Create Reports

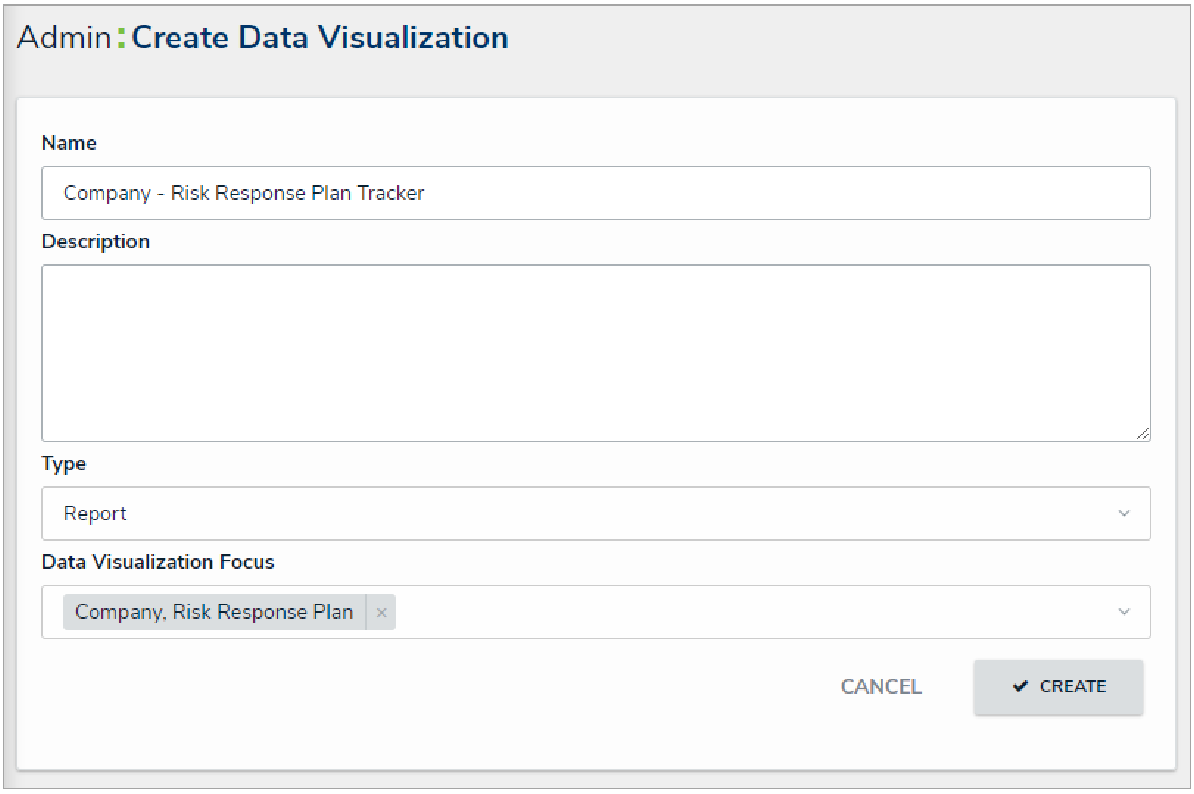
This article and the next few articles of this guide provide instructions for creating basic reports. Should you need to create additional reports with more complex requirements (e.g., a report that displays which risks are or are not associated with a Risk Response Plan), please contact your CSM at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

For more detailed information on reports (data visualizations) see the Reports and the Report Elements sections in the **Resolver Core Administrator's Guide**.

Create a New Data Visualization

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.



