

Add Parameters to a Report

Last Modified on 06/13/2024 1:35 pm EDT

Overview

A report **parameter** controls the data displayed in a report and all its elements. Parameters cannot be applied until one or more [report elements](#) have been added to the Report Canvas, as parameters rely on the [data series](#) selected in the element(s).

User Account Requirements

The user account used to log into Resolver must have Administrator permission to configure or apply parameters to reports.

Related Information/Setup

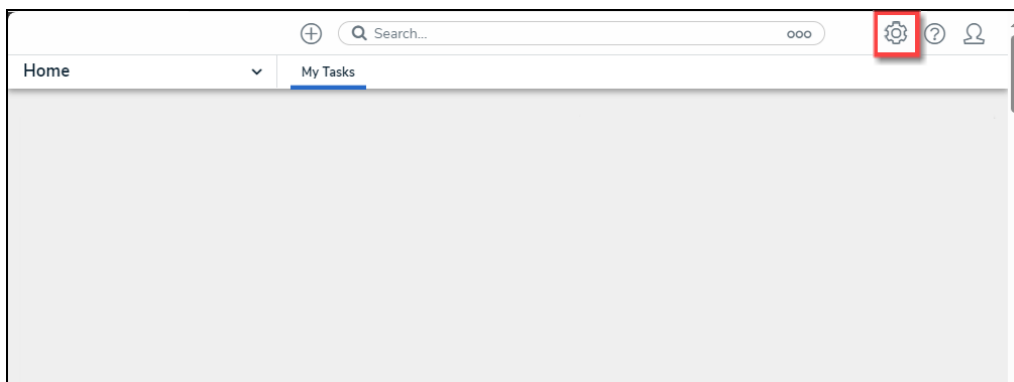
Please review the [Report Elements](#) section for more information on report elements.

Please review the [Focuses & Data Series](#) article for more information on report focuses and data series.

Please refer to the [Date & Time Field](#) article for further information on the **Date & Time** field.

