

Editing/Updating a Report Chart

Last Modified on 12/24/2024 12:02 pm EST

Overview

Pie Charts display numeric data based on the data definition selected and can be displayed as a full pie chart or half-pie chart.

User Account Requirements

The user account you use to log into Resolver must have Administrator permissions to access Data Visualizations.

Related Information/Setup

Please see the Create a Pie Chart article for more information on creating a pie chart on a report.

Navigation

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



Administration Icon

2. From the Administrator Settings menu, click Admin Overview.



		① Q Search	 @	0 L
Home	✓ My Tasks		Admin Overview	
			Settings	
	My Tasks	\$ SORT Q SEARCH	ළ User Management	
			Q Branding	
			Languages	

Administrator Settings Menu

3. From the *Admin Overview* screen, click the **Data Visualizations** tile under the **Views** section.

		(Q Search		••••	\$? 2
Admin Ove	rview	~				
Data №	lodel			Views		
Object 1	Fypes		Object Type Groups	Configurable Forms	Data Visualizations	
Fields	=	Assessments	Data Definitions			

Data Visualization Tile

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

		+	Q Search		••••	\$? 2	
Views	~	Forms	Data Visualizations				
Admin:	Admin: Data Visualizations + CREATE DATA VISUALIZATION						
Q BCP						0	
BCP - Bus	iness Continui	ty Plan Stat	us Report				
This report pr	ovides an overviev	v of the status	of all Business Continuity Plans				

Search Field

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



		(+)	Q Search	***	\$ ® &
Views	~	Forms	Data Visualizations		
Admin:Da	ta Visu	alizatio	ns	+ CREATE DAT	A VISUALIZATION
Q BCP					8
BCP - Busine	ss Continuit	ty Plan Stat v of the status	tus Report of all Business Continuity Plans		

Report Link

Editing/Updating a Report Chart

1. From the *Admin: Edit Report* screen, navigate to the *Report Cavas* section.



Table Section

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



		(+)	Q Search				***		\$ \$	2
Views	~	Forms	Data Visualizations							
Elements		Rej	port Canvas				🛓 EXPOI	RT OUTPUT	OPTIONS	s
					÷	<i>i</i> •				
Display	+	Co St	orrective Action atus		Business Continuity Plan Status					
					Slice 3 ()					
		Slice	10	Slice ()		si ()				
		Bu	siness Continuity F	lans						
		Col	umn		Column		Column			

Edit Icon

3. From the *Edit Pie Chart* pop-up, enter a **Data Type** name in the **Search** field to narrow the results on the **Select Your Data Type** list.

		•••	\$ 3
Views V Forms Data Visualiza	tions		
Admin:Edit Report	EDIT PIE CHART		×
	Data series:		Î
BCP - Business Continuity Plan Status Report	Data Type Configure Your Chart		
This report provides an overview of the status of all Business Continu			
Report Focus: Company, Business Continuity Plan, Corrective Action Report Focus: Company, Business Unit, Business Continuity Plan, Cr	SELECT YOUR DATA TYPE	[Select All
Report Focus: Company, Business Continuity Plan Anchor: Com Report Focus: Company, Business Unit, Business Continuity Plan	Q Search		
+ ADD ANOTHER REPORT FOCUS	✓ LIBRARY DATA	LIBRARY	
	Compliance Assessment	ASSESSMENT TYPE	
Filters	Internal Audit Project	ASSESSMENT TYPE	
	Internal Controls Assessment	ASSESSMENT TYPE	
LAST REVIEW DATE DUE DATE NEXT REVIEW DATE RISK E	IT Compliance Assessment	ASSESSMENT TYPE	
▼ CONFIGURE FILTERS	IT Risk Assessment	ASSESSMENT TYPE	
Parameters	Location Audit	ASSESSMENT TYPE	
	Location-Specific Framework	ASSESSMENT TYPE	
CONFIGURE PARAMETERS	Objective Risk Assessment	ASSESSMENT TYPE	
Export Attachments	Process Risk Assessment	ASSESSMENT TYPE	
A FIELD - BUSINESS CONTINUITY PLAN	Risk Assessment	ASSESSMENT TYPE	
	Security Framework Audit	ASSESSMENT TYPE	
	Vendor Assessment	ASSESSMENT TYPE	~

Search Field

4. (Optional) Select the Select All checkbox to select all data types listed.