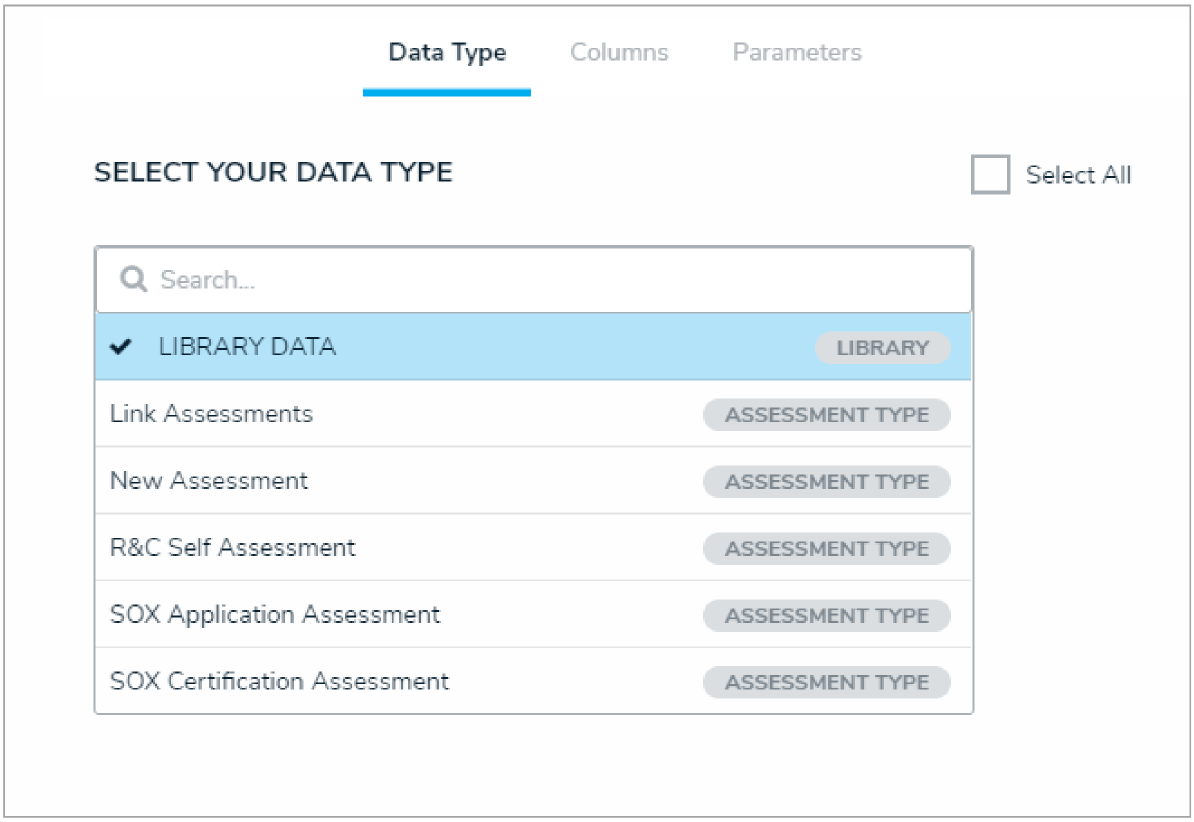
The Create Data Visualization page.

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

Add a Table to the Report

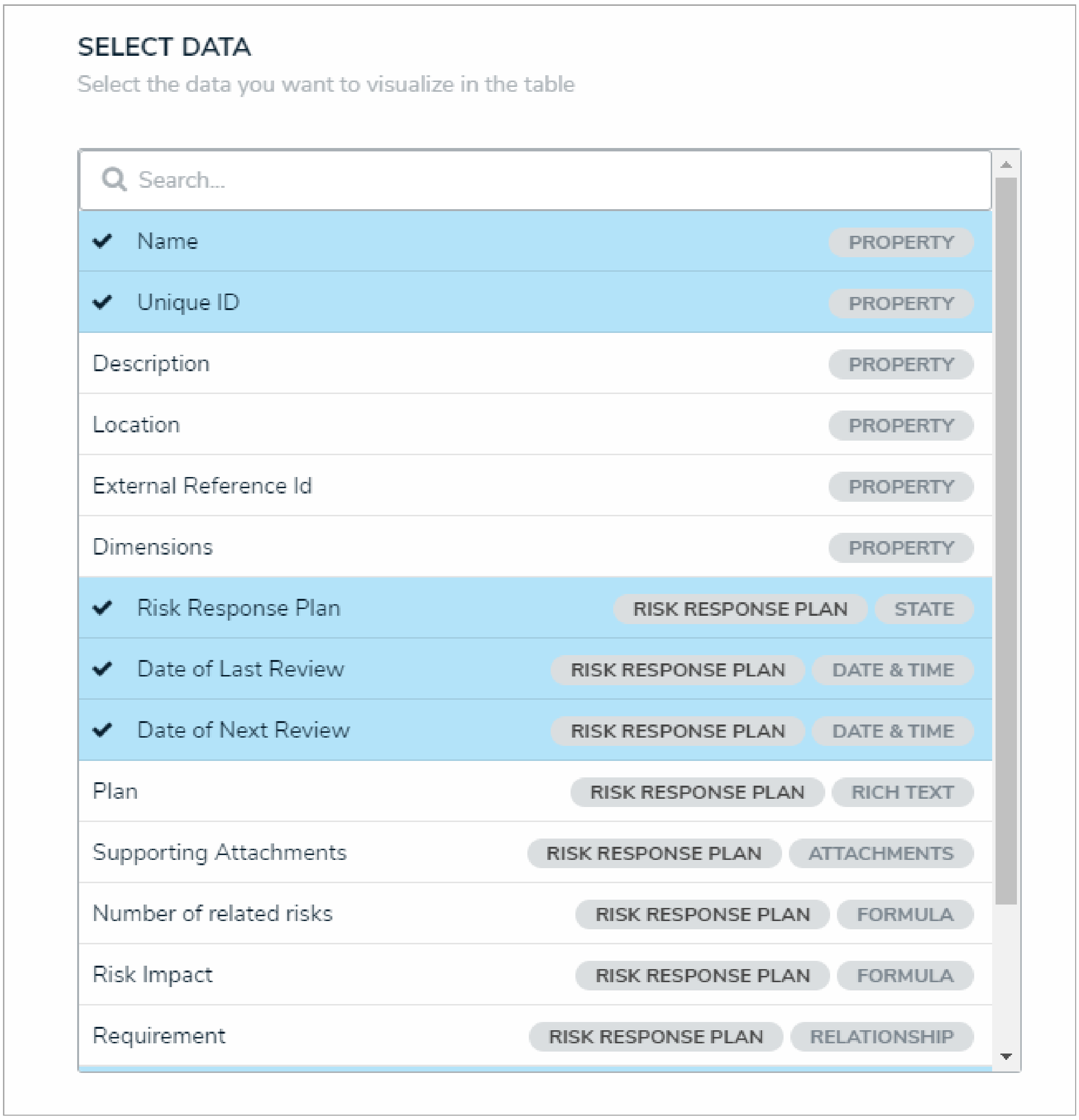
Add a table element to the report:

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, the 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.

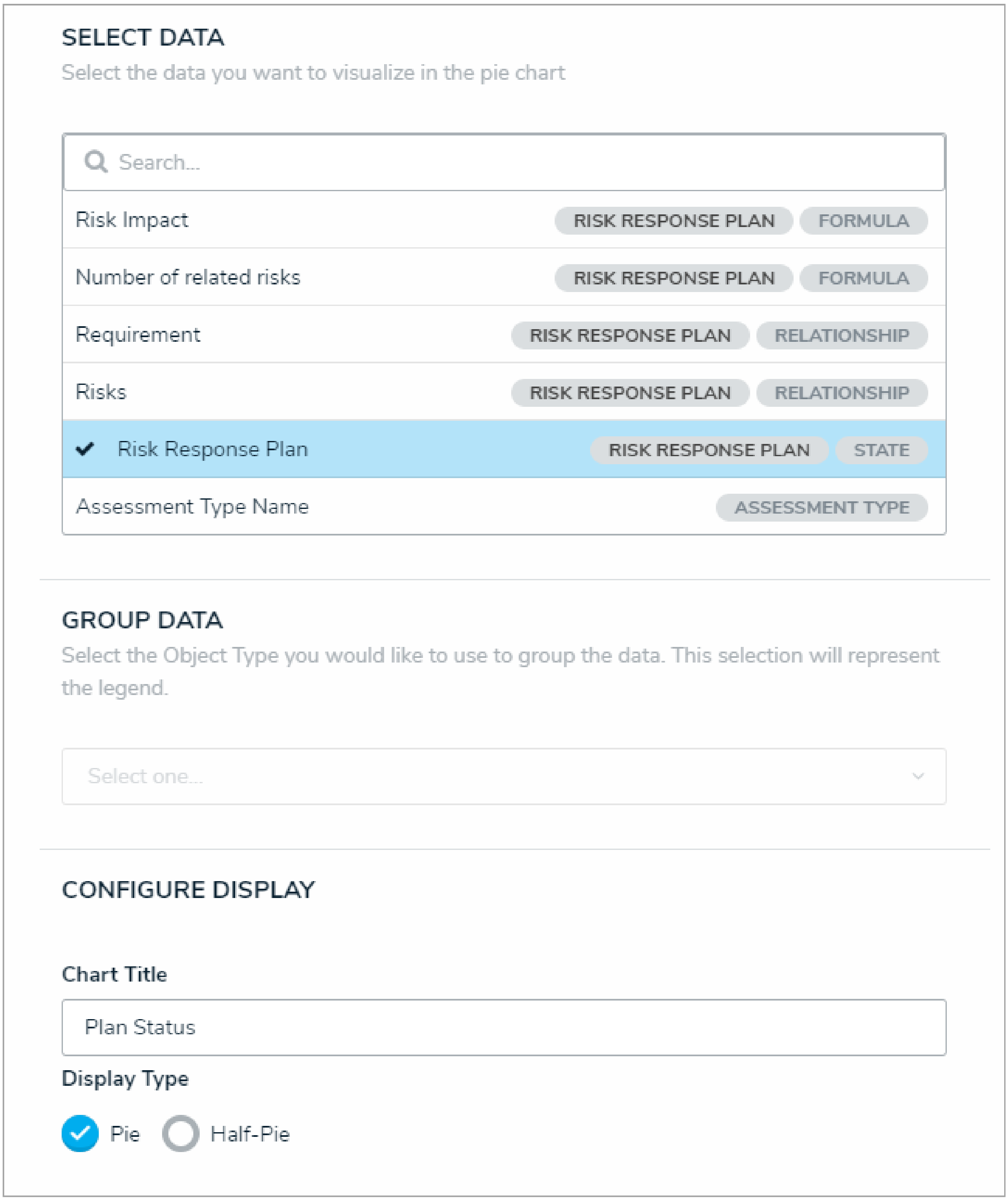
6. Scroll to the bottom of the palette, then select the **Display colored cells as ovals** checkbox.
7. Click **Done** when finished.

