:RESOLVER

# Add a Table to a Report

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Tables display selected data in text form and can be exported into a Word or Excel document from a view. Clicking on the data in any of the cells will display either the default form selected in the role permissions or an alternate form selected by an administrator in the table settings. Depending on the user's role permissions, the user may be able to view or edit the data in the form.

Tables with more than 10,000 rows of data will not load correctly. It's recommended that admins configure filters and/or apply parameters (at the report level or at the table level) to filter the data and prevent errors, improve loading times, and provide a better end-user experience.

If you need to use the Data Import feature to update existing objects, you can retrieve the objects' external reference IDs by adding the **External Reference ID** property to a table then reviewing the table in a view.

**Risk Category**

Search Table...

| Risk Category Name | Impact Trend | Likelihood Trend | Risk Trend |
|---|---|---|---|
| Fines | | | |
| Change in incoming work requests | Worse: 0 | Worse: -1 | Decreasing: -2 |
| Change in supply | Worse: 0 | Worse: 0 | Decreasing: 0 |
| Compliance with Legislation, Regulation, Administrative Agreement | | | |
| Product Delivery Delayed | Worse: -1 | Worse: -1 | Decreasing: -3 |
| Lack of cashflow | Better: 2 | Better: 2 | Increasing: 12 |
| Emerging Market Exposure | Better: 1 | Worse: 0 | Increasing: 2 |
| Changing consumer confidence | Worse: -1 | Better: 1 | Increasing: 1 |
| Material invoices are paid without shipment being verified | Worse: -2 | Worse: 0 | Decreasing: -8 |
| Vendor payment is made for the incorrect amount | Worse: 0 | Worse: 0 | Decreasing: 0 |
| Incorrect valuation of capital assets | Worse: 0 | Worse: 0 | Decreasing: 0 |
| Product Pricing is not approved or validated in market | Worse: 0 | Worse: 0 | Decreasing: 0 |
| Disclosures are not accurate | Worse: -2 | Worse: -2 | Decreasing: -10 |
| Uncollectible debts not written off | Better: 2 | Better: 1 | Increasing: 8 |
| Unjustified or unauthorized write-offs | | | |
| Personal data breach | Worse: 0 | Worse: 0 | Decreasing: 0 |
| Problems with invoicing (delays, amounts) | Better: 2 | Better: 2 | Increasing: 8 |

Page 1 of 1 | 17 Rows

*A table as it's displayed in a view.*

## Supported Data

The following data can be selected to appear in a table:

- **Properties:** The objects' properties, including:
  - Name
  - Unique ID
  - Description

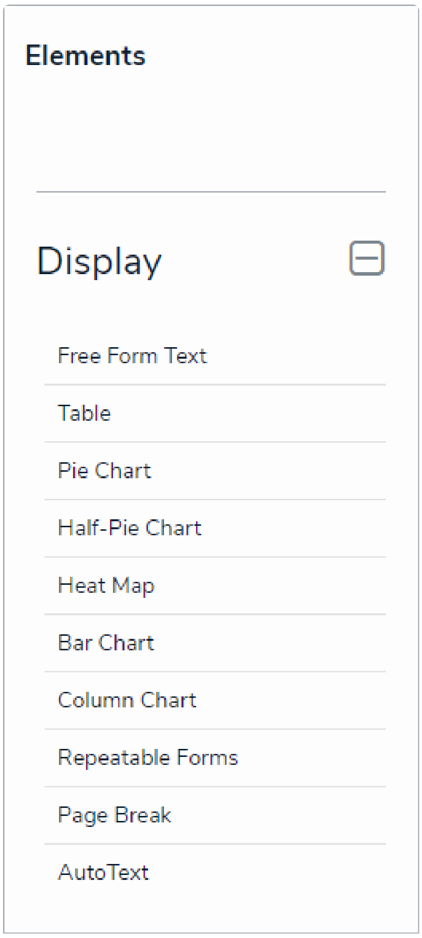
    - External Reference ID
    - Assessment dimensions
    - Location addresses or coordinates only. If an address is not available, coordinates are displayed. Map rendering is not supported.
- **Fields:** The value of the objects' fields, including plain or rich text, numeric, date and time, select list, attachments, and formulas.
- **Relationships:** The name of relationship objects.
- **Workflow State:** The current workflow state of the objects.
- **Roles:** Displays the user(s) who have been added to an object via the role field on a form.
- **Assessment Name/Workflow State:** Displays the name of a related assessment and its workflow state.

