Edit Columns on a Table within a Report

Overview

Users can display additional information on a table by adding or editing table columns.

User Account Requirements

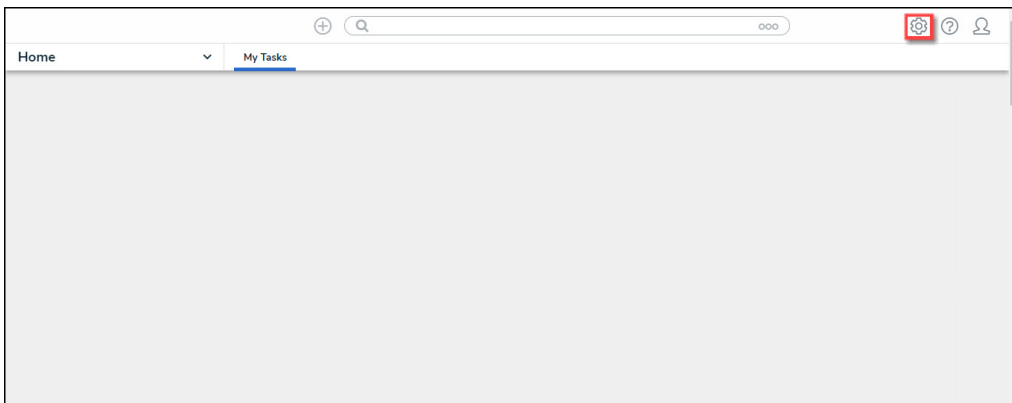The user account you use to log in must have Administrator permission to access the Data Visualization feature.

Related Information/Setup

For more information regarding Views, please refer to the Views Over article.

For more information on role permissions, please refer to the Workflow Permissions article.
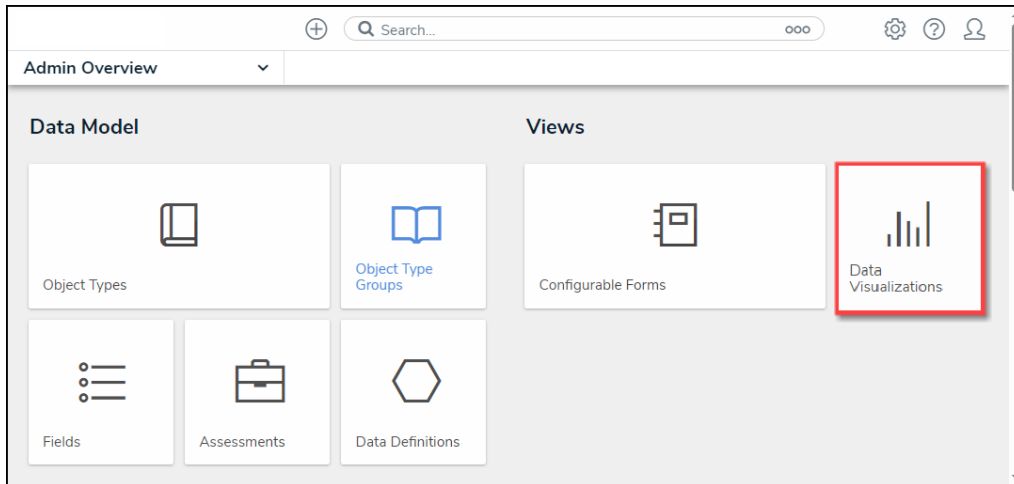
Navigation

