

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

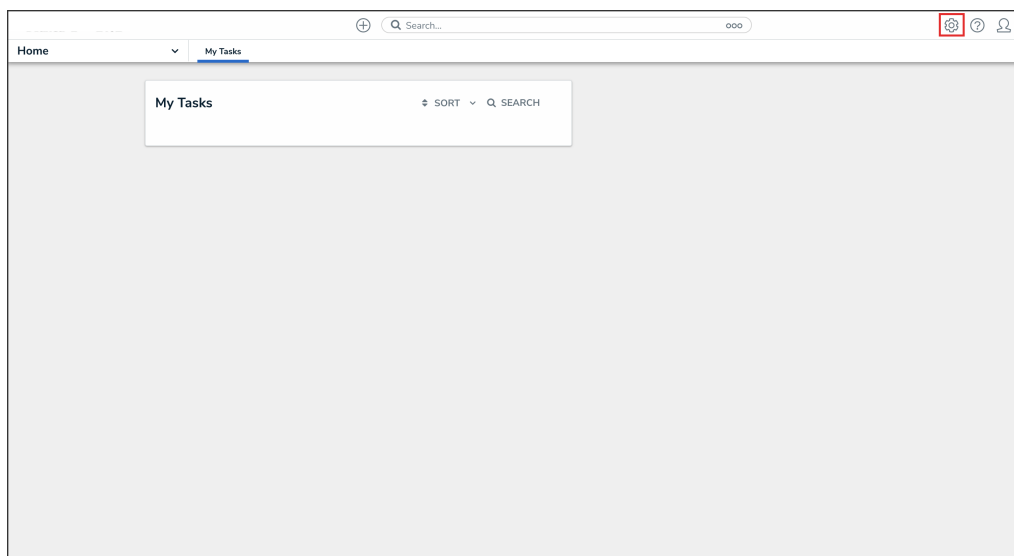
The user account you use to log into Resolver must have Administrator permissions to access Data Visualizations.

Related Information/Setup

Please see the [Create a Pie Chart](#) article for more information on creating a pie chart on a report.

