

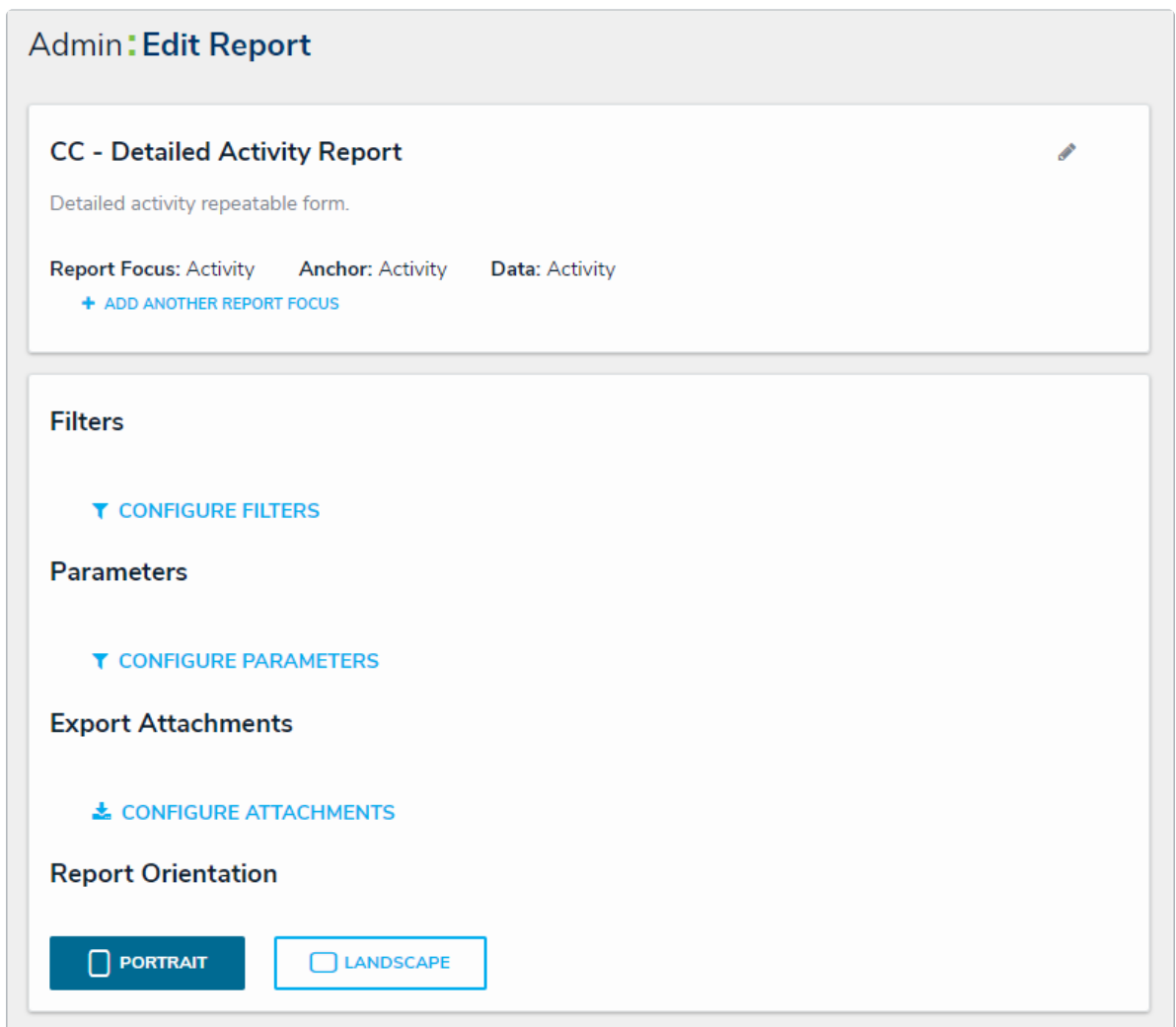
Configure Export Attachments

Last Modified on 10/06/2021 3:23 pm EDT

Attachments are the data series, fields, and relationships of a report that users can export. To ensure that only the most relevant information is exported, administrators can determine which elements of the report can become attachments.

