Editing/Updating a Data Grid

Last Modified on 01/30/2025 3:57 pm EST

Overview

A **Data Grid** is a data visualization that displays object data in a spreadsheet-style format.

User Account Requirements

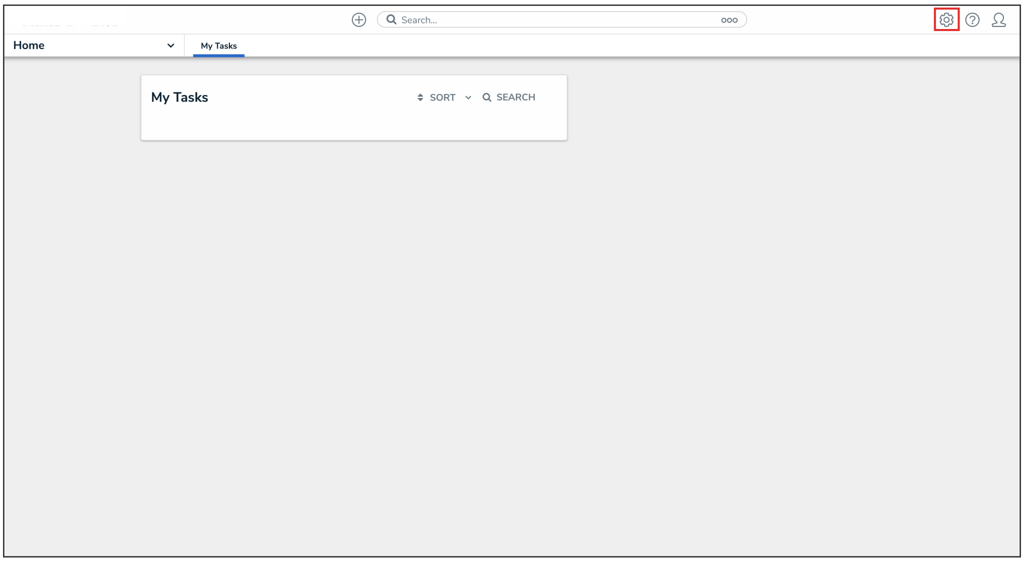
The user account you use to log into Resolver must have Administrator permission or Data Management advanced permissions to edit a Data Grid.

Related Information/Setup

Please see the Create a Data Grid article for more information on creating a new data gird.

