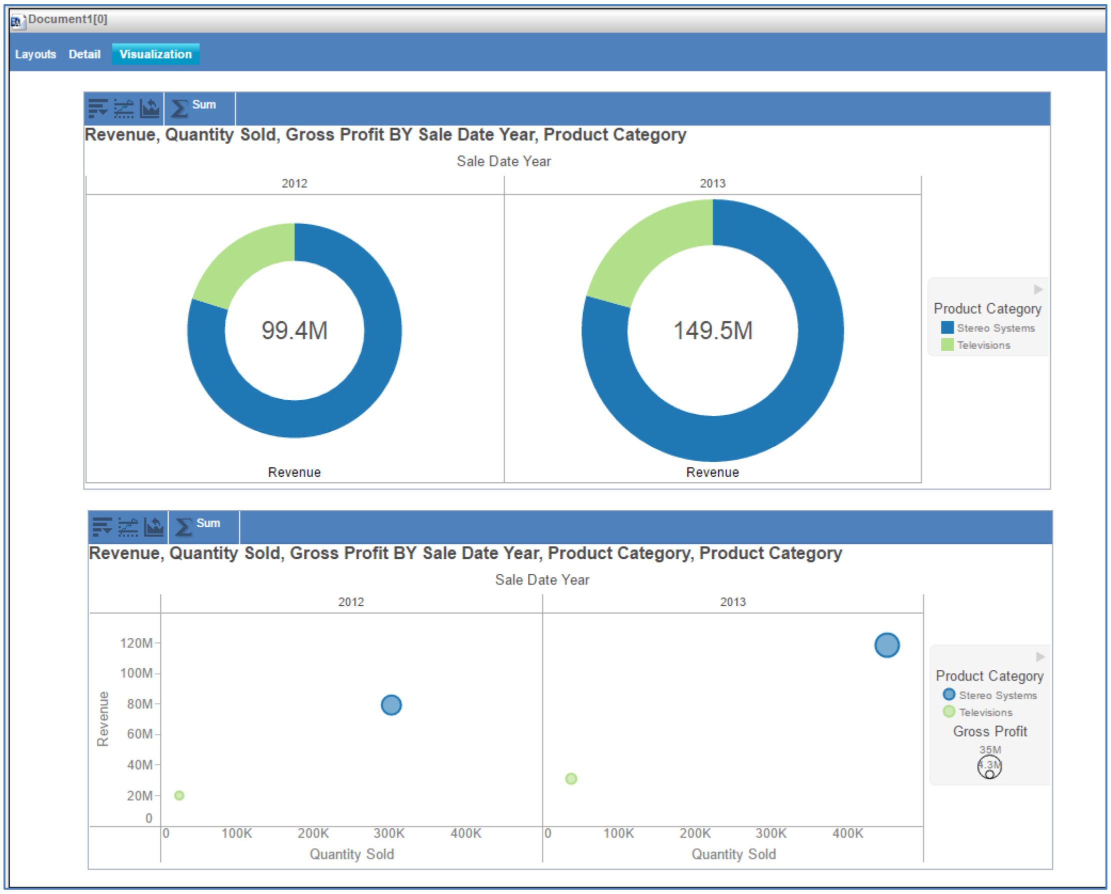
50. Click the *Detail* tab on your document to switch to that page and then make several selections in the list boxes, as shown in the following image.



Sale Date Year	Product Category	Product Subcategory	Store Type	Revenue	Gross Profit	Quantity Sold
2013	Stereo Systems	Home Theater Systems	Store Front	34,558,640.44	11,437,009.44	163467
		Receivers	Store Front	23,285,698.56	6,759,172.56	61664
		Speaker Kits	Store Front	43,868,017.15	10,556,588.15	99928
		iPod Docking Station	Store Front	16,867,270.54	6,244,914.54	126692
	Televisions	Flat Panel TV	Store Front	30,964,700.29	6,560,087.29	38123
2012	Stereo Systems	Home Theater Systems	Store Front	15,874,112.12	5,254,679.12	75069
			Web	7,272,620.66	2,407,589.66	34407
		Receivers	Store Front	10,684,046.13	3,134,468.13	28025
			Web	4,806,175.18	1,394,075.18	12698
		Speaker Kits	Store Front	20,415,249.02	4,924,663.02	46250
			Web	8,930,321.81	2,147,620.81	20578
		iPod Docking Station	Store Front	7,854,909.65	2,900,359.65	59205
			Web	3,506,503.27	1,296,120.27	26485
	Televisions	Flat Panel TV	Store Front	13,672,802.95	2,920,959.95	17086
			Web	6,370,052.72	1,341,195.72	7854

