

Creating a Data Analytics Export Report

Last Modified on 02/19/2025 10:18 am EST

Overview

An Administrator or Data Management advanced permissions user can create a new Data Analytics Export report. **Data Analytics Export reports** are data visualizations that are specifically designed to allow end users to export object data (properties, fields, workflow states, relationships, and references) into an Excel spreadsheet.

User Account Requirements

The user account used to log into Resolver must have Administrator permission or Data Management advanced permissions to create a Data Analytics Export Report.

Related Information/Setup

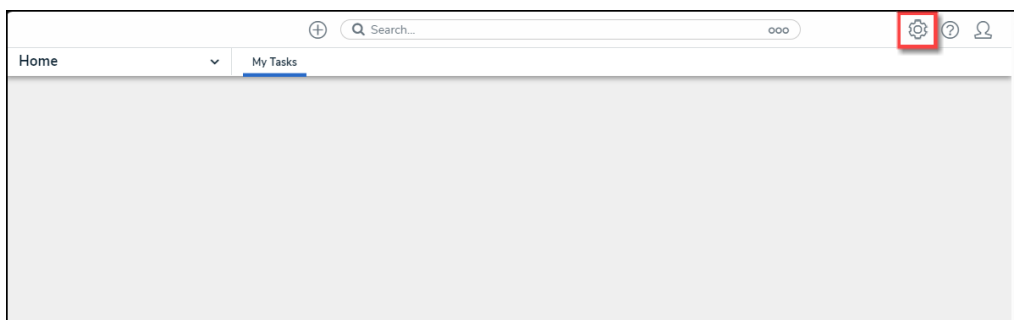
Please refer to the [Add a View to an Activity](#) article for more information on adding a Data Analytics Export report to a View.

Please refer to the [Add an Action to an Activity in Resolver Core](#) article for more information on adding a Data Analytics Export report to an Action.

Please refer to the [Export Data Action on Forms in Resolver Core](#) article for more information on adding a Data Analytics Export report to Export Data.

