

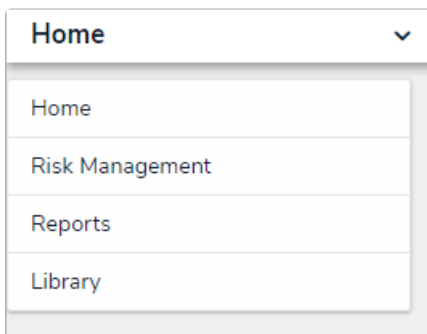
# View a Report

Last Modified on 05/09/2022 3:27 pm EDT

In Resolver Core, reporting visibility is restricted by [user group](#). How these different user groups work with reports (i.e., data visualizations) varies, depending on the unique insights they seek. This article covers the diverse ways Risk Management users may interact with their reporting data (e.g., pie charts, data grids) in their application.

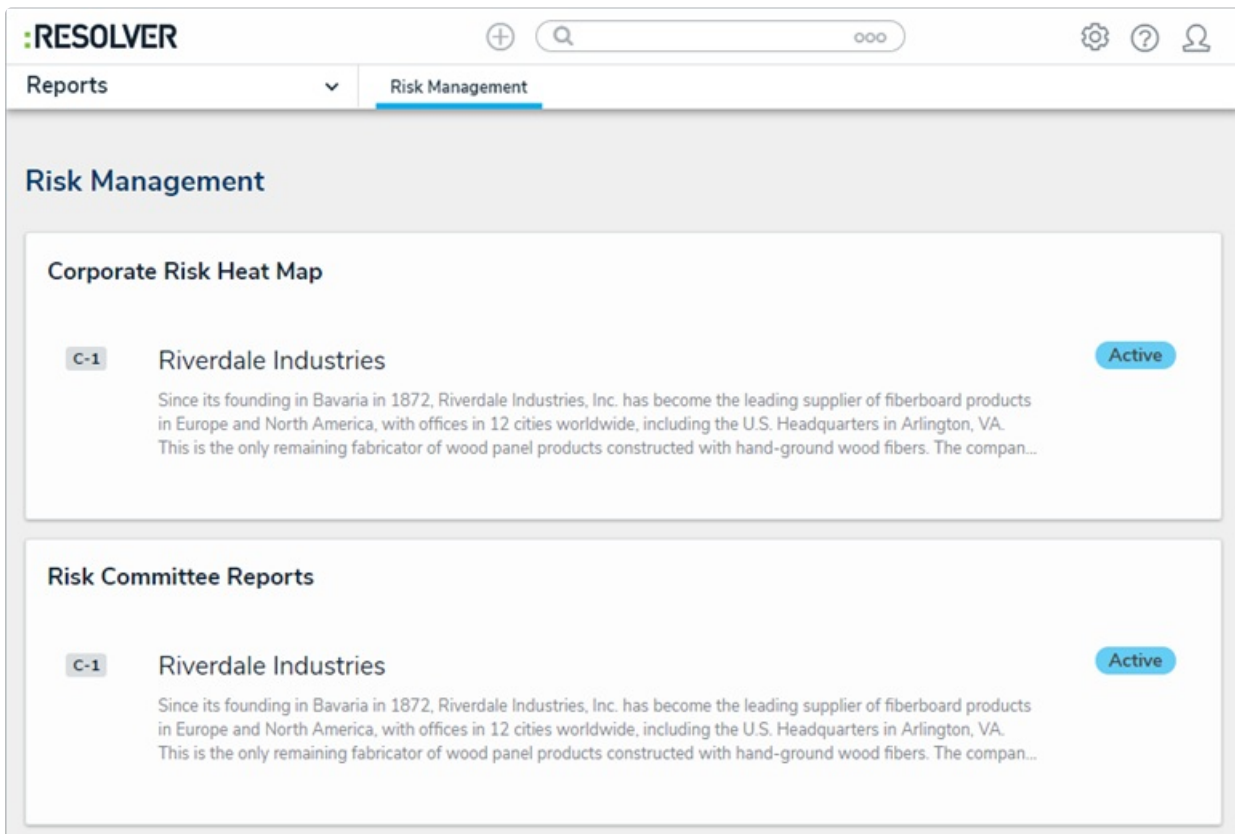
## To view a report:

1. Log into a user account from the Risk Team or Administrator (Risk Management) user group.
2. Click the dropdown in the nav bar > Reports to display the Risk Management tab.



