View a Report

Before a report can be viewed, an administrator must first create it and add it to a view in an application. The data you can view in a report depends on your role's permissions and the report's configurations in the administrative settings.

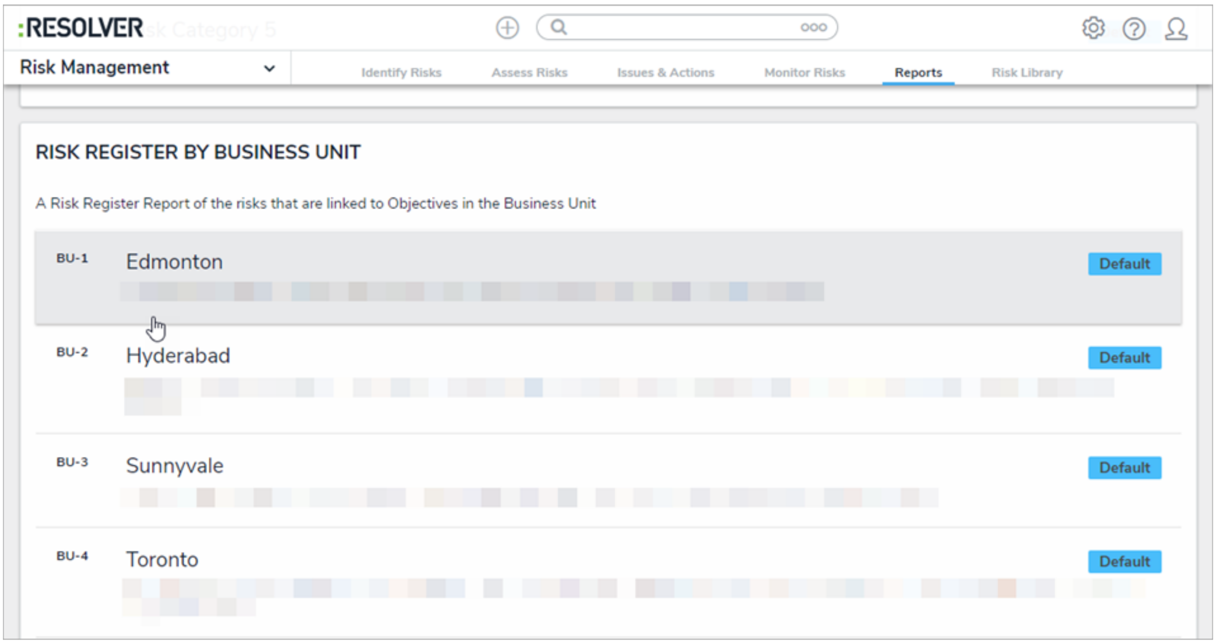
> Some report filters rely on the current user's time zone. As such, some users from different time zones may see different data in the same report. See the Time Zone Conversions on Reports article for more information.

For information on viewing a data grid or data export report, see the View a Data Grid and Export Object Data from a Data Analytics Report articles. For information on exporting a report, see the Export a Report article.