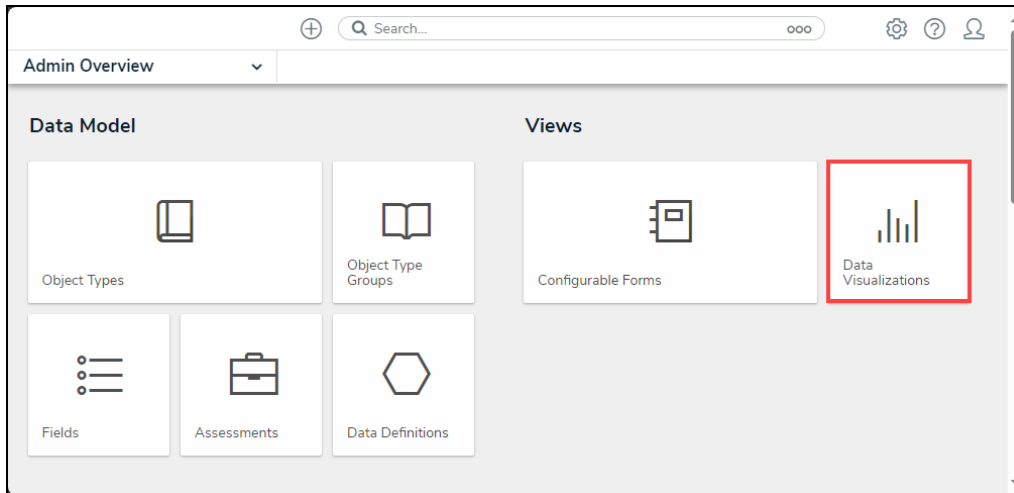
Navigation

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



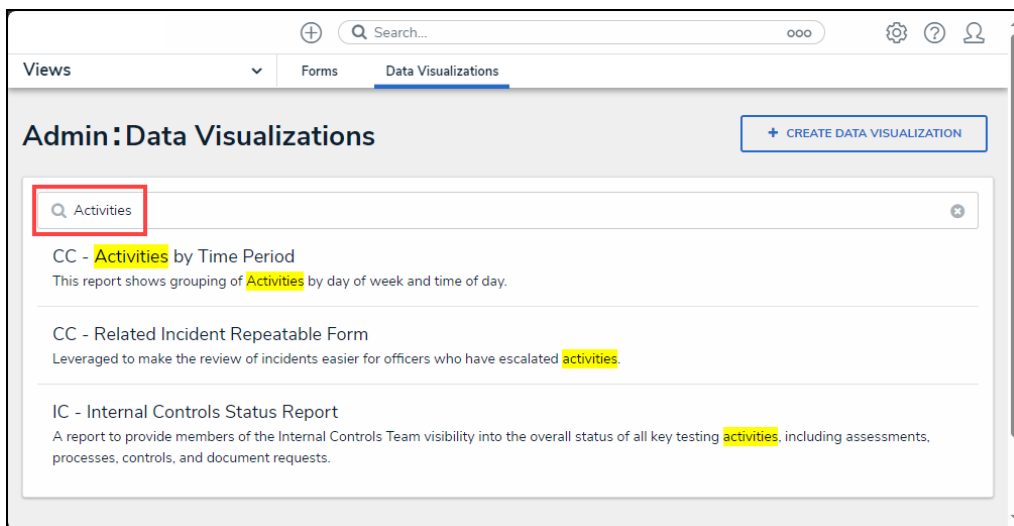
Administration Icon

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



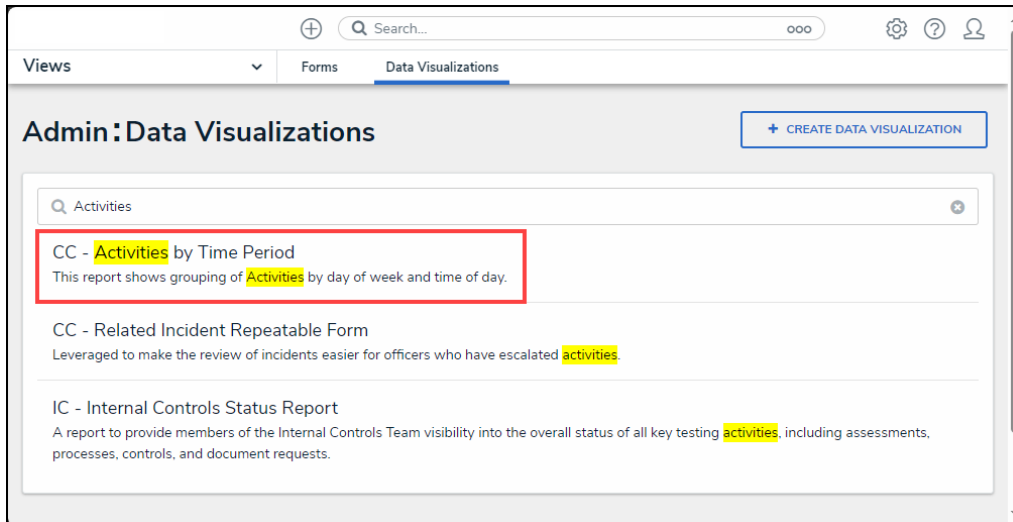
Data Visualizations Tile

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



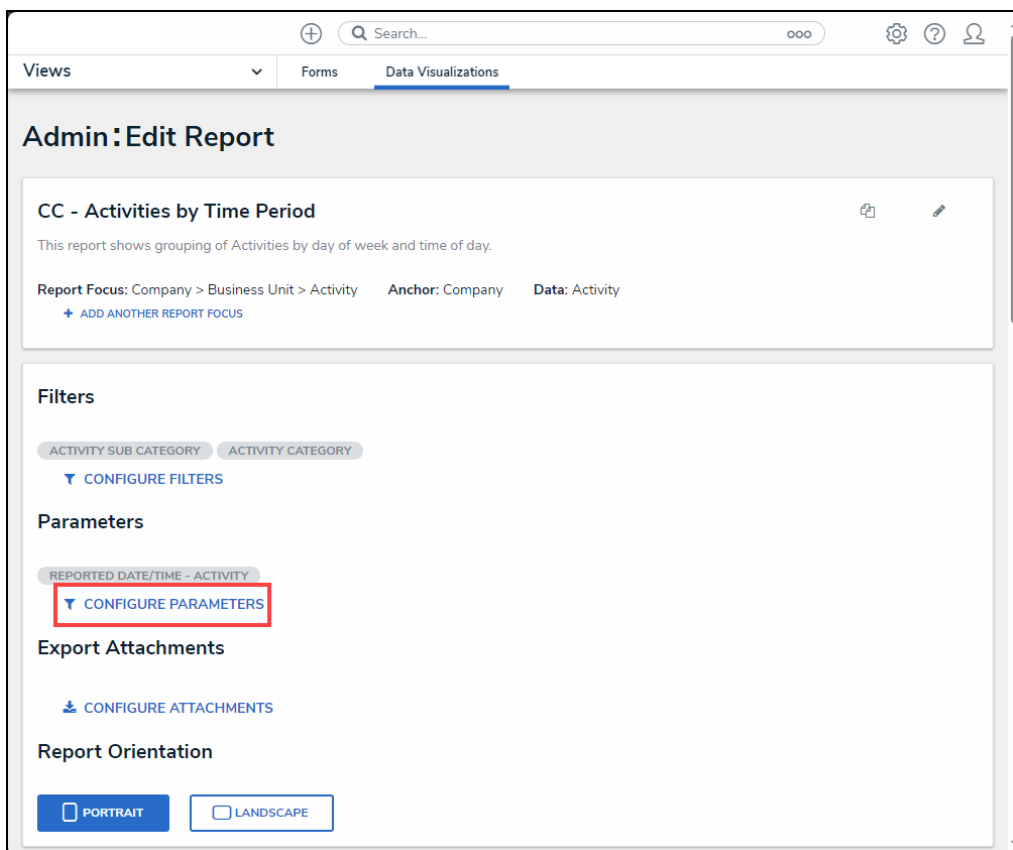
Search Field

4. Click on a **Report** link.



Report Link

5. From the **Admin: Edit Report** screen, click the **Configure Parameters** link under the **Parameters** section.



Configure Parameters Link

Adding Parameters to a Report