(Q. Search		••••	\$ ® \$
Views V Forms Data Visuali	ations		
Admin: Edit Report	EDIT PIE CHART		×
	Data series:		i
BCP - Business Continuity Plan Status Repor	Data Type Configure Your Chart		
This report provides an overview of the status of all Business Conti Report Focus: Company, Business Continuity Plan, Corrective Acti Report Focus: Company, Business Unit, Business Continuity Plan,	n SELECT YOUR DATA TYPE	[Select All
Report Focus: Company, Business Continuity Plan Anchor: Co Report Focus: Company, Business Unit, Business Continuity Plan + + ADD ANOTHER REPORT FOCUS +	Q Search ✓ LIBRARY DATA	LIBRARY	
	Compliance Assessment	ASSESSMENT TYPE	
Filters	Internal Audit Project Internal Controls Assessment	ASSESSMENT TYPE	
LAST REVIEW DATE DUE DATE NEXT REVIEW DATE RISK REPORT DATE	IT Compliance Assessment	ASSESSMENT TYPE	
CONFIGURE FILTERS	IT Risk Assessment	ASSESSMENT TYPE	-
Parameters	Location Audit	ASSESSMENT TYPE	-
	Location-Specific Framework	ASSESSMENT TYPE	-
CONFIGURE PARAMETERS	Objective Risk Assessment	ASSESSMENT TYPE	
Export Attachments	Process Risk Assessment	ASSESSMENT TYPE	
A FIELD - BUSINESS CONTINUITY PLAN	Risk Assessment	ASSESSMENT TYPE	
	Security Framework Audit	ASSESSMENT TYPE	
B 101 17	Vendor Assessment	ASSESSMENT TYPE	-

Select All Checkbox

 Select the data type(s) that will be displayed in the chart from the Select You Data Type list. Selecting an Assessment Type, Data Type will include the assessment name and workflow state.



Data Type

6. Selecting **LIBRARY DATA** will include object type data.



(Q Search		•••	\$? 2
Views V Forms Data Visuali	rations		
Admin'Edit Report	EDIT PIE CHART		×
	Data series: Business Continuity Plan		
BCP - Business Continuity Plan Status Repor	t Data Type Configure Your Chart		
Report Focus: Company, Business Unit, Business Continuity Plan,	SELECT YOUR DATA TYPE	I	Select All
Report Focus: Company, Business Continuity Plan, Corrective Actin Report Focus: Company, Business Unit, Business Continuity Plan	Q. Search		
+ ADD ANOTHER REPORT FOCUS	LIBRARY DATA Compliance Assessment		
Filters	Internal Audit Project	ASSESSMENT TYPE	
LAST REVIEW DATE DUE DATE NEXT REVIEW DATE RISK	Internal Controls Assessment	ASSESSMENT TYPE	
REPORT DATE	IT Compliance Assessment	ASSESSMENT TYPE ASSESSMENT TYPE	
Parameters	Location Audit	ASSESSMENT TYPE	
-	Location-Specific Framework	ASSESSMENT TYPE	
CONHIGURE PARAMETERS Export Attachments	Objective Risk Assessment Process Risk Assessment	ASSESSMENT TYPE	
	Risk Assessment	ASSESSMENT TYPE	
SUPPORTING AT LACHMENTS - BUSINESS CONTINUITY PLAN	Security Framework Audit	ASSESSMENT TYPE	
Report Orientation	Vendor Assessment	ASSESSMENT TYPE	

Library Data

7. Click the Configure Your Chart tab.



Configure Your Chart Tab

8. From the *Configure Your Chart* tab, choose 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 definition selected in the data series selected on the *Data Type* tab.



⊕ Q Search	···· ŵ 0	Do
Views V Forms Data Visuali	zations	
Admin - Edit Report	EDIT PIE CHART	×
	Data series: Business Continuity Plan	í
BCP - Business Continuity Plan Status Repor	t Data Type Configure Your Chart	
This report provides an overview of the status of all Business Conti	nu	
Report Focus: Company, Business Unit, Business Continuity Plan,	Co SELECT A RELATIONSHIP	_
Report Focus: Company, Business Continuity Plan Anchor: Co Report Focus: Company, Business Continuity Plan, Corrective Activ	mi on	_
Report Focus: Company, Business Unit, Business Continuity Plan	Anchor	_
+ ADD ANOTHER REPORT FOCUS		_
	SELECT DATA	_
Filters	Select the data you want to visualize in the pie chart	
	Q Search	- 1
REPORT DATE DUE DATE NEXT REVIEW DATE RISK	Risk Exposure BUSINESS CONTINUITY PLAN FORMULA	
▼ CONFIGURE FILTERS	Corrective Actions BUSINESS CONTINUITY PLAN RELATIONSHIP	
Parameters	Information Assets BUSINESS CONTINUITY PLAN RELATIONSHIP	
	Key Contacts BUSINESS CONTINUITY PLAN RELATIONSHIP	
CONFIGURE PARAMETERS	Locations BUSINESS CONTINUITY PLAN RELATIONSHIP	
Export Attachments	Risks BUSINESS CONTINUITY PLAN RELATIONSHIP	
SUPPORTING ATTACHMENTS - BUSINESS CONTINUITY PLAN	Vendors BUSINESS CONTINUITY PLAN RELATIONSHIP	
🛓 CONFIGURE ATTACHMENTS	Business Continuity Plan BUSINESS CONTINUITY PLAN STATE	
Report Orientation	Assessment Type Name ASSESSMENT TYPE	