You can also 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 using any of the relationships saved to the table's selected data definition. You can create custom reports for the currently logged in user (e.g. My Incidents or My Risks) by applying the **Current User** parameter to the table. See step 14 below for more information.

## Instructions

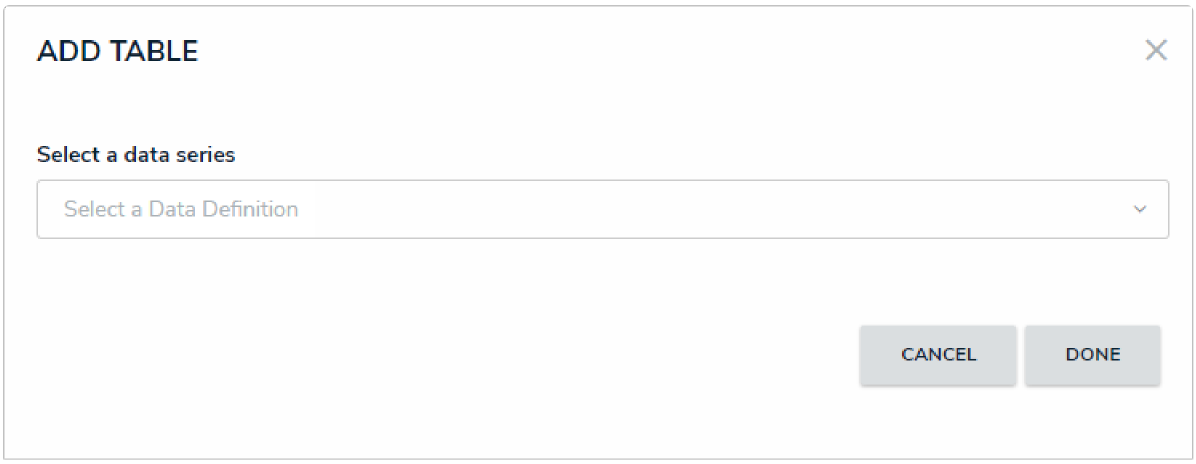
### To add a table to a report:

1. In the **Elements** section, click the icon beside **Display**.




*The Elements section.*

2. Drag and drop **Table** from the **Elements** section to the **Report Canvas**.
3. Select a data series from the **Select a data series** dropdown menu, then click **Done**. The data definition selected here will determine which object types you can choose to display in the table.




*Selecting a data series.*

4. Choose the data types you'd like to display in the table from the **Data Type** tab. Selecting **LIBRARY DATA** will include object type data, while selecting an **Assessment Type** will include the assessment name and workflow state. By default, all data types are selected. To make individual selections, deselect the **Select All** checkbox, then click the data type(s) you wish to include.