The Risk Management application in the nav bar.

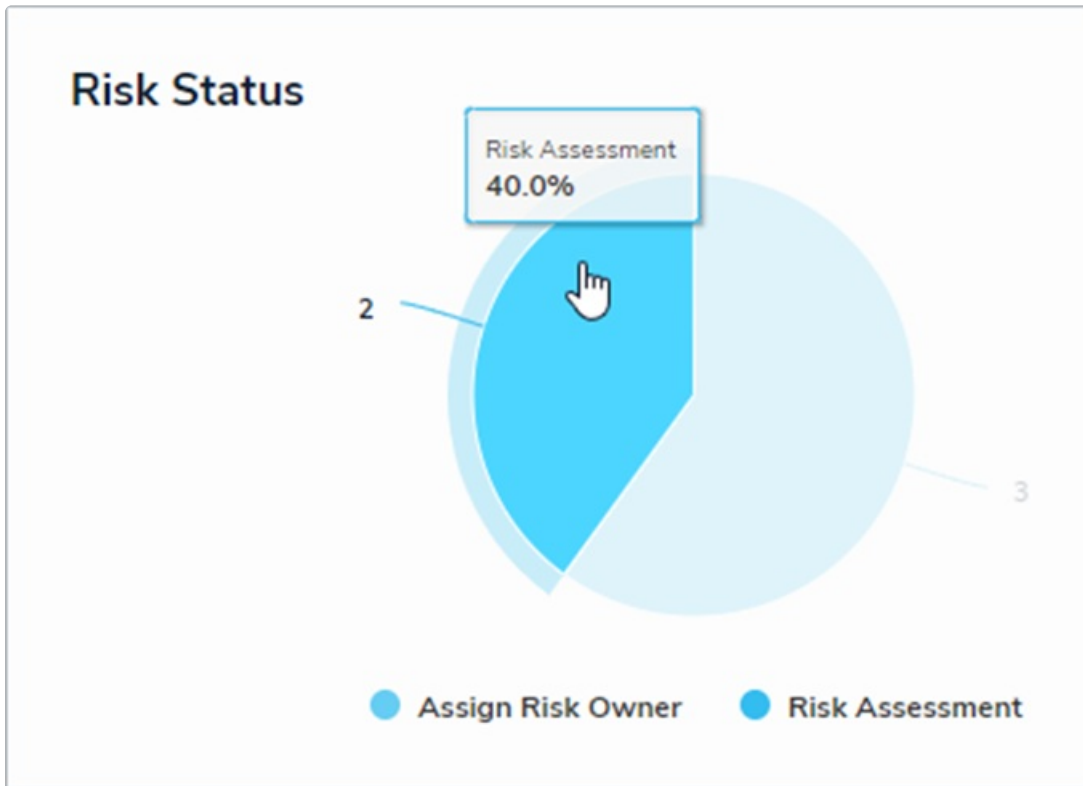
3. Click the relevant report to open it.



The Risk Management tab of Reports.



### To view a bar, column, or pie chart:

1. Hover your cursor over the chart for more detailed information.
2. Click on a pie chart section to make it more prominent on-screen.



*Hover the cursor over a bar, column, or bar chart for more details.*

### To view a table:

1. Click a cell to open the associated object in a palette.
2. Click a column to sort the data in the table.
3. Click **Next** or **Previous** at the bottom of the table to scroll to any other pages.
4. Enter search terms in the **Search Table...** field to narrow down which data displays.
5. Click the  icon to export the table data into a Word document.
6. Click the  icon to export the table data into an Excel spreadsheet.


