

# **View a Report**

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# Overview

Before a report can be viewed, an administrator must create and add it to a view in an application. Some Report filters rely on the current user's time zone. Some users from different time zones may see different data in the same Report. See the Time Zone Conversions on Reports article for more information.

## **User Account Requirements**

The data you can view in a Report depends on your role's permissions and the Report's configurations in the administrative settings.

# **Related Information/Setup**

Please refer to the Roles Overview article for more information on role permissions.

Please refer to the Time Zone Conversions on Reports article for more information on time zones.

Please refer to the View a Data Grid and Export Object Data from a Data Analytics Report articles for information on viewing a data grid and data export Report.

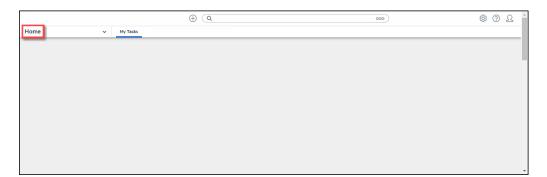
Please refer to the Export a Report article for information on exporting a Report.

Please refer to the Loading & Caching Report Data article for more information on refreshing and reloading Report data.

Please refer to the Add Repeatable Forms to a Report article for more information on repeatable forms.

# Navigation

1. From the *Home* screen, click the *Home* dropdown menu.





#### Home Dropdown Menu

2. Select **Reports** from the dropdown menu.

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Home ~	My Tasks		
Home			
Portal Tasks			
Command Center			
Incident Management 2   2021-04-			
WAVR-21™			
Reports 113 2023-02-			
Library Assigned to me on Feb ()			

Reports

3. **(Optional)** If your organization has multiple Applications, select an Application by clicking the corresponding tab on the *Reports* screen.

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Internal Audit Management 🛛 🗸	Risk Assessment	Audit Plan	Planning	Fieldwork	Reporting							
<b>Reporting</b> Prepare all necessary reports to commun	icate results of the audit	prior to closure.										
Audits in Reporting Sorted by Unique ID (Asce												
Audit Committee Summary	Sorted by Uniq	ue ID (Ascendin	g)									
AP-3 2022 Internal Audit	- IT						Active					
AP-7 Internal Audit HR De	epartment						Active					
								_				

Reports Screen Application Tabs

### **Viewing a Report**

1. From the *Reports* screen, navigate to a Report and click the **Report** link.



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Reports ~	Risk Management	Risk Management (Standard)	Compliance Management	Internal Audi	it ***
Risk Management					
Corporate Risk Heat Map				Sorted by Uniqu	e ID (Ascending)
C-1 Riverdale Industries					Active
Risk Committee Reports				Sorted by Uniqu	e ID (Ascending)
C-1 Riverdale Industries					Active
Issues by Business Unit				Sorted by Uniqu	e ID (Ascending)
C-1 Riverdale Industries					Active

Report Link

 If a Filter is marked as **Required** by an Administrator during the Report creation, a *Filter Report* screen will appear, asking the user to fill out all required filters.

<i>Note:</i> <i>The</i> <b>Run Report</b> <i>button will remain greyed out until all required fields are filled</i>	out.
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oorts	✓ Risk	Management	Risk Manage	ment	(Standard) Col	mpliance Managen	nent In	ternal Audit	
RM - Risk Co		-		ed filt	ers and then click 'R	un Report'.			
Control Effectiveness					Date Identified - Is	ssue	<b>1</b> ТО		~
				~					
Due Date - Issue Requ					Event Severity - L	oss Event			
from	~	🛗 ТО		~					~
Indicator Rating					Inherent Risk Scor	re			
				~					~
Issue: Issue Owner					Net Loss (USD)				
Q									~
Priority - Issue					Residual Risk Sco	re			
				~					~
Risk Response Plan -	Risk								
				~					