Report parameters differ from report filters as they include objects with specified parameter field values or blank values. While filters exclude objects that do not have a specific value. For

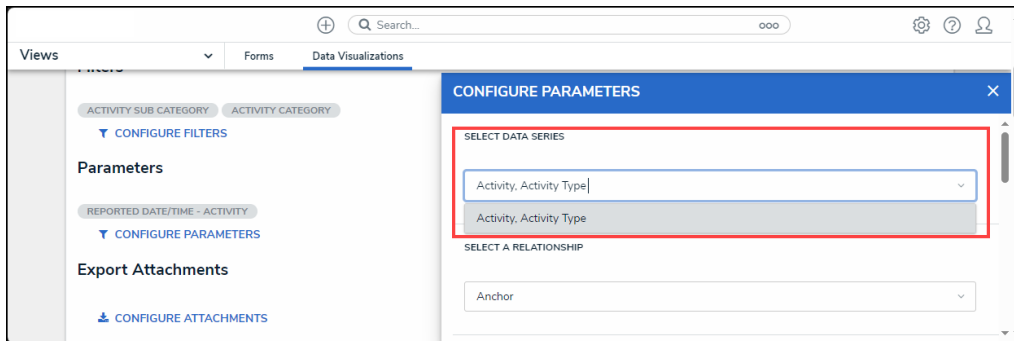
Example, if an object has no value filled in for the selected field, it will appear in the report when that field is used as a parameter, but not when that field is used as a filter.

1. From the **Configure Parameters** pop-up, select a data series option from the **Select Data Series** dropdown menu. The option selected will determine the options available on the **Configure Parameters** pop-up.



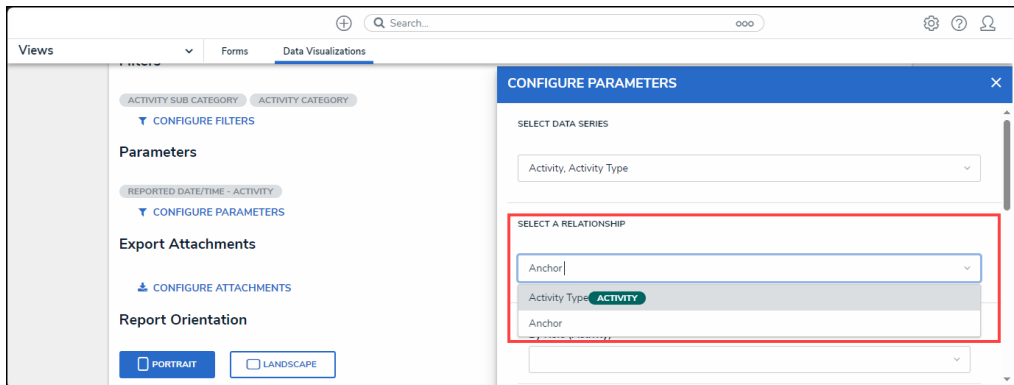
Tip:

In order for options to appear in the Select Data Series dropdown menu, at least one report element must be added to the report canvas. Please refer to the [Report Elements](#) section for further information.



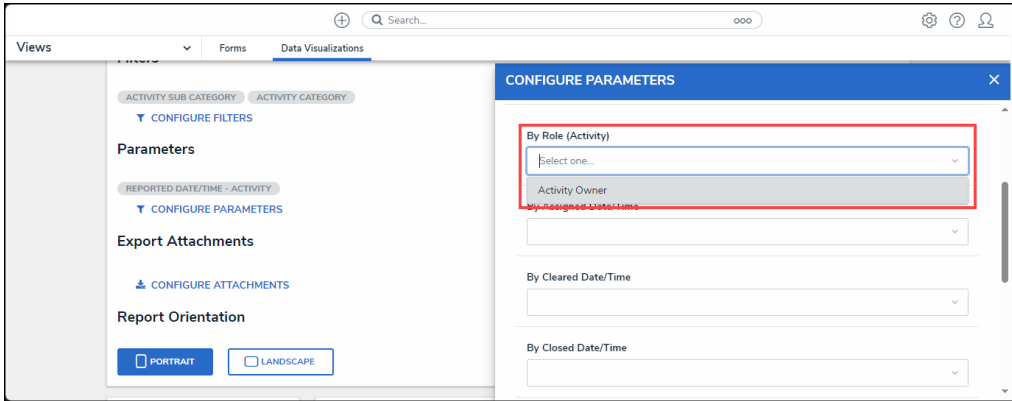
Select Data Series Dropdown Menu

2. Select a relationship type from the **Select a Relationship** dropdown menu:
 - o **Anchor** (Report Focus)
 - o **Relationship**
 - o **Reference**



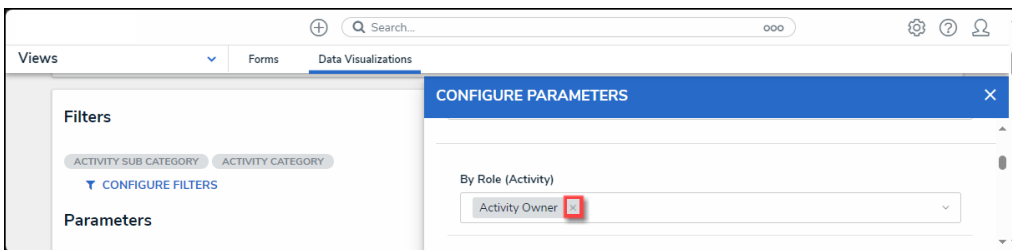
Select a Relationship Dropdown Menu

3. Select roles from the **By Role (Object Type Name)** dropdown menu, only users in the roles selected can view the report and its elements.