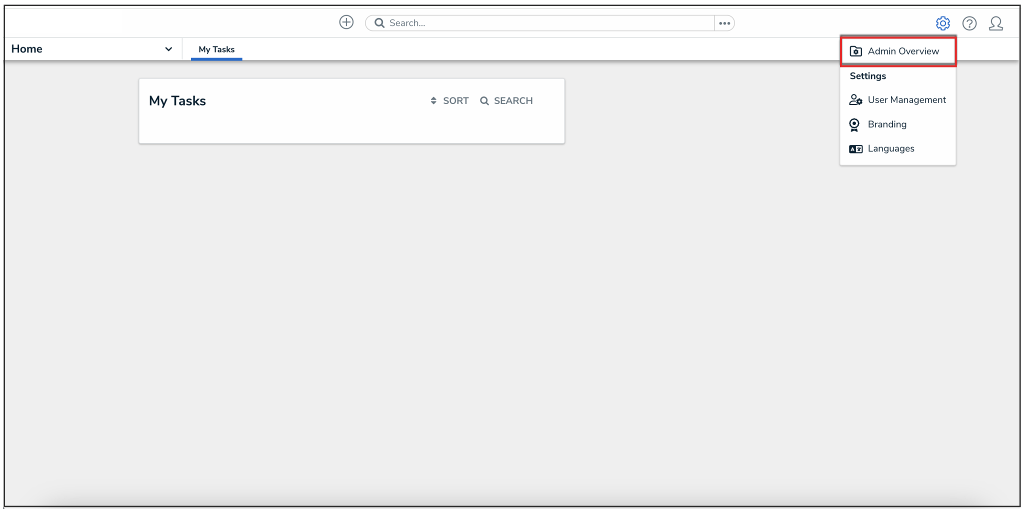
Navigation

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



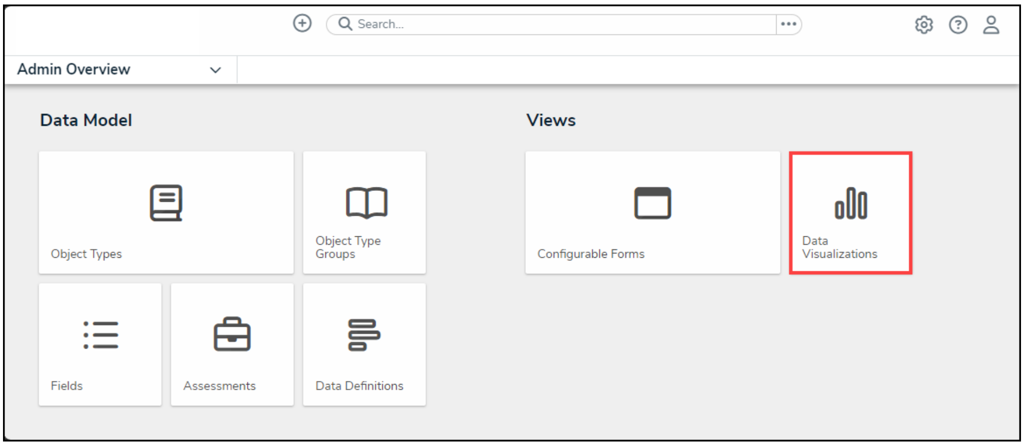
Administration Icon

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



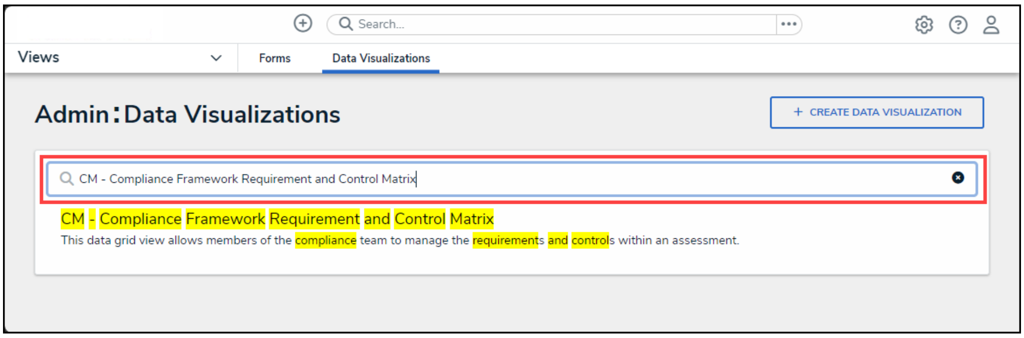
Administrator Settings Menu

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



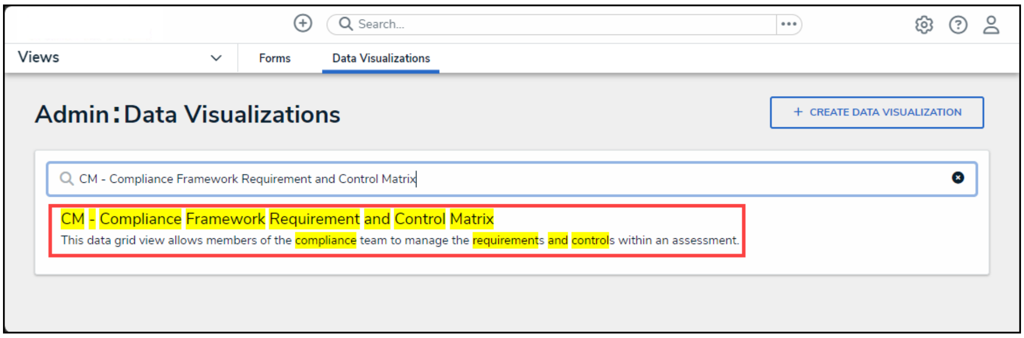
Data Visualization Tile

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



Search Field

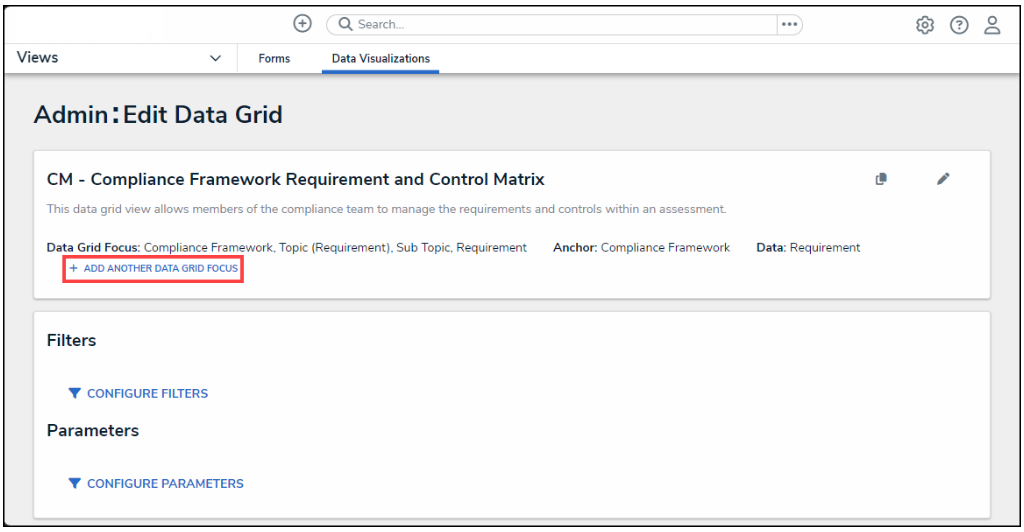
5. Click the **Report** you want to add or edit a column.