Risk Unique ID	Risk Name	Risk Description	Risk Owner	Risk Response Plan	Risk state
R-2.1	Data Quality				Risk Assessment
R-1.1	Cyber Security	The probability of exposure or loss resulting from a cyber-attack or data breach.		Treat - Reduce	Risk Assessment

*Click a cell to open a palette or click a column header to sort the table's data.*



Only table data can be exported into a Word document or Excel spreadsheet. If you export data from a report that also contains a chart or heat map, that data will not appear in the document or spreadsheet.

## To view a data grid:

1. Hover your cursor over a **Name** column cell, then click the  icon to open a grid object in a palette.

Risk Name	Risk Unique ID
New Litigation & Arbitration	R-135.1
Legal	R-134.1
Labour	R-133.1

*The palette icon in the Name column.*


2. Click a cell, then type your changes, or select from the available edit options.



If the column is not marked as Read-Only, changes made to cells are applied to the relevant object and saved automatically.

Risk Unique ID	Risk Name	Risk Description
R-135.1	New Litigation and Arbitration	Inability to effectively monitor the influx of potential litigations, status of current, and resolution of
R-134.1		The risk of being the subject of a claim or

*Click to edit cell (unless marked as Read-Only).*

3. Hover your cursor over the top of the column to show the  icon, then click and drag to resize the column.
4. Click the column name at the top of the grid to sort the data alphabetically in ascending order.
5. Click the column name again to sort the data in descending order.
6. Click the column name a third time to remove any sorting.
7. Click a cell with Rich Text Formatting enabled to open the RTF editor, type your changes, then

click the  icon to save.



If you don't have permission to edit the RTF field, clicking it will display the fields' contents in focused mode. Click x to close the RTF editor or window and return to the data grid.


London Office		
Risk Unique ID	Risk Name	Risk Description
R-87.1	Accountability	The risk that responsibility and ownership for management of tasks, processes and objectives is
R-80.1	Advertising	Ineffective monitoring of advertising procedures result in increased instances of non-

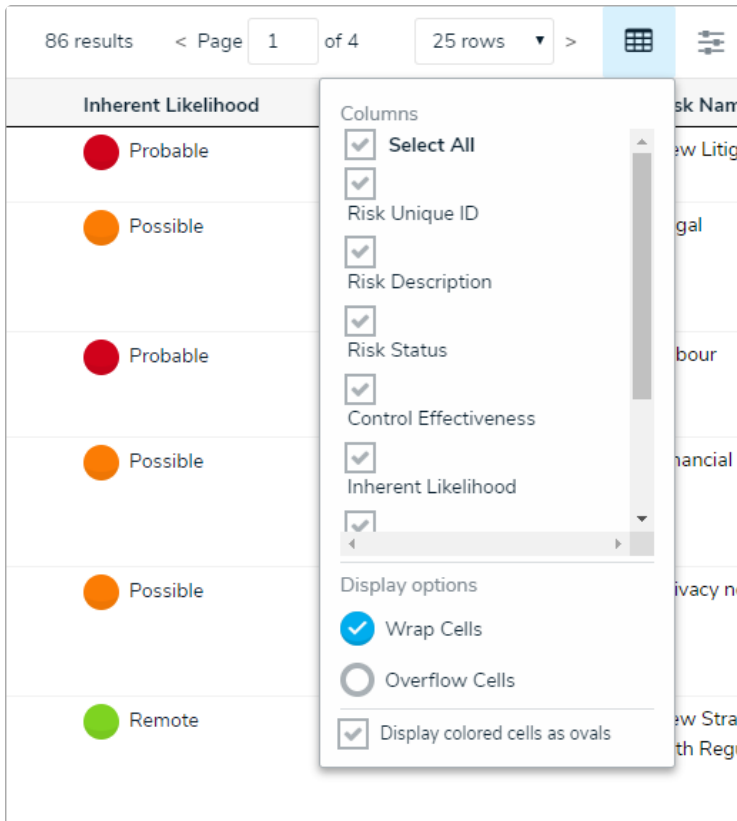
*Sorting the columns on a grid.*

- Click the < or > icons to move the current page forward or back by one. Alternatively, click the textbox and type the relevant page number, or click the page number arrows, then click away from the text box to reload.
- Adjust the number of rows displayed by selecting an option from the row dropdown menu.