1. From the **Home** screen, click the **Administration** icon.
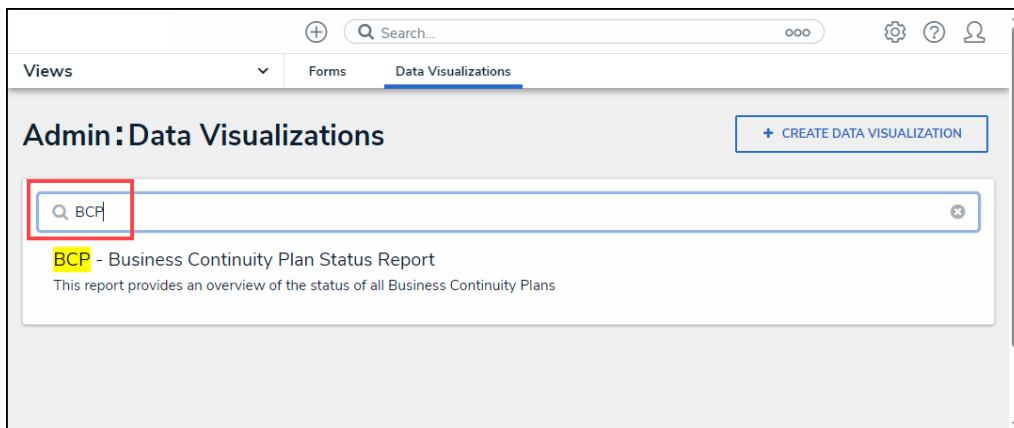

Administration Icon

2. From the **Admin Overview** screen, click the **Data Visualizations** tile under the **Views** section.
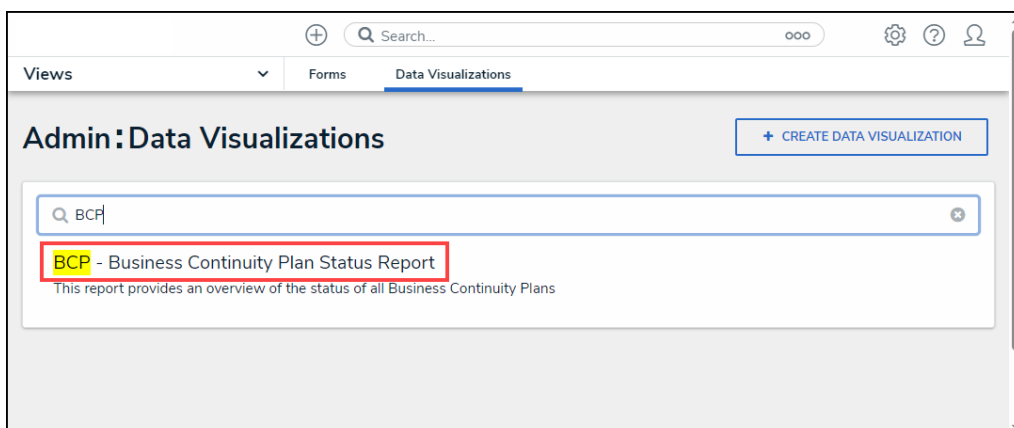
Data Visualization Tile

3. From the **Admin: Data Visualizations** screen, enter a keyword in the **Search** field to narrow the search results list.