#### Filter Report Screen

3. Fill out all required filters and click the **Run Report** button to generate the Report.

RM - Risk	Commi	ttee Repor	t				
Your report must b	e filtered prior to I	launch. To do so, pleas	e fill in all required fil	ters and then clic	ck 'Run Report'.		
Control Effect				Date Identifie	d - Issue		
Control Effect	veness		~	🛗 FROM	~	🛗 ТО	~
Due Date - Iss		∼ 🕅 January 1	0, 2024 ~	Event Severity	y - Loss Event		~
September 1, 2023				Inherent Risk	Score		
			~				~
Issue: Issue Or	wner			Net Loss (USE	))		
Q							~
Priority - Issue			~	Residual Risk	Score		
Risk Response	Plan - Risk		~				~
			~				

Run Report Button



#### Note:

Tip:

*If an administrator configures, filters can also be applied after loading the Report. See the Filters section below for more information.* 

4. If the Report includes a bar, column, or pie chart, hover your cursor over the chart for more information about the data.



*If using a keyboard to navigate, press the* **Tab** *key to select a chart or legend and use the* **Arrow** *keys to navigate between chart or legend segments or items.* 



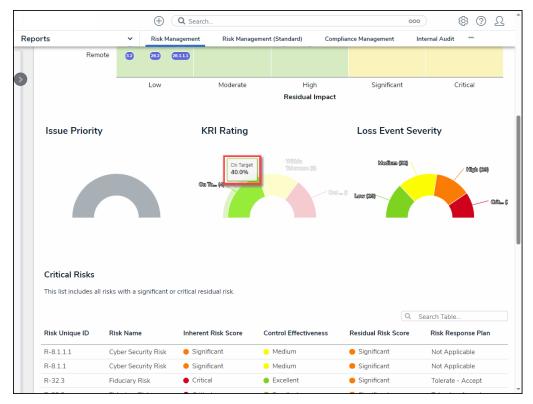


Chart Hover Over

5. Clicking on a pie chart section will separate it from the rest of the chart for emphasis.

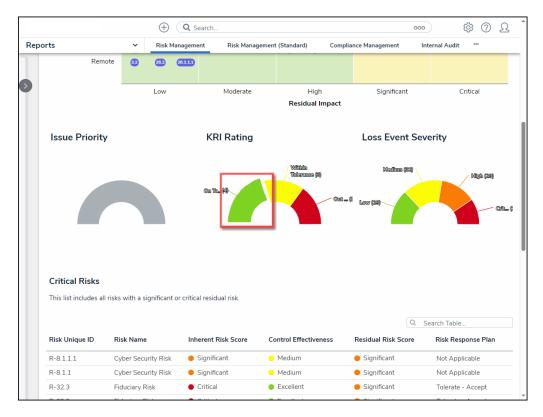
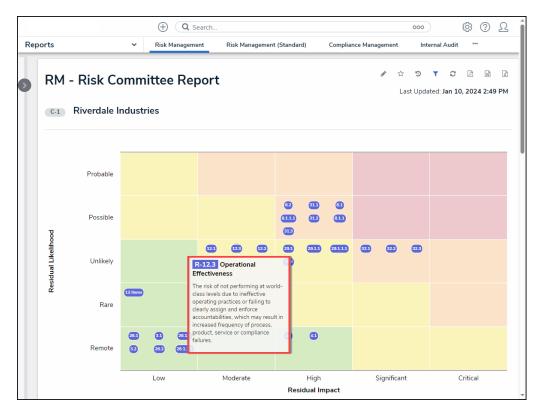


Chart Highlight

6. If the report includes a heat map, hover your cursor over the objects on the heat map

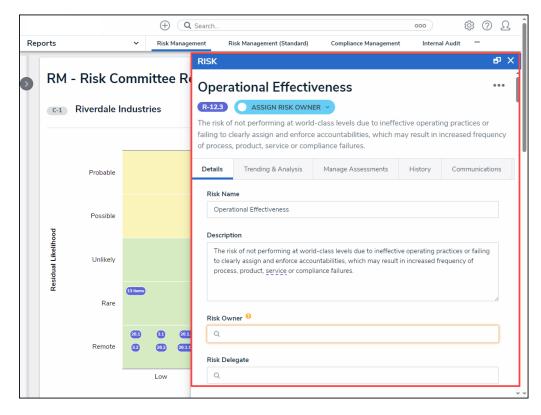


(circle and unique IDs) to display the object's description.