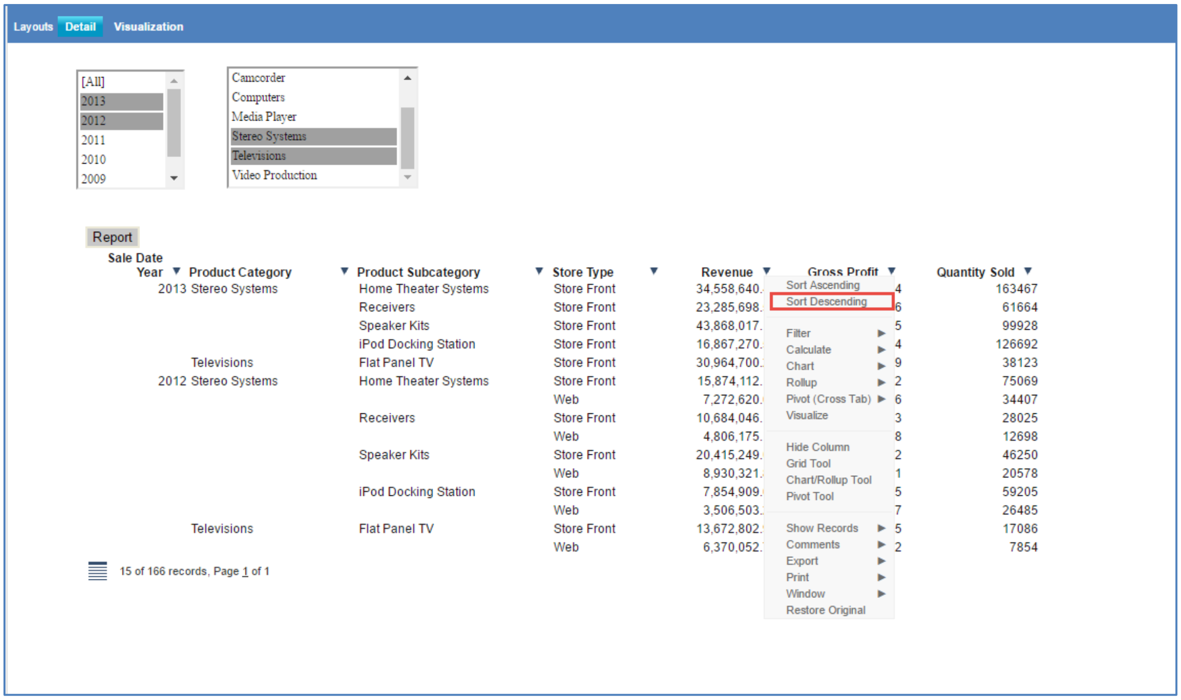
51. Click the *Visualization* tab on your document to switch to that page.

    Notice that your two charts have been refreshed based on your selections in the list boxes, as shown in the following image.

