

Create a New Data Grid

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

Overview

Administrators and Data Management advanced permissions users can create a new Data Grid. A Data Grid is a data visualization that displays object data in a spreadsheet-style format.

You can create custom data grids for the currently logged in user (e.g. My Incidents or My Risks) by applying the **Current User** parameter to the data grid element. See step 24 below for more information.

User Account Requirements

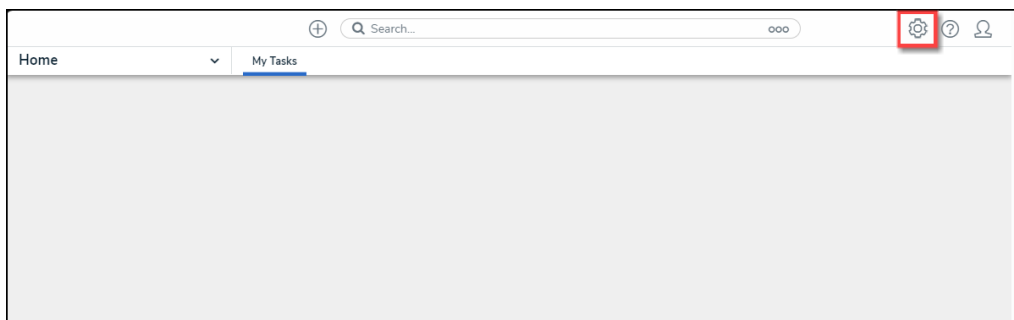
The user account used to log into Resolver must have Administrator permission or Data Management advanced permissions to create a Data Grid.

Related Information/Setup

Please refer to the [Create a Date Grid View](#) article for more information on creating a Data Grid View.

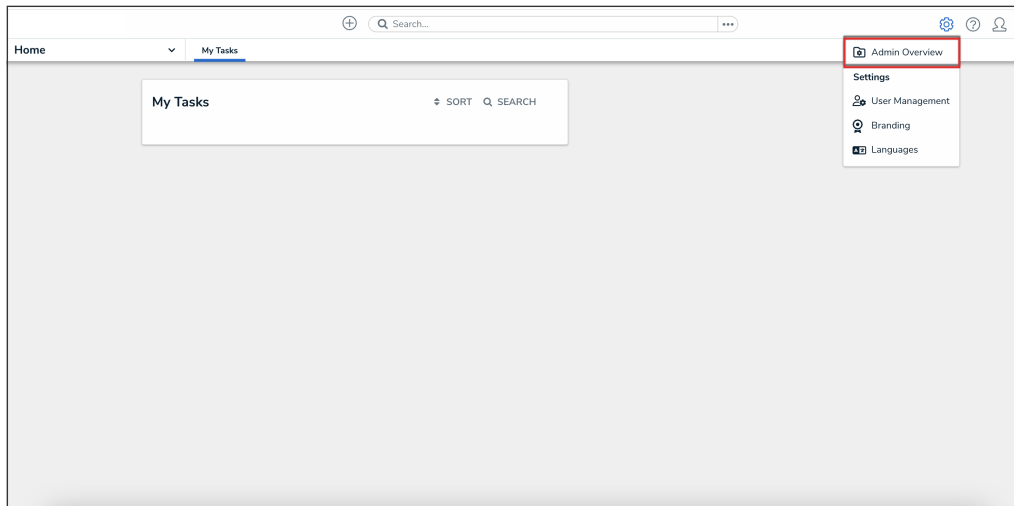
Navigation

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



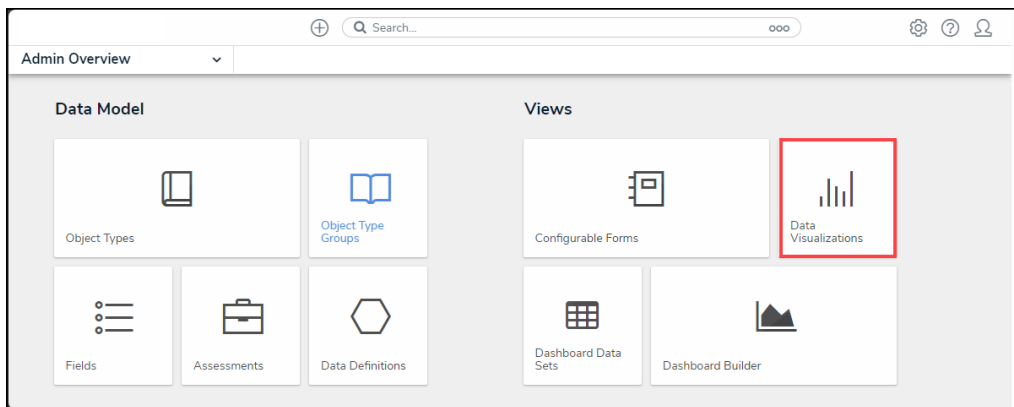
Administration Icon

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



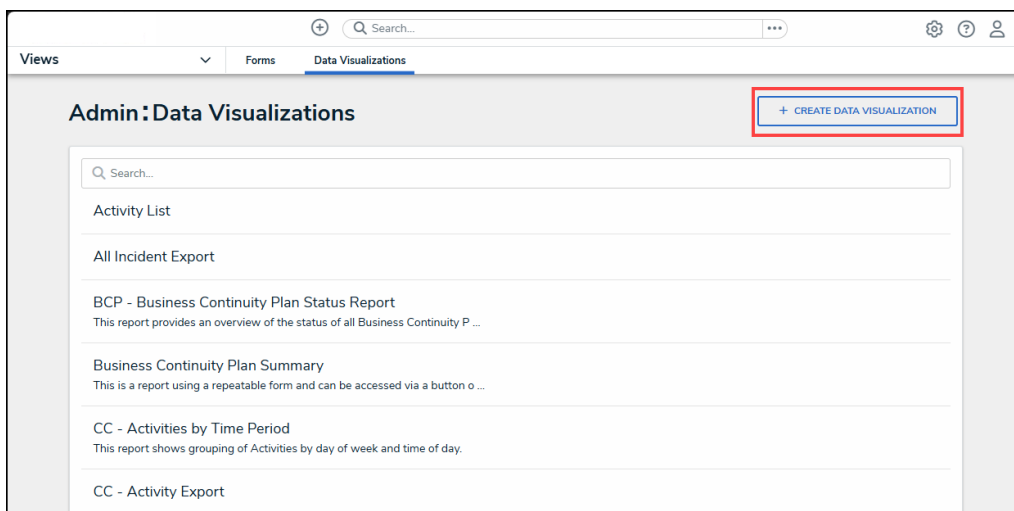
Administrator Settings Menu

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



Data Visualizations Tile

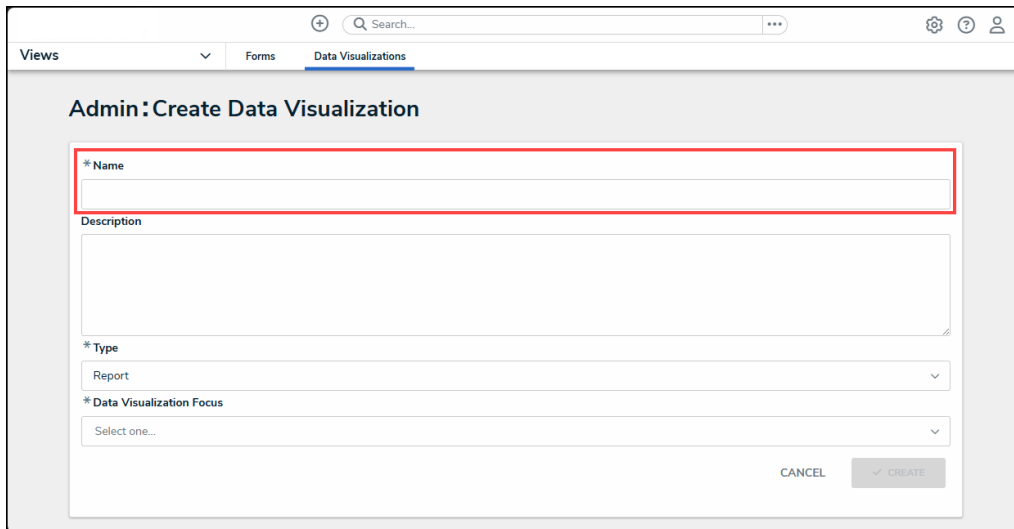
- From the **Admin: Data Visualizations** screen, click the **+ Create Data Visualizations** button.