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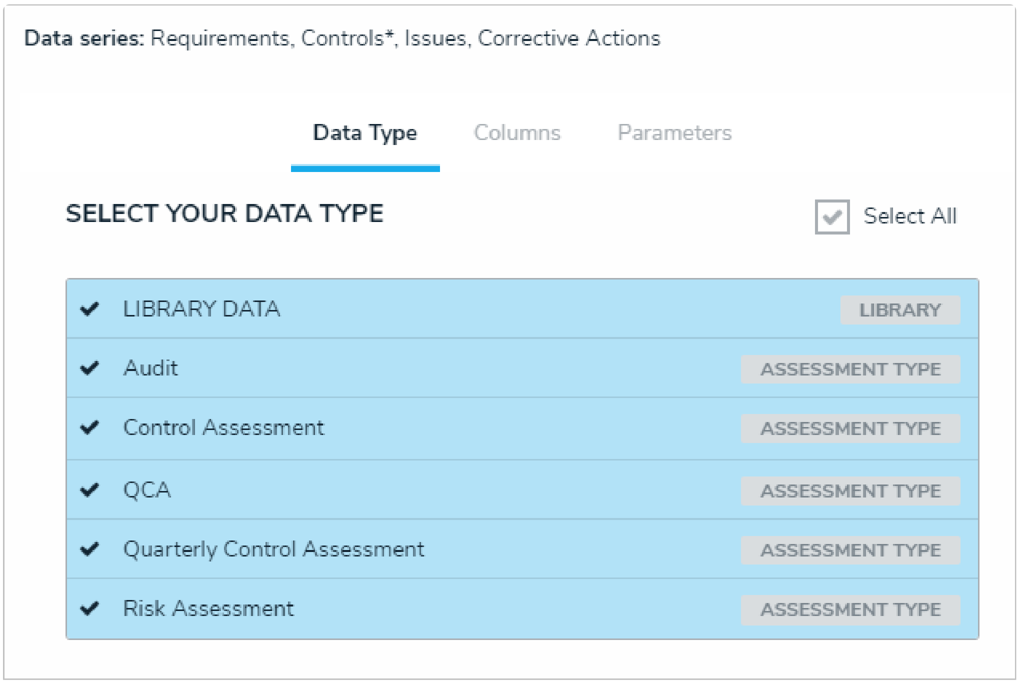
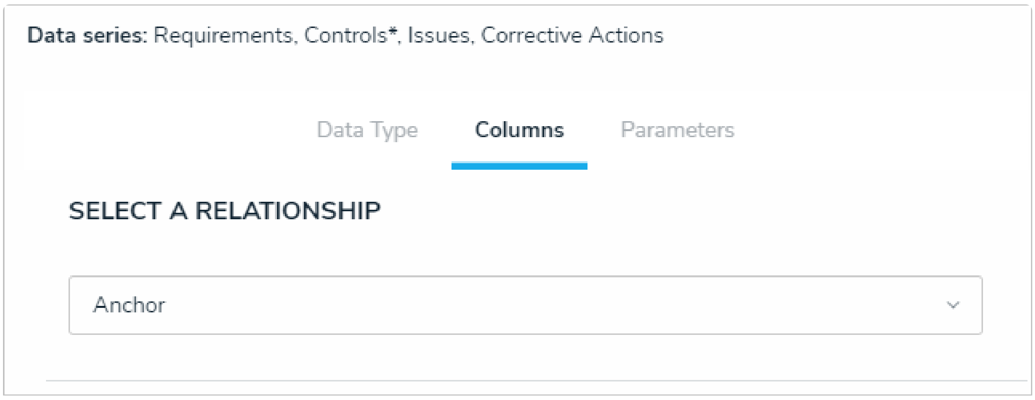