Search Field

4. Click the **Report** you want to add or edit a column.

Report Link

Edit Columns in a Report Table

1. From the ***Admin: Edit Report*** screen, navigate to where the table is on the **Report**.
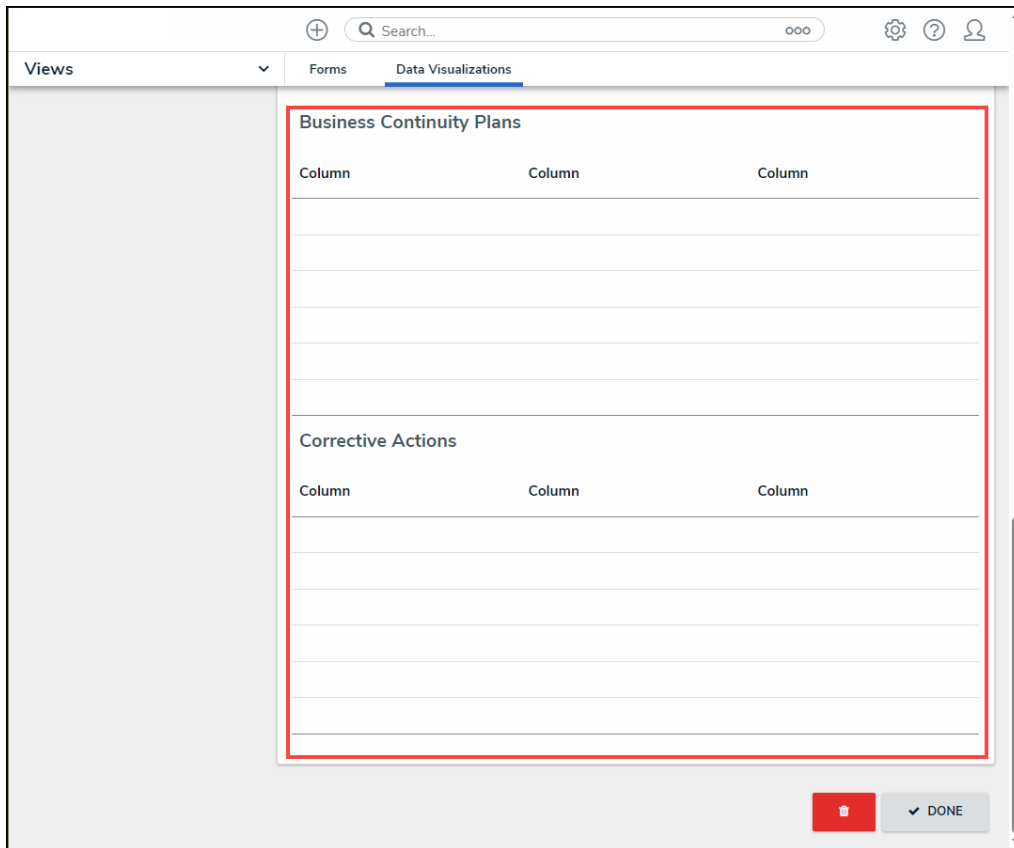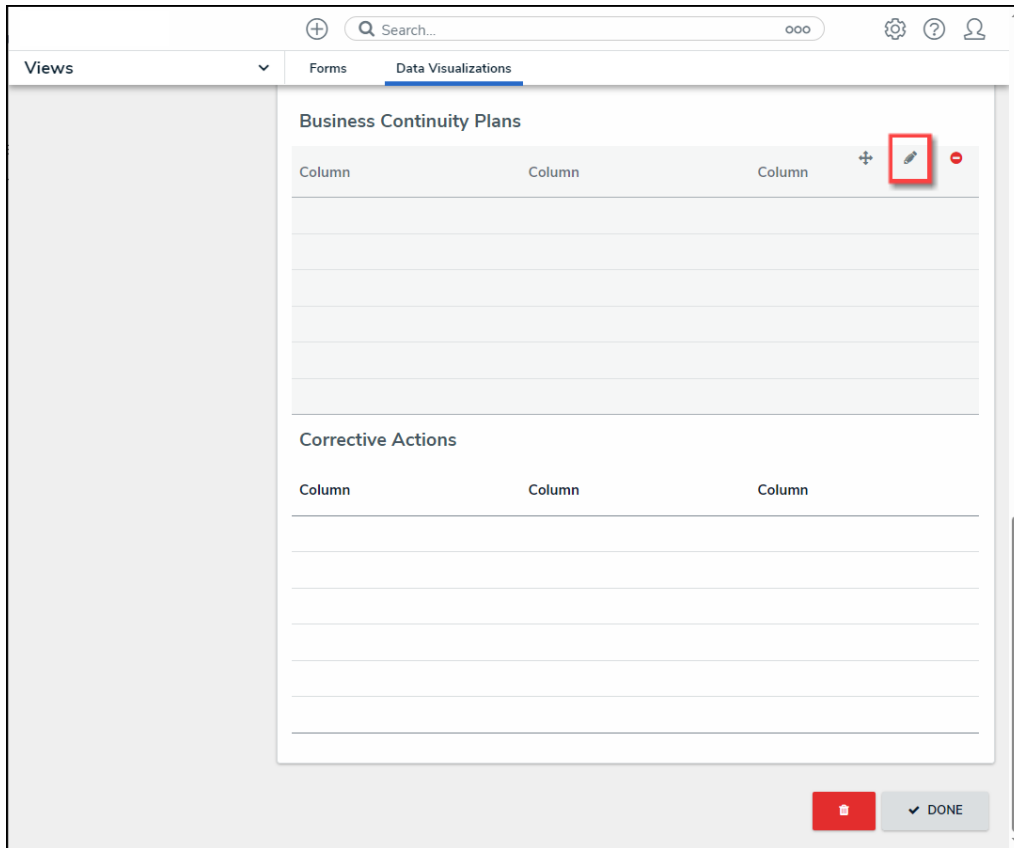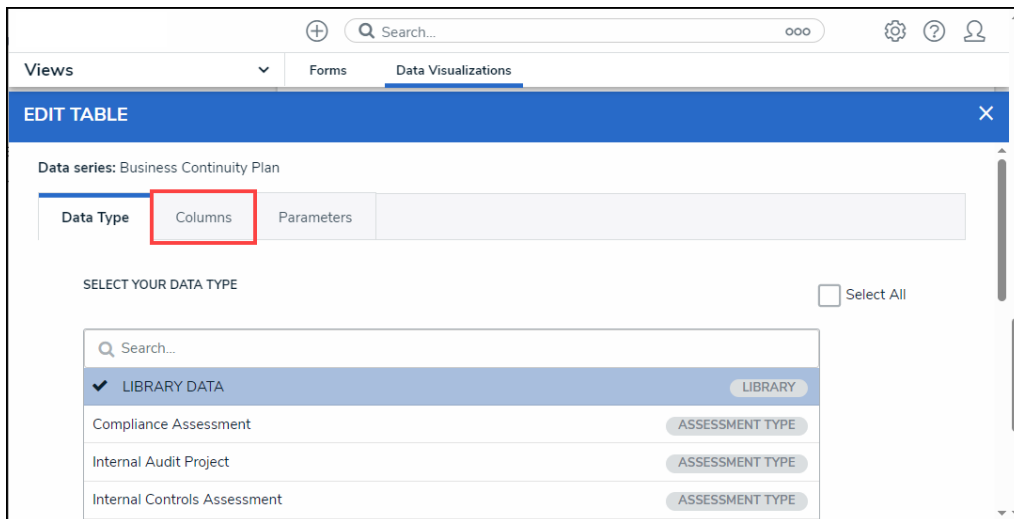