Creating a New Data Grid

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

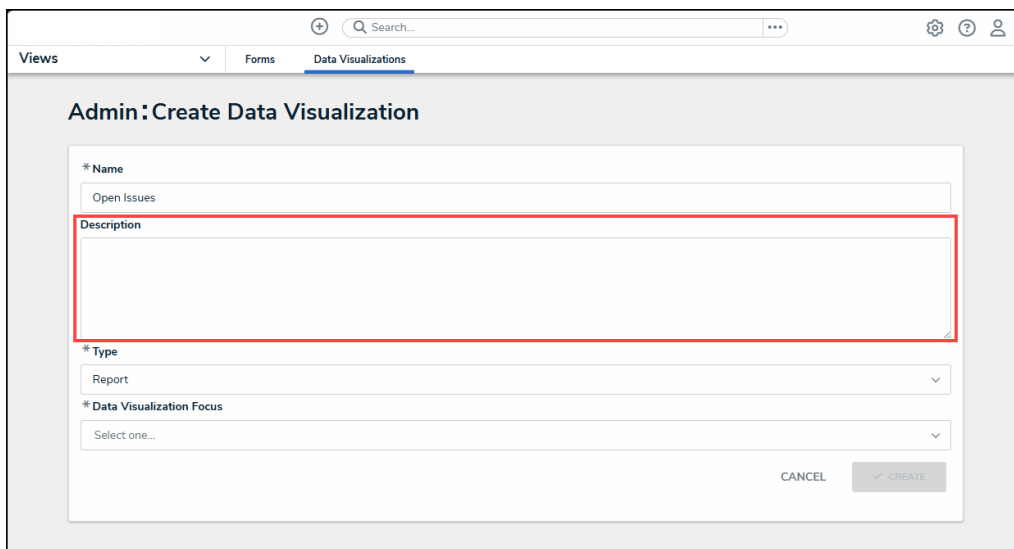
1. From the **Admin: Create Data Visualization** screen, enter a Data Grid Name in the **Name** field. The name will represent the Data Grid throughout the system.



The screenshot shows the 'Admin: Create Data Visualization' form. The form has a header bar with 'Views', 'Forms', and 'Data Visualizations' tabs. Below the header, the title 'Admin: Create Data Visualization' is displayed. The form contains several fields: a text field for '* Name' (highlighted with a red border), a text area for 'Description', a dropdown for '* Type' with 'Report' selected, and a dropdown for '* Data Visualization Focus' with 'Select one...' selected. At the bottom right, there are 'CANCEL' and 'CREATE' buttons.

Name Field

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



The screenshot shows the 'Admin: Create Data Visualization' form. The form has a header bar with 'Views', 'Forms', and 'Data Visualizations' tabs. Below the header, the title 'Admin: Create Data Visualization' is displayed. The form contains several fields: a text field for '* Name' with 'Open Issues' entered, a text area for 'Description' (highlighted with a red border), a dropdown for '* Type' with 'Report' selected, and a dropdown for '* Data Visualization Focus' with 'Select one...' selected. At the bottom right, there are 'CANCEL' and 'CREATE' buttons.

Description Field

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

The screenshot shows the 'Admin: Create Data Visualization' form. The 'Name' field contains 'Open Issues'. The 'Description' field contains 'A Data Grid displaying current open Issues,'. The 'Type' dropdown menu is open, showing three options: 'Report', 'Data Analytics Export', and 'Data Grid'. The 'Data Grid' option is highlighted.

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. Users can select more than one focus in the **Data Visualization Focus** field. A Data Visualization Focus is a data definition that broadly specifies which object type's data will be displayed in a data visualization.

The screenshot shows the 'Admin: Create Data Visualization' form. The 'Name' field contains 'Open Issues'. The 'Description' field contains 'A Data Grid displaying current open Issues,'. The 'Type' dropdown menu is open, showing 'Data Grid'. The 'Data Visualization Focus' dropdown menu is open, showing a list of focus options. The 'Issues, Requirements, Sub Topics, Topics' option is highlighted.

Data Visualization Focus Field

- Click the **Create** button to create the Data Grid.

Admin: Create Data Visualization

* Name
Open Issues

Description
A Data Grid displaying current open Issues,

* Type
Data Grid

* Data Visualization Focus
Issues

CANCEL CREATE

Create Button

- From the **Admin: Edit Data Grid** screen, on the **Elements** section, click the **Expand** icon next to **Display**.

Admin: Edit Data Grid

Open Issues
A Data Grid displaying current open issues.