Instructions

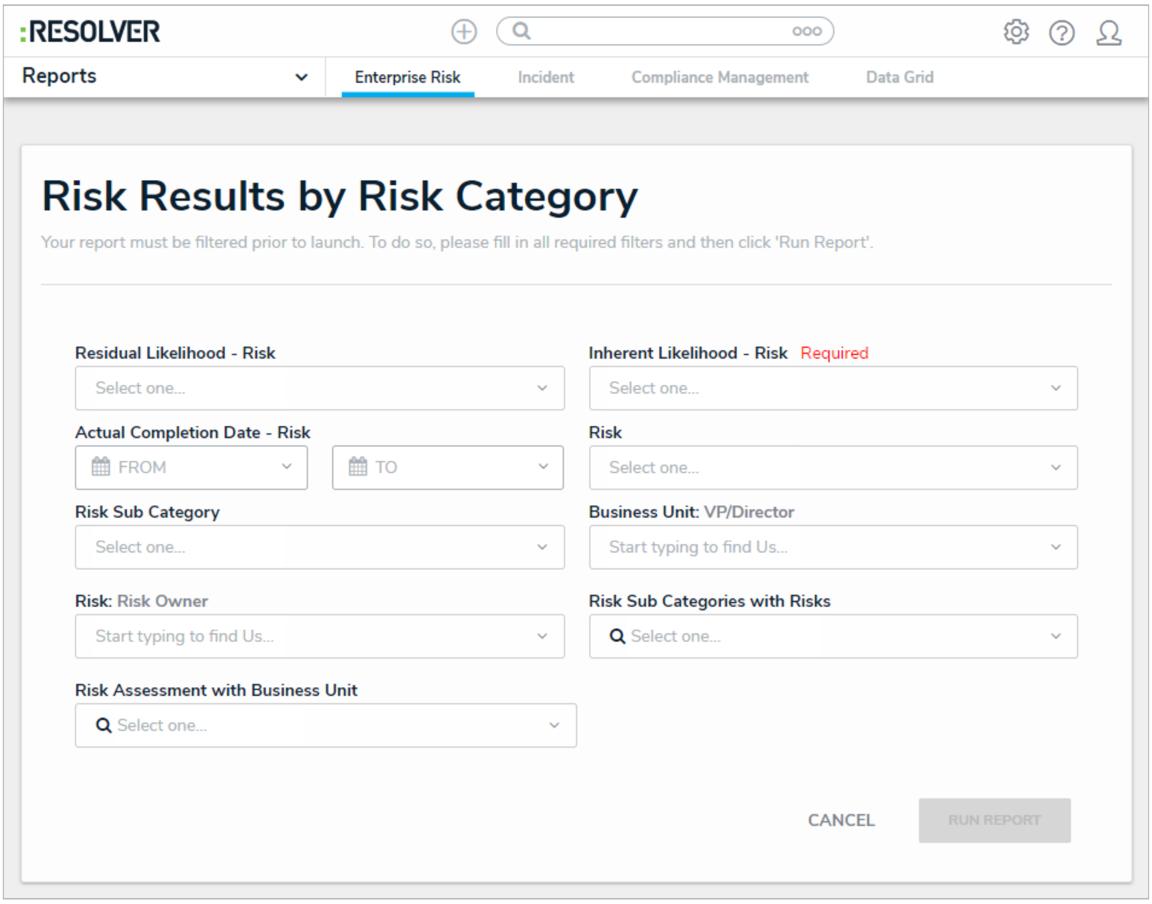
To view a report:

1. Navigate to the application and activity where the report is saved.
2. Click an anchor (root) object in the view to open the report.



Clicking on an anchor object to open a report.

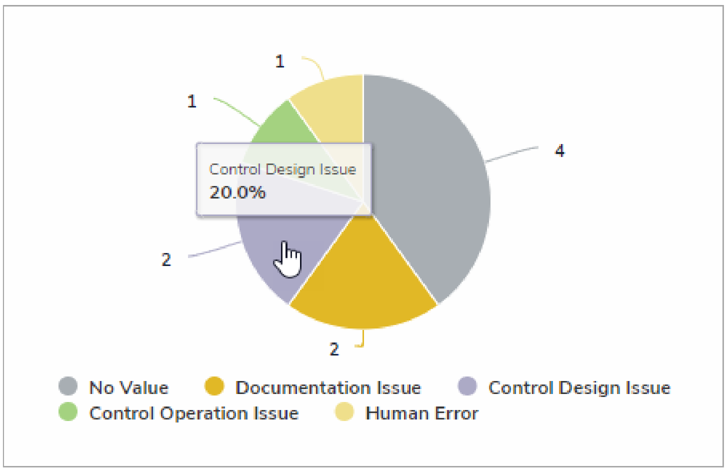
3. If a filter has been marked as required by an administrator:
    a. Apply all required filters by clicking them and selecting an option. If the filter is a search field, begin typing keywords to display a list of available options, then click to select the appropriate value.
    b. Apply additional optional filters as required.
    c. Click **Run Report**.



Filters are displayed before a report is loaded if an administrator has marked a filter as required.

