



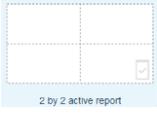
How to Create Your First Active Report

With these instructions, you will learn how to:

1. Choose a template and theme
2. Add data
3. Add a visualization
4. Copy and paste
5. Add a data drop-down list (filter)
6. Create a connection

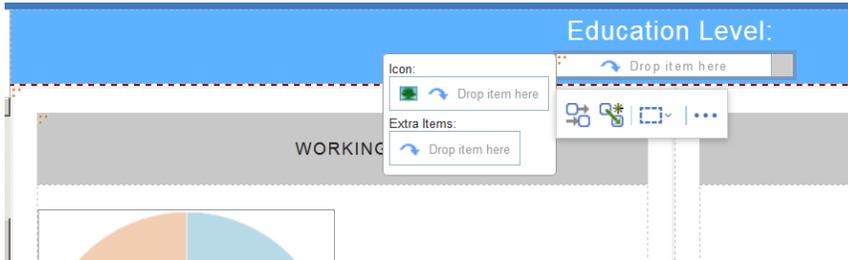
[Open associated video...](#)

Steps:

1. To create an active report, click the *New* icon  and select *Report*.
2. On the resulting *Templates* tab, select *2 by 2 active report* .
3. Click the *Themes* tab , select *Cool blue*, and click *OK*.
4. To add data, click the plus icon  and select *Team Content > Samples > Data > American time use* and click *Open*. This data is from a previously uploaded file.
5. 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*.
6. Click the *Pie* checkbox, then select *Get started pie* and click *OK*, and *OK* again.
7. To populate the visualization with data from the *Data* panel , open the tree and:
 - o Double-click *Weekly Hours Worked*, which will put it into *Size* by default,
 - o Double-click *Gender* to put it into *Series*, and
 - o Drag *Education Level* to the *Extra Categories* slot.
8. Above the visualization, double click the title placeholder, type "WORKING", and click *OK*.

9. At the top of the report, double click the report title placeholder, type “Education Level: “, and click *OK*.

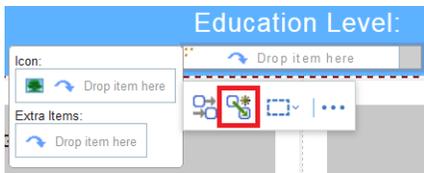
10. To add a dropdown to filter the visualization, open the *Toolbox* panel  , open the *Active Report* section, and drag a *Data drop-down list* to the right of the report title’s text item. In the resulting dialog, leave the defaults and click *OK*. The report header should look like this:



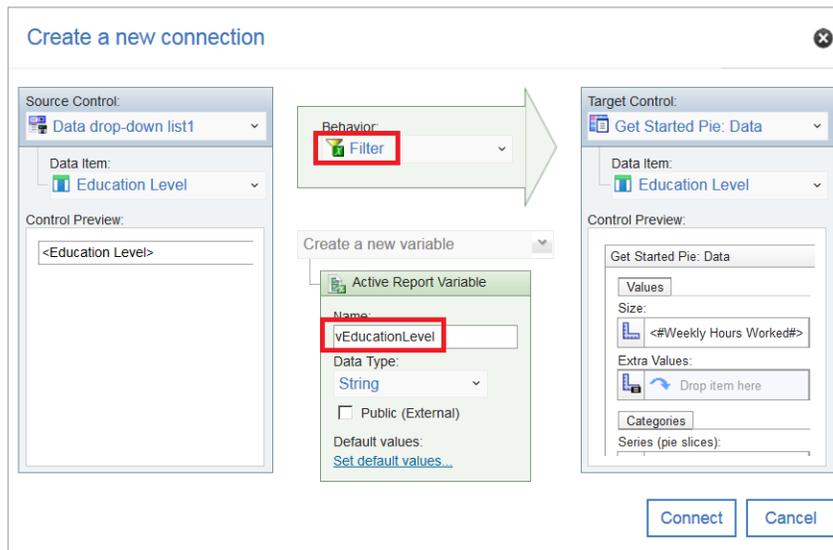
11. Open the *Data* panel  and double-click *Education Level* to add it to the data drop-down list.

12. Next, connect the dropdown to the pie and create a filter. Click the *Create a new connection*

icon  for the data drop-down list:



13. Change the *Behavior* to *Filter*, rename the *Active Report Variable* to *vEducationLevel*, and click *Connect*:



14. Add three more pie visualizations. Select the first pie, click the *More* icon  in the context toolbar, and click *Copy*.

15. In each of the three empty table cells, click to select the cell, click the *More* icon , and click *Paste*. The report should look like this:

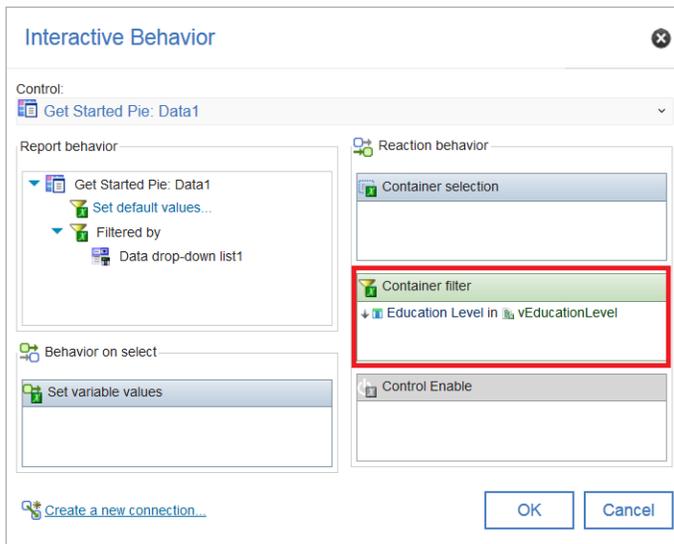


16. In the new visualizations, double-click the title placeholders and edit them to:

- Pie #2: "VOLUNTEERING"
- Pie #3: "JOB SEARCHING"
- Pie #4: "TELEVISION"

17. Open the *Data* panel  and drag *Volunteering* over Pie #2 and drop it onto the *Size* slot, replacing *Weekly Hours Worked*.
18. Drag *Job Searching* from the *Data* panel and drop it onto the *Size* slot of Pie #3, replacing *Weekly Hours Worked*.
19. Drag *Television* from the *Data* panel and drop it onto the *Size* slot of Pie #4, replacing *Weekly Hours Worked*.
20. You do not need to make any modifications to the original connection between the drop-down filter and the three new pie visualizations because the filter variable was copied with the

visualization:



21. To test the new report, click *Run options*  and select *Run Active Report*. The report will open in a new browser tab.
22. Try changing the dropdown to filter the pies.

Congratulations! You have created your first active report! If you go back to the first tab you can save the report  into *My content* and open it again later.