Data Grid Focus: Issues Anchor: Issue Data: Issue
+ ADD ANOTHER DATA GRID FOCUS

Filters
▼ CONFIGURE FILTERS

Parameters
▼ CONFIGURE PARAMETERS

Elements

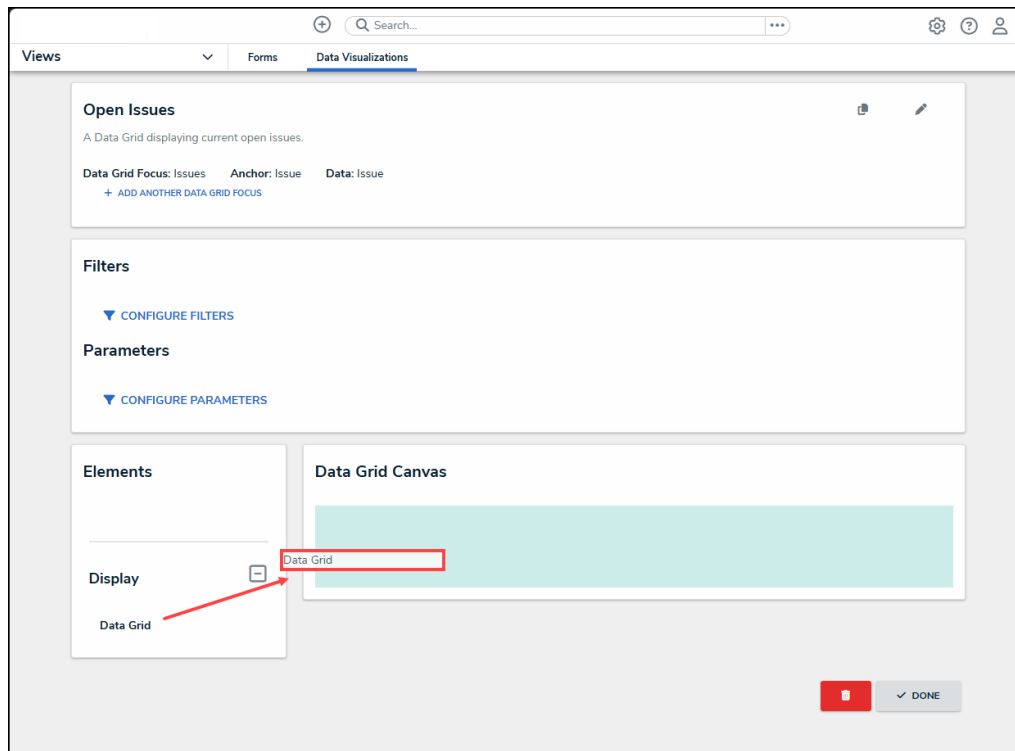
Display

Data Grid Canvas

DONE CANCEL

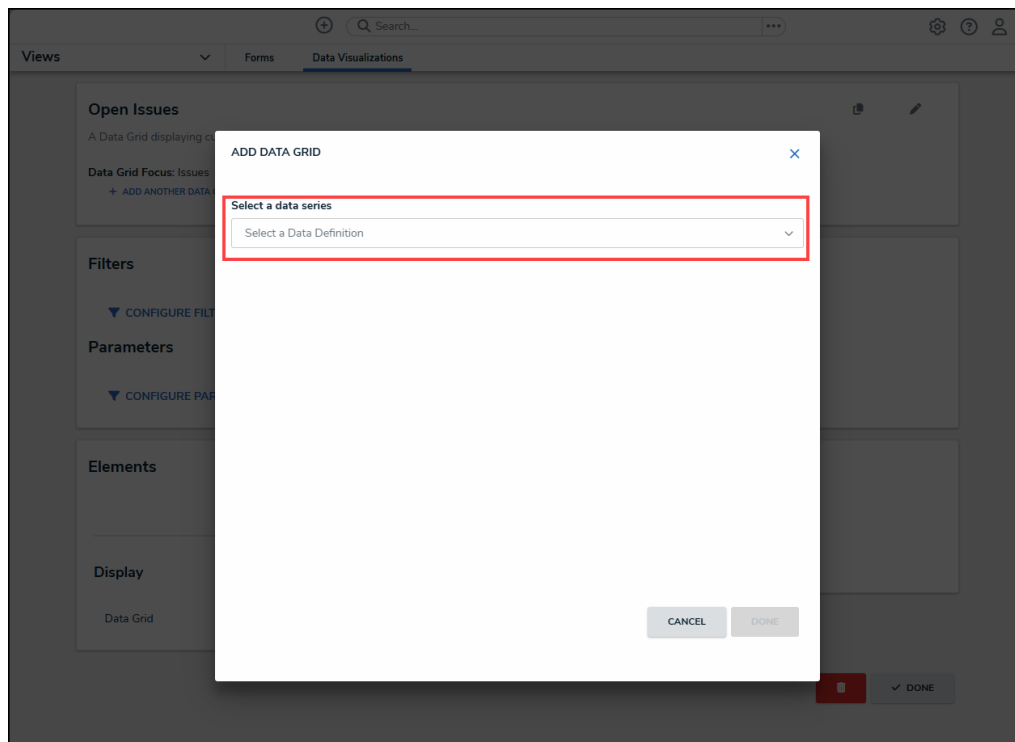
Expand Icon

- Drag and drop the **Data Grid** link from the **Elements** section to the **Data Grid Canvas**.



Drag and Drop Data Grid Link

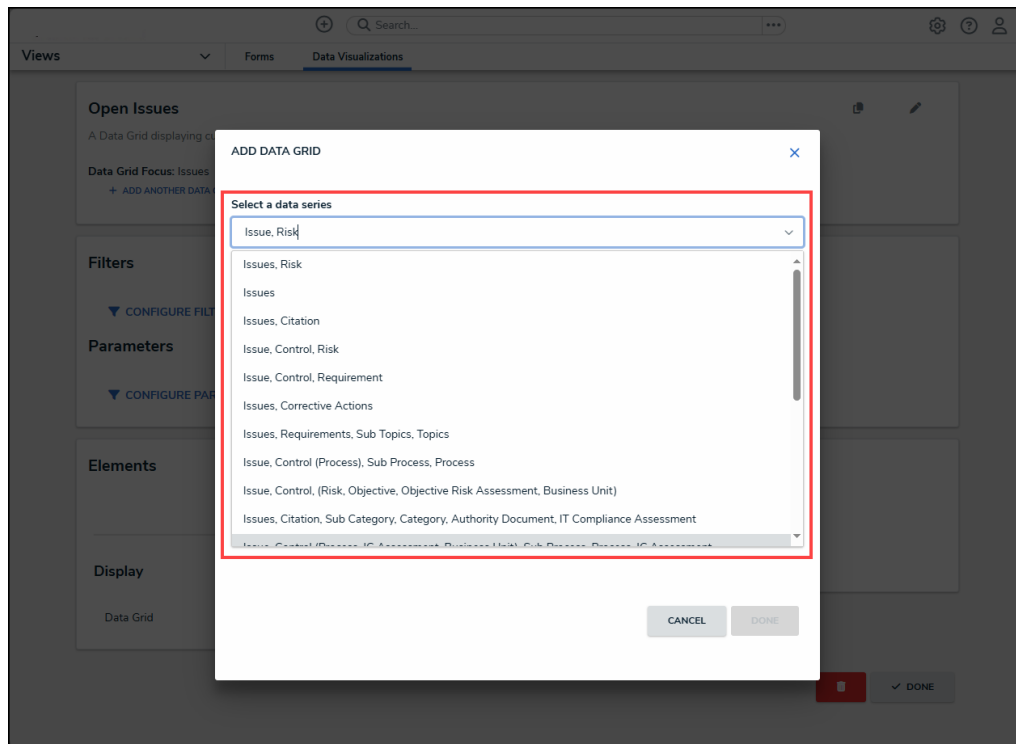
- From the **Add Data Grid** screen, enter a data definition name in the **Select a Data Series** field to narrow the list.



Select a Data Series Field

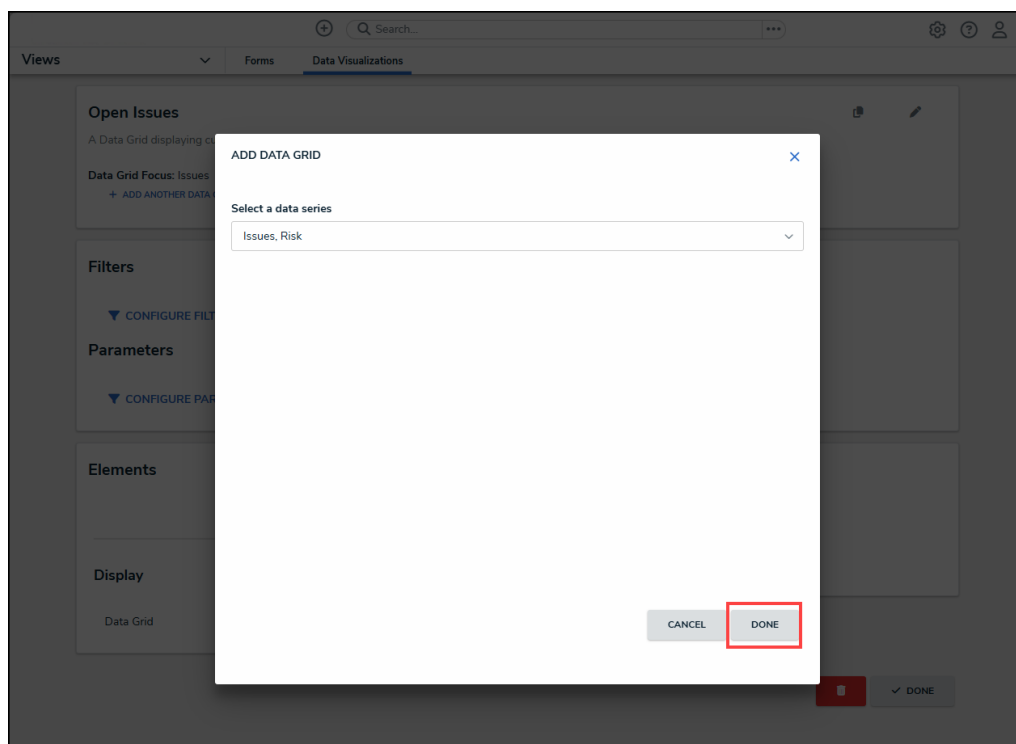
- Select a data definition from the **Select a Data Series** field dropdown menu. The data

definition selected here will determine the object data you can display in the Data Grid.



