

Creating a Data Analytics Export Report

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Overview

An Administrator or Data Management advanced permissions user can create a new Data Analytics Export report. **Data Analytics Export reports** are data visualizations that are specifically designed to allow end users to export object data (properties, fields, workflow states, relationships, and references) into an Excel spreadsheet.

User Account Requirements

The user account used to log into Resolver must have Administrator permission or Data Management advanced permissions to create a Data Analytics Export Report.

Related Information/Setup

Please refer to the Add a View to an Activity article for more information on adding a Data Analytics Export report to a View.

Please refer to the Add an Action to an Activity in Resolver Core article for more information on adding a Data Analytics Export report to an Action.

Please refer to the Export Data Action on Forms in Resolver Core article for more information on adding a Data Analytics Export report to Export Data.

Navigation

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

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Administration Icon

2. From the Administrator Settings menu, click Admin Overview.



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Administrator Settings Menu

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

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Data Visualizations Tile

4. From the *Admin: Data Visualizations* screen, click the **+ Create Data Visualizations** button.

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+ Create Data Visualizations Button

Creating a Data Analytics Export Report

Ensure the data definition you wish to use for the data analytics report has been created from the Data Definitions settings in **Administration**.

1. From the *Admin: Create Data Visualization* screen, enter a report name in the **Name** field. The name will represent the report throughout the system.

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Name Field

 (Optional) Enter a brief description of the Data Analytics Export in the Description field. The description will appear below the Data Analytics Export's name on the *Admin: Data Visualization* screen.

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3. Click the **Type** field and select **Data Analytics Export** from the dropdown menu.



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Type Dropdown Menu

Click the Data Visualization Focus field and select a focus from the dropdown menu.
Enter the name of the focus in the Data Visualization Focus field to narrow the focus list.
A Data Visualization Focus is a data definition that broadly specifies which object type's data will be displayed in a data visualization.

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Data Visualization Focus Field

5. Click the **Create** button to create the Data Visualization Export.



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Create Button

6. The *Admin: Edit Report* screen will appear. Once the export report has been created, you can grant end users access to it by adding it to a View, Action, or Export Data form action.

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Admin: Edit Report Screen