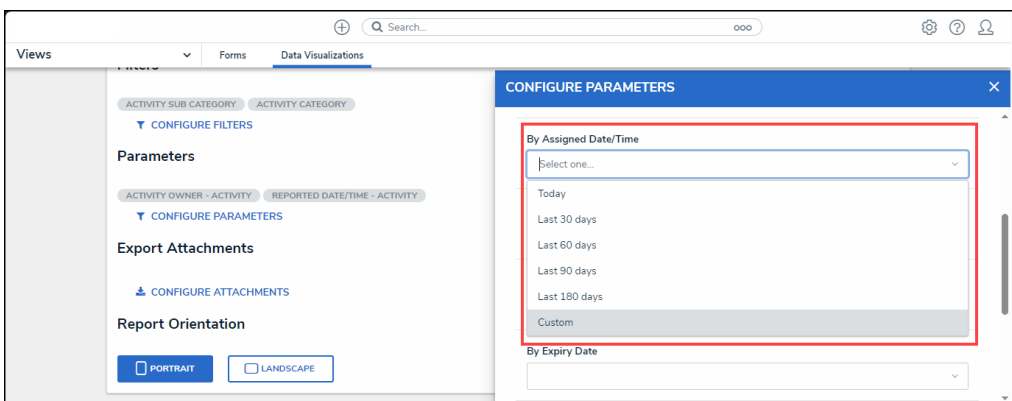
By Role Dropdown Menu

- Click on the **x** icon next to the role value to delete the role from the **By Role (Object Type Name)** field.

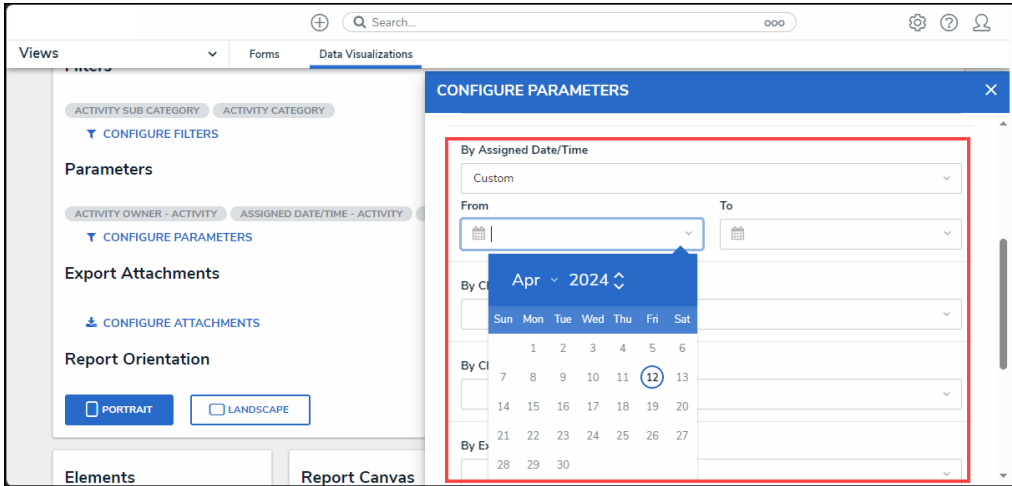


x icon

- Select a data range to filter the report data based on values in the **Data & Time** fields (**By Assigned, By Cleared, By Closed, By Expired Date, or By Reported**), by selecting a range option from the **By (Object Date Field)** dropdown menu.
 - Today:** This option shows data from today's date.
 - Last (x) Days:** This option shows data from the last 30, 60, 90, or 180 days, starting from today's date.
 - Custom:** This option allows a user to provide a date range, selecting a **From** and **To** date from the **Calendar** pop-up for the corresponding fields.



By (Object Date Field)