Select a Data Series Field Dropdown Menu

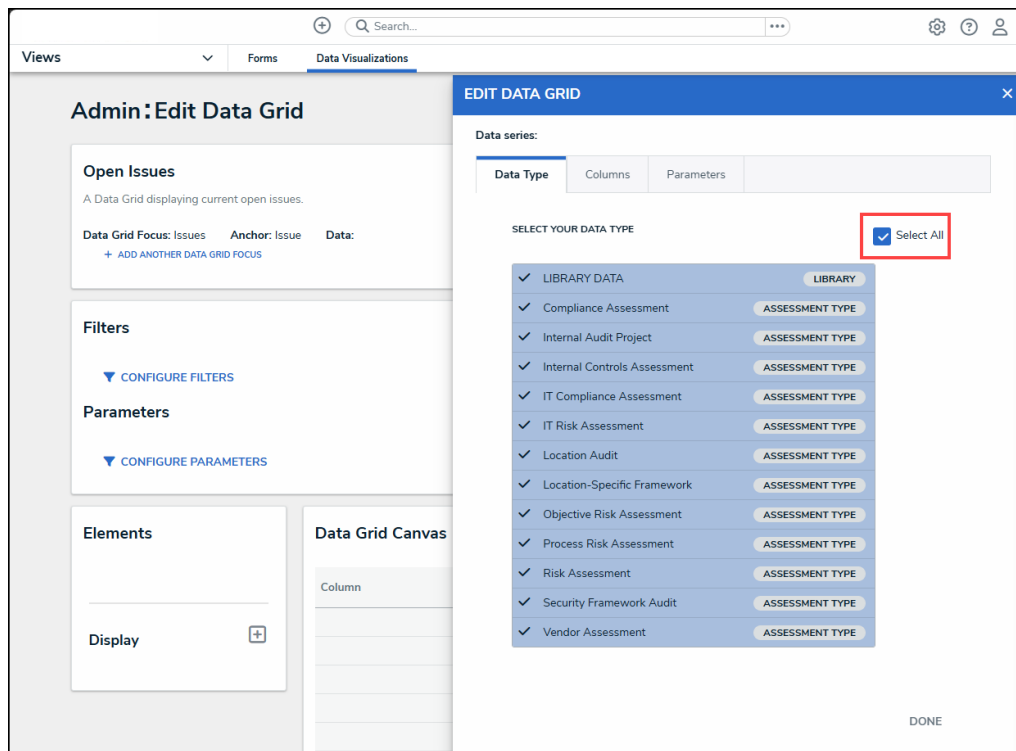
10. Click the **Done** button.



Done Button

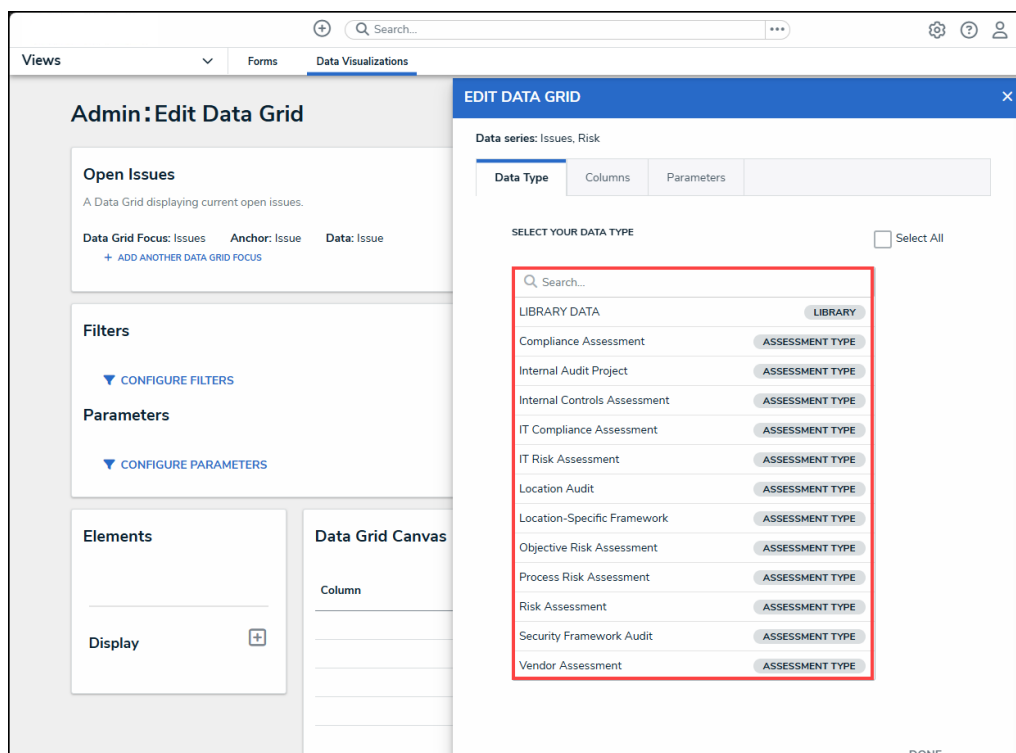
11. From the **Data type** tab on the **Edit Data Grid** pop-up, by default, the **Select All**

checkbox is selected, which will include all data types on the Data Grid. To select individual data types, deselect the **Select All** checkbox and click on the data types you want to appear on the Data Grid.



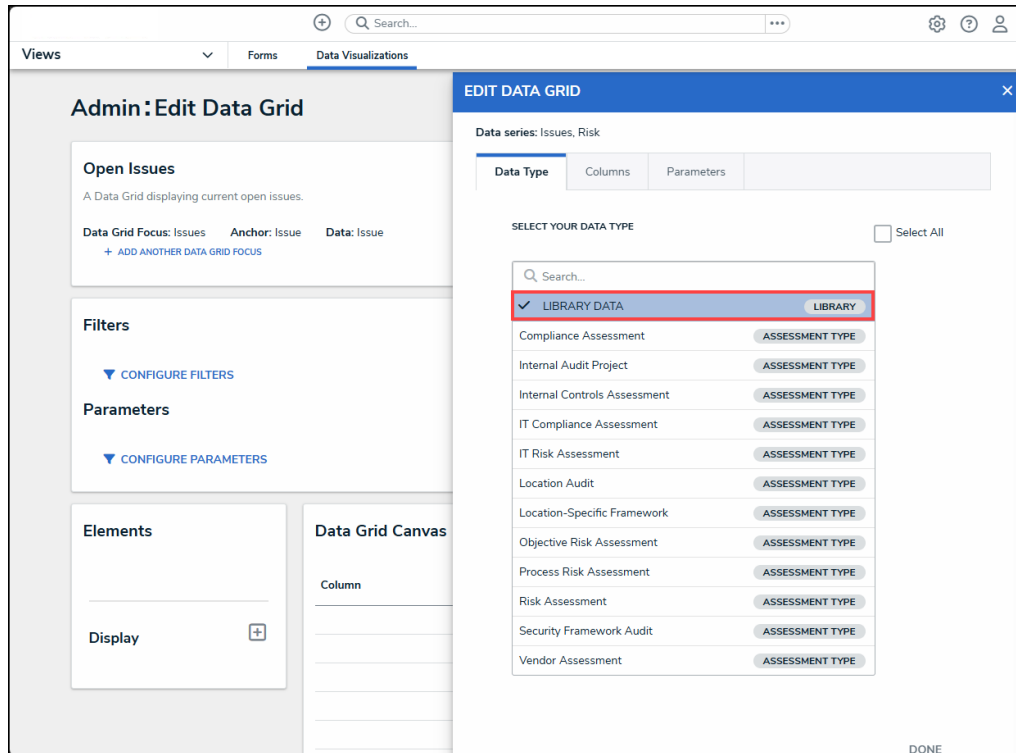
Select All Checkbox

- Choose the **Data Types** that will appear on the Data Grid from the **Select Your Data Type** field.



