

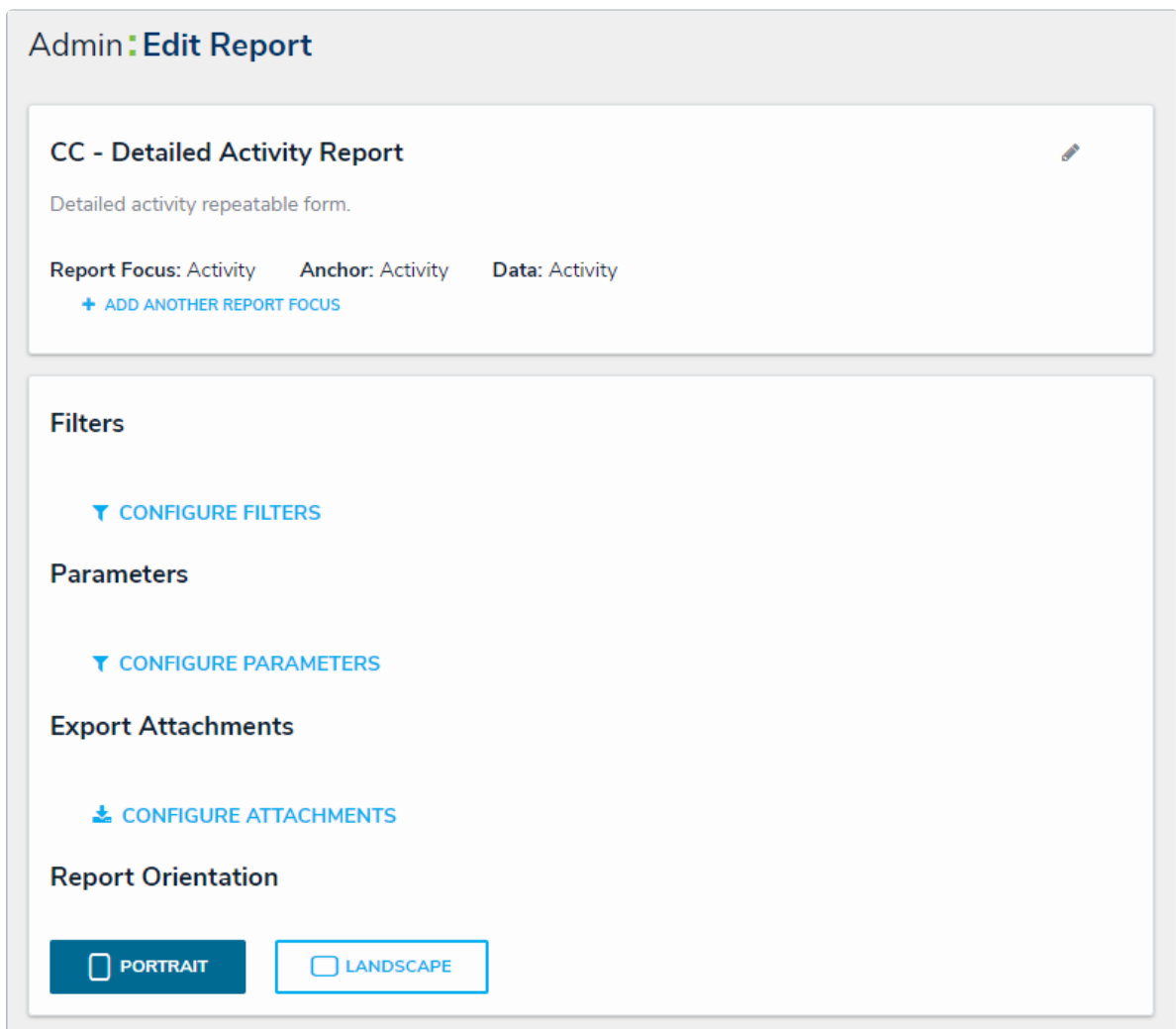
Configure Export Attachments

Last Modified on 10/06/2021 3:23 pm EDT

Attachments are the data series, fields, and relationships of a report that users can export. To ensure that only the most relevant information is exported, administrators can determine which elements of the report can become attachments.