Heat Map Object Description

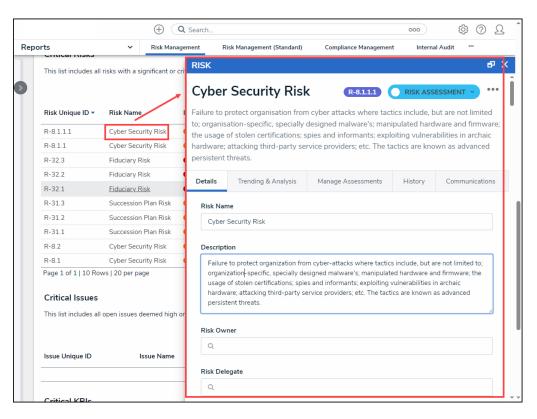
7. Click an object (circle and unique IDs) for more detailed information.



More Detail



8. If the report includes a table, click a cell to open the associated object in a pop-up screen for further details.



Object Pop-up Screen

9. Click a **Column Header** to sort the table by ascending (arrow icon up) or descending (arrow icon down) order based on the column's value.

orts	✓ Risk Man	agement Risk Manag	gement (Standard) Comp	pliance Management li	nternal Audit ***
Critical Risks					
This list includes all	risks with a significant or	critical residual risk.			
				Q	Search Table
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

Sort by Column

10. Click the Next and Previous icons to scroll through additional table pages if the table has



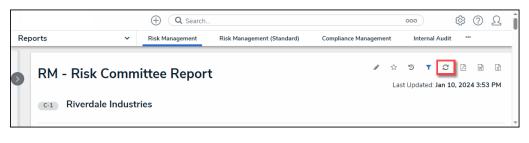
multiple pages.

11. Click the **Search** icon and enter a keyword to narrow the data results listed within the table.

ports	✓ Risk Ma	inagement Risk Man	agement (Standard) Cor	npliance Management	Internal Audit ***	
Critical Risks	III risks with a significant o	or critical residual risk.				
				Q	Cyber	(
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	
	Cyber Security Risk	😑 Significant	😑 Medium	😑 Significant	Not Applicable	
R-8.2			Medium	Significant	Not Applicable	

Search Field

Click the **Refresh** icon in the Toolbar at the top of the screen to refresh the report data.
Please refer to the Loading & Caching Report Data article for more information on refreshing and reloading report data.





### **Starred Reports**

1. Click the **Star** icon in the **Toolbar** at the top of the screen.





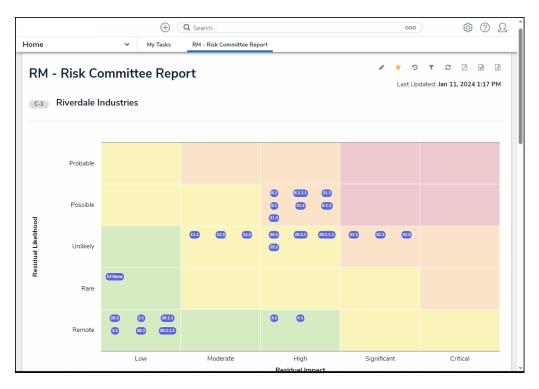
2. From the **Add Report to Home** screen, click the **Label Report** field to enter a custom report label or leave the field alone to use the default label.



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C-1 River	dale Indust	ries			4 AM Add Report To Home 🗙	ч
					* Label report	
					RM - Risk Committee Report	
	1				Make this report your landing page	
Pro	bable					
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Add Report to Home Screen

3. Click the **Make this report your landing page** checkbox to have the report open when you first log in, replacing the *Home* screen.



Report Home Screen

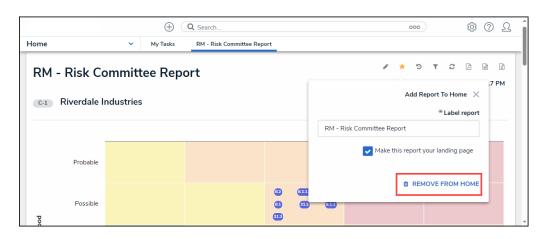
- Click the + Add to Home link to add the report to your My Task list or to add the report as the new *Home* screen.
- 5. Click the highlighted **Star** icon.



