

Add a Table to a Report

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Overview

Administrators can add tables to reports within Resolver. Tables display data in text form that can also be exported to Microsoft Word or Excel.

User Account Requirements

The user account you use to log into Resolver must have Administrator permissions to access Data Visualizations.

Related Information/Setup

Please refer to the Add a View article for further information on exporting table data from a View.

Please refer to the Views Over article for more information regarding Views.

Please refer to the Workflow Permissions article for more information on role permissions.

Please refer to the Add Parameters to a Report article for more information on report parameters.

Please refer to the Properties on Forms article for more information on table properties.

Please refer to the References on Object Types article for more information on references.

Please refer to the Views Overview and Create a Report View articles for more information on adding a report to a report view.

Navigation

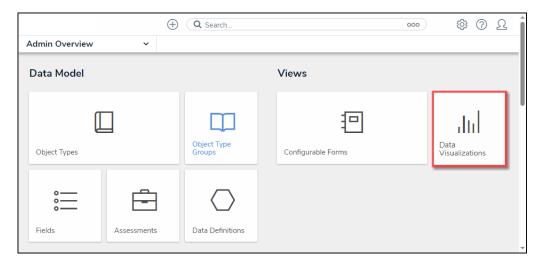
1. From the *Home* screen, click the **Administration** icon.

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Home	~	My Tasks			_



Administration Icon

2. From the *Admin Overview* screen, click the **Data Visualizations** tile under the *Views* section.



Data Visualizations Tile

Adding a Table to a Report

1. From the *Admin: Data Visualizations* screen, enter a report name in the **Search** field to narrow the search results.

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Search Field

2. Click a **Report** link.



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Report Link

3. From the *Admin: Edit Report* screen, click the **Expand** icon next to **Display** under the *Elements* section.

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Expand Icon

 (Optional) Click the Free Form Text tile and drag and drop it on the Report Canvas. The Free Form Text tile will allow you to create a table header.



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Drag and Drop Free Form Text Tile



5. Scroll to the bottom of the **Report Canvas**, hover over the **Free Form Text** element and select the **Edit** icon.

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6. Enter a **Table Name** and **Description** in the **Content** field. You can use Markdown to add additional formatting to the text.



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Content Field

7. (**Optional**) Click the **Expand** icon for additional help with Markdown.

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Expand Icon

- 8. Click the **Done** button to apply your changes.
- 9. From the *Admin: Edit Report* screen, drag and drop the **Table** tile onto the **Report Canvas**.



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Drag and Drop Table Tile

10. From the *Add Table* screen, select a data definition from the **Select a data series** dropdown menu. The data definition selected will determine the object types available to display in the table.

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Select a Data Series Dropdown Menu

- 11. Click the **Done** button.
- 12. You will return to the *Admin: Edit Table* screen, and the *Edit Table* pop-up will appear.



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Edit Table Pop-up

13. From the *Data Type* tab on the *Edit Table* pop-up, the Select All checkbox is enabled by default, automatically selecting all data types. Deselecting the Select All checkbox will allow you to choose select data types as opposed to all data types.

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CONFIGURE PARAMETERS	✓ Location Audit	ASSESSMENT TYPE	
Export Attachments	✓ Location-Specific Framework	ASSESSMENT TYPE	
	✓ Objective Risk Assessment	ASSESSMENT TYPE	
Le CONFIGURE ATTACHMENTS	✓ Process Risk Assessment	ASSESSMENT TYPE	
Report Orientation	✓ Risk Assessment	ASSESSMENT TYPE	
	✓ Security Framework Audit	ASSESSMENT TYPE	
	✓ Vendor Assessment	ASSESSMENT TYPE	
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Select All Checkbox