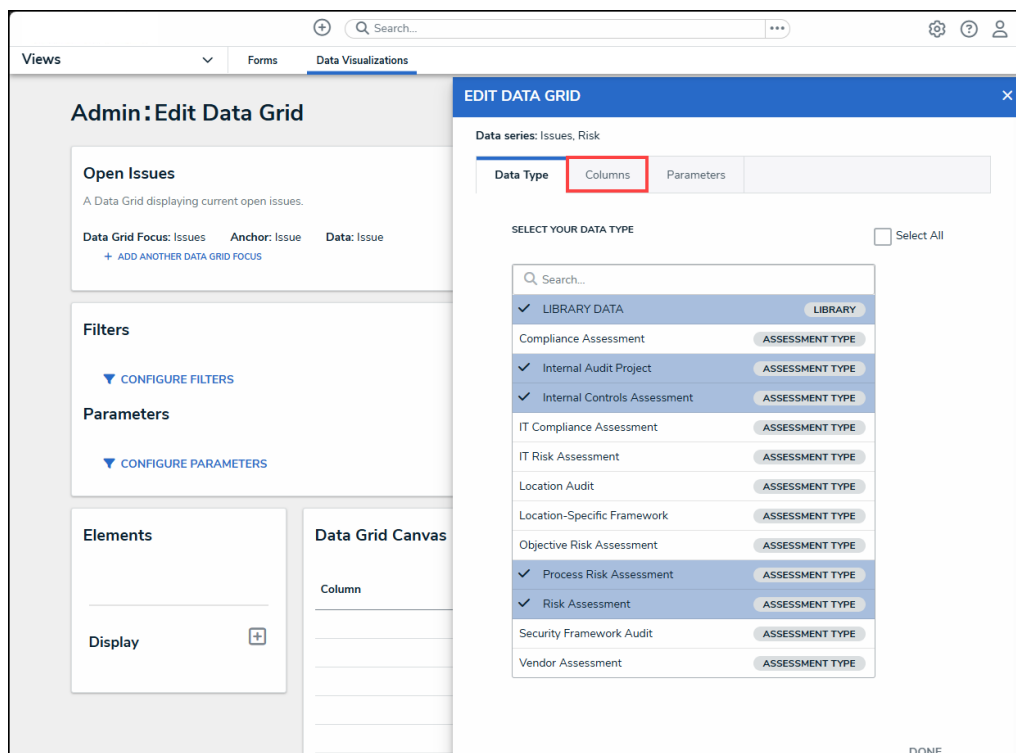
Select Your Data Type Field

13. Select **Library Data** from the **Select Your Data Type** field to also include object type data on the Data Grid.



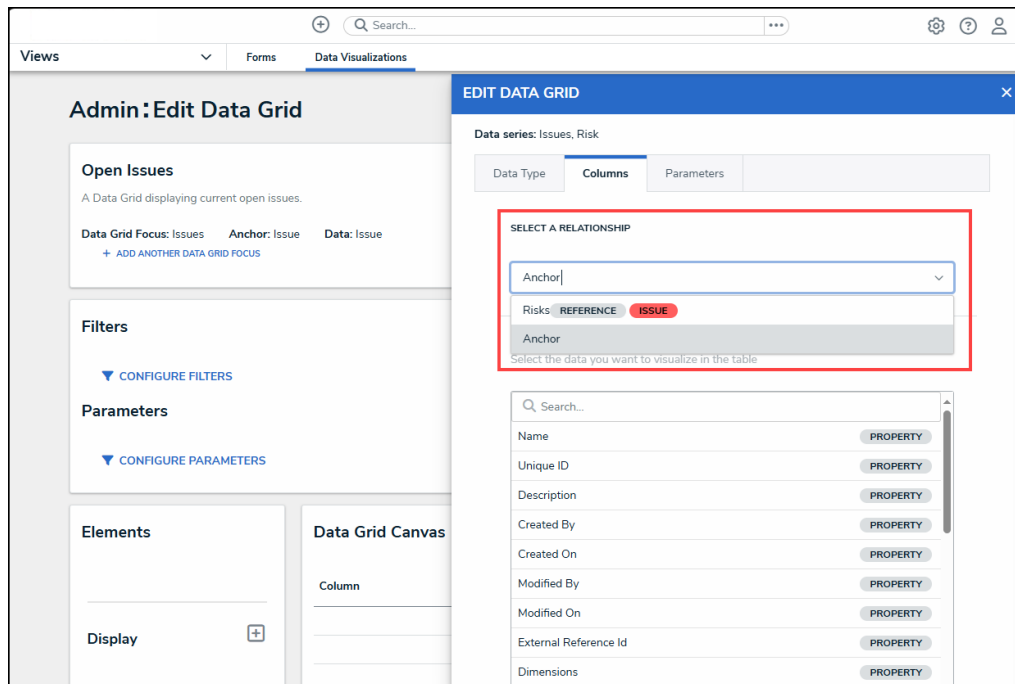
Library Data

14. Click the **Columns** tab.



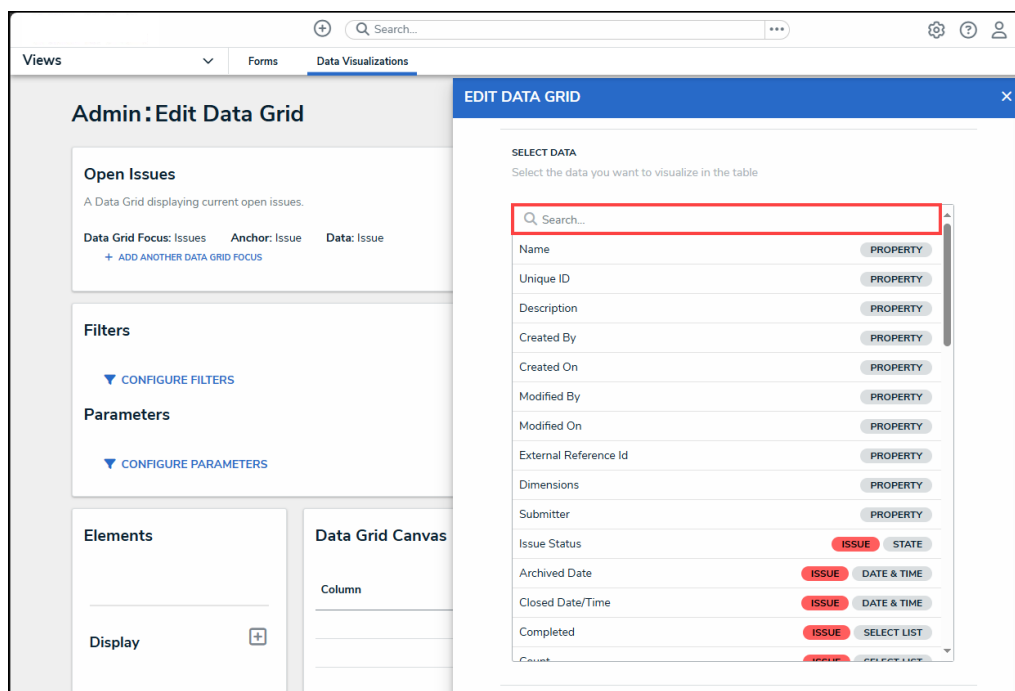
Columns Tab

- From the **Columns** tab, select a **Relationship** from the **Select a Relationship** field dropdown menu. Users can choose either the Data Grid Anchor or an Object Type in the data path. The options in the **Select a Relationship** dropdown menu will vary depending on the data series selected.



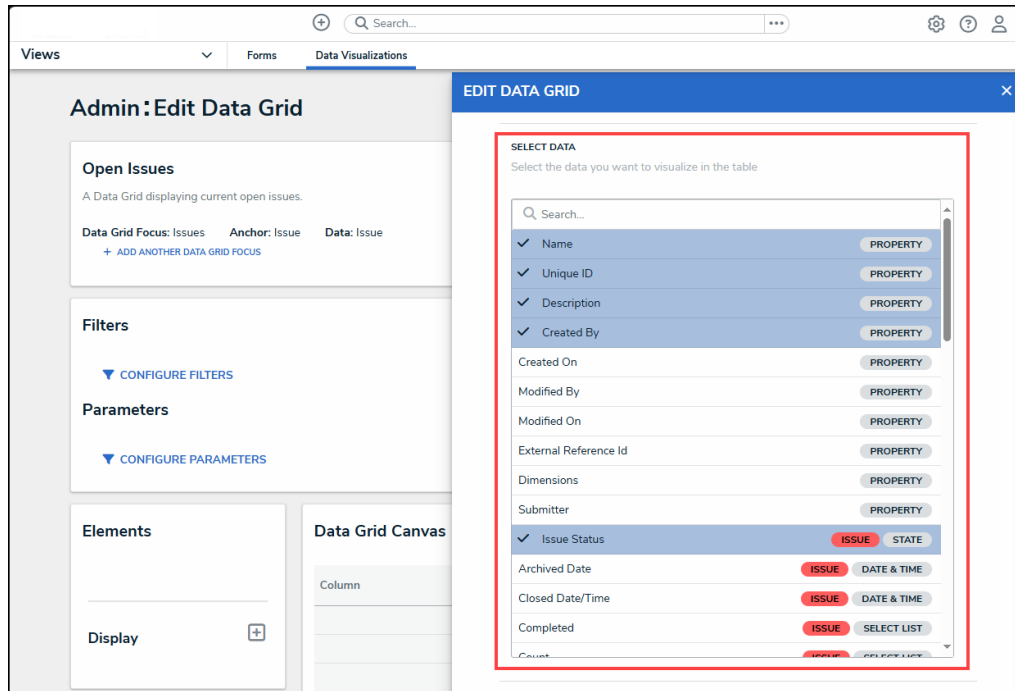
Select a Relationship

- (Optional)** Click the **Search** field to narrow the search results on the **Select Data** list.