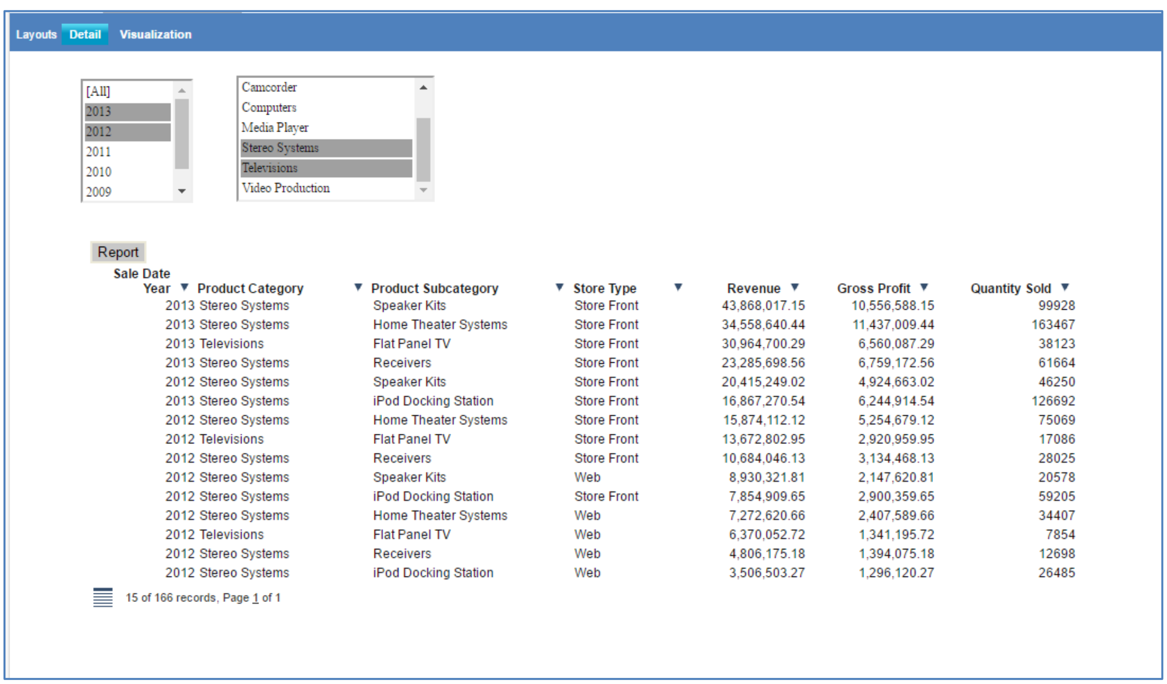


52. Click the *Detail* tab on your document to switch to that page.

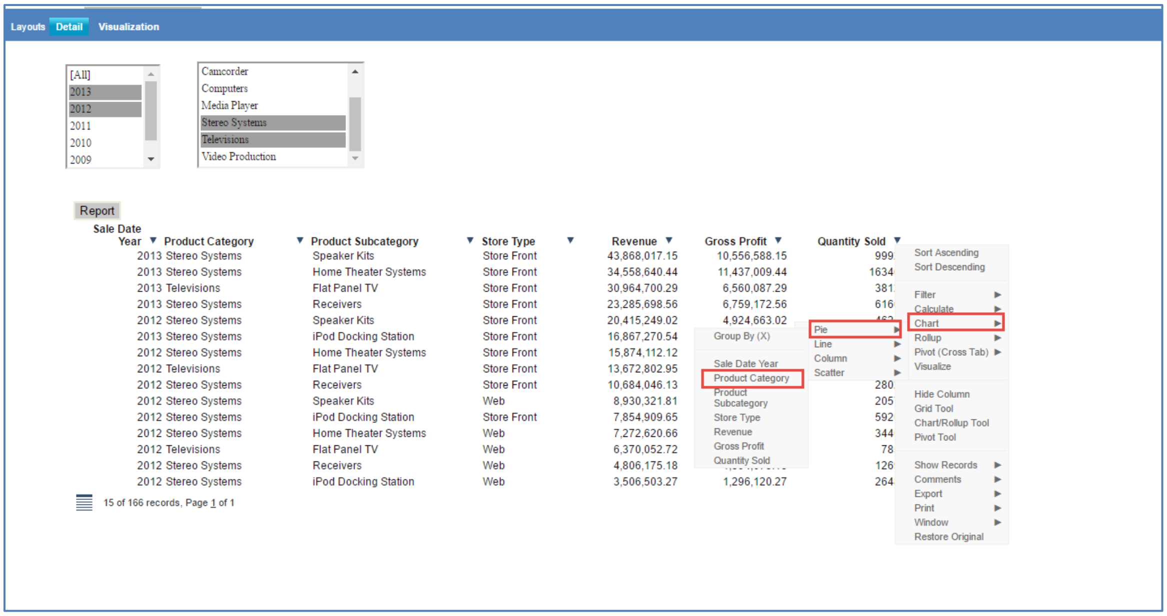
53. Click the drop-down arrow next to *Revenue* and select *Sort Descending* from the context menu, as shown in the following image.