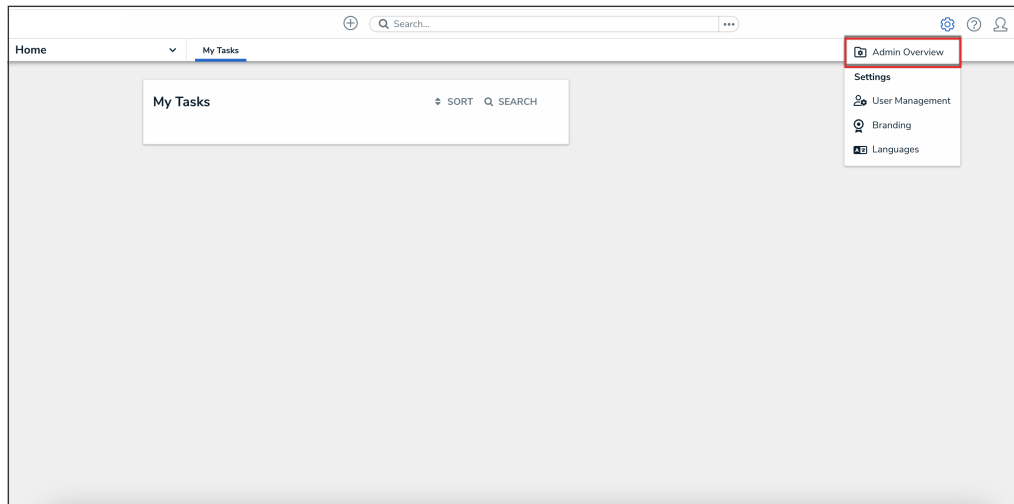
Navigation

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



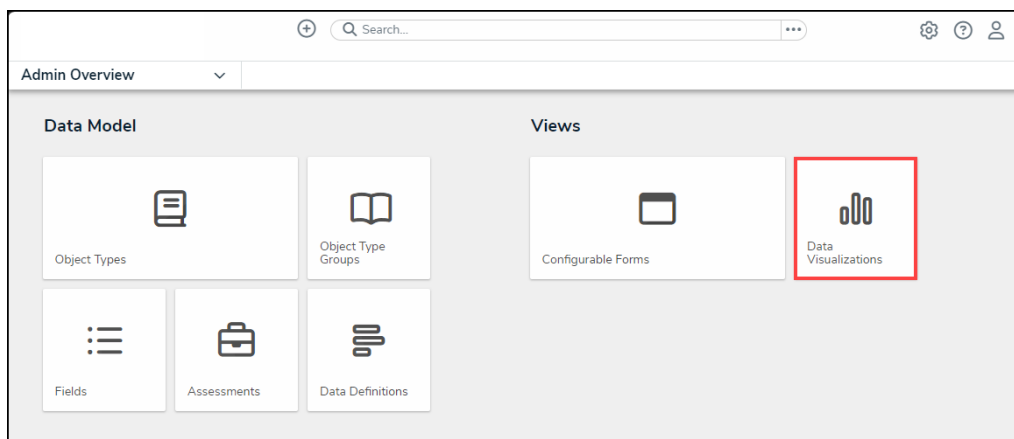
Administration Icon

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



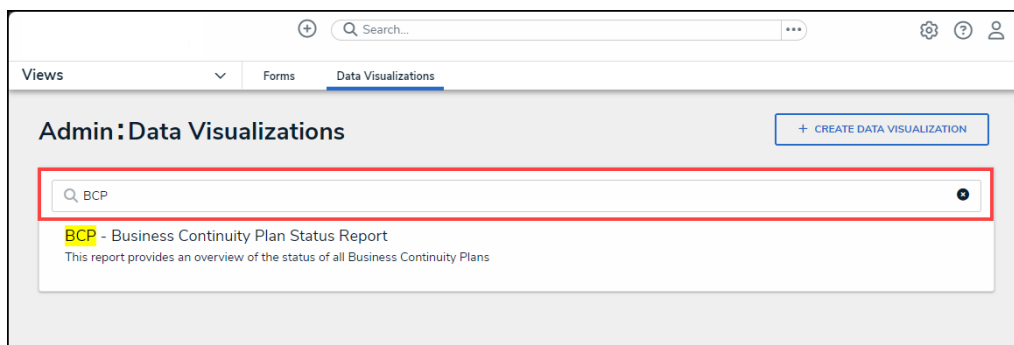
Administrator Settings Menu

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



