


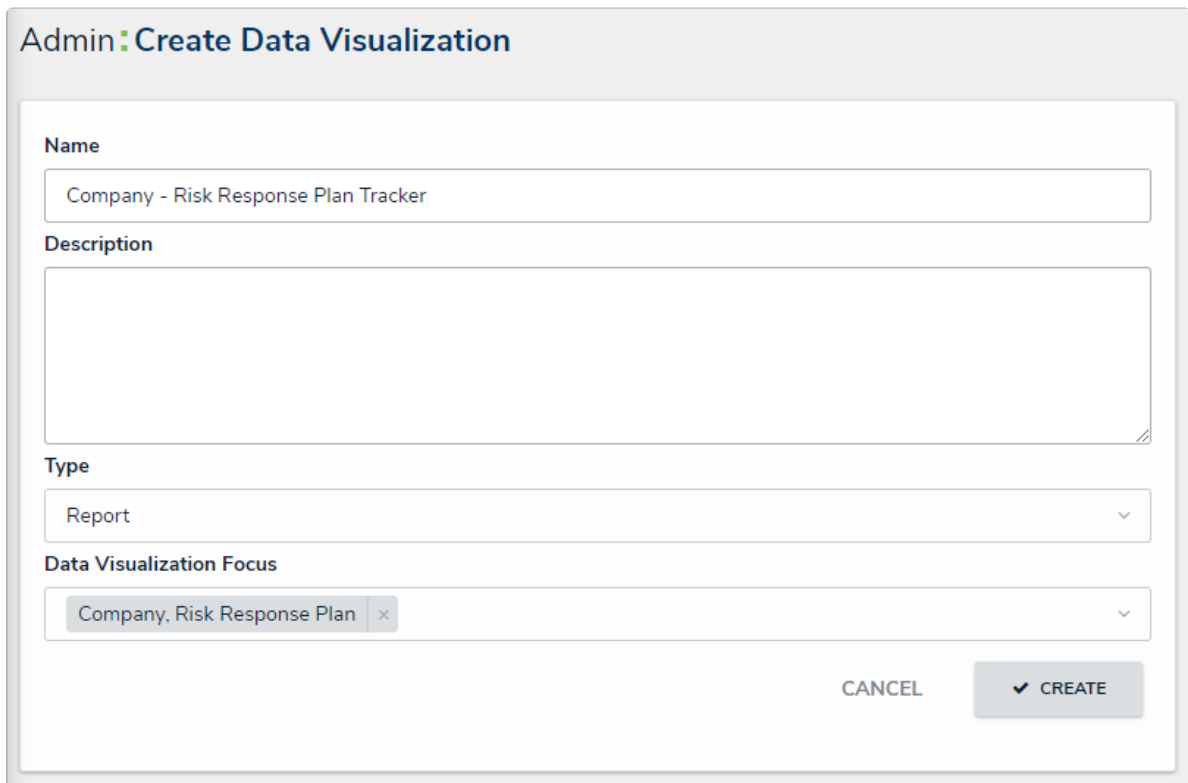
Create Reports

Last Modified on 04/25/2022 11:15 am EDT

This article and the next few articles of this guide provide instructions for creating basic reports. Should you need to create additional reports with more complex requirements (e.g., a report that displays which risks are or are not associated with a Risk Response Plan), please contact your CSM at customersuccess@resolver.com. Read more here: [Reports](#) and [Report Elements](#).

To create a new data visualization:

1. Click the  icon in the top bar > **Data Visualizations** in the **Views** section.
2. Click **Create Data Visualization**.
3. Enter **Company - Risk Response Plan Tracker** in the **Name** field.
4. Ensure **Report** is selected in the **Type** dropdown menu.
5. Select **Company, Risk Response Plan** from the **Data Visualization Focus** dropdown menu.