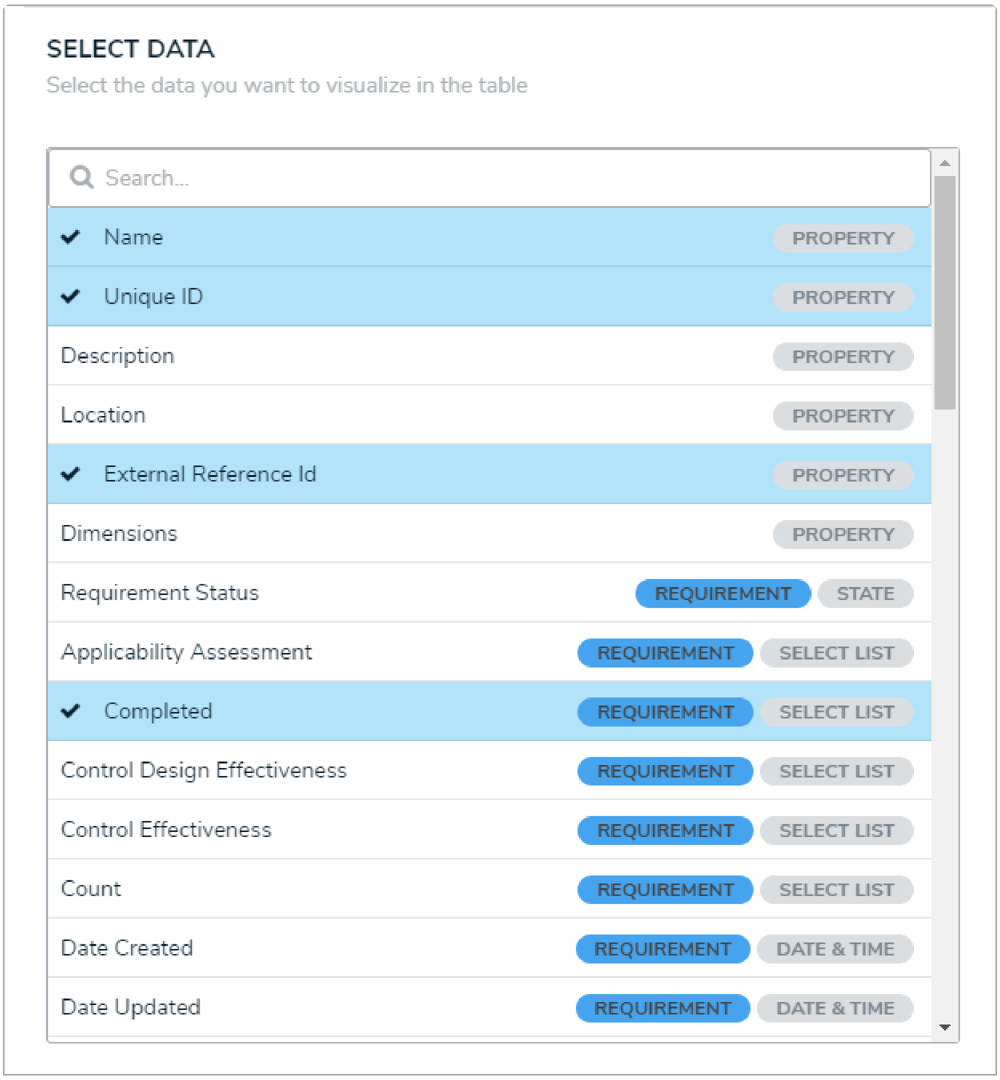

*The Data Type tab.*

5. Click the **Columns** tab.
6. Choose either the anchor or an object type in the data path from the **Select a Relationship** dropdown menu. The options in this dropdown menu will vary depending on the definition selected as the data series in the step above.



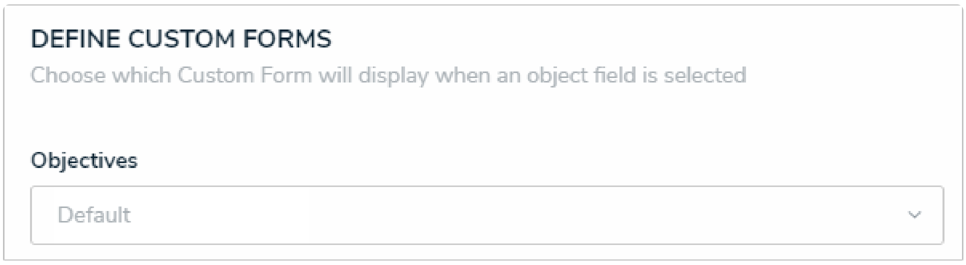

*Selecting which object type's data will appear in the table.*

7. Select the properties, workflow states, fields, formulas, relationships, and/or roles you want to display in the table from the **Select Data** section. Use the **Search** field to search for a particular data type, if needed. Clicking a selected data type will deselect it and remove it from the table.