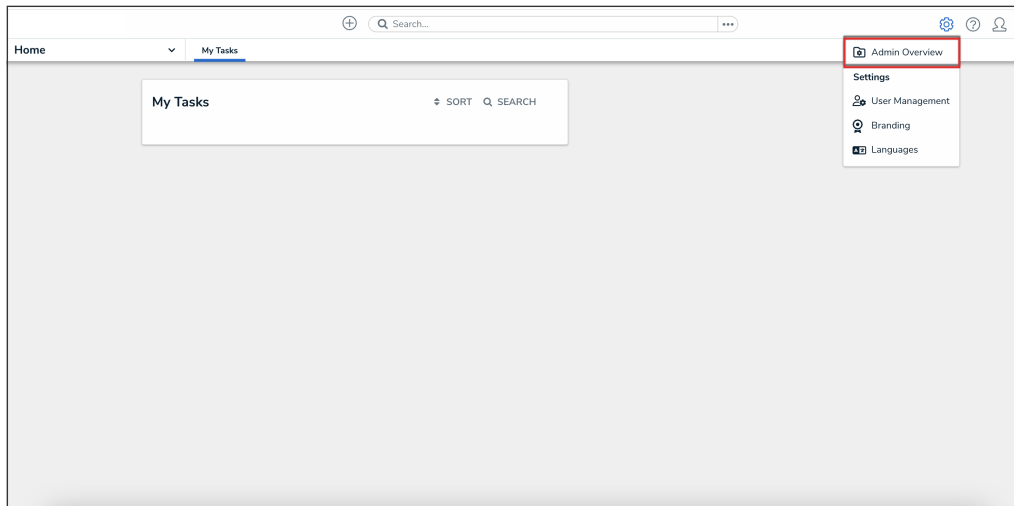
Navigation

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



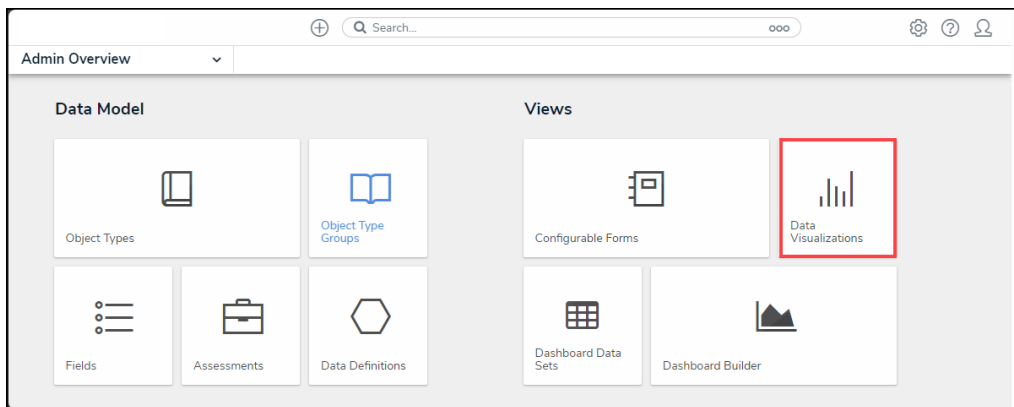
Administration Icon

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



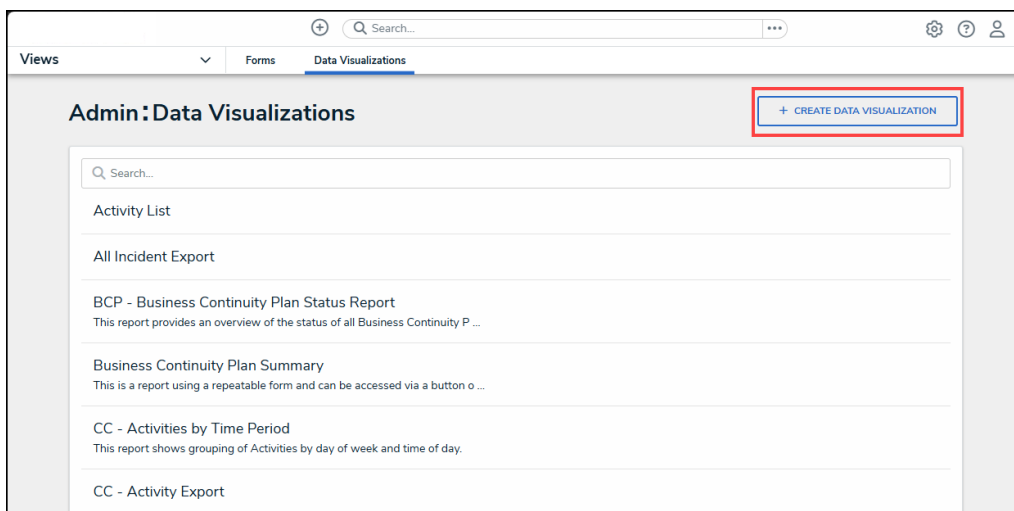
Administrator Settings Menu

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



Data Visualizations Tile

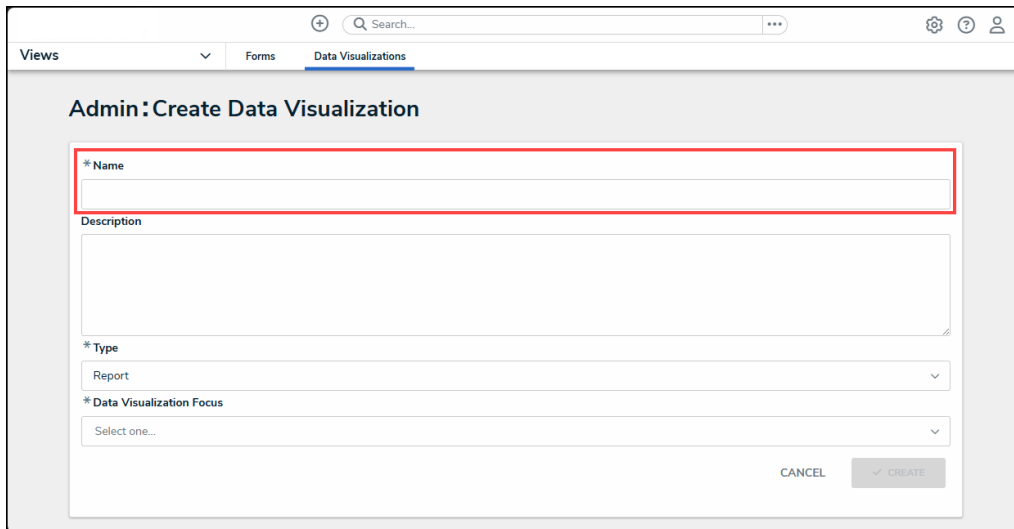
- From the **Admin: Data Visualizations** screen, click the **+ Create Data Visualizations** button.



Creating a Data Analytics Export Report

Ensure the data definition you wish to use for the data analytics report has been created from the [Data Definitions](#) settings in **Administration**.

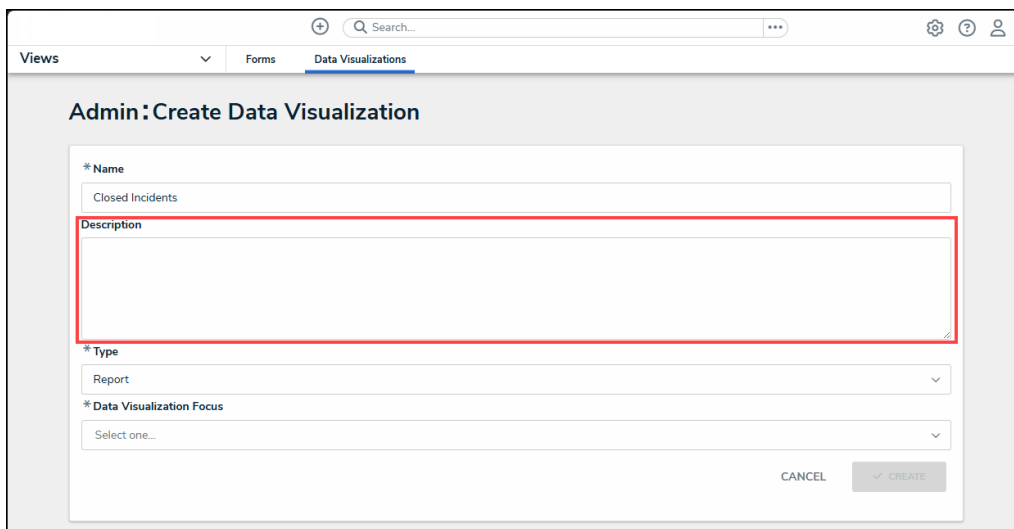
1. From the **Admin: Create Data Visualization** screen, enter a report name in the **Name** field. The name will represent the report throughout the system.