To configure a report's export attachments:

1. Click the  icon in the top bar > **Data Visualizations** in the **Views** section.
2. Click the report you wish to configure the exports for or enter its name in the **Search** field, then click it to open the **Edit Report** page.



The screenshot shows the 'Admin: Edit Report' interface. At the top, it says 'Admin: Edit Report'. Below this is a section for the report 'CC - Detailed Activity Report', which is described as 'Detailed activity repeatable form.' It shows 'Report Focus: Activity', 'Anchor: Activity', and 'Data: Activity', with a link to '+ ADD ANOTHER REPORT FOCUS'. Below this are sections for 'Filters' (with a 'CONFIGURE FILTERS' link), 'Parameters' (with a 'CONFIGURE PARAMETERS' link), 'Export Attachments' (with a 'CONFIGURE ATTACHMENTS' link), and 'Report Orientation' (with 'PORTRAIT' and 'LANDSCAPE' options). The 'PORTRAIT' option is currently selected.

The Admin: Edit Report page.

3. Click **Configure Attachments** under **Export Attachments** to open the **Add Attachment Export** palette.

ADD ATTACHMENT EXPORT ✕

Select a data series

Select a Data Definition

- Activity
- Activity, Activity Type, Activity, Officer Response, Activity
- Activity, Activity Type
- Activity, Incident
- Activity (Activity Type; Business Unit)
- Activity (Involved Organization; Involved Person; Involved Vehicle; Involved Item; Incident)

CANCEL **DONE**

The Add Attachment Export palette.

4. Select the data series the exports will be coming from in the **Select a data series** field.
5. Click **Done**.
6. Click **Configure Attachments** again to open the **Edit Attachment Export** palette.
7. In the **Data Type** tab, select the type of data you wish to include in the export. All data types are selected by default.

EDIT ATTACHMENT EXPORT

Data series: Activity, Activity Type, Activity, Officer Response, Activity

RESET DATA

Data Type

Configuration

Parameters

SELECT YOUR DATA TYPE

☒ Select All

✓ LIBRARY DATA	LIBRARY
✓ Compliance Assessment	ASSESSMENT TYPE
✓ Internal Audit Project	ASSESSMENT TYPE
✓ Internal Controls Assessment	ASSESSMENT TYPE
✓ IT Compliance Assessment	ASSESSMENT TYPE
✓ IT Risk Assessment	ASSESSMENT TYPE
✓ Location-Specific Framework	ASSESSMENT TYPE
✓ Objective Risk Assessment	ASSESSMENT TYPE
✓ Process Risk Assessment	ASSESSMENT TYPE
✓ Risk Assessment	ASSESSMENT TYPE
✓ Security Framework Audit	ASSESSMENT TYPE
✓ Vendor Assessment	ASSESSMENT TYPE

DONE

The Data Type tab.

8. In the **Configuration** tab:

- Choose the relationship from the **Select a Relationship** select list.
- Begin typing the name of the field you wish to add to the export in the **Select Fields** field and select it to add it to the export. More than one field can be added.

EDIT ATTACHMENT EXPORT

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Data series: Activity, Activity Type, Activity, Officer Response, Activity

RESET DATA

Data Type

Configuration

Parameters

SELECT A RELATIONSHIP

Anchor

▼

SELECT FIELDS

Select the fields you want to include in the export

Q Search...

DONE

The Configuration tab.

9. In the **Parameters** tab, select how the information in the export will be filtered with any of the select lists in the **Define Parameters** section.

EDIT ATTACHMENT EXPORT

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Data series: Activity, Activity Type, Activity, Officer Response, Activity

RESET DATA

Data Type

Configuration

Parameters

SELECT A RELATIONSHIP

Anchor

DEFINE PARAMETERS

The selected parameters will filter the data presented in your table

By Activity: Workflow

Select one...

By Activity Call Source

Select one...

By Activity Disposition

Select one...

By Activity Report Required

Select one...

By Count

Select one...

The Parameters tab.

10. Click **Done**.