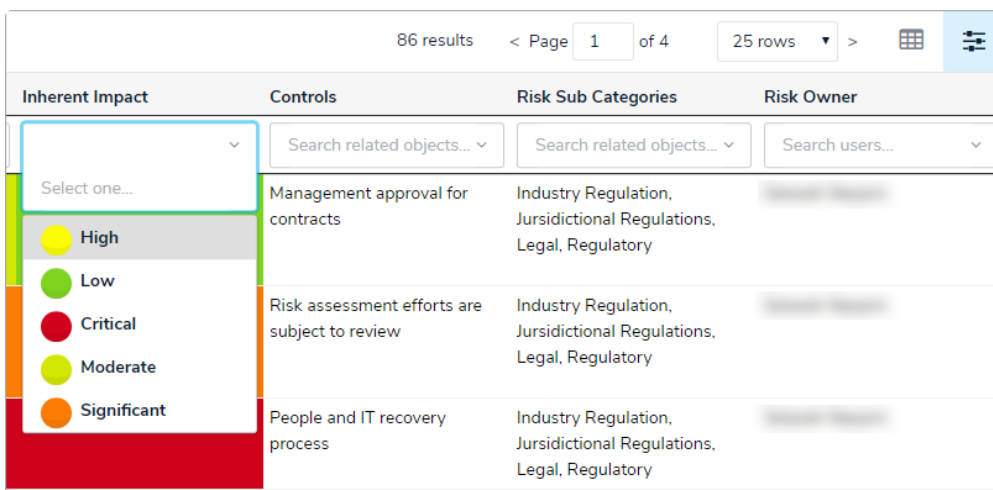
*Changing the grid page.*

- Click the  icon in the top-right corner of the page.
- To show/hide columns, select/deselect the column checkboxes.
- Select the **Wrap Cells/Overflow Cells** options to wrap/unwrap the data.
- Select the **Display colored cells as ovals** checkbox to show formula or select list cells as text in that format (instead of with a full background color). This option does not apply to workflow states.




Grid display options.

- Click the  icon to the page's far right to enable filters below the column headers, then begin typing keywords or select an option.
- Click the  icon again to disable/reset any filters.
- Refresh your browser to reset any custom display settings, including filters, column widths, hidden columns, page numbers, or rows.