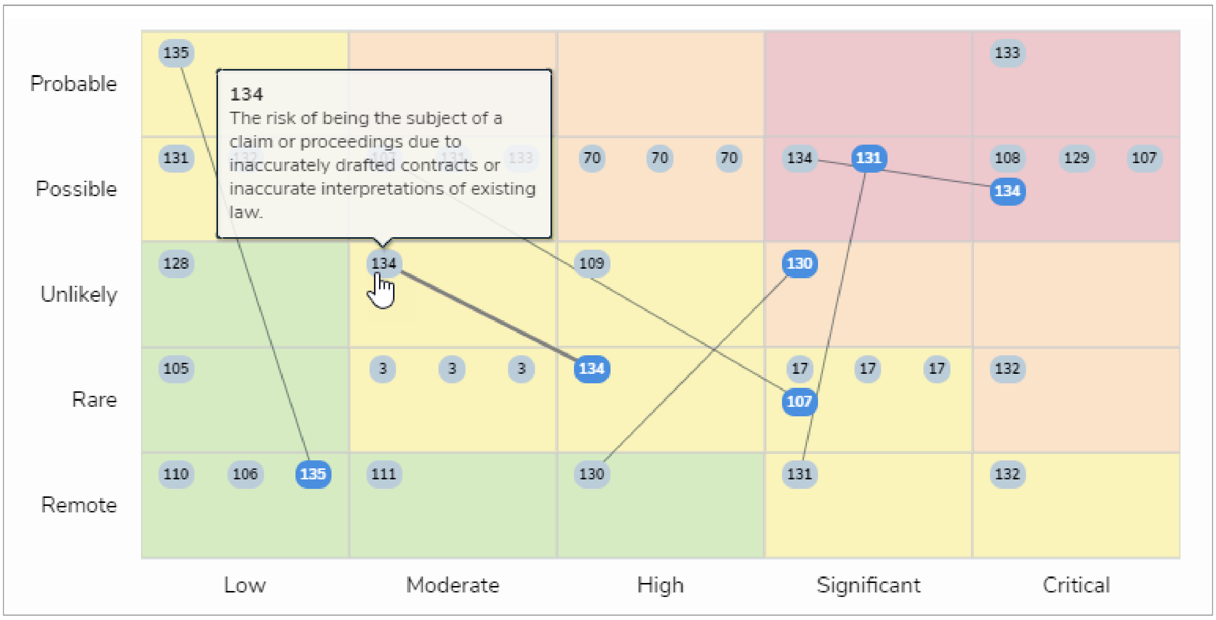
> If configured by an administrator, filters can also be applied after the report is loaded. See the **Filters** section below for more information.

4. If the report includes a bar, column, or pie chart, hover your cursor over the chart for more information about the data. Clicking on a section of a pie chart will separate it from the rest of the chart for emphasis.



Hovering your cursor over bar, column, or bar chart will display additional information.

5. If the report includes a heat map, hover your cursor over the objects on the heat map (represented by circles and identified by their unique IDs) to display the object's description. Click the object view and/or edit it in a palette.



Hovering your cursor over an object in a heat map will display the object's description while clicking the object will open it in a palette.

6. If the report includes a table:
    a. Click a cell to open the associated object in a palette.
    b. Click a column to sort the data in the table.
    c. Click **Next** or **Previous** at the bottom of the table to scroll through any additional pages.
    d. Enter search terms in the **Search Table...** field to narrow down which data is displayed. Note that up to 20 objects are returned in the results.