To configure a report's export attachments:

1. Click the  icon in the top bar > **Data Visualizations** in the **Views** section.
2. Click the report you wish to configure the exports for or enter its name in the **Search** field, then click it to open the **Edit Report** page.



The Admin: Edit Report page.

3. Click **Configure Attachments** under **Export Attachments** to open the **Add Attachment Export** palette.

ADD ATTACHMENT EXPORT ✕

Select a data series

Select a Data Definition

- Activity
- Activity, Activity Type, Activity, Officer Response, Activity
- Activity, Activity Type
- Activity, Incident
- Activity (Activity Type; Business Unit)
- Activity (Involved Organization; Involved Person; Involved Vehicle; Involved Item; Incident)

CANCEL **DONE**

The Add Attachment Export palette.

4. Select the data series the exports will be coming from in the **Select a data series** field.
5. Click **Done**.
6. Click **Configure Attachments** again to open the **Edit Attachment Export** palette.
7. In the **Data Type** tab, select the type of data you wish to include in the export. All data types are selected by default.

EDIT ATTACHMENT EXPORT ✕

Data series: Activity, Activity Type, Activity, Officer Response, Activity RESET DATA

Data Type Configuration Parameters

SELECT YOUR DATA TYPE Select All

<input checked="" type="checkbox"/> LIBRARY DATA	LIBRARY
<input checked="" type="checkbox"/> Compliance Assessment	ASSESSMENT TYPE
<input checked="" type="checkbox"/> Internal Audit Project	ASSESSMENT TYPE
<input checked="" type="checkbox"/> Internal Controls Assessment	ASSESSMENT TYPE
<input checked="" type="checkbox"/> IT Compliance Assessment	ASSESSMENT TYPE
<input checked="" type="checkbox"/> IT Risk Assessment	ASSESSMENT TYPE
<input checked="" type="checkbox"/> Location-Specific Framework	ASSESSMENT TYPE
<input checked="" type="checkbox"/> Objective Risk Assessment	ASSESSMENT TYPE
<input checked="" type="checkbox"/> Process Risk Assessment	ASSESSMENT TYPE
<input checked="" type="checkbox"/> Risk Assessment	ASSESSMENT TYPE
<input checked="" type="checkbox"/> Security Framework Audit	ASSESSMENT TYPE
<input checked="" type="checkbox"/> Vendor Assessment	ASSESSMENT TYPE

DONE

The Data Type tab.

8. In the **Configuration** tab:

- a. Choose the relationship from the **Select a Relationship** select list.
- b. Begin typing the name of the field you wish to add to the export in the **Select Fields** field and select it to add it to the export. More than one field can be added.

EDIT ATTACHMENT EXPORT ✕

Data series: Activity, Activity Type, Activity, Officer Response, Activity RESET DATA

Data Type **Configuration** Parameters

SELECT A RELATIONSHIP

Anchor ▾

SELECT FIELDS
Select the fields you want to include in the export

DONE

The Configuration tab.

9. In the **Parameters** tab, select how the information in the export will be filtered with any of the select lists in the **Define Parameters** section.

EDIT ATTACHMENT EXPORT ✕

Data series: Activity, Activity Type, Activity, Officer Response, Activity RESET DATA

Data Type Configuration **Parameters**

SELECT A RELATIONSHIP

Anchor ▼

DEFINE PARAMETERS

The selected parameters will filter the data presented in your table

By Activity: Workflow
Select one... ▼

By Activity Call Source
Select one... ▼

By Activity Disposition
Select one... ▼

By Activity Report Required
Select one... ▼

By Count
Select one... ▼

The Parameters tab.

10. Click **Done**.