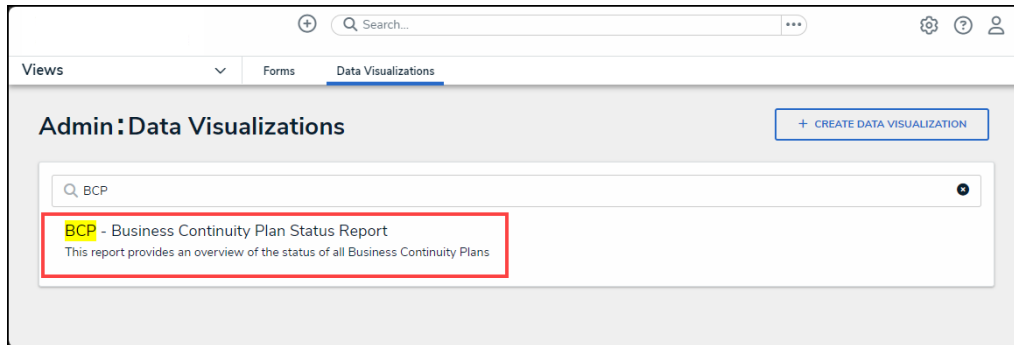
Data Visualization Tile

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



Search Field

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



Report Link

Editing/Updating a Report Chart

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

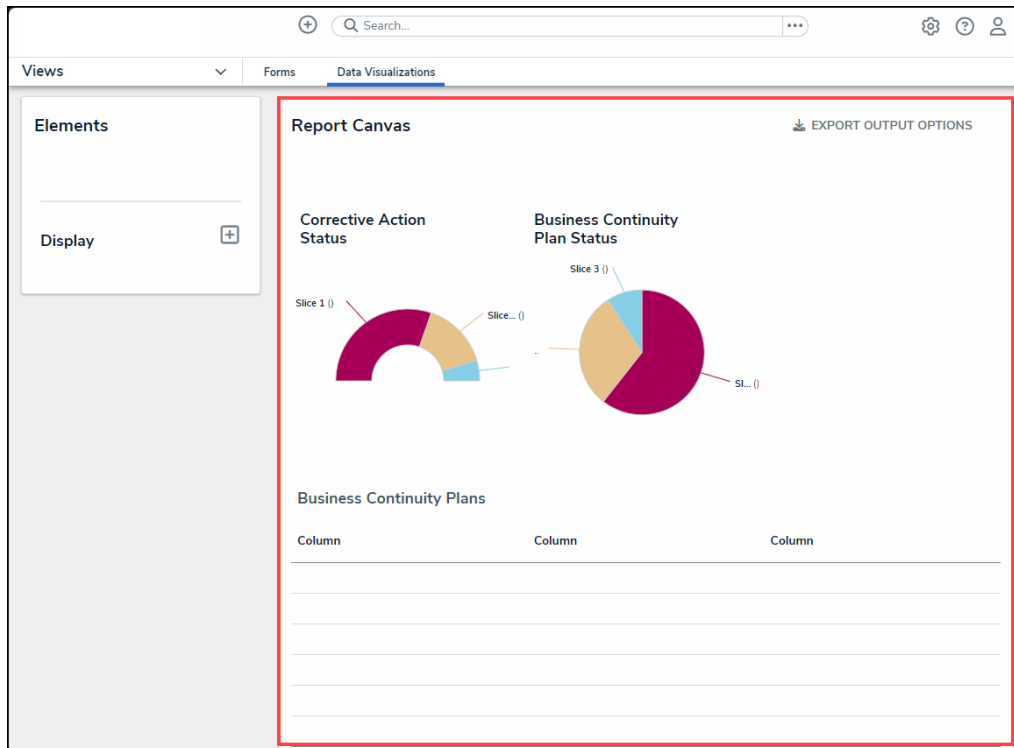
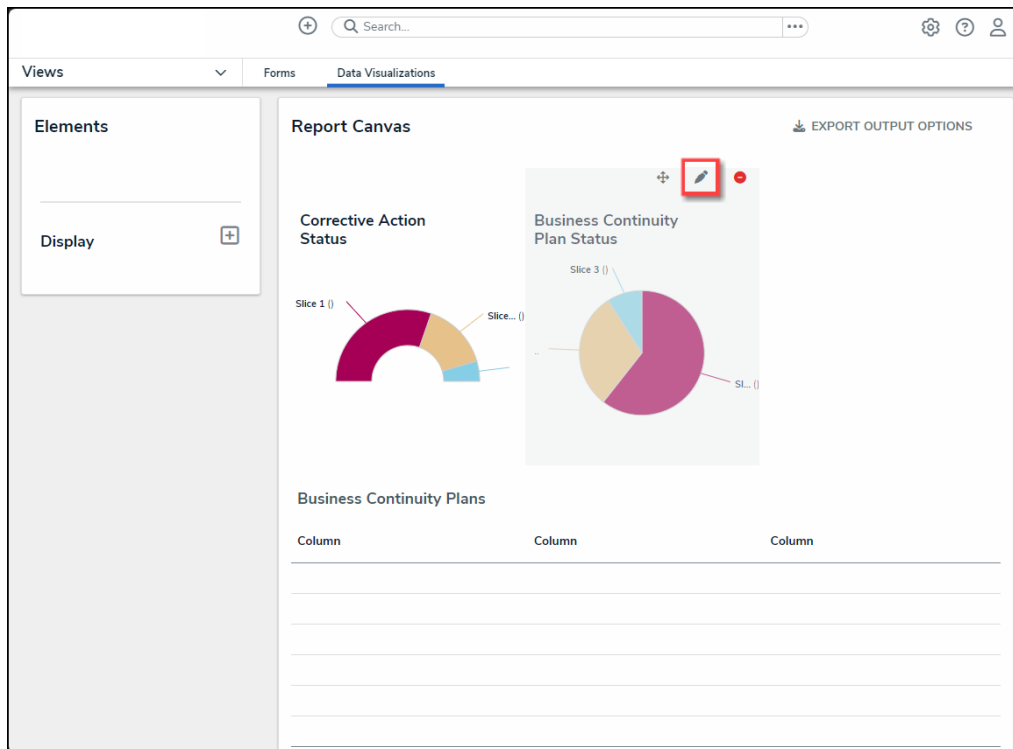