Add a Pie Chart to the Report

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**.



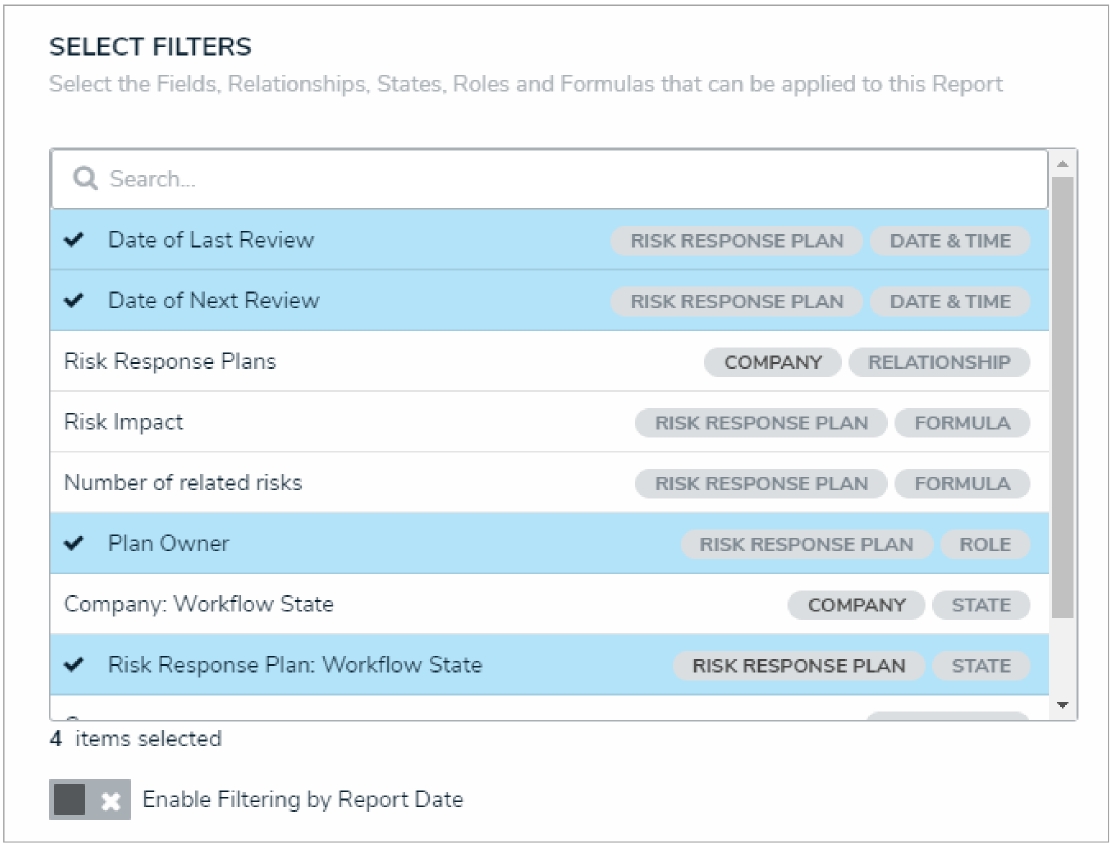
The Edit Pie Chart palette.

9. Click **Done** to return to the **Form Canvas**.
10. Drag the pie chart to move it above the table element.

Add Filters to the Report

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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