Table Section

2. Hover the cursor over a table and click the **Edit** icon to edit the table.
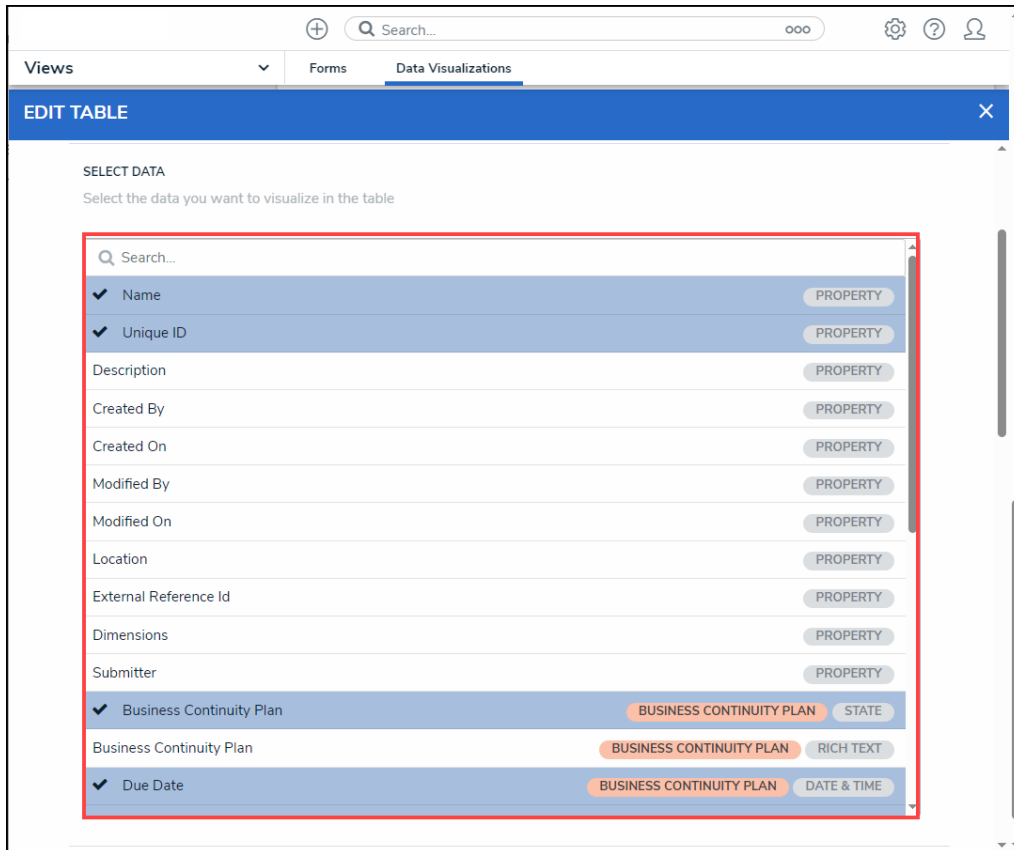
Edit Icon

