

Create a New Data Grid

Last Modified on 04/20/2021 12:05 pm EDT


Note that the following features are not currently functional when configuring a data grid:

- The **Description** field on the **Create a Data Visualization** and **Edit Data Grid** pages;
- The **Show SUM totals for all numeric columns** checkbox in the **Columns** tab in the **Edit Data Grid** palette; and
- The **Configure Filters** option in the **Edit Data Grid** page.



You can create custom data grids for the currently logged in user (e.g. My Incidents or My Risks) by applying the **Current User** parameter to the data grid element. See step 24 below for more information.

To create a data grid:

1. Ensure the data definition you wish to use for data grid has been created from the [Data Definitions](#) settings in **Administration**.
2. Click the  icon in the top bar > **Data Visualizations** in the **Views** section.
3. Click **Create Data Visualizations**.
4. Enter the name for the data grid in the **Name** field.
5. Select **Data Grid** from the **Type** dropdown menu.
6. Select one or more [focuses](#) from the **Data Visualization Focus** dropdown menu.

Admin: Create Data Visualization

Name
Data Grid

Description

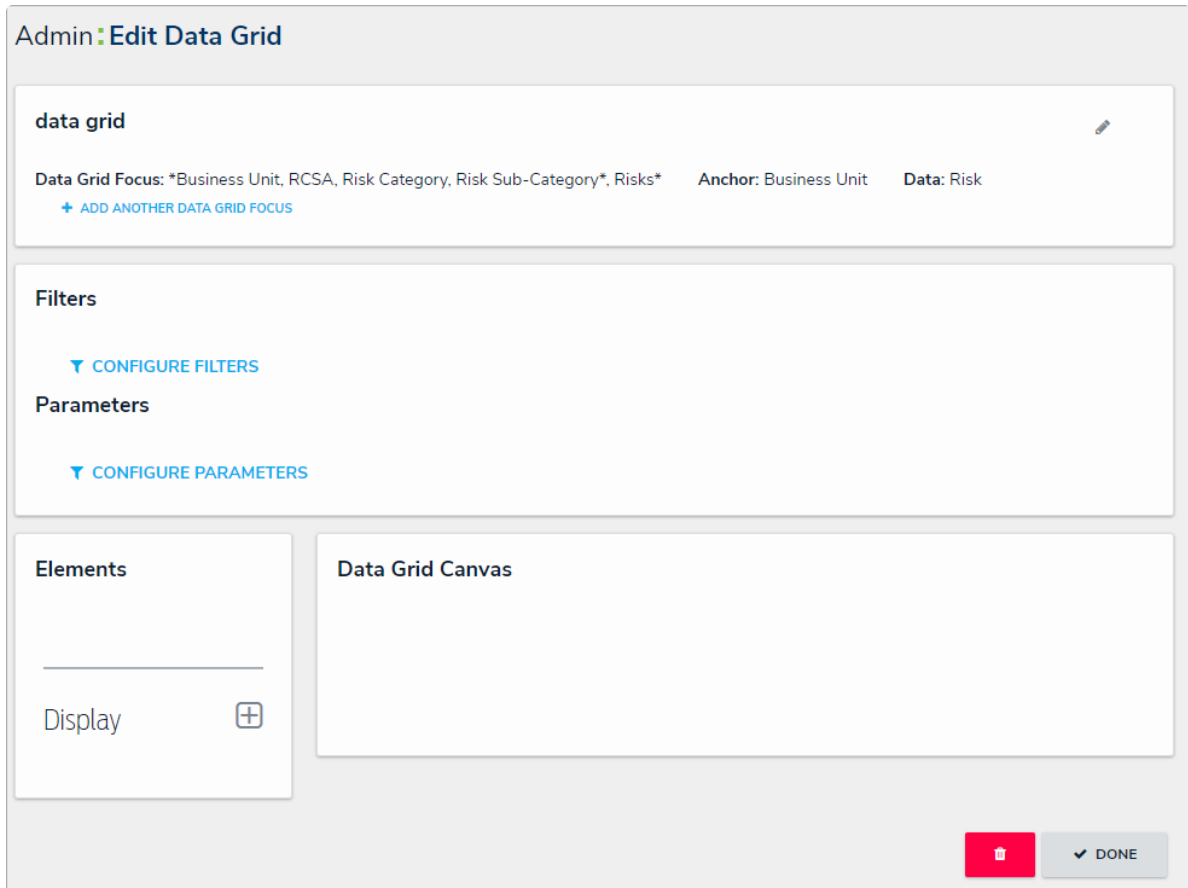
Type
Data Grid

Data Visualization Focus
Business Unit, RCSA, Risk Category, Risk Sub-Category, Risks*


