

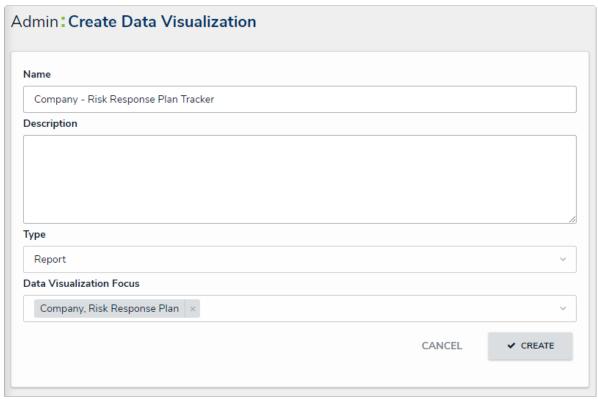
Create Reports

Last Modified on 02/26/2025 3:41 pm EST

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 \bigcirc 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.

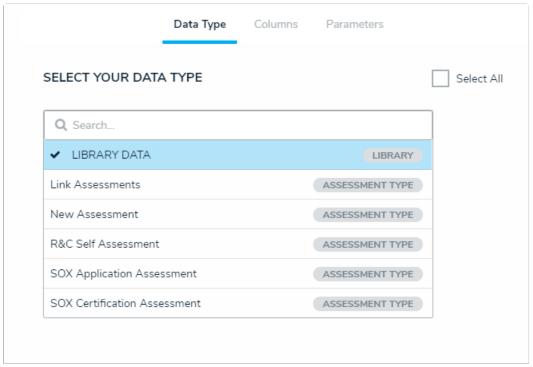
6. Click Create to display the Edit Report page.

Add a table 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.



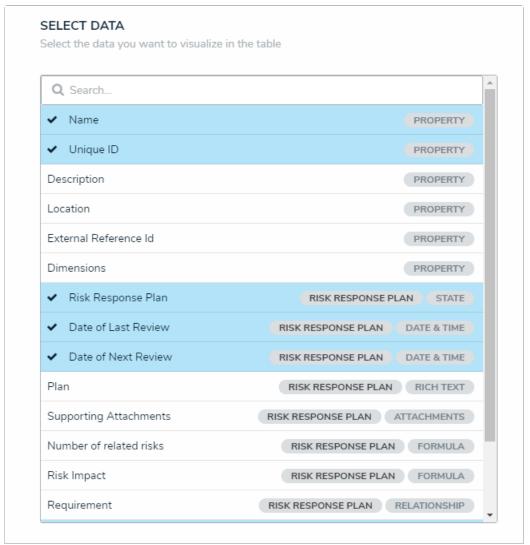
4. From the **Data Type** tab, deselect the **Select All** checkbox.



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)





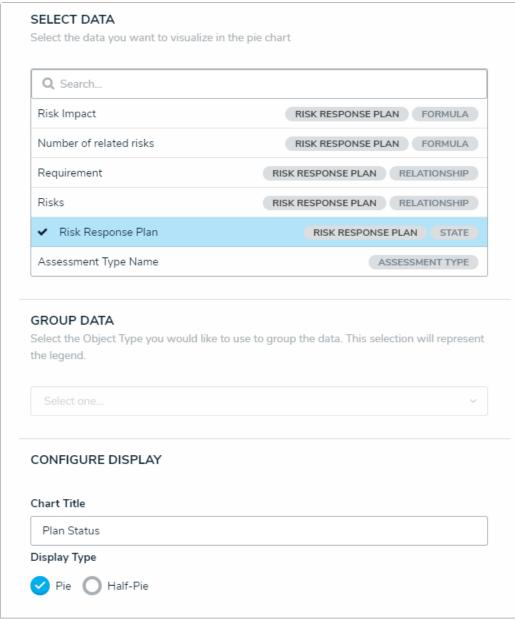
The Select Data section.

- 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**.
- 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**.





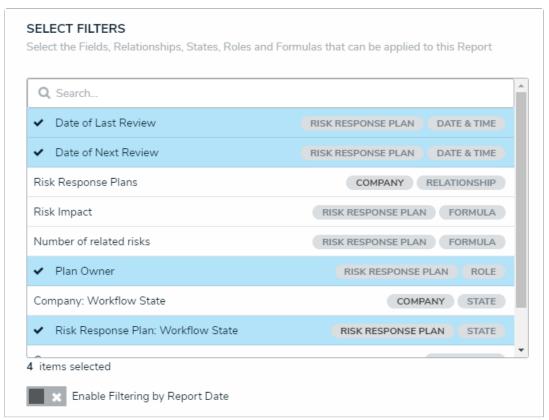
The Edit Pie Chart palette.

- 9. Click 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:

- 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 \mathbf{X} in the top-right corner of the palette when finished.

<< Previous Next >>