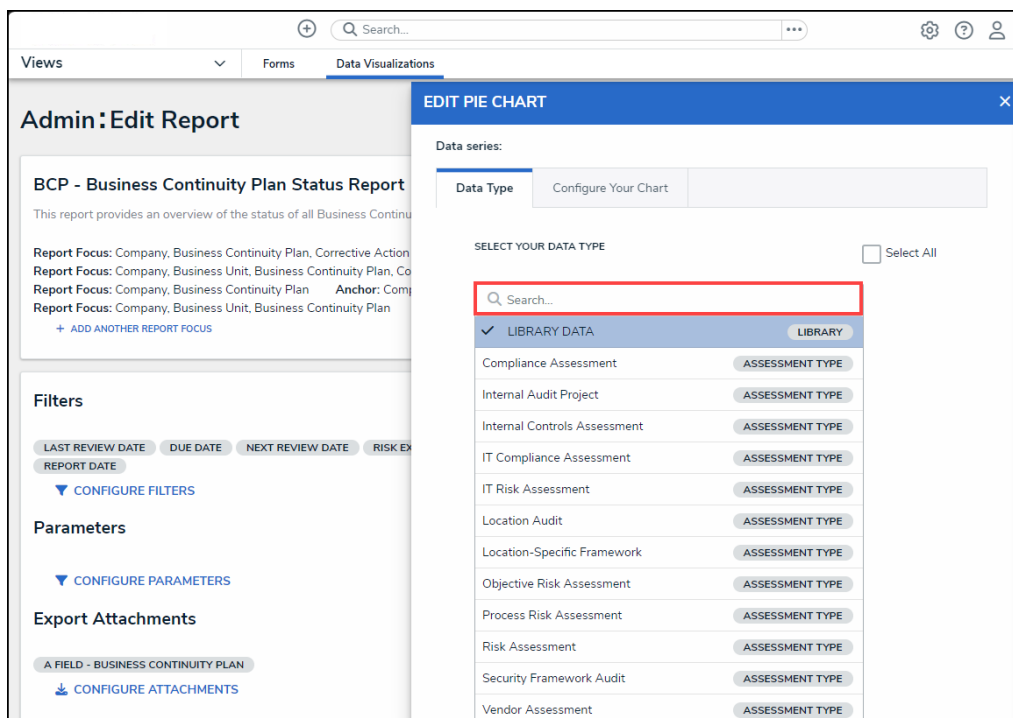
Table Section

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



Edit Icon

- 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.



Search Field

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

Admin:Edit Report

BCP - Business Continuity Plan Status Report

This report provides an overview of the status of all Business Continuity Plans.

Report Focus: Company, Business Continuity Plan, Corrective Action
 Report Focus: Company, Business Unit, Business Continuity Plan, Corrective Action
 Report Focus: Company, Business Continuity Plan, Corrective Action
 Report Focus: Company, Business Unit, Business Continuity Plan, Corrective Action

+ ADD ANOTHER REPORT FOCUS

Filters

LAST REVIEW DATE DUE DATE NEXT REVIEW DATE RISK EXPOSURE
 REPORT DATE

▼ CONFIGURE FILTERS

Parameters

▼ CONFIGURE PARAMETERS

Export Attachments

A FIELD - BUSINESS CONTINUITY PLAN
 ↓ CONFIGURE ATTACHMENTS

EDIT PIE CHART

Data series:

Data Type Configure Your Chart

SELECT YOUR DATA TYPE

Search...

✓ 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 Audit	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

☐ Select All

Select All Checkbox

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

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+ ADD ANOTHER REPORT FOCUS

Filters

LAST REVIEW DATE DUE DATE NEXT REVIEW DATE RISK EXPOSURE
 REPORT DATE

▼ CONFIGURE FILTERS

Parameters

▼ CONFIGURE PARAMETERS

Export Attachments

SUPPORTING ATTACHMENTS - BUSINESS CONTINUITY PLAN
 ↓ CONFIGURE ATTACHMENTS

EDIT PIE CHART

Data series: Business Continuity Plan

Data Type Configure Your Chart

SELECT YOUR DATA TYPE

Search...