CANCEL CREATE

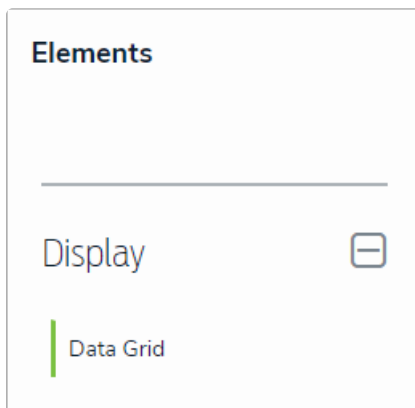
The Create Data Visualization page.

7. Click **Create** to display the **Edit Data Grid** page.



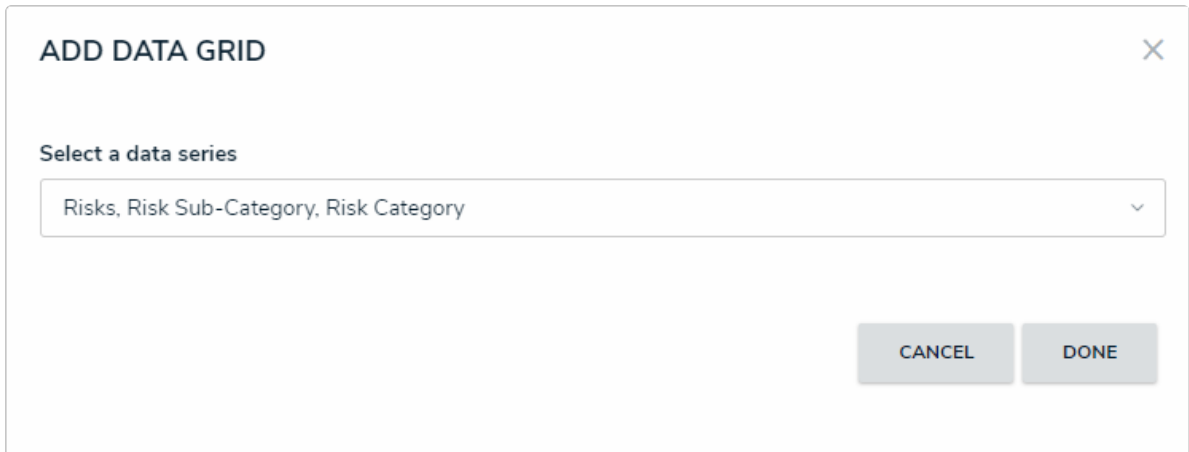
The Edit Data Grid page.

8. **Optional:** Click **Add Another Data Grid Focus** to include another report focus definition. Depending on the data path, selecting another focus will provide more [data series](#) options to choose from when adding a data grid.
9. In the **Elements** section, click the  icon beside **Display**.



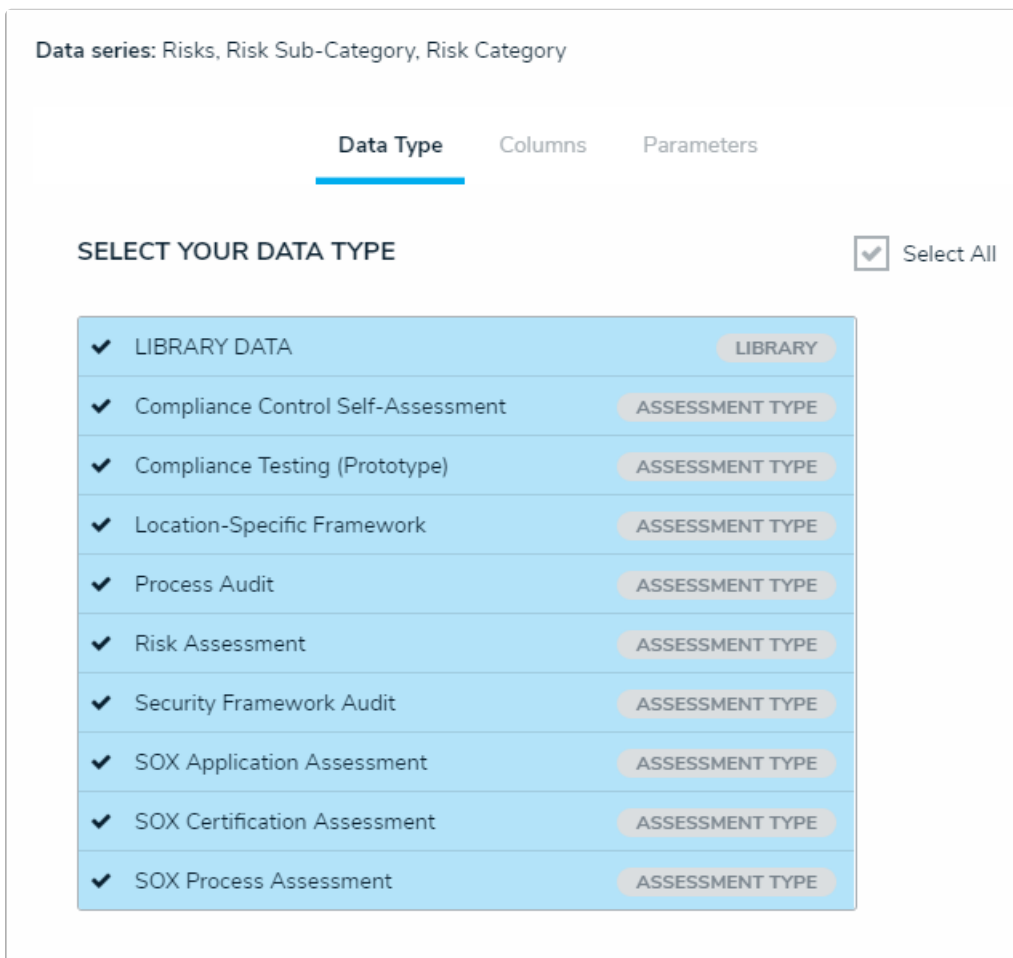
The Elements section.