Admin: Create Data Visualization

Name
Company - Risk Response Plan Tracker

Description

Type
Report

Data Visualization Focus
Company, Risk Response Plan

CANCEL CREATE

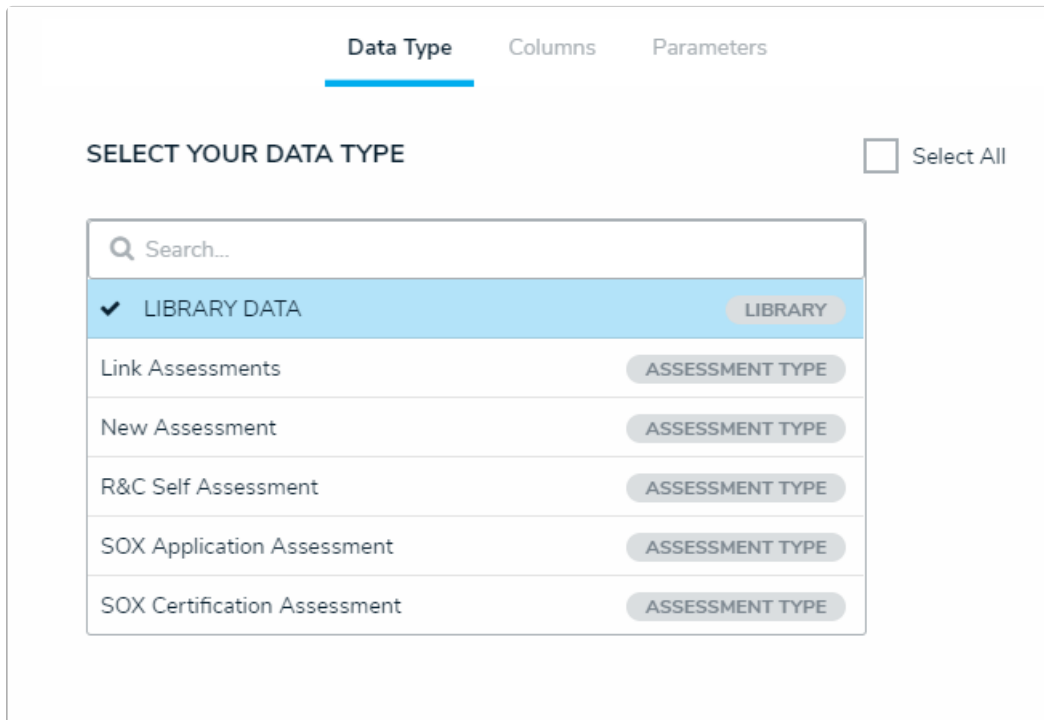
The Create Data Visualization page.

6. Click **Create** to display the **Edit Report** page.

Add a table element to the report:

1. From the **Edit Report** page for **Company - Risk Response Plan Tracker**, expand **Display** from the **Elements** menu to the left of the **Report Canvas**.
2. Drag and drop the **Table** element to the **Report Canvas**.
3. Select **Risk Response Plans** from the **Select a data series** dropdown menu, then click **Done** to display the **Edit Table** palette.