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 Audit	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

☐ Select All

Data Type

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

Admin:Edit Report

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 Report Focus: Company, Business Continuity Plan, Anchor: Company
 Report Focus: Company, Business Continuity Plan, Corrective Action
 Report Focus: Company, Business Unit, Business Continuity Plan

+ ADD ANOTHER REPORT FOCUS

Filters

LAST REVIEW DATE DUE DATE NEXT REVIEW DATE RISK EXPOSURE
 REPORT DATE

▼ CONFIGURE FILTERS

Parameters

▼ CONFIGURE PARAMETERS

Export Attachments

SUPPORTING ATTACHMENTS - BUSINESS CONTINUITY PLAN

↓ CONFIGURE ATTACHMENTS

Report Orientation

EDIT PIE CHART

Data series: Business Continuity Plan

Data Type Configure Your Chart

SELECT YOUR DATA TYPE ☐ Select All

Q Search...

✓ **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 Audit 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

Library Data

- Click the **Configure Your Chart** tab.

Admin:Edit Report

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 Report Focus: Company, Business Continuity Plan, Anchor: Company
 Report Focus: Company, Business Continuity Plan, Corrective Action
 Report Focus: Company, Business Unit, Business Continuity Plan

+ ADD ANOTHER REPORT FOCUS

Filters

LAST REVIEW DATE DUE DATE NEXT REVIEW DATE RISK EXPOSURE
 REPORT DATE

▼ CONFIGURE FILTERS

Parameters

▼ CONFIGURE PARAMETERS

Export Attachments

SUPPORTING ATTACHMENTS - BUSINESS CONTINUITY PLAN

↓ CONFIGURE ATTACHMENTS

Report Orientation

EDIT PIE CHART

Data series: Business Continuity Plan

Data Type **Configure Your Chart**

SELECT YOUR DATA TYPE ☐ Select All

Q Search...

✓ **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 Audit 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

Configure Your Chart Tab

- 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.

Admin:Edit Report

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 Report Focus: Company, Business Continuity Plan **Anchor:** Company
 Report Focus: Company, Business Continuity Plan, Corrective Action
 Report Focus: Company, Business Unit, Business Continuity Plan

[+ ADD ANOTHER REPORT FOCUS](#)

Filters

LAST REVIEW DATE DUE DATE NEXT REVIEW DATE RISK EXPOSURE

[REPORT DATE](#)

[CONFIGURE FILTERS](#)

Parameters

[CONFIGURE PARAMETERS](#)

Export Attachments

SUPPORTING ATTACHMENTS - BUSINESS CONTINUITY PLAN

[CONFIGURE ATTACHMENTS](#)

Report Orientation

EDIT PIE CHART

Data series: Business Continuity Plan

Data Type **Configure Your Chart**

SELECT A RELATIONSHIP

Anchor

SELECT DATA

Select the data you want to visualize in the pie chart

Q Search...

Risk Exposure	BUSINESS CONTINUITY PLAN	FORMULA
Corrective Actions	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Information Assets	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Key Contacts	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Locations	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Risks	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Vendors	BUSINESS CONTINUITY PLAN	RELATIONSHIP
☒ Business Continuity Plan	BUSINESS CONTINUITY PLAN	STATE
Assessment Type Name		ASSESSMENT TYPE

Select a Relationship Dropdown Menu

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

Admin:Edit Report

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Report Focus: Company, Business Unit, Business Continuity Plan, Corrective Action
 Report Focus: Company, Business Continuity Plan **Anchor:** Company
 Report Focus: Company, Business Continuity Plan, Corrective Action
 Report Focus: Company, Business Unit, Business Continuity Plan

[+ ADD ANOTHER REPORT FOCUS](#)

Filters

LAST REVIEW DATE DUE DATE NEXT REVIEW DATE RISK EXPOSURE

[REPORT DATE](#)

[CONFIGURE FILTERS](#)

Parameters

[CONFIGURE PARAMETERS](#)

Export Attachments

SUPPORTING ATTACHMENTS - BUSINESS CONTINUITY PLAN

[CONFIGURE ATTACHMENTS](#)

Report Orientation

EDIT PIE CHART

SELECT DATA

Select the data you want to visualize in the pie chart

Q Search...