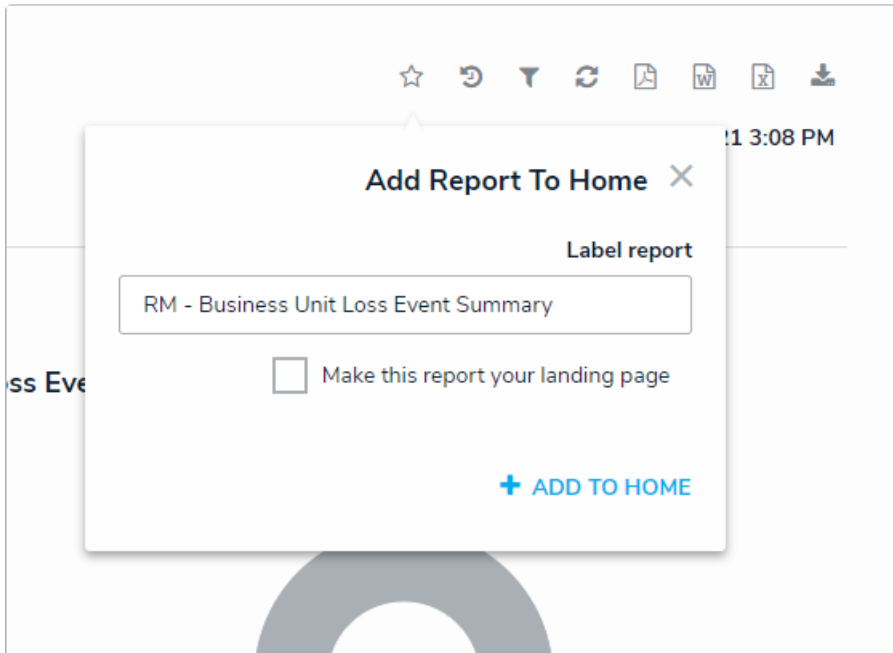


Filtering how the data grid displays.


## To star a report:

- Click the  icon at the top-right corner of the report to open the Add Report To Home window and create a report tab in the [nav bar](#).




2. Enter a custom tab name in the **Label report** field. The report's name, as saved by an administrator, appears in this field by default.

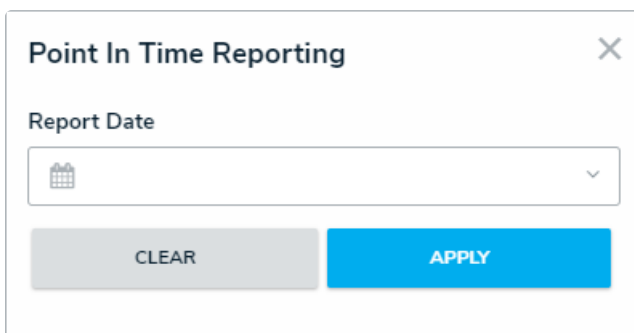


*The Add Report to Home window.*

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 on your screen.
4. Revert back the home page back to **My Tasks** by deselecting the checkbox.
5. Click **Add To Home** to finish.
6. Delete the tab from the nav bar by clicking the  icon, then click **Remove From Home**.