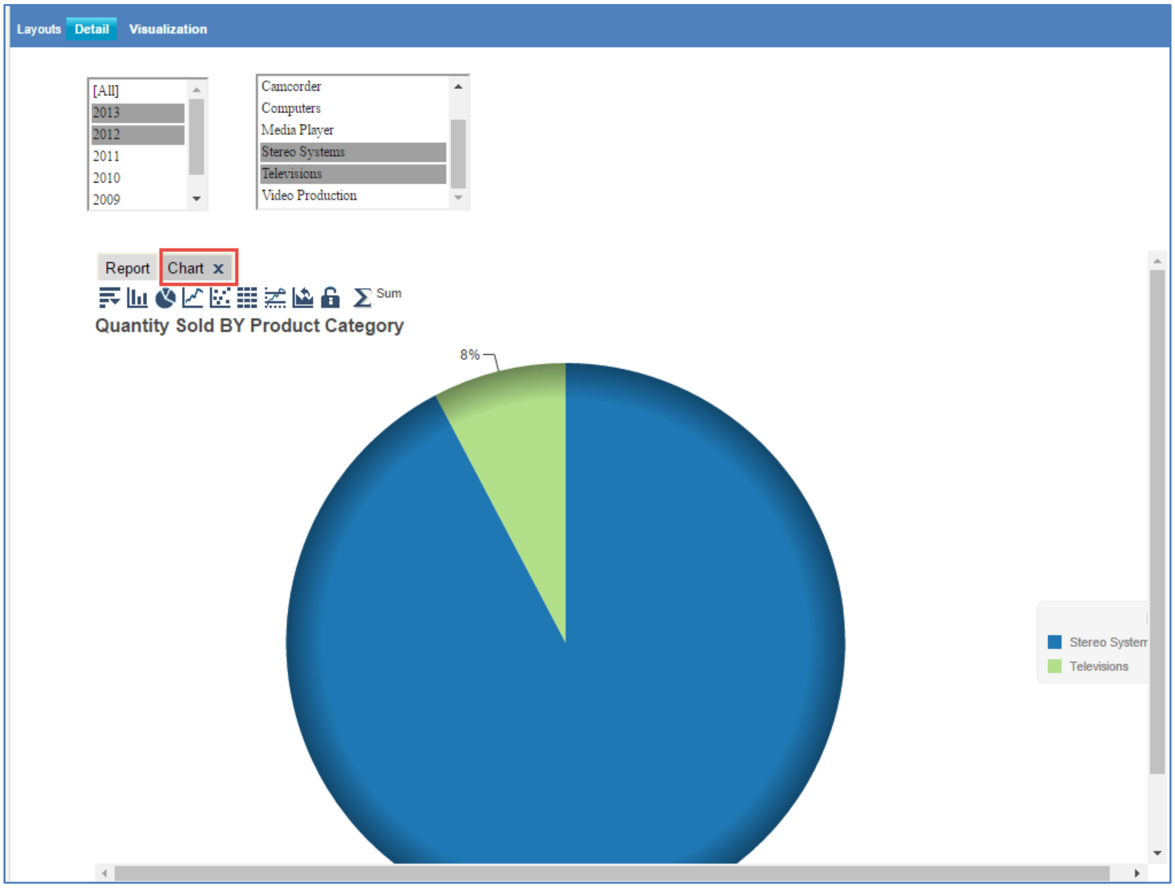
This quickly shows the products that have the most revenue over the years selected, as shown in the following image.



54. Click the drop-down arrow next to *Quantity Sold*, select *Chart*, *Pie*, and then click *Product Category* from the context menu, as shown in the following image.

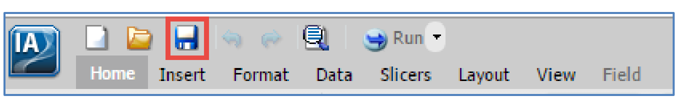


Notice that the results are placed in a new tab based on the active report output settings you specified earlier, as shown in the following image.



55. Continue to explore with other selections to see additional results based on your data.

56. Save your document by clicking the *Save* icon on the Quick Access Toolbar, as shown in the following image.



The Save As dialog box opens.

57. Provide a name for your new document and then click *Save*.

You are now ready to move on to *Module 5*, where you will learn how to create a Distribution List used by ReportCaster, the scheduling and distribution feature of the WebFOCUS Business User Edition. In addition, you will also learn how to create and manage a Schedule. This allows you to automatically send reports to key members in your department and organization.