Report Link

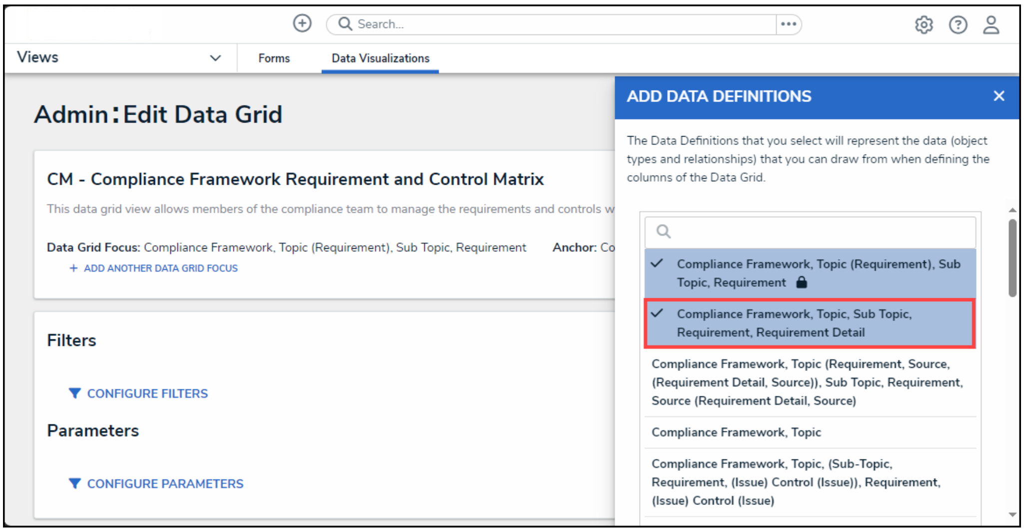
Editing/Updating a Data Grid

1. From the ***Admin: Edit Data Grid*** screen, click the **+ Add Another Data Grid Focus** link.



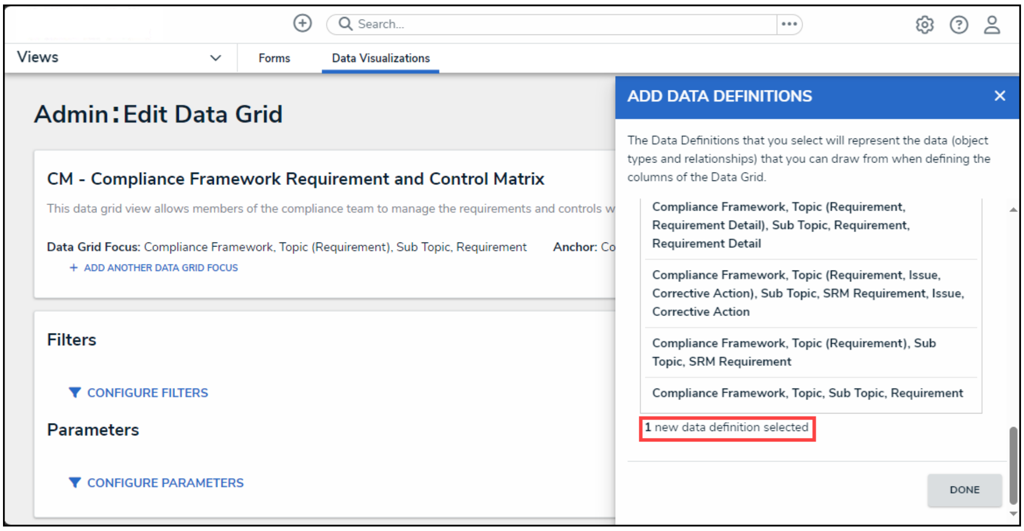
+ Add Another Data Grid Focus Link

2. From the ***Add Data Definitions*** pop-up screen, add a focus by clicking on the data definitions listed.



Data Definition

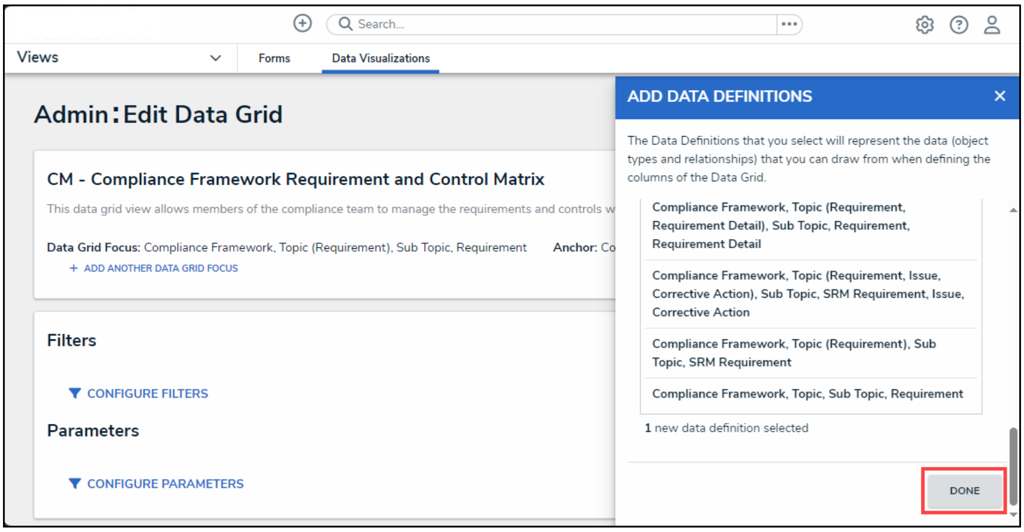
3. **(Optional)** Enter a keyword in the **Search** field to narrow down the results listed.