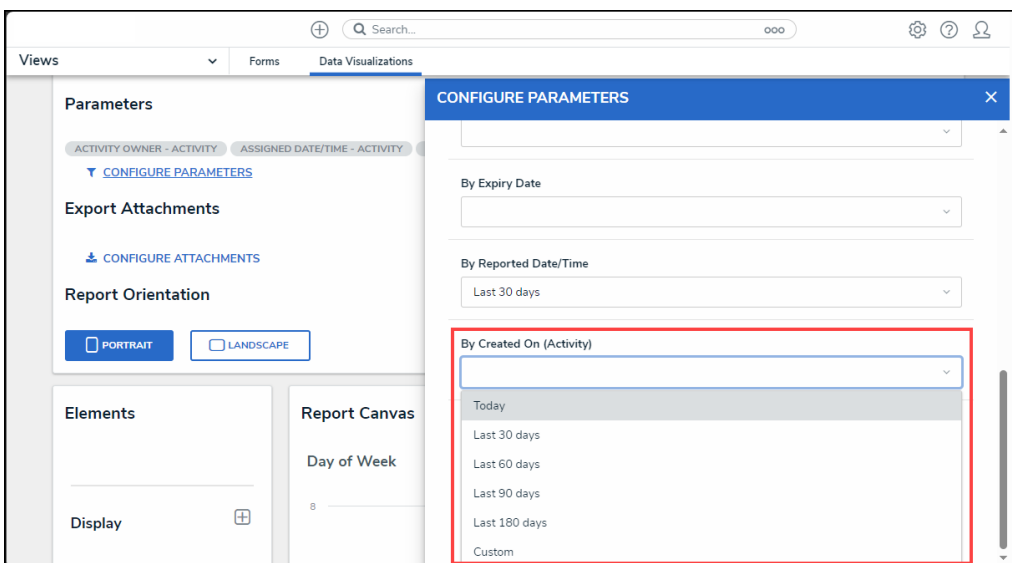


Custom Date Range

Tip:

Please refer to the [Date & Time Field](#) article for further information on the **Date & Time** field.

6. Select a range used to filter the data by creation date from the **By Created On** dropdown menu.
 - **Today:** This option shows data from today's date.
 - **Last (x) Days:** This option shows data from the last 30, 60, 90, or 180 days, starting from today's date.
 - **Custom:** This option allows a user to provide a date range, selecting a **From** and **To** date from the **Calendar** pop-up for the corresponding fields.

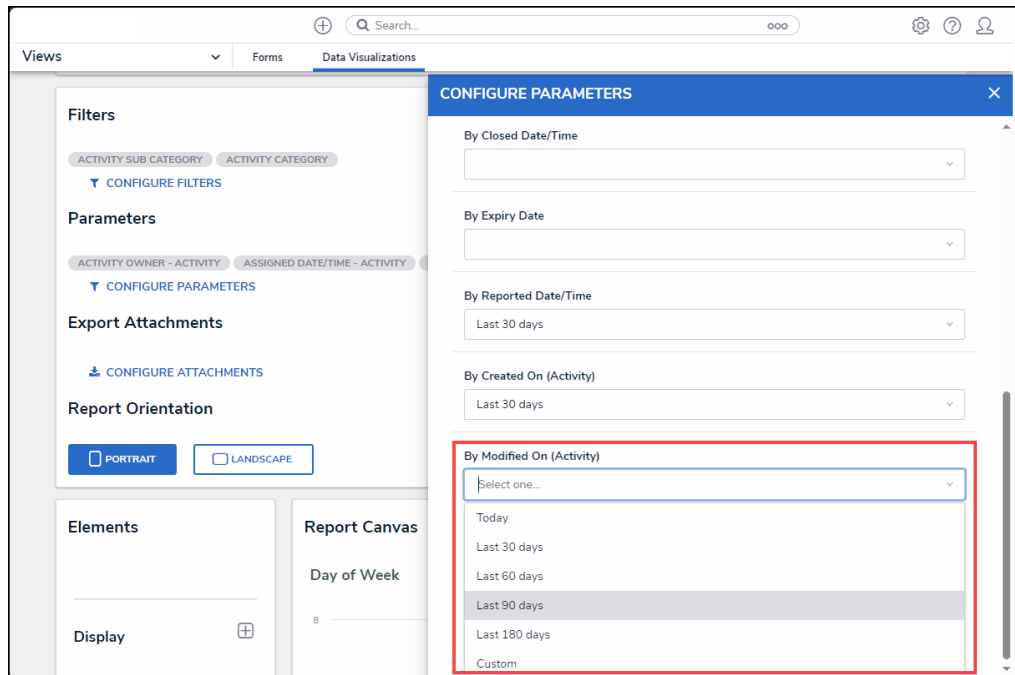


By Created On Dropdown Menu

7. Select a range used to filter the data by modified date from the **By Modified On** dropdown

menu.

- **Today:** This option shows data from today's date.
- **Last (x) Days:** This option shows data from the last 30, 60, 90, or 180 days, starting from today's date.
- **Custom:** This option allows a user to provide a date range, selecting a **From** and **To** date from the **Calendar** pop-up for the corresponding fields.



By Modified On Dropdown Menu

8. Place the cursor in a **Date & Time**, **By Created On**, or **By Modified On** fields and use the **Backspace** key or **Delete** key on a Keyboard to remove a date parameter.
9. Click the **x** in the top righthand corner of the **Configure Parameters** pop-up to apply changes and exit the pop-up.