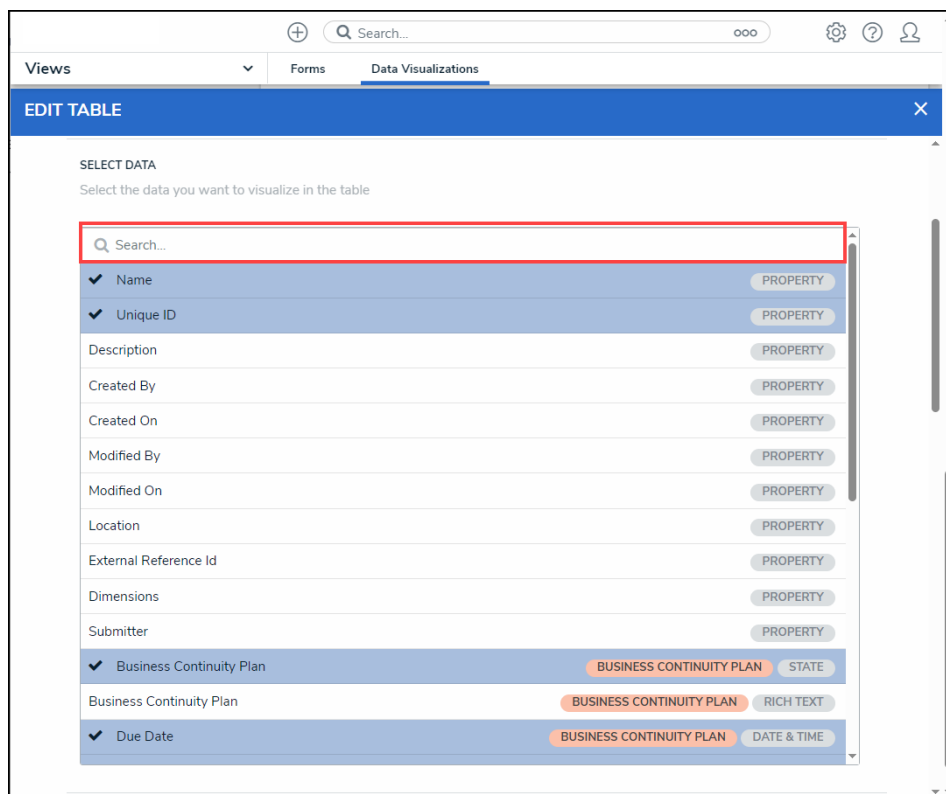3. From the ***Edit Table*** screen, click the **Columns** tab.