Select a Relationship Dropdown Menu

9. (Optional) Enter a keyword in the Search field to narrow the Select Data list.

	(\div)	Q Search				•••	{	\$?	Do
Views ~	Forms	Data Visualizat	ons						
Admin:Edit Report			EDIT PI	E CHART					×
BCP - Business Continuity	y Plan Stat	us Report	s	ELECT DATA elect the data you want to v	visualize in the pie char	t			
This report provides an overview of th	ie status of all E	susiness Continu	- [Q, Search					
Report Focus: Company, Business Un Report Focus: Company, Business Co	Report Focus: Company, Business Unit, Business Continuity Plan, Co Report Focus: Company, Business Continuity Plan Anchor: Com			Risk Exposure	BUSINESS	CONTINUITY PLAN	FORMULA		- 1
Report Focus: Company, Business Co Report Focus: Company, Business Un	ntinuity Plan, C it, Business Co	orrective Action ntinuity Plan		Corrective Actions	BUSINESS CON	TINUITY PLAN	RELATIONSHIP		- 1
+ ADD ANOTHER REPORT FOCUS				Information Assets	BUSINESS CON	TINUITY PLAN	RELATIONSHIP		- 1
				Key Contacts	BUSINESS CON	TINUITY PLAN	RELATIONSHIP		
Filters			_	Locations	BUSINESS CON	TINUITY PLAN	RELATIONSHIP		
		_		Risks	BUSINESS CON	TINUITY PLAN	RELATIONSHIP	•	
LAST REVIEW DATE DUE DATE REPORT DATE	NEXT REVIEW	DATE RISK EX		Vendors	BUSINESS CON	TINUITY PLAN	RELATIONSHIP		
▼ CONFIGURE FILTERS				 Business Continuity Planet 	lan BUSIN	ESS CONTINUITY P	PLAN		
Parameters				Assessment Type Name		ASS	ESSMENT TYPE		

Search Field

10. Select the data (numeric, select list, formula, relationship, or state) that you wish to display in the pie chart from the **Select Data** list.



	···· 🔞 😗 🖉	0
Views V Forms Data Visualizat	ations	
Admin:Edit Report	EDIT PIE CHART	×
BCP - Business Continuity Plan Status Report	Select DATA Select the data you want to visualize in the pie chart	
This report provides an overview of the status of all Business Continu	Q. Search	
Report Focus: Company, Business Unit, Business Continuity Plan, Co Report Focus: Company, Business Continuity Plan Anchor: Company, Comp	Risk Exposure BUSINESS CONTINUITY PLAN FORMULA	
Report Focus: Company, Business Continuity Plan, Corrective Action Report Focus: Company, Business Unit, Business Continuity Plan	Corrective Actions BUSINESS CONTINUITY PLAN RELATIONSHIP	
+ ADD ANOTHER REPORT FOCUS	Information Assets BUSINESS CONTINUITY PLAN RELATIONSHIP	
	Key Contacts BUSINESS CONTINUITY PLAN RELATIONSHIP	
Filters	Locations BUSINESS CONTINUITY PLAN RELATIONSHIP	
	Risks BUSINESS CONTINUITY PLAN RELATIONSHIP	
LAST REVIEW DATE DUE DATE NEXT REVIEW DATE RISK EX	Vendors BUSINESS CONTINUITY PLAN RELATIONSHIP	
	Business Continuity Plan BUSINESS CONTINUITY PLAN STATE	
Parameters	Assessment Type Name ASSESSMENT TYPE	
		-

Select Data List

11. Select an object type or relationship from the **Group Data** dropdown menu. This selection will represent the legend on the pie chart and determine how the data is displayed.