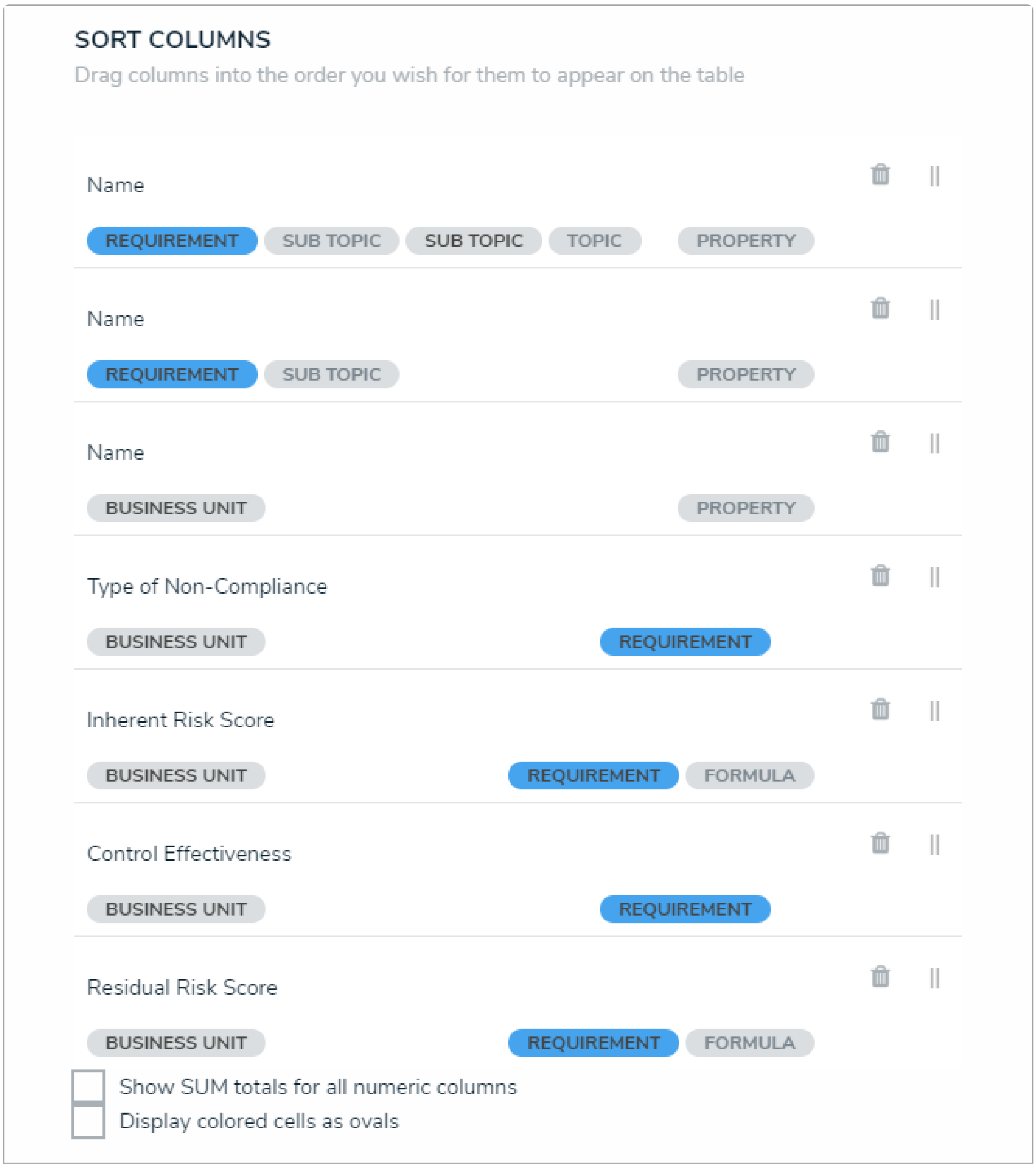

*The Select Data section.*

8. From the **Define Custom Forms** dropdown menu, select which form is displayed when a user clicks on data in the table. Choosing **Default** will display the form selected in the user's role permissions for the object type.