Columns Tab

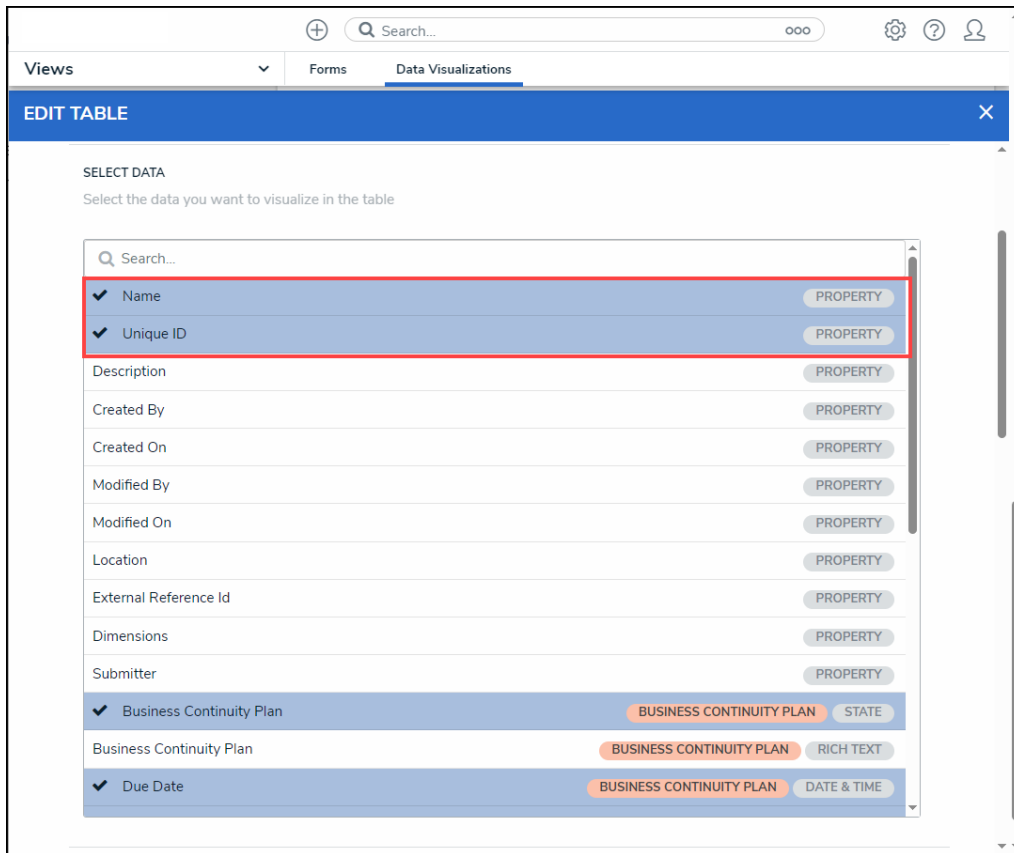4. From the ***Columns*** tab, scroll to the ***Select Data*** section.

Select Data Section

5. **(Optional)** Enter a keyword in the **Search** field to narrow your search.
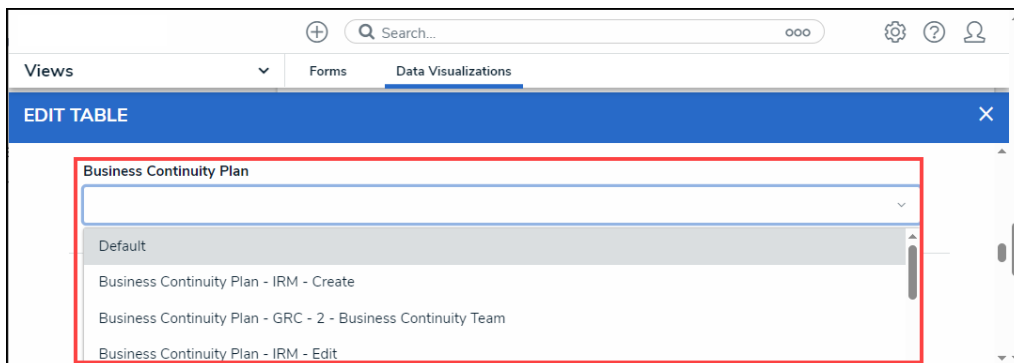