14. Select the data types to display by clicking on a data type and placing a checkmark next to the selected data type.



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- Selecting LIBRARY DATA will include object type data while selecting an Assessment Type will include the assessment name and workflow state.
- 16. The following data can appear in a table:
 - Properties: Object Type properties include Name, Unique ID, or Location (If an address is not available, coordinates are displayed. Map rendering is not supported).
 For more information, please refer to the Properties on Forms article.
 - **Fields:** An Object's field value includes plan or rich text, numeric, date and time, select list, attachments, and formulas.
 - Relationships: The Object's Relationship Name indicates that two or more objects are connected together through object types on an object type group added to a relationship on another object type.
 - References: The Object's Reference Name indicates an object is connected to another object through a relationship. Unnamed references will be hidden from the tables to avoid confusion; however, if a reference name is removed from a table after being added as a table column. In that case, the relationship name will be displayed for the reference in the Edit Table configuration, and Unresolved Reference will be used as the table column header. For more information, please refer to the References on Object Types article.
 - **Workflow State:** The Object's current Workflow State is the various stages of the data collection process (e.g., Create, Triage, Review, Investigate, Close).



- **Roles:** The users added to an object. User names must be added to a form on the **Role** field to appear within this column.
- **Assessment Name/Workflow State:** The name of the related assessment and its Workflow State.
- 17. Click the *Columns* tab.

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	✓ Objective Risk Assessment	ASSESSMENT TYPE	
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	 Security Framework Audit 	ASSESSMENT TYPE	
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Columns Tab

18. Select a relationship from the **Select a Relationship** dropdown menu. The relationship selected controls the data that appears on the **Select Data** dropdown menu.



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Select a Relationship Dropdown Menu

19. (Optional) Enter a keyword in the **Search** field to narrow your search.

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Select Data Search Field

20. Click on a property, workflow state, field, formula, relationship, reference, or role to add the information to the table using a data column.



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Select a Column Element

- 21. **(Optional)** Deselect a column element (field, workflow state, etc.) to remove the column from the table.
- 22. Select a default form from the **Default Custom Forms** dropdown menu. The form selected will appear when a user clicks on the table data. Choosing **Default** will display the form on the user's role permissions for the object type.



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Activity List		Choose which Custom Form will display when an object field is selected	
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Filters		Activity - CC - Portal - Create Activity - CC - Create	
▼ CONFIGURE FILTERS	_	Activity - CC - Details Navigation Activity - CC - Detailed Repeatable Form	
Parameters	_	Activity - CC - Edit Activity - CC - Officer Portal - Requires Review	
CONFIGURE PARAMETERS Export Attachments	_	Activity - CC - Read Only	
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Default Custom Forms Dropdown

23. **(Optional)** From the *Sort Columns* section, click the **Delete** icon to remove a column from the table.

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Filters CONFIGURE FILTERS	Unique ID BUSINESS UNIT PROPERTY Description	Ē		
Parameters CONFIGURE PARAMETERS	BUSINESS UNIT PROPERTY Created By BUSINESS UNIT PROPERTY	Ô		
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CONFIGURE ATTACHMENTS Report Orientation PORTRAIT	Business UNIT PROPERTY Show SUM totals for all numeric columns Display colored cells Oisplay colored ovals Display no color			
Elements Report Canva				
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Delete Icon



24. **(Optional)** Click the **Move** icon to rearrange the columns on the table.

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	COMPANY			PROPERTY					
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	Risk Exposure				Û	П			
	COMPANY			BUSINESS CONTINUITY PLAN FORMULA					
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	Next Review Date				Û	П			
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Move Icon

25. **(Optional)** Select the **Show SUM totals for all numeric columns** checkbox will display the total value of all numeric fields on the table.

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Show SUM total for all numeric columns

26. (Optional) Select a **Display** option radio button.



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Activity List	Show SUM totals for all numeric columns	
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	Display no color	
Filters		
CONFIGURE FILTERS		DONE
Parameters		*

Display Options Radio Buttons

27. **(Optional)** Select the **Display Colored Cells** radio button to display formulas or select list cells with text and full background color.