Risk Exposure	BUSINESS CONTINUITY PLAN	FORMULA
Corrective Actions	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Information Assets	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Key Contacts	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Locations	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Risks	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Vendors	BUSINESS CONTINUITY PLAN	RELATIONSHIP
☒ Business Continuity Plan	BUSINESS CONTINUITY PLAN	STATE
Assessment Type Name		ASSESSMENT TYPE

Search Field

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

Admin:Edit Report

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Report Focus: Company, Business Continuity Plan, Anchor: Company
Report Focus: Company, Business Continuity Plan, Corrective Action
Report Focus: Company, Business Unit, Business Continuity Plan
[+ ADD ANOTHER REPORT FOCUS](#)

Filters

LAST REVIEW DATE DUE DATE NEXT REVIEW DATE RISK EXPOSURE
 REPORT DATE
[▼ CONFIGURE FILTERS](#)

Parameters

EDIT PIE CHART

SELECT DATA
 Select the data you want to visualize in the pie chart

Search...

Risk Exposure	BUSINESS CONTINUITY PLAN	FORMULA
Corrective Actions	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Information Assets	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Key Contacts	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Locations	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Risks	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Vendors	BUSINESS CONTINUITY PLAN	RELATIONSHIP
Business Continuity Plan	BUSINESS CONTINUITY PLAN	STATE
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.

Admin:Edit Report

BCP - Business Continuity Plan Status Report

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Report Focus: Company, Business Continuity Plan, Anchor: Company
Report Focus: Company, Business Continuity Plan, Corrective Action
Report Focus: Company, Business Unit, Business Continuity Plan
[+ ADD ANOTHER REPORT FOCUS](#)

Filters

LAST REVIEW DATE DUE DATE NEXT REVIEW DATE RISK EXPOSURE
 REPORT DATE
[▼ CONFIGURE FILTERS](#)

Parameters

EDIT PIE CHART

GROUP DATA
 Select the Object Type you would like to use to group the data. This selection will represent the legend.

Select one...

Business Continuity Plan OBJECT TYPE

CONFIGURE DISPLAY

Chart Title
 Business Continuity Plan Status

Display Type
☒ Pie ☐ Half-Pie

DONE

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.

The screenshot shows the 'Admin:Edit Report' interface with the 'EDIT PIE CHART' modal open. The modal has a blue header and a white body. It contains a 'GROUP DATA' section with a dropdown menu set to 'Business Continuity Plan'. Below this is a 'CONFIGURE DISPLAY' section. In this section, the 'Chart Title' field is highlighted with a red rectangular box and contains the text 'Business Continuity Plan Status'. Below the 'Chart Title' field is the 'Display Type' section, which has two radio buttons: 'Pie' (which is selected) and 'Half-Pie'. At the bottom right of the modal is a 'DONE' button. The background interface shows the 'BCP - Business Continuity Plan Status Report' and various filters and parameters.

Chart Title Field

13. 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.

This screenshot is similar to the previous one, showing the 'Admin:Edit Report' interface with the 'EDIT PIE CHART' modal. In this view, the 'Display Type' section is highlighted with a red rectangular box. This section contains two radio buttons: 'Pie' (which is selected) and 'Half-Pie'. The 'Chart Title' field above it still contains 'Business Continuity Plan Status'. The 'DONE' button is visible at the bottom right of the modal. The background interface remains the same.

Display Type Field

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

Search...

Views

Forms

Data Visualizations

Admin:Edit Report

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Report Focus: Company, Business Continuity Plan Anchor: Company
Report Focus: Company, Business Continuity Plan, Corrective Action
Report Focus: Company, Business Unit, Business Continuity Plan
[+ ADD ANOTHER REPORT FOCUS](#)

Filters

LAST REVIEW DATE

DUE DATE

NEXT REVIEW DATE

RISK EXPOSURE

REPORT DATE

[▼ CONFIGURE FILTERS](#)

Parameters

[▼ CONFIGURE PARAMETERS](#)

EDIT PIE CHART

GROUP DATA

Select the Object Type you would like to use to group the data. This selection will represent the legend.

Business Continuity Plan

CONFIGURE DISPLAY

Chart Title

Business Continuity Plan Status

Display Type

☒ Pie ☐ Half-Pie

DONE

Done Button