10. Drag and drop **Data Grid** from the **Elements** section to the **Data Grid Canvas**.
11. Select a [data series](#) from the **Select a data series** dropdown menu, then click **Done**. The data definition selected here will determine the object data you can display in the grid.



Selecting a data series in the Add Data Grid window.

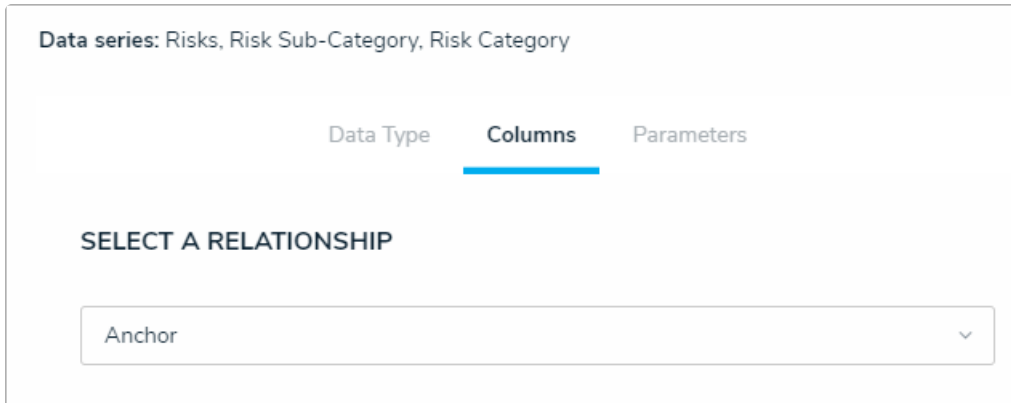
12. Choose the data types you'd like to display in the grid from the **Data Type** tab. Selecting **LIBRARY DATA** will include [object type data](#), while selecting an **Assessment Type** will include the assessment name and workflow state. By default, all data types are selected. To make individual selections, deselect the **Select All** checkbox, then click the data type(s) you wish to include. Clicking a selected data type will deselect it.



The Data Type tab.