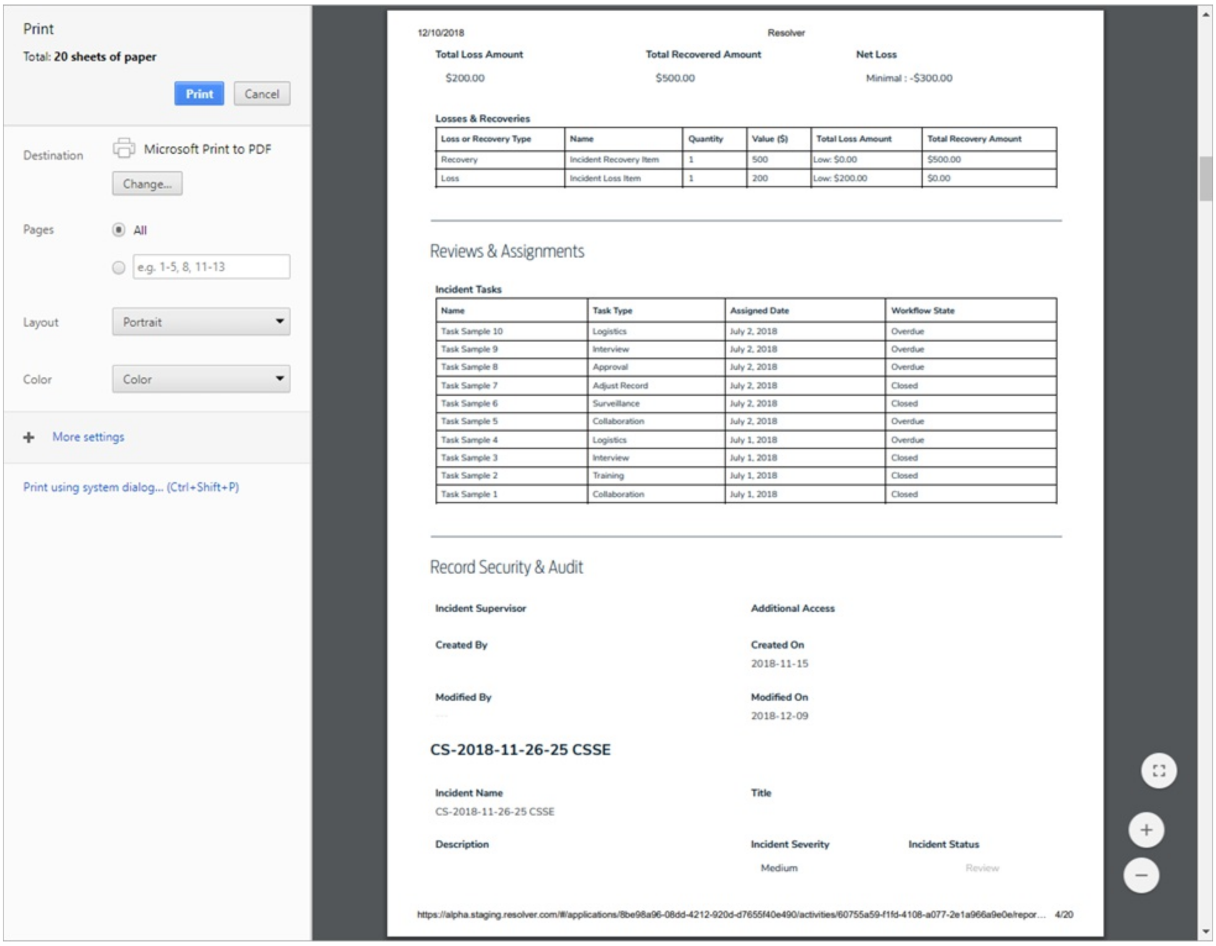
2017 Audits

Search Table...

Audits Name	Audit state	Audit Scope	Estimated Timing	Audit Budget Hours	Internal Auditor	Audit Client
Procurement Audit	Reporting	The audit scope defines what part of the organization will be audited. If the full audit is divided in smaller segments then the scope of any given segment is what portion of the organization will be audited at that time. Typically, Internal Audit prepares and Audit Plan for the year which will indicate the various divisions or activity and when it will be audited. Also noted in the audit program is the audit objective(s). The audit objective describes why an audit is being conducted. Another reason is demonstrate conformance to others. Although audits may appear in their own right to be "good practice", it is essential that auditors have a clear concept of what the general objectives of such audits are.	Q1 2017			
AML Compliance Audit	Closed	Determine the effectiveness of AML controls throughout the organization.	Q1 2017			
New system integration audit 12	Reporting	In order to give assurance that the Department/agency operates effectively, it is essential to carry out some form of monitoring activity in addition to ongoing monitoring and measurement. Listed below are some of the potential benefits of Internal Auditing:	Q1 2017			
Mortgages Audit	Planning	The auditor will start by reviewing your approval criteria for new mortgages to ensure that none of your practices are discriminatory and the risk level is appropriate. He will typically make a list of the minimum requirements for credit, income, appraisal value, debt-to-income ratio and any other key metrics your company uses for evaluation. This will be used as a reference for reviewing individual loan applications later in the audit.	Q3 2017	40		

Clicking on a cell in a table will display the associated object in a palette, while clicking on a column header will sort the data in the table.

7. To refresh the data displayed in the report, click the icon. See the Loading & Caching Report Data article for more information on refreshing and reloading.
8. If the report includes a repeatable form, you can view read-only, printer-friendly versions of object data as it was entered onto a configurable form.



Printing a repeatable form.