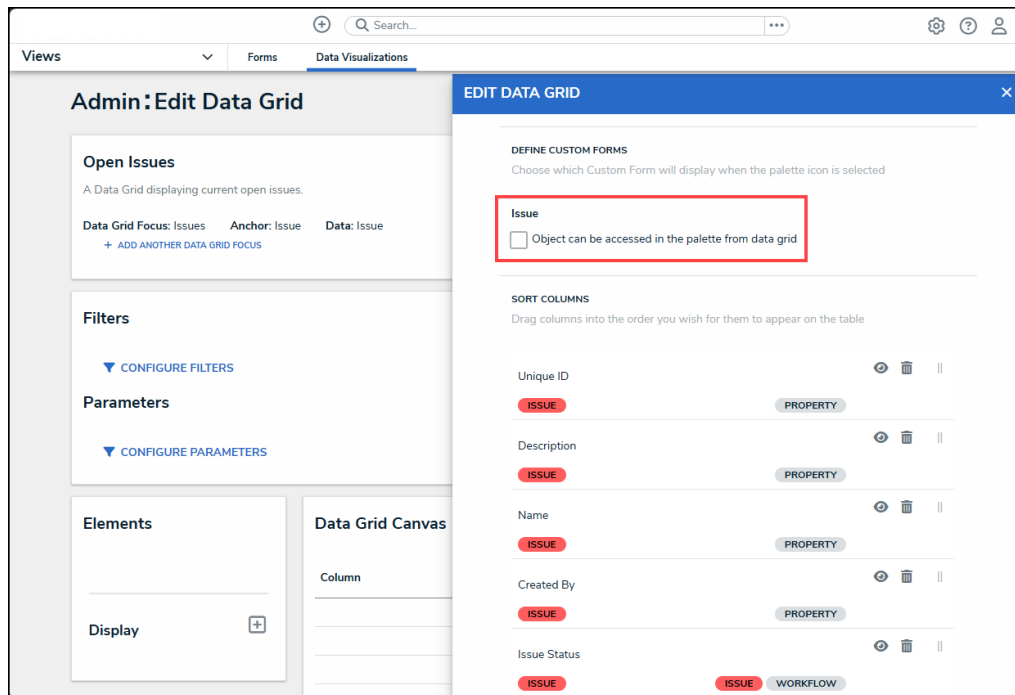
Search Field

- Click on the **Data Columns** to select the columns that will appear on the Data Grid (e.g., properties, workflow states, fields, formulas, relationships) from the **Select Data** list.



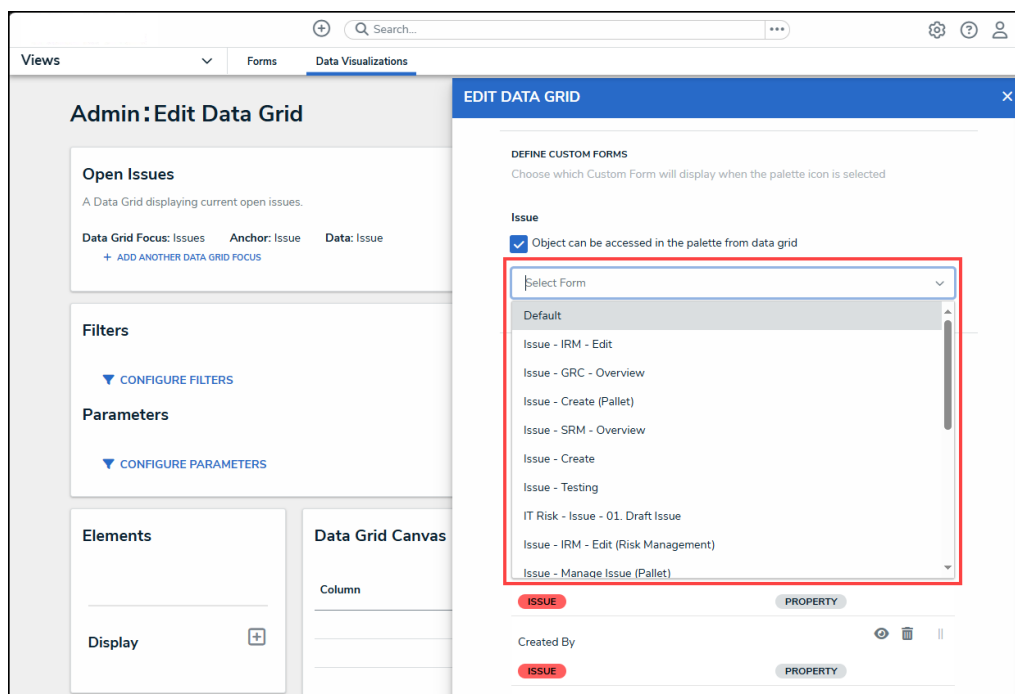
Select Data List

- From the **Define Custom Forms** section, select the **Object can be accessed in the palette from data grid** checkbox to enable an icon that appears when hovering a cursor over the **Name** column in the Data Grid. Clicking the icon displays the object in a pop-up. Users will not be able to view objects in a pop-up if the **Name** property isn't displayed in the data grid.



Object can be Accessed in the Palette from Data Grid Checkbox

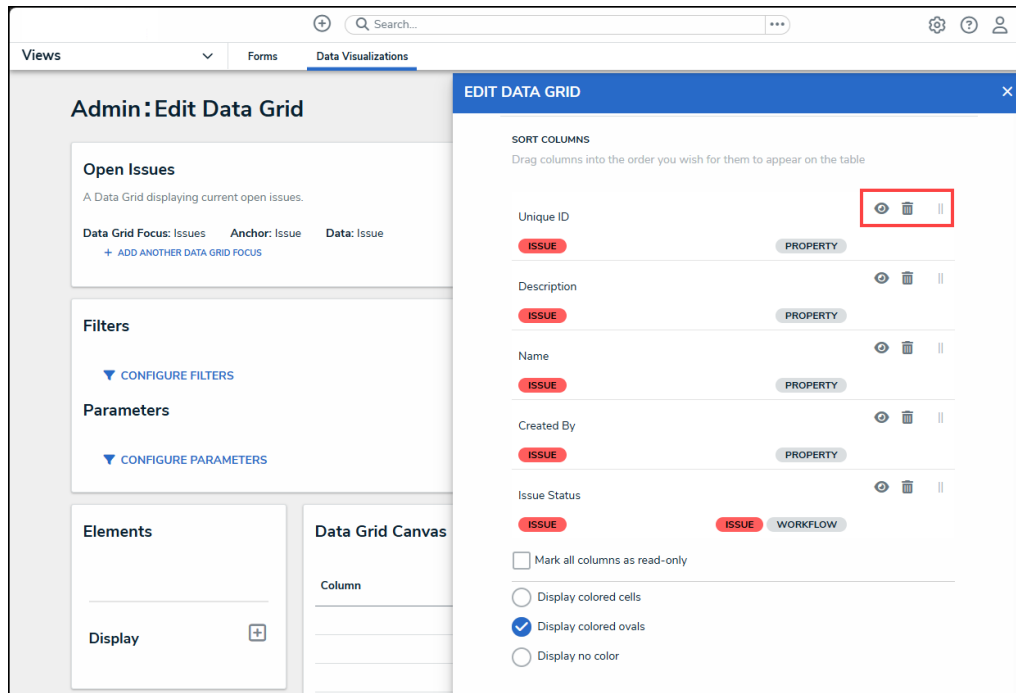
19. If you selected the **Object can be accessed in the palette from data grid** checkbox the **Select Form** dropdown menu will appear. Select a form from the dropdown menu to choose which form is displayed when the user clicks the palette icon.



