




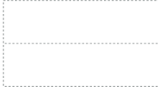
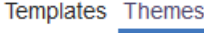





# How to Create Your First Report









With these instructions, you will learn how to:


1. Choose a template and theme
2. Add data
3. Add a line visualization
4. Sort
5. Set properties
6. Add a crosstab

[Open associated video...](#)

Steps:

1. To create a report, click the *New* icon  and select *Report*.
2. On the resulting *Templates* tab, select *2 rows* .
3. Click the *Themes* tab  and select *Blue*, then click *OK*.
4. To add data, click the plus icon  and select *Team Content > Samples > Data > Banking loss events* and click *Open*. This data is from a previously uploaded file.
5. At the top of the report, double click the report title placeholder, type “BANKING LOSS EVENTS”, and click *OK*.
6. To add a visualization, click the first plus icon  and select *Visualization*. **Note:** If you don't see the *Visualization* object you can open the *Toolbox* , scroll down to the *Data Container* section, right-click *Visualization*, and select *Add to Pinned Toolbox Items*. Only the first 6 items in the *Pinned* section are displayed via the plus icon , so you need to right click *Visualization* in the *Pinned* section and select *Move up*.
7. Click the *Line* checkbox, select *Line with palette and theme*, and click *OK*, and *OK* again.
8. To populate the visualization with data from the *Data* panel , open the tree and:
  - o Double-click *Net Loss*, which will put it into *Size* by default.
  - o Double-click *Year* to put it into *Categories*.

- Double-click *Region* to put it into *Series*.
9. To sort the years from lowest to highest, click `<#Year#>` in the visualization, click *Sort*  in the context menu, and select *Ascending*.
  10. To size the line visualization, click on the visualization to select it, open the properties , and set the following:
    - Width: 900
    - Height: 200
  11. Above the line visualization, double click the title placeholder and type “NET LOSS OVER YEAR BY REGION” and click *OK*.
  12. To add a crosstab to the report, click the plus icon  in the bottom row and select *Crosstab*.
  13. In the resulting dialog, accept the defaults by clicking *OK*.
  14. Go to the *Data* panel  and populate the crosstab with data:
    - Double-click *Risk Category*, which will put it into *Rows* by default.
    - Double-click *Year* to put it into *Columns*.
    - Double-click *Net Loss* to put it into *Measures*.
  15. In the crosstab, click `<#Risk Category#>`, click *Sort*  in the context menu, and select *Ascending*.
  16. Click `<#Year#>`, click *Sort*  in the context menu, and select *Ascending*.
  17. With `<#Year#>` still selected, click *Right*  in the context menu.
  18. To size the crosstab, select it and set the following property:
    - Size & overflow: Width: 90%
  19. Above the new crosstab, double-click the title placeholder, type “NET LOSS BY RISK CATEGORY”, and click *OK*.
  20. To preview the report, click *Run options*  and select *Run HTML*.

Congratulations! You have created your first report! You can save the report  into *My content* and open it again later.