The screenshot shows the 'Admin: Create Data Visualization' form. The 'Name' field is highlighted with a red border. The form includes a search bar at the top, tabs for 'Views', 'Forms', and 'Data Visualizations', and a title 'Admin: Create Data Visualization'. The form fields are: '* Name' (text input), 'Description' (text area), '* Type' (dropdown menu with 'Report' selected), and '* Data Visualization Focus' (dropdown menu with 'Select one...' selected). At the bottom right are 'CANCEL' and 'CREATE' buttons.

Name Field

2. **(Optional)** Enter a brief description of the Data Analytics Export in the **Description** field. The description will appear below the Data Analytics Export's name on the **Admin: Data Visualization** screen.



The screenshot shows the 'Admin: Create Data Visualization' form. The 'Description' field is highlighted with a red border. The form includes a search bar at the top, tabs for 'Views', 'Forms', and 'Data Visualizations', and a title 'Admin: Create Data Visualization'. The form fields are: '* Name' (text input with 'Closed Incidents' entered), 'Description' (text area), '* Type' (dropdown menu with 'Report' selected), and '* Data Visualization Focus' (dropdown menu with 'Select one...' selected). At the bottom right are 'CANCEL' and 'CREATE' buttons.

Description Field

3. Click the **Type** field and select **Data Analytics Export** from the dropdown menu.

The screenshot shows the 'Admin: Create Data Visualization' form. At the top, there's a search bar and navigation tabs for 'Views', 'Forms', and 'Data Visualizations'. The form has three main sections: '* Name' with a text input containing 'Closed Incidents', 'Description' with a large text area, and '* Type' with a dropdown menu. The dropdown menu is open, showing three options: 'Report', 'Data Analytics Export' (which is highlighted), and 'Data Grid'.

Type Dropdown Menu

- Click the **Data Visualization Focus** field and select a focus from the dropdown menu. Enter the name of the focus in the **Data Visualization Focus** field to narrow the focus list. A Data Visualization Focus is a data definition that broadly specifies which object type's data will be displayed in a data visualization.

This screenshot shows the same form as the previous one, but with the '* Data Visualization Focus' dropdown menu open. The dropdown menu is highlighted with a red box and contains a long list of focus options. The first option is 'Incident', followed by a detailed list of focus definitions like 'Incident(Case; Contributing Factor; Evidence; Involved Item(Item; Item); Interview; Involved Item(Item; Item Evidence; Location; Item; Asset); Involved Location(Location); Involved Organization(Organization); Involved Person(Person; Person of Interest); Involved Vehicle(Vehicle); Narrative; Incident)'. Other options include 'Incident, Contributing Factor', 'Incident, Corrective Action', 'Incident, Evidence', 'Incident, Incident Link, Case, Attachment', 'Incident, Incident Type', 'Incident, Interview', and 'Incident, Involved Item (Items; (Items; Asset))'. The '* Name' field still contains 'Closed Incidents' and the '* Type' dropdown is set to 'Data Analytics Export'.

Data Visualization Focus Field

- Click the **Create** button to create the Data Visualization Export.

The screenshot shows the 'Admin: Create Data Visualization' form within the Resolver application. The form is titled 'Admin: Create Data Visualization' and is located under the 'Data Visualizations' tab. It contains several input fields: a text field for '* Name' with the value 'Closed Incidents', a text area for 'Description', a dropdown menu for '* Type' with the value 'Data Analytics Export', and another dropdown menu for '* Data Visualization Focus' with the value 'Incident'. At the bottom right of the form, there are two buttons: 'CANCEL' and '✓ CREATE'. The '✓ CREATE' button is highlighted with a red rectangle.

Create Button

6. The **Admin: Edit Report** screen will appear. Once the export report has been created, you can grant end users access to it by adding it to a [View](#), [Action](#), or [Export Data](#) form action.

The screenshot shows the 'Admin: Edit Report' screen within the Resolver application. The screen is titled 'Admin: Edit Report' and is located under the 'Data Visualizations' tab. It displays a report titled 'Closed Incidents' with a 'Report Focus: Incident', 'Anchor: Incident', and 'Data: Incident'. At the bottom right of the screen, there are two buttons: a red button with a white icon and a '✓ DONE' button.

Admin: Edit Report Screen