				Q	Search Table
Risk Unique ID	Risk Name	Inherent Risk Score	Control Effectiveness	Residual Risk Score	Risk Response Plan
R-8.1.1.1	Cyber Security Risk	Significant	Medium	Significant	Not Applicable
R-8.1.1	Cyber Security Risk	Significant	Medium	Significant	Not Applicable
R-32.3	Fiduciary Risk	Critical	Excellent	Significant	Tolerate - Accept
R-32.2	Fiduciary Risk	Critical	Excellent	Significant	Tolerate - Accept
R-32.1	Fiduciary Risk	Critical	Excellent	Significant	Tolerate - Accept
R-31.3	Succession Plan Risk	Significant	Medium	Significant	Not Applicable
R-31.2	Succession Plan Risk	Significant	Medium	Significant	Not Applicable
R-31.1	Succession Plan Risk	Significant	Medium	Significant	Not Applicable
R-8.2	Cyber Security Risk	Significant	Medium	Significant	Not Applicable
R-8.1	Cyber Security Risk	Significant	Medium	Significant	Not Applicable

Display Colored Cells

28. **(Optional)** Select the **Display Colored Ovals** radio button to display formulas or select list cells as text with colored circle background.

Risk Unique ID	Risk Name	Inherent Risk Score	Control Effectiveness	Residual Risk Score	Risk Response Plan
R-8.1.1.1	Cyber Security Risk	Significant	😑 Medium	😑 Significant	Not Applicable
R-8.1.1	Cyber Security Risk	 Significant 	😑 Medium	Significant	Not Applicable
R-32.3	Fiduciary Risk	Critical	Excellent	Significant	Tolerate - Accept
R-32.2	Fiduciary Risk	Critical	Excellent	Significant	Tolerate - Accept
R-32.1	Fiduciary Risk	Critical	Excellent	Significant	Tolerate - Accept
R-31.3	Succession Plan Risk	Significant	😑 Medium	Significant	Not Applicable
R-31.2	Succession Plan Risk	Significant	😑 Medium	Significant	Not Applicable
R-31.1	Succession Plan Risk	Significant	😑 Medium	Significant	Not Applicable
R-8.2	Cyber Security Risk	Significant	😑 Medium	Significant	Not Applicable
R-8.1	Cyber Security Risk	Significant	Medium	Significant	Not Applicable



29. **(Optional)** Select the **Display No Color** radio button to display formulas or select list cells as text with no background.



				Q	Search Table
Risk Unique ID	Risk Name	Inherent Risk Score	Control Effectiveness	Residual Risk Score	Risk Response Plan
R-8.1.1.1	Cyber Security Risk	Significant	Medium	Significant	Not Applicable
R-8.1.1	Cyber Security Risk	Significant	Medium	Significant	Not Applicable
R-32.3	Fiduciary Risk	Critical	Excellent	Significant	Tolerate - Accept
R-32.2	Fiduciary Risk	Critical	Excellent	Significant	Tolerate - Accept
R-32.1	Fiduciary Risk	Critical	Excellent	Significant	Tolerate - Accept
R-31.3	Succession Plan Risk	Significant	Medium	Significant	Not Applicable
R-31.2	Succession Plan Risk	Significant	Medium	Significant	Not Applicable
R-31.1	Succession Plan Risk	Significant	Medium	Significant	Not Applicable
R-8.2	Cyber Security Risk	Significant	Medium	Significant	Not Applicable
R-8.1	Cyber Security Risk	Significant	Medium	Significant	Not Applicable

Display No Color

30. Click the **Parameters** tab.

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Activity List	Data Type Columns Parameters		
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Filters			
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	Modified On	PROPERT	TY .
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Elements Report Canva	External Reference Id	PROPERT	TY .
	Dimensions	PROPERT	TY .
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Parameters Tab

31. From the *Parameters* tab, select a relationship from the **Select a Relationship** dropdown menu. The relationship selected controls the data that appears on the **Select Data** dropdown menu.