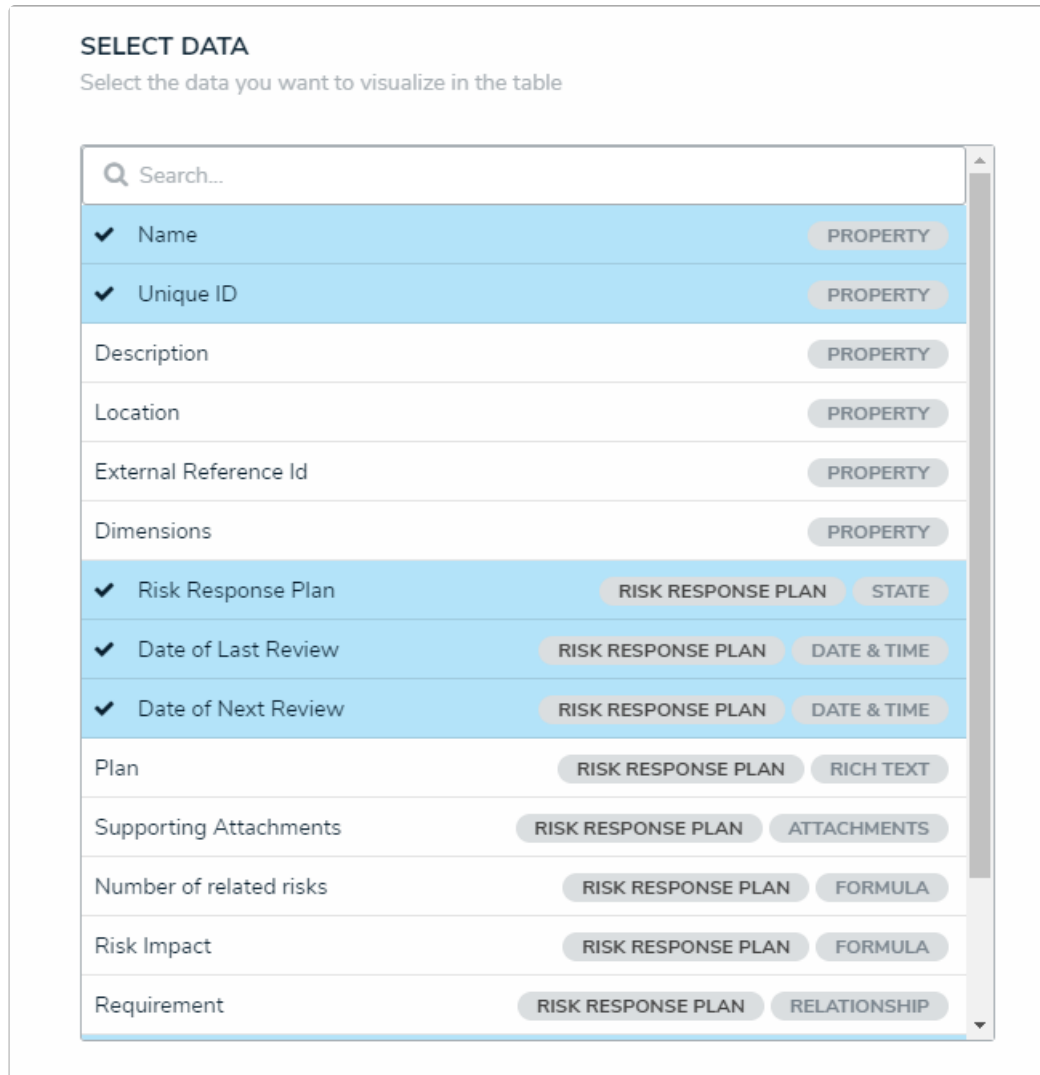
4. From the **Data Type** tab, deselect the **Select All** checkbox.



The Data Type tab in the Edit Table palette.

5. Click the **Columns** tab, then click to select the following in the **Select Data** section:

- Name (Property)
- Unique ID (Property)
- Plan Owner (Role)
- Date of Last Review (Date & Time)
- Date of Next Review (Date & Time)
- Risks (Relationship)
- Risk Response Plan (State)



The Select Data section.

6. Scroll to the bottom of the palette, then select the **Display colored cells as ovals** checkbox.
7. Click **Done** when finished.

To add a pie chart element to the report:

1. From the **Edit Report** page for **Company - Risk Response Plan Tracker**, expand **Display** from the **Elements** menu to the left of the **Report Canvas**.
2. Drag and drop the **Pie Chart** element to the **Report Canvas**.
3. Select **Risk Response Plans** from the **Select a data series** dropdown menu, then click **Done** to display the **Edit Pie Chart** palette.
4. From the **Data Type** tab, deselect the **Select All** checkbox.
5. Click the **Configure Your Chart** tab.
6. Select **Risk Response Plan (State)** from the **Select Data** section.
7. Enter **Plan Status** in the **Chart Title** field.
8. Ensure **Pie** is selected in the **Display Type**.