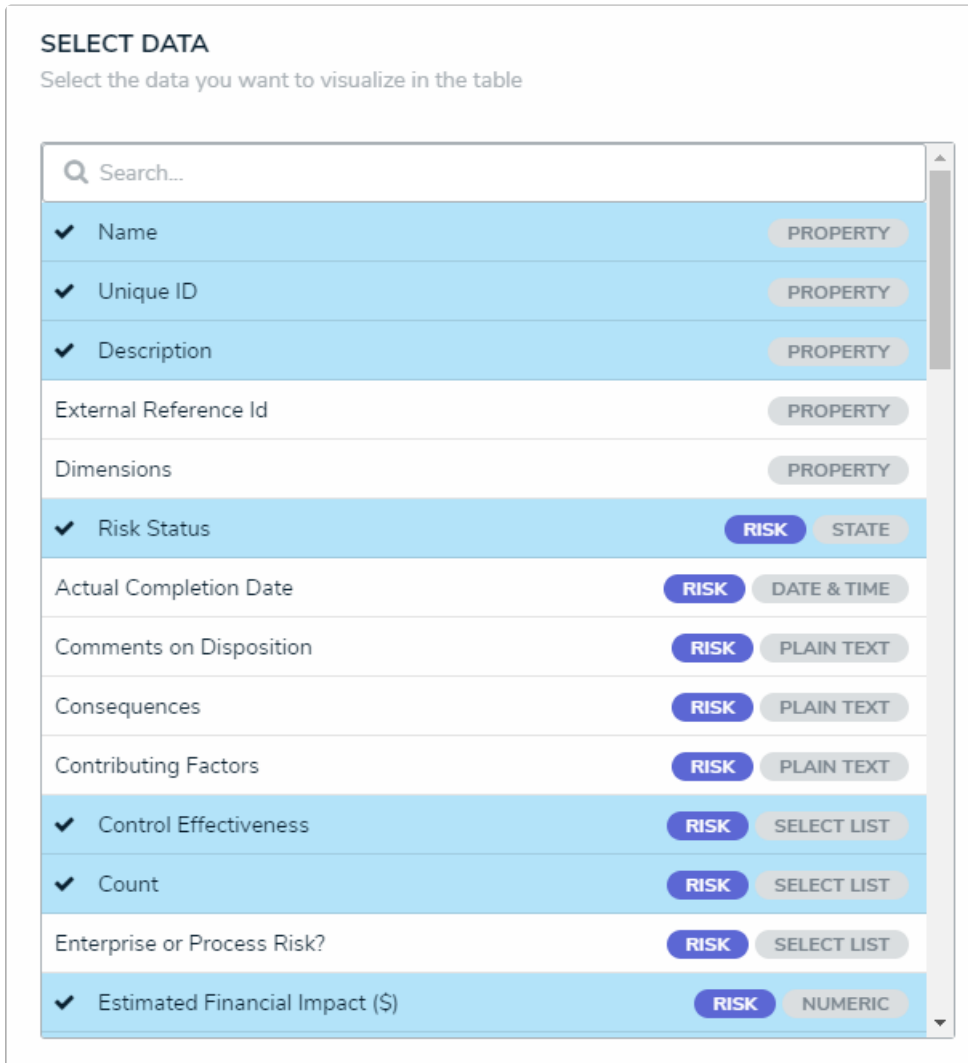
13. Click the **Columns** tab.
14. Choose either the anchor or an object type in the data path from the **Select a Relationship** dropdown menu. The options in this dropdown menu will vary depending on

the data series selected in the previous steps.



Selecting which object types' data will appear in the grid.

15. Select the properties, workflow states, fields, formulas, relationships, and/or roles you want to display in the grid as columns from the **Select Data** section. Use the **Search** field to search for a particular data type, if needed. Clicking a selected data type will deselect it and remove it from the grid.



The Select Data section.

16. Continue selecting object types from the **Select a Relationship** dropdown menu to include more data by repeating steps 14 and 15 above.

17. **Optional:** To allow users to open an object in a palette while **viewing** the grid:
- Select the **Object can be accessed in the palette from data grid** checkbox in the **Define Custom Forms** section. Selecting this checkbox enables an icon that appears when end-users hover their cursor over the **Name** column in the grid. Clicking the icon displays the object in a palette.
 - Select a form from the dropdown menu to choose which form is displayed when the user clicks the palette icon. This dropdown will be hidden unless the checkbox from the step above is selected.

DEFINE CUSTOM FORMS
Choose which Custom Form will display when the palette icon is selected

Risk



Object can be accessed in the palette from data grid

Risk - Edit - SRM

The Define Custom Forms section.



Users will not be able to view objects in a palette if the **Name** property isn't displayed in the data grid. See step 15 above to ensure this property is selected.

18. **Optional:** In the **Sort Columns** section, click the  icon beside any data types to mark their columns as read-only and prevent users from editing their cells in the grid. To mark all columns as read-only, select the **Mark all columns as read-only** checkbox at the bottom of the section. To once again enable editing, click the  icon beside individual columns or deselect the checkbox.