	(\div)	Q Search	•••	\$?	Do
Views ~	Forms	Data Visualizat	ions		
Admin: Edit Report			EDIT PIE CHART		×
BCP - Business Continuity	Plan Stat	tus Report	GROUP DATA Select the Object Type you would like to use to group the data. This selection will		*
This report provides an overview of th	e status of all E	Business Continu	Select one	~]	
Report Focus: Company, Business Uni Report Focus: Company, Business Con Report Focus: Company, Business Con	it, Business Co ntinuity Plan ntinuity Plan, C	ntinuity Plan, Co Anchor: Comp Corrective Action	Business Continuity Plan OBJECT TYPE		
+ ADD ANOTHER REPORT FOCUS	it, Business Co	ntinuity Plan	CONFIGURE DISPLAY		
			Chart Title		
Filters			Business Continuity Plan Status		- 1
LAST REVIEW DATE DUE DATE	NEXT REVIEW	DATE RISK EX	Display Type		- 1
REPORT DATE			Vie Half-Pie		- 1
CONFIGURE FILTERS					- 1
Parameters					
			DON	IE	-

Group Data Dropdown Menu

12. **(Optional)** Enter a Title for the chart in the **Chart Title** field. This title will appear above the chart when the chart is displayed.



		(\div)	Q Search			ණු (?	Do
Views	~	Forms	Data Visualizatio	ons				
Admin: Edit	t Report			EDIT PIE CHART				×
				GROUP DATA				
BCP - Busines	s Continuity	/ Plan Stat e status of all B	tus Report	Select the Object Type you wou represent the legend.	Ild like to use to group the data. This selection	will		
Report Focus: Comp Report Focus: Comp	Report Focus: Company, Business Unit, Business Continuity Plan, Co Report Focus: Company, Business Continuity Plan Anchor: Com			Business Continuity Plan		~		
Report Focus: Comp Report Focus: Comp + ADD ANOTHER R	any, Business Co any, Business Un EPORT FOCUS	ntinuity Plan, C it, Business Cor	orrective Action ntinuity Plan	CONFIGURE DISPLAY				
				Chart Title				
Filters				Business Continuity Plan Stat	tus			
LAST REVIEW DATE REPORT DATE	DUE DATE	NEXT REVIEW I	DATE RISK EX	Pie Half-Pie				
	FILTERS							
Parameters						DONE		
								-

Chart Title Field

 Select the type of pie chart you want to use to display the chart data by clicking the corresponding radio button under the **Display Type** field.

		(\div)	Q Search	6	?	Do
Views	~	Forms	Data Visualizati	ions		
Admin:Edit	Report			EDIT PIE CHART		×
BCP - Business	Continuity	Plan Stat	us Report usiness Continu	GROUP DATA Select the Object Type you would like to use to group the data. This selection will represent the legend.		•
Report Focus: Company, Business Unit, Business Continuity Plan, Co Report Focus: Company, Business Continuity Plan Anchor: Com			ntinuity Plan, Co Anchor: Comp	Business Continuity Plan		
Report Focus: Compar Report Focus: Compar + ADD ANOTHER REF	ny, Business Cor ny, Business Uni PORT FOCUS	ntinuity Plan, Ci t, Business Cor	orrective Action ntinuity Plan	CONFIGURE DISPLAY		
				Chart Title		
Filters			_	Business Continuity Plan Status		- 1
LAST REVIEW DATE REPORT DATE	DUE DATE	NEXT REVIEW I	DATE RISK EX	Display Type Pie Half-Pie		
	ILTERS					- 1
Parameters				DONE		
	ADAMETEDS		_			-

Display Type Field

14. Click the **Done** button when you are finished editing the pie chart.



		(\div)	Q Search	•••)	\$	
Views	~	Forms	Data Visualizatio	ons		
Admin:Edit	Report			EDIT PIE CHART		×
BCP - Business	Continuity	Plan Stat	us Report	GROUP DATA Select the Object Type you would like to use to group the data. This selection will represent the legend.		
Report Focus: Company, Business Unit, Business Continuity Plan, Co Report Focus: Company, Business Continuity Plan Anchor: Comp			ntinuity Plan, Co Anchor: Comp	Business Continuity Plan	~	
Report Focus: Company Report Focus: Company + ADD ANOTHER REPO	y, Business Con y, Business Unit ORT FOCUS	tinuity Plan, C , Business Cor	orrective Action ntinuity Plan	CONFIGURE DISPLAY		
				Chart Title		
Filters			Business Continuity Plan Status			
LAST REVIEW DATE REPORT DATE	DUE DATE	NEXT REVIEW [DATE RISK EX	Display Type		
Parameters	I LIG			DO	NE	

Done Button