SELECT DATA

Select the data you want to visualize in the pie chart

Risk Impact	RISK RESPONSE PLAN	FORMULA
Number of related risks	RISK RESPONSE PLAN	FORMULA
Requirement	RISK RESPONSE PLAN	RELATIONSHIP
Risks	RISK RESPONSE PLAN	RELATIONSHIP
✓ Risk Response Plan	RISK RESPONSE PLAN	STATE
Assessment Type Name	ASSESSMENT TYPE	

GROUP DATA

Select the Object Type you would like to use to group the data. This selection will represent the legend.

Select one...

CONFIGURE DISPLAY

Chart Title

Plan Status

Display Type

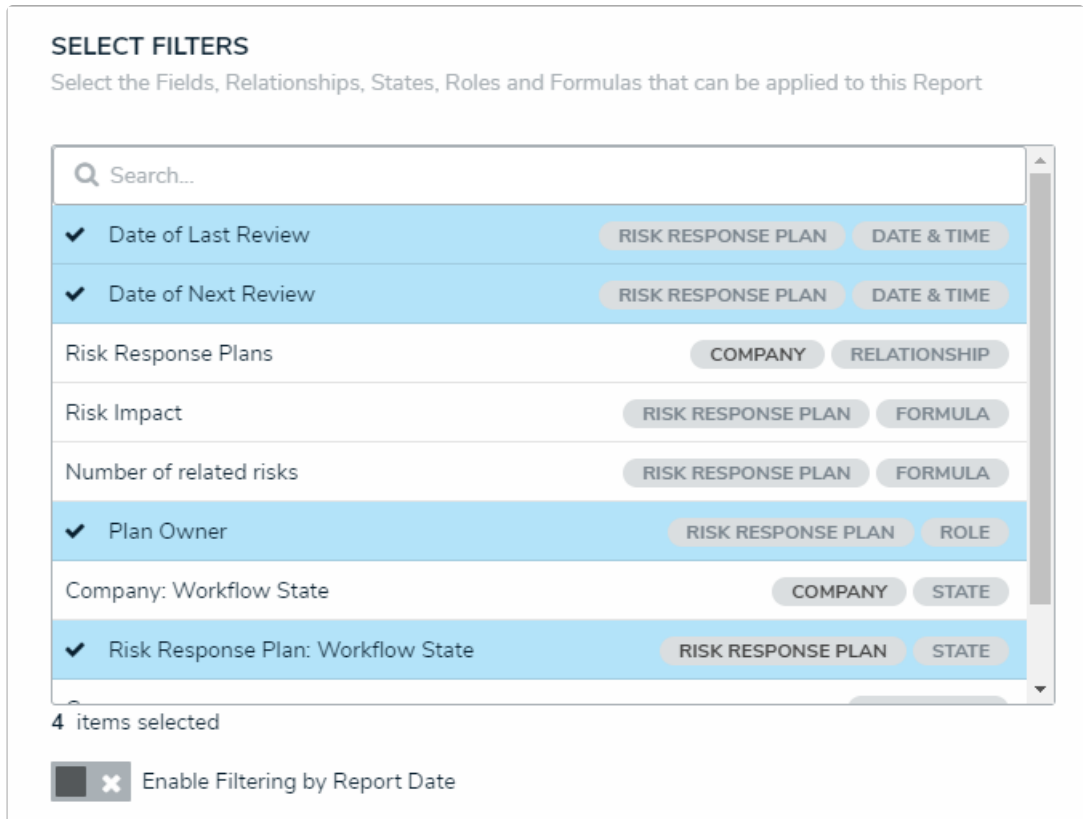
Pie
 Half-Pie

The Edit Pie Chart palette.

9. Click your browser's back button to return to the **Form Canvas**.
10. Drag the pie chart to move it above the table element.

To add filters to the report:

1. From the **Edit Report** page for **Company - Risk Response Plan Tracker**, click **Configure Filters**.
2. Select the following from the **Select Filters** section:
 - Plan Owner (Role)
 - Date of Last Review (Date & Time)
 - Date of Next Review (Date & Time)
 - Risk Response Plan: Workflow State



The Select Filters section of the Configure Filters palette.

3. Click the **X** in the top-right corner of the palette when finished.

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