Select Form Dropdown Menu

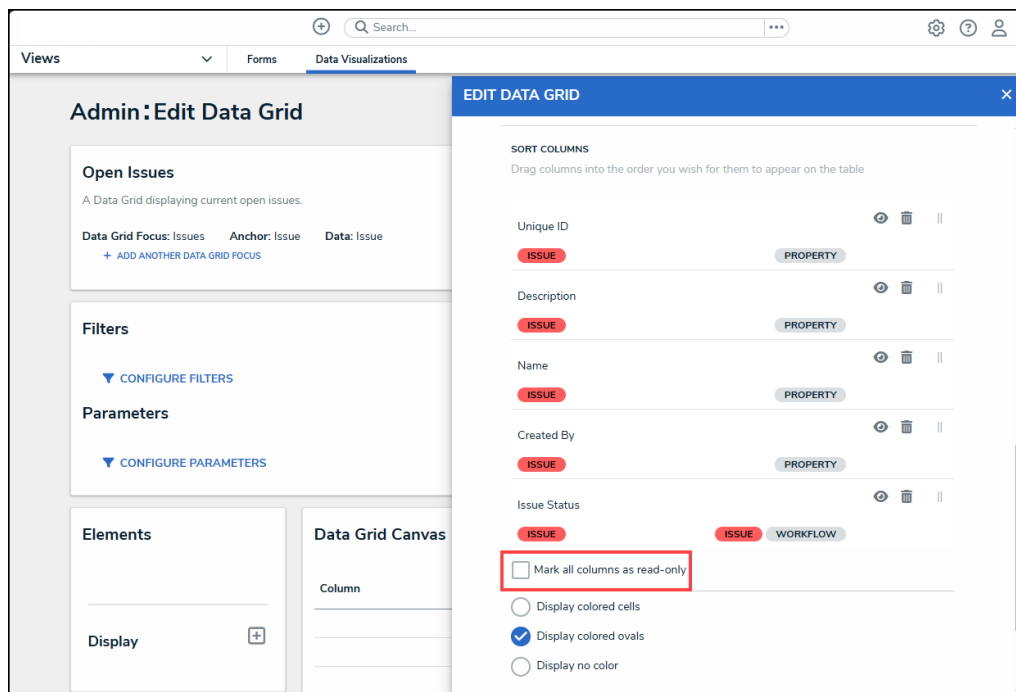
20. From the **Sort Columns** section, users can perform the following actions:
- **(Optional)** Click the **Read Only** Icon to prevent users from editing a Data Grid cell.

- **(Optional)** Click the **Delete** icon to remove a column from the Data Grid.
- **(Optional)** Click the **Move** icon to rearrange the columns on the Data Grid.



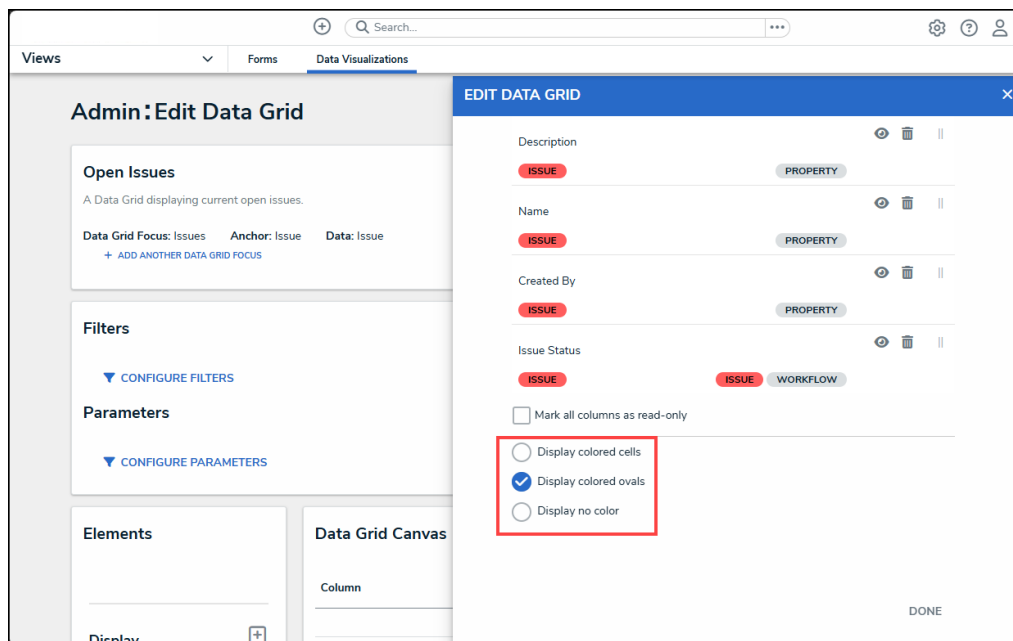
Sort Columns Options

21. **(Optional)** Click the **Mark all columns as read-only** checkbox to automatically mark all Data Grid columns as read-only, preventing users from editing a Data Grid cell.



Mark all columns as read-only Checkbox

22. **(Optional)** Select a **Display** option radio button.



Display Options Radio Buttons

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

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
Page 1 of 1 10 Rows 20 per page					

Display Colored Cells

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

Risk Register					
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
Page 1 of 1 10 Rows 20 per page					

Display Colored Ovals

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

Risk Register					
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
Page 1 of 1 10 Rows 20 per page					

Display No Color

26. Click the **Parameters** tab.

Views

Forms

Data Visualizations

Admin: Edit Data Grid

Open Issues

A Data Grid displaying current open issues.

Data Grid Focus: Issues Anchor: Issue Data: Issue

+ ADD ANOTHER DATA GRID FOCUS

Filters

▼ CONFIGURE FILTERS

Parameters

▼ CONFIGURE PARAMETERS

Elements

Display: +

Data Grid Canvas

Column

--

EDIT DATA GRID

Data series: Issues, Risk

Data Type

Columns

Parameters

SELECT A RELATIONSHIP

Anchor

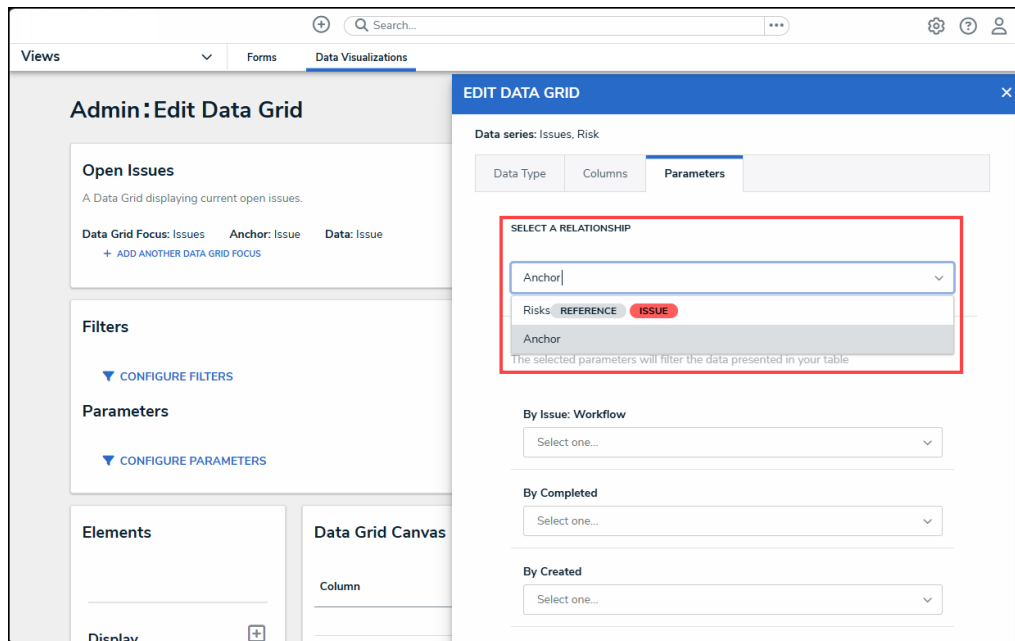
SELECT DATA

Select the data you want to visualize in the table

✓ Description	PROPERTY
✓ Created By	PROPERTY
Created On	PROPERTY
Modified By	PROPERTY
Modified On	PROPERTY
External Reference Id	PROPERTY
Dimensions	PROPERTY
Submitter	PROPERTY