Select Data Search Field

6. Click on a property, workflow state, field, formula, relationship, reference, or role to add the information to the table using a data column.
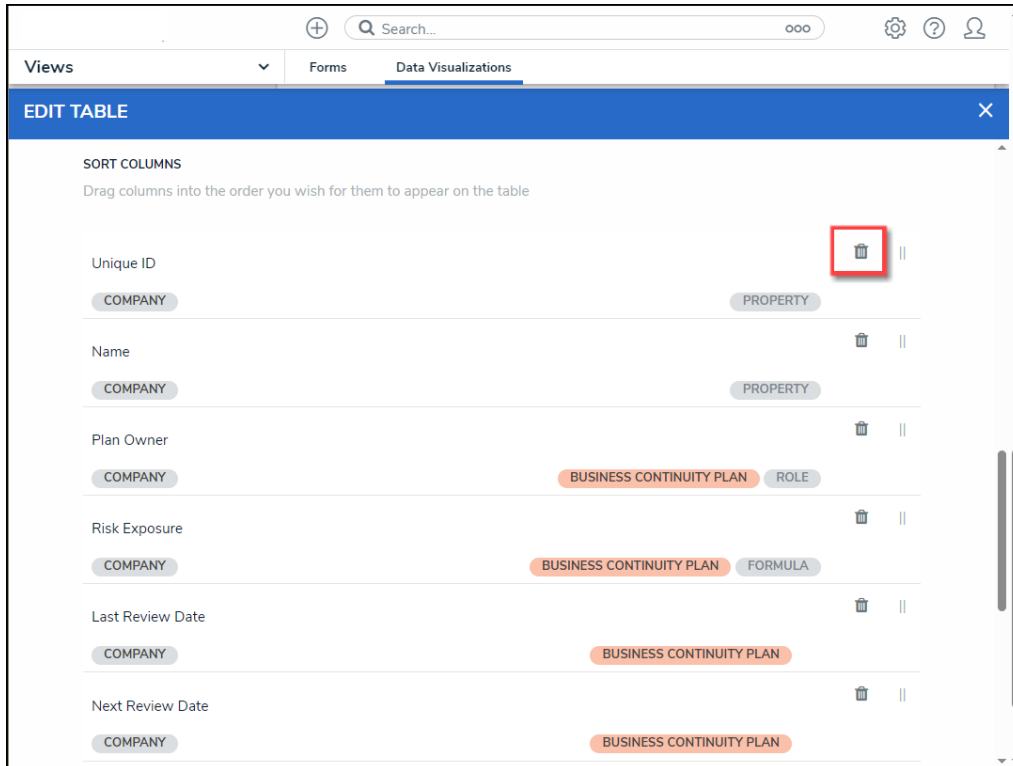

Select a Column Element

7. **(Optional)** Deselect a column element (field, workflow state, etc.) to remove the column from the table.

8. Select a default form from the **Default Custom Forms** dropdown menu. The form selected will appear when a user clicks on the table data. Choosing **Default** will display the form on the user's role permissions for the object type.
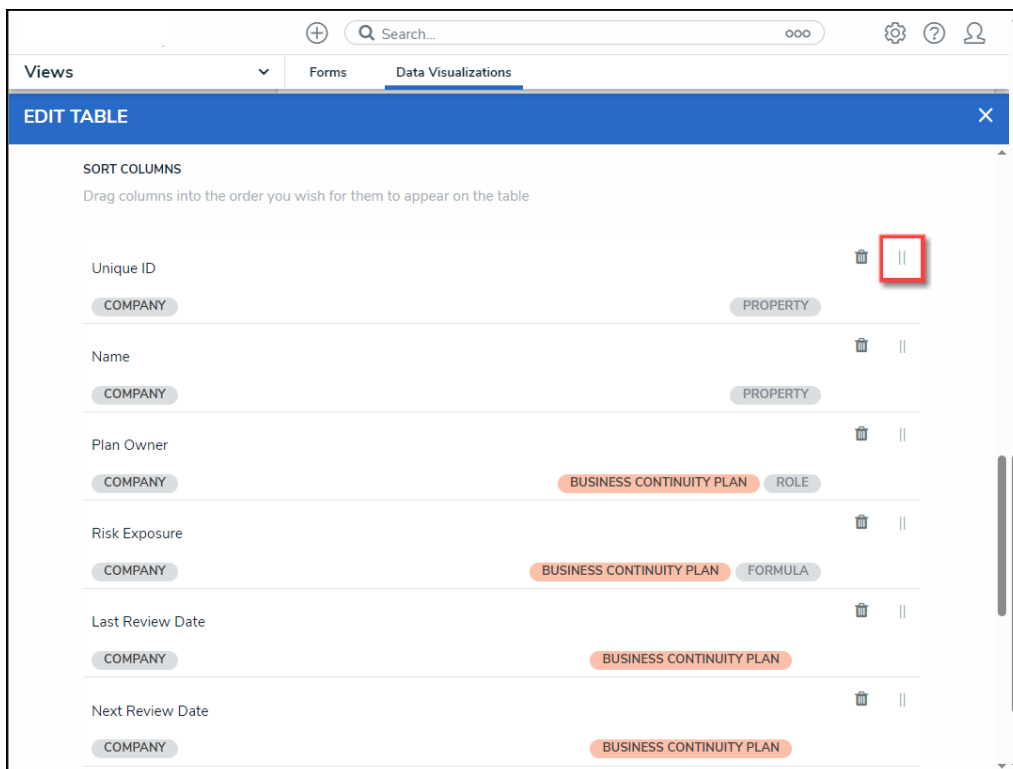

