



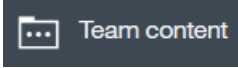




## How to Create Your First Report (Part 2)

With these instructions, you will learn how to:

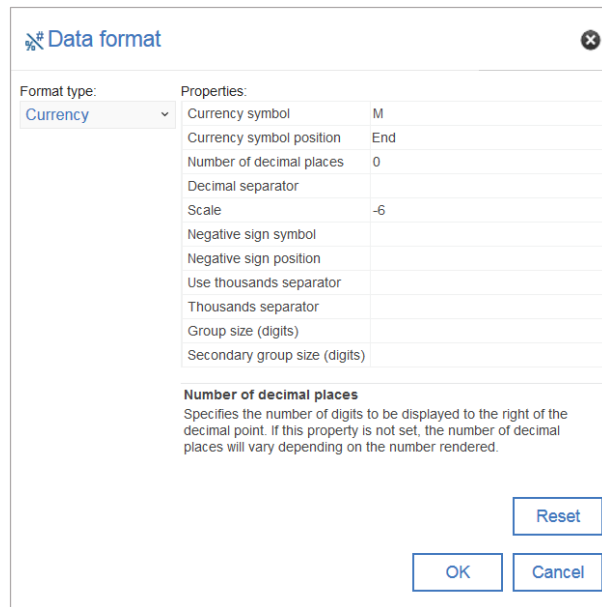
1. Convert a visualization into another type
2. Specify data formats
3. Add totals to a crosstab
4. Create a conditional style

[Open associated video...](#)

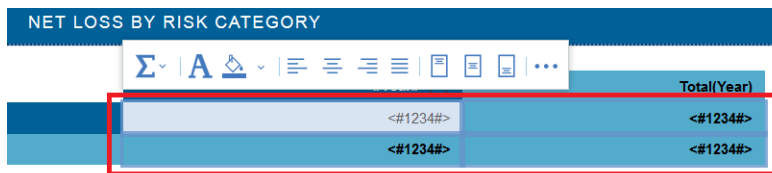
Steps:


1. Open the sample report named *1. My first report*. Click *Team content*  , *Samples*, and *\* Get started*. Click the *More* icon beside *1. My first report*  *1. My first report*  and select *Edit report*.
2. To change the line visualization into a column visualization, select the line visualization, click *More*  in the context toolbar, and click *Convert Visualization*.
3. Click the *Column* checkbox in the *Refine by* section, select *Column with palette and theme*, and click *OK*.
4. To format the data so that it is represented in millions, in the column visualization, click *Net Loss*, click *Data format*  in the context menu, and set the following:
  - Format type: Currency
  - Currency symbol: M
  - Currency symbol position: End
  - Number of decimal places: 0
  - Scale: -6

- The dialog should now look like this:

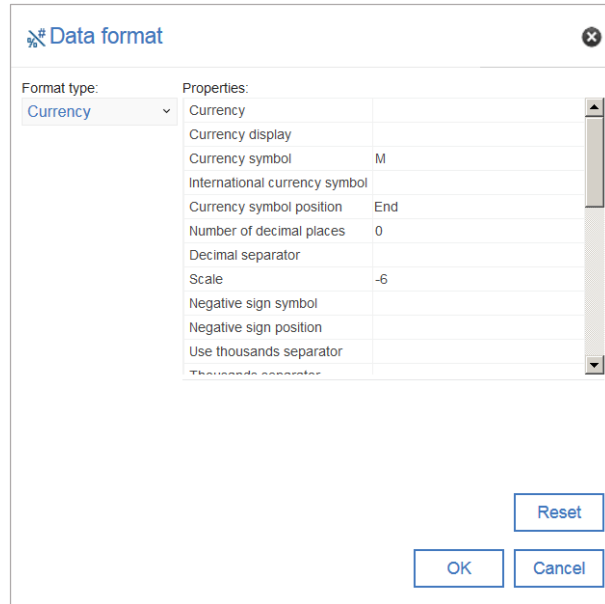


- Click *OK*
5. To add row and column totals to the crosstab, select any measure (e.g. <#1234#>), click *Summarize*  $\Sigma$  in the context toolbar, and then select *Total*.
  6. To set the data format in the crosstab, Ctrl+click all four of the measure cells to select them:




7. Open the properties , find *Data format*, click the ellipsis button, and set the following:
  - Format type: Currency
  - Currency symbol: M
  - Currency symbol position: End
  - Number of decimal places: 0
  - Scale: -6

- o The dialog should now look like this:



- o Click **OK**

8. To align the new labels with the values below, click the *Total(Year)* cell **Total(Year)** and click *Right*  in the context menu.

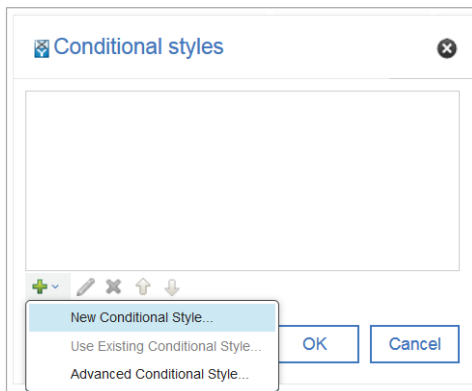
9. Click the *Total(Risk Category)* cell **Total(Risk Category)** and click *Left*  in the context menu

10. In the crosstab, it would be useful to highlight all values greater than 15 million in red to indicate that they are too high. Click the measure cell:

	Net Loss	<#Year#>	Total(Year)
<#Risk Category#>		<#1234#>	<#1234#>
Total(Risk Category)		<#1234#>	<#1234#>

11. In the properties for the measure, move up to *Conditional styles* and click the ellipsis button.

12. Click the green plus icon and select *New Conditional Style...*



13. Make sure that *Net Loss* is selected in the resulting dialog and click **OK**.

14. Click the green plus icon to add a new value.

15. Type 15000000 and click *OK*.
16. Change the first style to *Poor*:

Conditional style - numeric range


Based on the following: Net Loss

Name: Conditional Style 1


Range	Style
Highest value	Poor AaBbCc
15,000,000	(Default) AaBbCc
Lowest value	(Default) AaBbCc
Missing values	(Default) AaBbCc

OK Cancel

17. Click *OK*, then *OK* again.

18. To preview the report, click *Run options*  and select *Run HTML*.

Congratulations! You have learned how to enhance your first report! You can save the report

 into *My content* and open it again later.