Parameters Tab

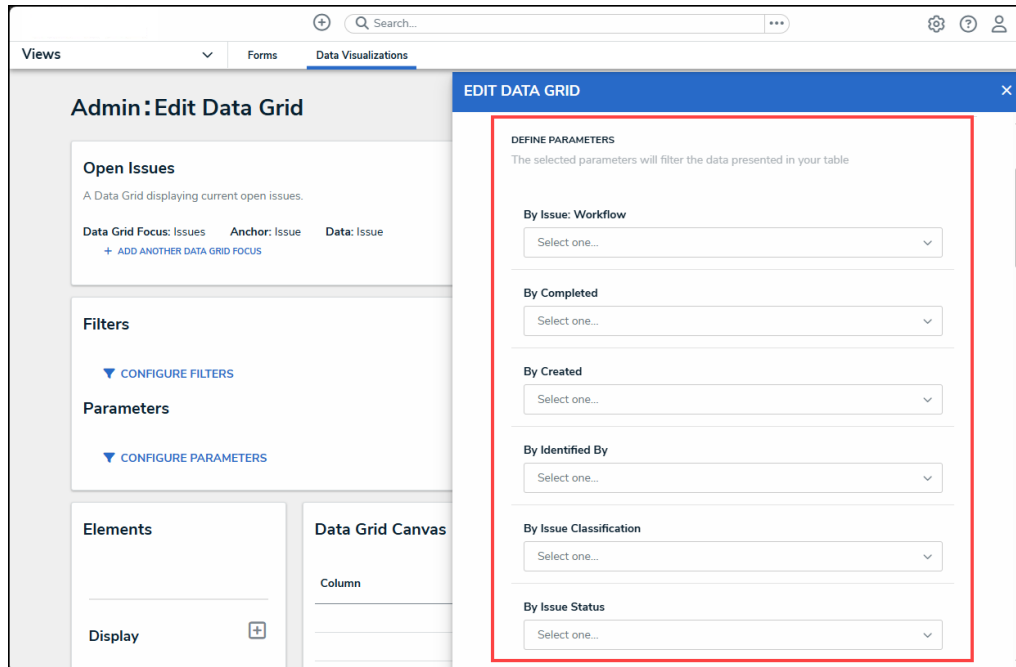
27. From the **Parameters** tab, select a Relationship from the **Select a Relationship** dropdown menu. The relationship selected here will determine which parameters (filters) you can apply to the Data Grid to refine the data that's displayed. If needed, you can select a relationship that differs from the relationship selected in the **Columns** tab.



Select a Relationship Dropdown Menu

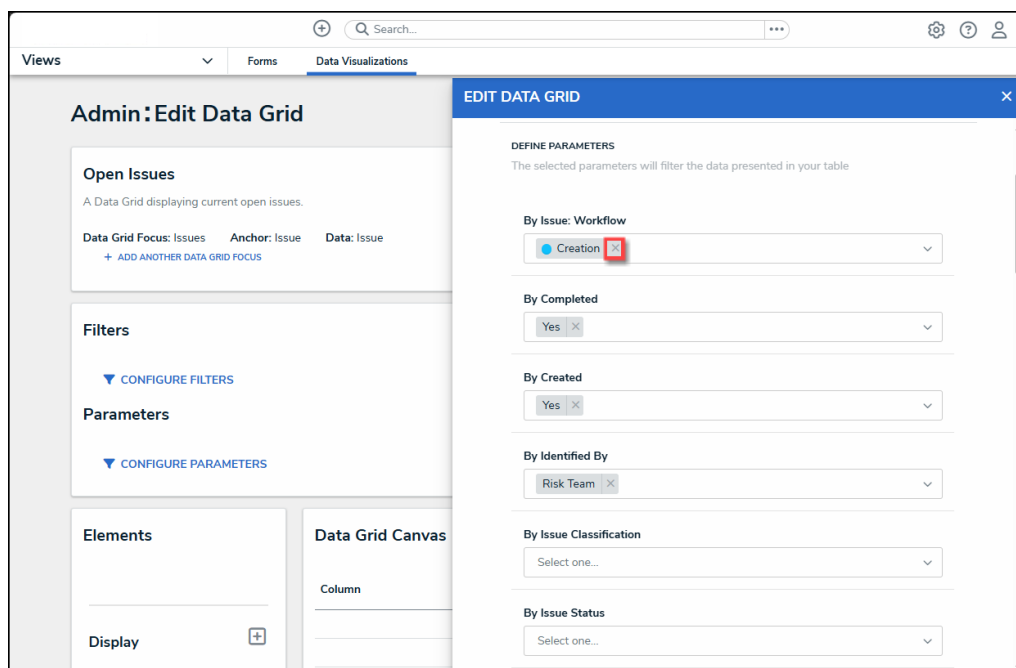
28. From the **Define Parameters** section, select one or more parameters to filter the data displayed in the Data Grid. Parameter options include:
- [Workflow states](#)
 - [Select list](#) options
 - [Formula](#) ranges (e.g. High, Medium, Low)
 - [Current User](#). When one or more roles are selected in this parameter, only users within those roles can view the data in the grid. This feature is useful to create customized data grids for specific users. The available roles are determined by the object types in the table's [data series](#)
 - [Date & Time Field](#) or [Created On/Modified On](#) properties. Selecting a range in the **By [Date Field]** dropdown menu will filter the data relative to the value selected in the [Date & Time](#) field on the objects. Selecting a range in the **By Created On ([Object Type Name])** or **By Modified On ([Object Type Name])** dropdown menus will filter the data relative to the date the objects were created or modified. All date-related options filter data in UTC time. It's recommended a date parameter is used to refine large data sets for improved report performance. Options include:
 - **Today:** Show data from today's date only.

- **Last [X] Days:** Show data within the last 30, 60, 90, or 180 days, relative to today's date.
- **Custom:** Shows data within the dates selected in the **From** and **To** fields. The table will include objects up to the end of that date.



Define Parameters Section

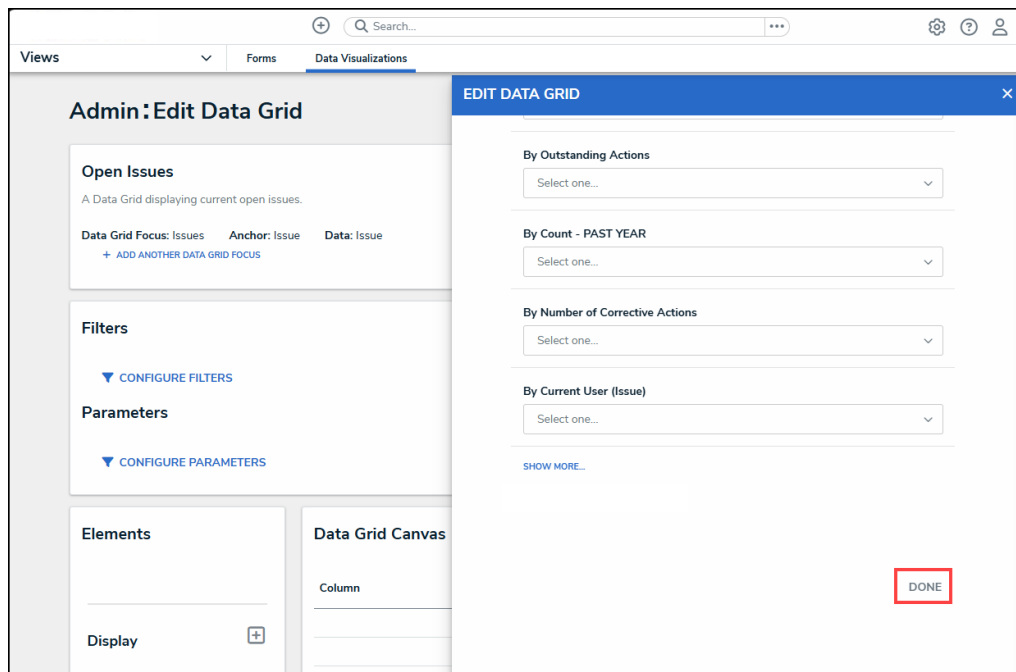
29. Click the **X** icon next to a parameter to delete it from the field.



X Icon

30. Click the **Done** button to close the **Edit Data Grid** pop-up. To add another Data Grid, you

must create a new Data Grid, only one Data Grid can be added per Data Grid.



Done Button

30. Once a grid is successfully created and configured, it must be added to a view in an activity. See the [Create a Data Grid View](#) article for more information.