### To view **Point in Time Data**:

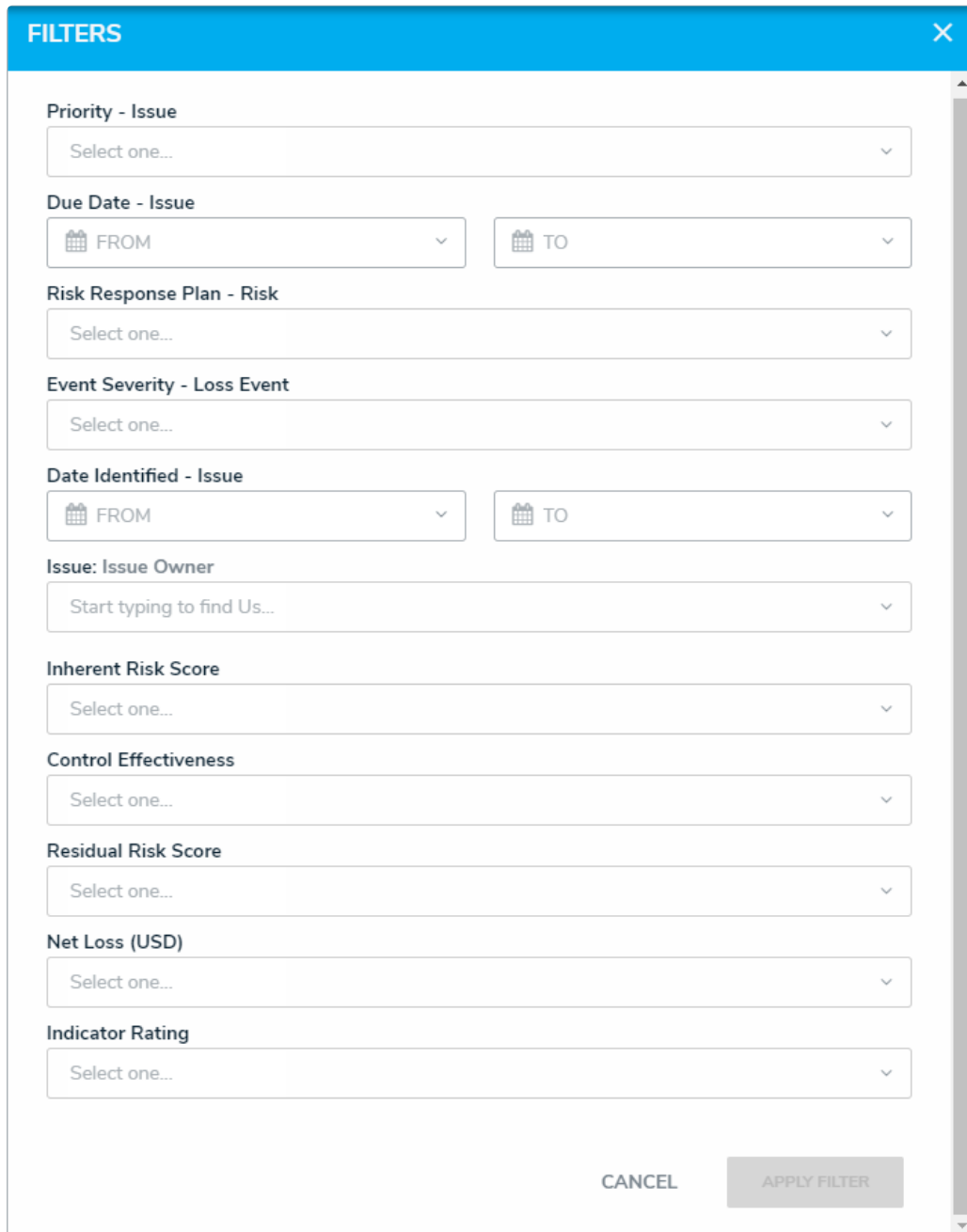
1. Click the  icon at the report's top-right corner to open the **Point in Time Reporting** window. When a report has filters applied, the point in time icon will appear in blue ().
2. Click the **Report Date** field to select the relevant date and click **Apply**.
3. To return the report to its default state, click the  icon and click **Clear**.



*The Point in Time reporting window.*

### To apply **Filters** to a report:

1. If **filters** are configured, click the  icon at the report's top-right corner to open the **Filters** palette. When a report is displayed with filters applied, the filter icon will appear in blue () .
2. Complete the fields as needed.



**FILTERS** ✕

**Priority - Issue**  
Select one... ▾

**Due Date - Issue**  
📅 FROM ▾    📅 TO ▾

**Risk Response Plan - Risk**  
Select one... ▾

**Event Severity - Loss Event**  
Select one... ▾

**Date Identified - Issue**  
📅 FROM ▾    📅 TO ▾

**Issue: Issue Owner**  
Start typing to find Us... ▾

**Inherent Risk Score**  
Select one... ▾

**Control Effectiveness**  
Select one... ▾

**Residual Risk Score**  
Select one... ▾


**Net Loss (USD)**  
Select one... ▾

**Indicator Rating**  
Select one... ▾

CANCEL    APPLY FILTER

*The Filters palette.*

### To export a report attachment:

1. Click the  icon at the report's top-right corner to open the **Report Attachments** palette.
2. Click **Export Attachments** to download the listed attachments as a .zip file.

RM - Risk Assessment Status Report ?



This attachment export might take a few minutes to download depending on the number of files, size of files and your network speed

Q

- Control
  - Strategic charters are documented
    - Supporting Evidence
      - strategic\_charter.txt

CANCEL    EXPORT ATTACHMENTS

*The Report Attachments palette.*

 To refresh report data, click the  icon.