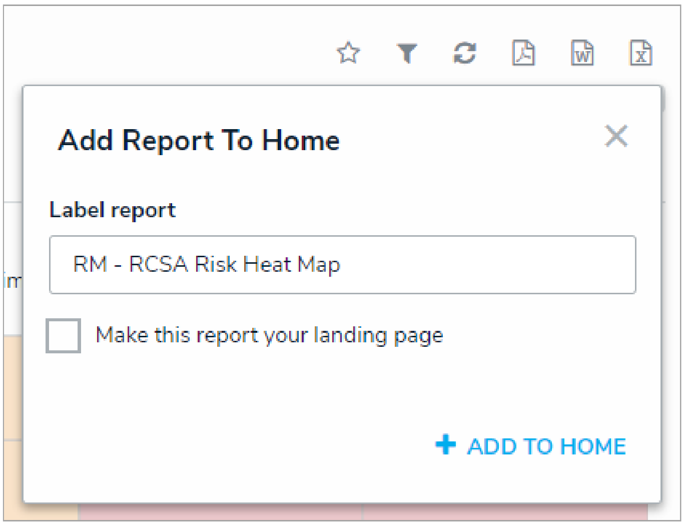
> Any repeatable forms with unsupported elements will not display any object data, resulting in an error message. See the Add Repeatable Forms to a Report for a list of unsupported elements or contact your administrator.

Starred Reports

To star a report (create a tab for the report in the nav bar):

1. Click the ☆ icon at the top-right corner of the report to open the **Add Report To Home** window.
2. If needed, enter a custom name for the tab in the **Label report** field. The report's name, as saved by an administrator, appears in this field by default.

:RESOLVER



The Add Report To Home window.

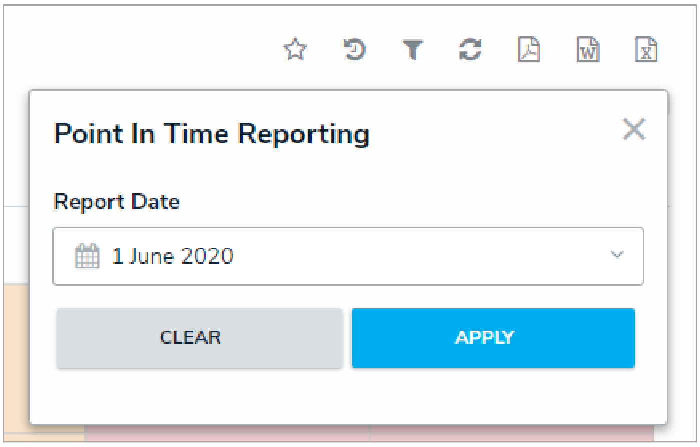
3. Select the **Make this report your landing page** checkbox if you want this report to replace the My Tasks tab or another report tab as the home page. To revert back the home page back to **My Tasks**, deselect the checkbox.
4. Click **Add To Home** to finish.
5. To delete the tab from the nav bar, click the icon, then click **Remove From Home**.

> For more information on reports added to tabs, see the Starred Reports article.

Historical Data (Point in Time Reporting)

To view historical report data:

1. Click the icon on the top-right of the report. If Point in Time Reporting has not been enabled for this report, this icon will not be visible.
2. Click the **Report Date** field, then select a date from the calendar. The dates are based on the current user's time zone.
3. Click **Apply** to reload the report with historical data.



The Point In Time Reporting option.

4. To view data from a different date, click the icon, select a date, then click **Apply** to reload the report. When historical data is displayed on a report, this icon is displayed in blue.