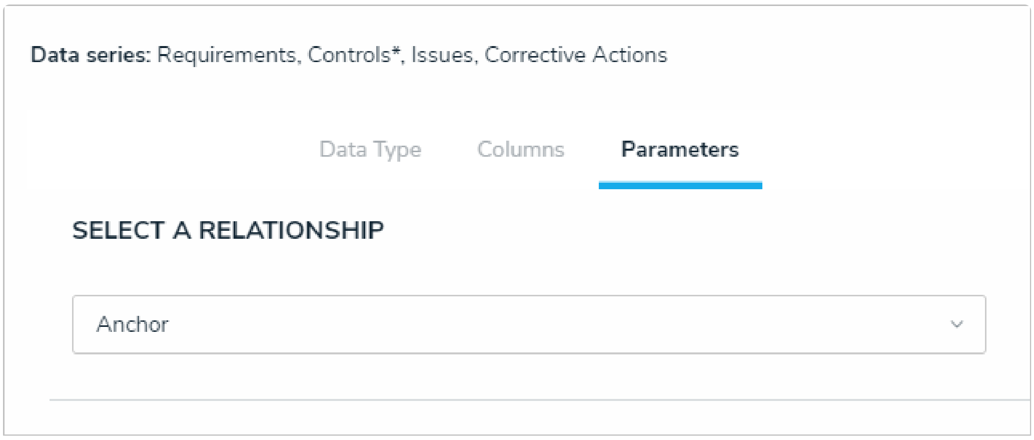

*The Define Custom Forms section.*

9. **Optional:** In the **Sort Columns** section, click and drag the icon next to the data types to rearrange how the columns will appear on the table.
10. **Optional:** If needed, click the icon next to the data type to delete it from the table.
11. **Optional:** Select the **Show SUM totals for all numeric columns** checkbox to display a sum total of the numeric field values on the table.




*The Sort Columns section where you can rearrange the table columns or delete the data types.*

12. **Optional:** Select the **Display colored cells as ovals** checkbox to show formula or select list cells as text with colored circles. When this option is not selected, cells are displayed with text and a full background color, if any.
13. Repeat steps 6-12 above to continue adding data from additional object types in the data definition.
14. Scroll to the top of the **Edit Table** palette, then click the **Parameters** tab.



*The Parameters tab.*

15. Choose a relationship from the **Select a Relationship** dropdown menu. The relationship selected here will determine which parameters (filters) you can apply to the table to refine the data that's displayed. If needed, you can select a relationship that differs from the relationship selected in the **Columns** tab.

> You can add parameters from an object type in the data series even if that object type isn't configured to display any data in the table.

16. Below **Define Parameters**, select one or more parameters to filter the data displayed in the report. Options include:
    - Workflow states;
    - Select list options;
    - Formula ranges (e.g. High, Medium, Low);
    - By Current User. When one or more roles are selected in this parameter, only users within those roles can view the data in the table. This feature is useful to create customized reports for specific users. The available roles are determined by the object types in the table's data series; or
    - By Date & Time Field or Created On/Modified On properties. Selecting a range in the **By [Date Field]** dropdown menu will filter the data relative to the value selected in the Date & Time field on the objects. Selecting a range in the **By Created On ([Object Type Name])** or **By Modified On ([Object Type Name])** dropdown menus will filter the data relative to the date the objects were created or modified. All date-related options filter data in UTC time. It's recommended a date parameter is used 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's date.
        - **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.

17. Repeat steps 15 and 16 above to add more parameters from additional object types.
18. To remove a select list, formula, or role parameter, click the **x** icon beside parameter. To delete a date parameter, click the field, then press the **Backspace** or **Delete** key on your keyboard.
19. Click **Done** to close the **Edit Table** screen.
20. Repeat the steps above to continue adding more tables to the report as needed. Once multiple elements are on the **Report Canvas**, you can rearrange them by hovering your cursor over the element, then clicking the icon and dragging the element to a new location on the canvas. To delete an element, hover your cursor over it on the canvas, then click the icon.

Once you're 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.