Highlighted Star Icon



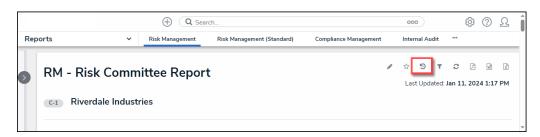
 From the + Add to Home screen, click the Remove from Home button to remove the report from the Home screen.



Remove from Home button

# Historical Data (Point in Time Reporting)

1. Click the **Historical Data** icon in the **Toolbar** at the top of the screen.



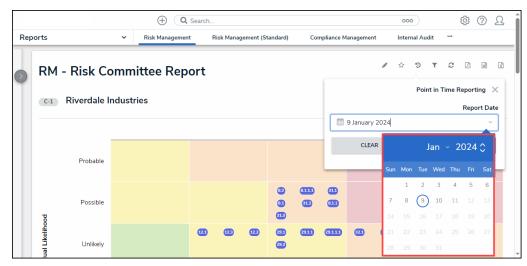
Historical Data Icon

Note:

If Point in Time Reporting has not been enabled for this report, the **Historical Data** icon will not be visible.

2. From the *Point in Time Reporting* screen, click the **Report Date** field and select a report date from the **Calendar** pop-up.





Calendar Pop-up

3. Click the **Apply** button to refresh the report with the historical data based on the Date selected from the *Calendar* pop-up.

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Apply Button

### **Filters**

The **Filters** icon will appear if configured by an Administrator.

1. Click the **Filter** icon in the **Toolbar** at the top of the screen.



Filter Icon

2. From the *Filter* pop-up, apply any of the following filters to narrow the data that appears on the report:



- **State:** Allows users to filter the table data by object workflow states (e.g., Creation, Draft, Active, and Archived).
- **Role:** Allows users to filter the table data by user roles granted direct access to objects from the report's data definition.
- Date & Time: Allows users to filter the table data by date and time values. If the field is configured to collect the date and time, the report is filtered based on the current user's time zone.
- **Select List:** Allows a user to filter table data by select list values (e.g., Low, Medium, High).
- Formula: Allows a user to filter table data by formula labels.
- **Relationship/Reference:** Allows a user to filter table data by one or more object type relationship or references. For example, selecting the Risk 1 object type in this filter will also display all the Control objects that Risk 1 appears on through a relationship.
- **Object Type:** Allow a user to filter table data by object type.

#### Note:

Sections may be blank if these filter types have not been added to the report by an administrator.

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		Riverdale I	ndustr	ies							~	
						Date Identified - Issue						
						from	~	🛗 ТО			~	
						Due Date - Issue						
		Probable				from	~	🛗 ТО			~	
						Event Severity - Loss Event						
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Filter Pop-up

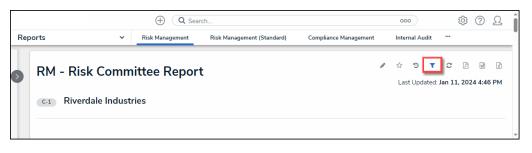
3. Click the **Apply Filter** button to apply any selected filters to the table data.



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Rep	oorts		~	Risk M	anagement		Risk Management (Standard)	Compliance Management	Internal Audit				
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	sidual Likeliho	Unlikely Unlikely			(	Residual Risk Score							
	Re	Rare			Risk Response Plan - Risk				``	-			
						CANCEL	APPLY	FILTER					

Apply Filter Button

4. The **Filter** icon will appear blue, indicating that there are filters applied to the table data.



Filter Icon

 Click the x beside a filter to remove the filter. If the filter is date-based, select the field and use the **Delete** or **Backspace** key to delete the dates from the fields.

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		•		FILTERS						×	
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	C-1 Riverdale	Indust	ries						~		L
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	Possible			👝 Medium 🛛 🗙					~		* *

Removing a Filter

6. Click **Apply Filter** to save your changes.