SORT COLUMNS

Drag columns into the order you wish for them to appear on the table

| | | | |
|-----------------------|----------|----------|--|
| Unique ID | 👁️ | 🗑️ | |
| BUSINESS UNIT | PROPERTY | | |
| Name | 👁️ | 🗑️ | |
| BUSINESS UNIT | PROPERTY | | |
| Description | 👁️ | 🗑️ | |
| BUSINESS UNIT | PROPERTY | | |
| Risk Status | 👁️ | 🗑️ | |
| BUSINESS UNIT | RISK | WORKFLOW | |
| Control Effectiveness | 👁️ | 🗑️ | |
| BUSINESS UNIT | RISK | | |
| Inherent Likelihood | 👁️ | 🗑️ | |
| BUSINESS UNIT | RISK | | |
| Inherent Impact | 👁️ | 🗑️ | |
| BUSINESS UNIT | RISK | | |

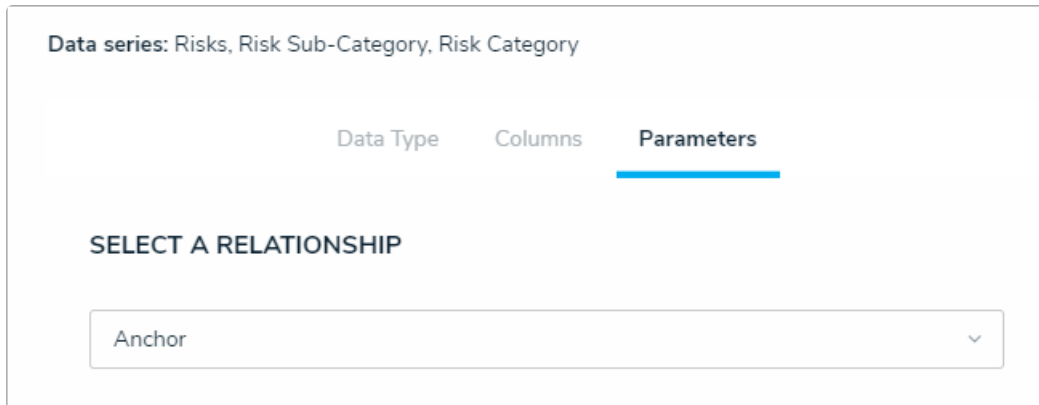
Mark all columns as read-only
 Display colored cells as ovals

The Sort Columns section.



If a user accessing the grid does not have the required [workflow permissions](#) to edit an object, the data will appear to that user as read-only, even if all data types are left editable in the settings.

19. **Optional:** Click and drag the || icon next to the data types to rearrange the order of the columns in the grid.
20. **Optional:** If needed, click the 🗑️ icon next to the data type to delete it from the grid.
21. **Optional:** Select the **Display colored cells as ovals** checkbox to show formula or select list cells text with colored circles. When this option is not selected, cells are displayed with text and a full background color, if any. End-users can enable or disable this option when viewing the data grid.
22. Scroll to the top of the **Edit Data Grid** palette, then click the **Parameters** tab.



The Parameters tab.

23. Choose a relationship from the **Select a Relationship** dropdown menu. The relationship selected here will determine which parameters (filters) you can apply to the grid to refine the data that's displayed. If needed, you can select a relationship that differs from the relationship selected in the **Columns** tab.



You can add parameters from an object type in the data series even if that object type isn't configured to display any data in the grid.

24. Below **Define Parameters**, select one or more parameters to filter the data displayed in the grid. Parameter options include:
- [Workflow states](#);
 - [Select list](#) options;
 - [Formula](#) ranges (e.g. High, Medium, Low);
 - By [Current User](#). When one or more roles are selected in this parameter, only users within those roles can view the data in the grid. This feature is useful to create customized data grids for specific users. The available roles are determined by the object types in the table's [data series](#); or
 - By [Date & Time Field](#) or [Created On/Modified On](#) properties. Selecting a range in the **By [Date Field]** dropdown menu will filter the data relative to the value selected in the [Date & Time](#) field on the objects. Selecting a range in the **By Created On ([Object Type Name])** or **By Modified On ([Object Type Name])** dropdown menus will filter the data relative to the date the objects were created or modified. All date-related options filter data in UTC time. It's recommended a date parameter is used to refine large data sets for improved report performance. Options include:
 - **Today**: Show data from today's date only.
 - **Last [X] Days**: Show data within the last 30, 60, 90, or 180 days, relative to today's date.
 - **Custom**: Shows data within the dates selected in the **From** and **To** fields. The table will include objects up to the end of that date.

25. Repeat steps 23 and 24 above to add more parameters from additional object types.
26. To remove a select list, formula, or role parameter, click the **x** icon beside parameter. To delete a date parameter, click the field, then press the **Backspace** or **Delete** key on your keyboard.
27. Click **Done** to close the **Edit Data Grid** palette. If additional grids are required, a new report must be created by following the steps above.

Once a grid is successfully created and configured, it must be added to a view in an activity. See the [Create a Data Grid View](#) article for more information.