Default Custom Forms Dropdown

9. **(Optional)** From the **Sort Columns** section, click the **Delete** icon to remove a column from the table.
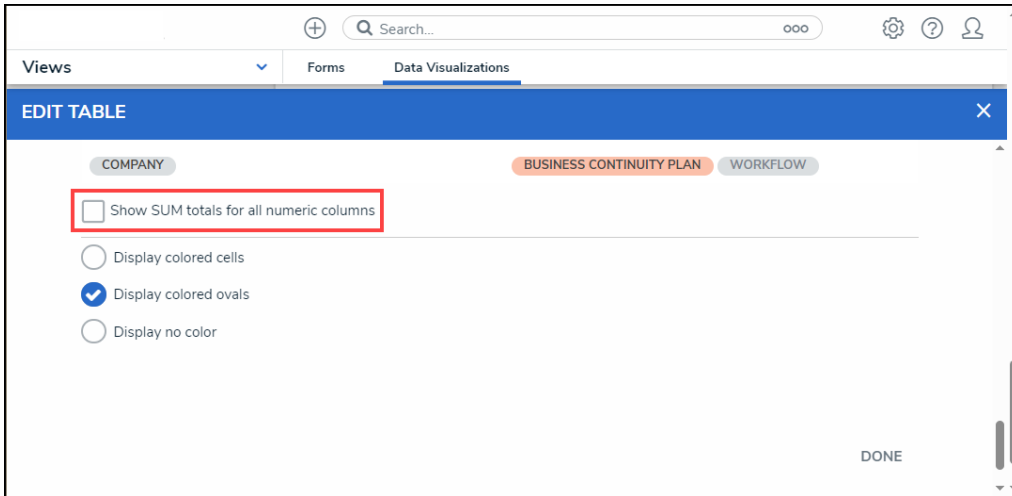
Delete Icon

10. **(Optional)** Click the **Move** icon to rearrange the columns on the table.

Move Icon

11. **(Optional)** Select the **Show SUM totals for all numeric columns** checkbox will display

the total value of all numeric fields on the table.

Show SUM total for all numeric columns

12. **(Optional)** Select the **Display Colored Cells** checkbox to display formulas or select list cells with text and full background color.

Display Colored Cells

13. **(Optional)** Select the **Display Colored Ovals** checkbox to display formulas or select list cells as text with colored circle background.

Display Colored Ovals

14. **(Optional)** Select the **Display No Color** checkbox to display formulas or select list cells as text with no background.

Risk Unique ID	Risk Name	Inherent Risk Score	Control Effectiveness	Residual Risk Score	Risk Response Plan
R-8.1.1.1	Cyber Security Risk	Significant	Medium	Significant	Not Applicable
R-8.1.1	Cyber Security Risk	Significant	Medium	Significant	Not Applicable
R-32.3	Fiduciary Risk	Critical	Excellent	Significant	Tolerate - Accept
R-32.2	Fiduciary Risk	Critical	Excellent	Significant	Tolerate - Accept
R-32.1	Fiduciary Risk	Critical	Excellent	Significant	Tolerate - Accept
R-31.3	Succession Plan Risk	Significant	Medium	Significant	Not Applicable
R-31.2	Succession Plan Risk	Significant	Medium	Significant	Not Applicable
R-31.1	Succession Plan Risk	Significant	Medium	Significant	Not Applicable
R-8.2	Cyber Security Risk	Significant	Medium	Significant	Not Applicable
R-8.1	Cyber Security Risk	Significant	Medium	Significant	Not Applicable

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Display No Color

15. Click the **Done** button to apply your changes.

Done Button