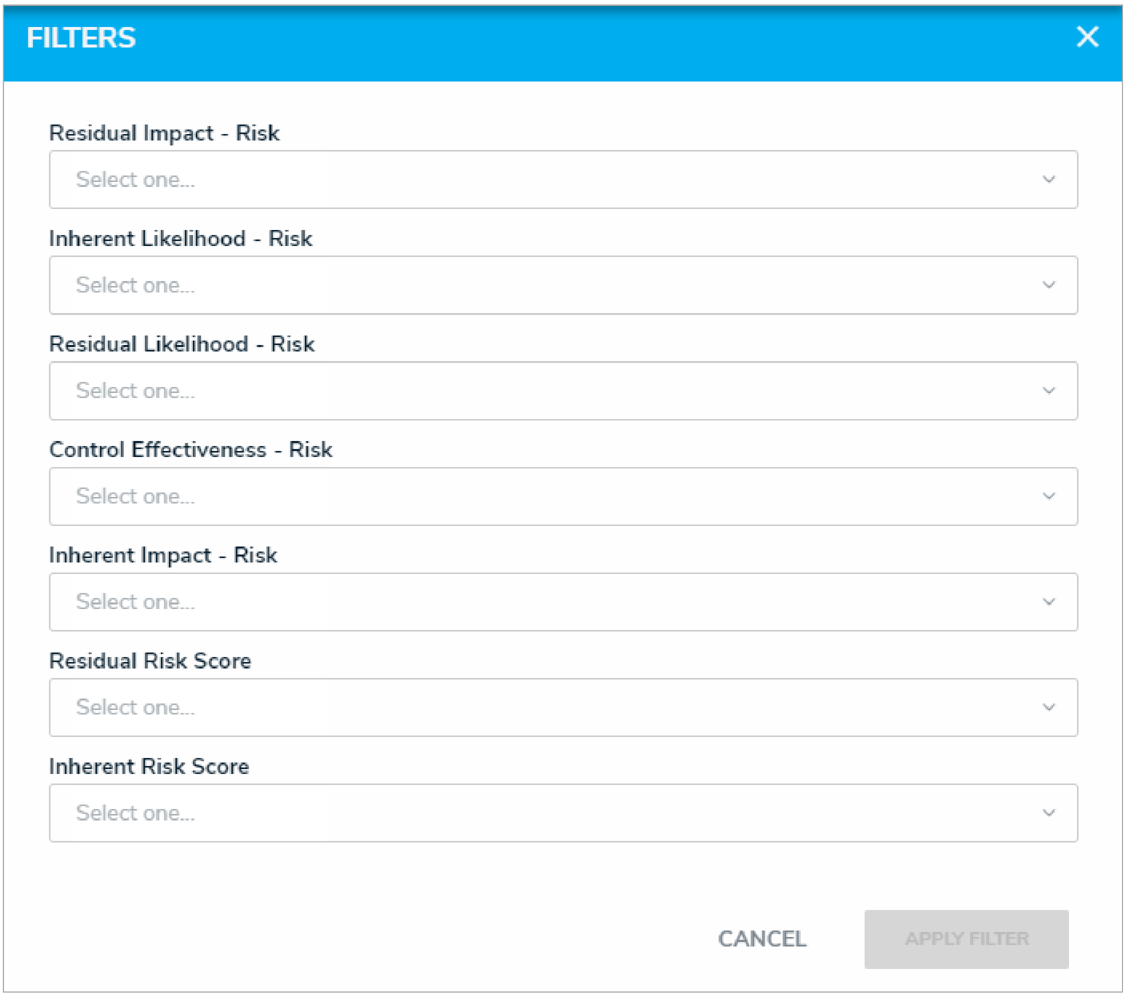
The Point In Time Reporting icon.

5. To return to present-day data, click the icon, then click **Clear**.

Filters

To apply filters to a report (if configured by an administrator):

1. Click the icon at the top-right corner of the report to open the **Filters** palette. When a report's data is filtered, the filter icon is displayed in a solid blue ( ).
2. Apply the following filter types as needed. Note that some or all of these sections may be blank if these filter types have not been added to the report by an administrator:
    - **State:** Filters the report data by the objects' current workflow state(s).
    - **Role:** Filters report data by users or user groups in explicit roles that have explicit that have been granted direct access to objects from the report's data definition.
    - **Date & Time:** Filters the report data using date ranges from a Date & Time field. If the field is configured to collect both the date and time, the report is filtered based on the current user's time zone. See the Time Zone Conversions on Reports article for more information.
    - **Select List:** Filters the report data by select list fields.
    - **Formula:** Filters the report data by formula label(s).
    - **Relationship:** Displays report data from one or more selected relationship object types and any related reference object types. For example, selecting the Risk 1 object type in this filter will also display all the Control objects that Risk 1 appears on through a relationship.
    - **Object Type:** Displays report data from one or more selected object types.



The Filters palette.

3. Click **Apply Filter** to close the palette and reload the report.

4. To remove a filter, click the icon at the top-right of the report, click the **x** beside the filter you wish to remove. If the filter is a date-based filter, select then delete the dates from the fields. Click **Apply Filter** to close the palette and reload the report.