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Filters	Anchor	
CONFIGURE FILTERS	The selected parameters will filter the data presented in your table	
Parameters	By Activity: Workflow	
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Export Attachments	By Activity Call Source	
🕹 CONFIGURE ATTACHMENTS	Select one V	
Report Orientation	By Activity Disposition	
	Select one ~	
	By Activity Report Required	
Elements Report Canva	Select one ~	

Select a Relationship Dropdown Menu

32. Users can apply **parameters** that use workflow states, formula ranges, select list options, or roles to filter what data is displayed on the table. Parameters can be applied to a table using relationships saved to the table's <u>data definition</u> but not references.



Note:

Tables with more than 10,000 data rows will not load correctly. Resolver recommends that filters or parameters are applied to filter the data and prevent errors.

- 33. Under the **Define Parameters** section, enter parameters in the following field types to filter the data displayed in the Table:
 - **By Workflow State:** Filter the table data by the various Workflow State stages (e.g., Create, Triage, Review, Investigate, Close).
 - **By Select List Values:** Filter the table data by Select List values. A Select List is a field type that allows users to select one or more options (e.g., dropdown menu).
 - By Formula Range: Filter the table data by formula range (e.g., Low, Medium, High). A Formula uses numeric and variable values (e.g., select lists, numeric or date fields, or workflow states) to generate Incident Severity, Estimated Damage, or Incident Likelihood. Formulas are added to an Object Type through a Relationship or Reference.
 - By Current Users: Filter the table data by user or user group. When one or more



user groups are selected, only users within those roles can view the data in the table. This feature is useful to create customized reports for specific users. The Object Types in the Table's data series determines the available roles.

- By Date and Time: Filter the table data by Date and Time range. All date-related options filter data in UTC (Universal Time Coordinated). Resolver recommends a date parameter to refine large data sets for improved report performance. Options include:
 - Today: Show data from today's date only.
 - Last [X] Days: Show data within the last 30, 60, 90, or 180 days relative to today.
 - **Custom**: Shows data within the dates selected in the **From** and **To** fields. The table will include objects up to the end of that date.
- By Created On/Modified On: Filter the table data by Created On/Modified On Date. All date-related options filter data in UTC. Resolver recommends a date parameter to refine large data sets for improved report performance. Options include:
 - Today: Show data from today's date only.
 - Last [X] Days: Show data within the last 30, 60, 90, or 180 days relative to today.
 - **Custom**: Shows data within the dates selected in the **From** and **To** fields. The table will include objects up to the end of that date.

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Admin:Edit Report	DEFINE PARAMETERS The selected parameters will filter the data presented in your table
Activity List	
Report Focus: Business Unit/Activity Anchor: Business Unit + ADD ANOTHER REPORT FOCUS	By Activity: Workflow Select one
	By Activity Call Source
Filters	Select one V
	By Activity Disposition
Parameters	Select one V
CONFIGURE PARAMETERS	By Activity Report Required
Export Attachments	Select one V
	By External Data Source
& CONFIGURE ATTACHMENTS Report Orientation	Select one V
	By Is Off Site
	Select one v
Elements Report Canva	By Priority
Liements Report Canva	Select one V



Define Parameter Fields

- 34. Click the **x** icon next to a parameter to remove it from the Table.
- 35. Click a **Date Parameter** field and use the **Backspace** or **Delete** key to remove the value from the field.
- 36. **(Optional)** Select the **Show SUM totals for all numeric columns** checkbox will display the total value of all numeric fields on the table.

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Views	~	Forms	Data Visualiza	tions		
				EDIT TABLE	×	×
Admin:E	dit Repo	rt		By Current User (Activity)		-
Activity Lis	t			Select one	~	
	lusiness Unit/Activ HER REPORT FOCUS	vity Ancho	r: Business Unit	SHOW MORE_		
Filters					DONE	

Show SUM Totals for all Numeric Columns Checkbox

37. Click **Done** to close the **Edit Table** screen.

		(+)	Q Search	•••)	\$ 3
Views	~	Forms	Data Visualiza	ions	
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Done Button

38. When you are done adding elements and configuring your report, you must add it to a report view to make it available to end-users. See the Views Overview and Create a Report View articles for more information.