4. Once you have selected all focus data definitions, scroll to the bottom of the ***Add Data Definitions*** pop-up.
5. The number of data definitions selected will be indicated at the bottom of the pop-up next to the **new data definition selected** tag.



new data definition selected Tag

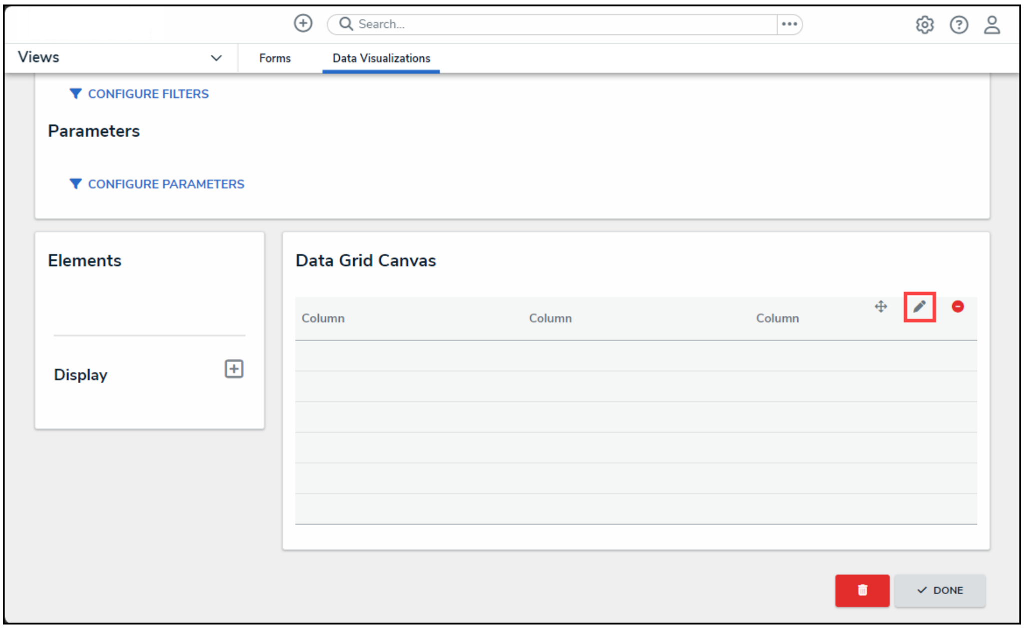
6. Click on the **Done** button to exit the ***Add Data Definition*** pop-up and return to the ***Admin: Edit Data Grid*** screen.

> ***Note:***
> *Once a Focus is added to a Data Grid it cannot be removed. A **Locked** Icon will appear next to all focuses, added to the Data Grid.*



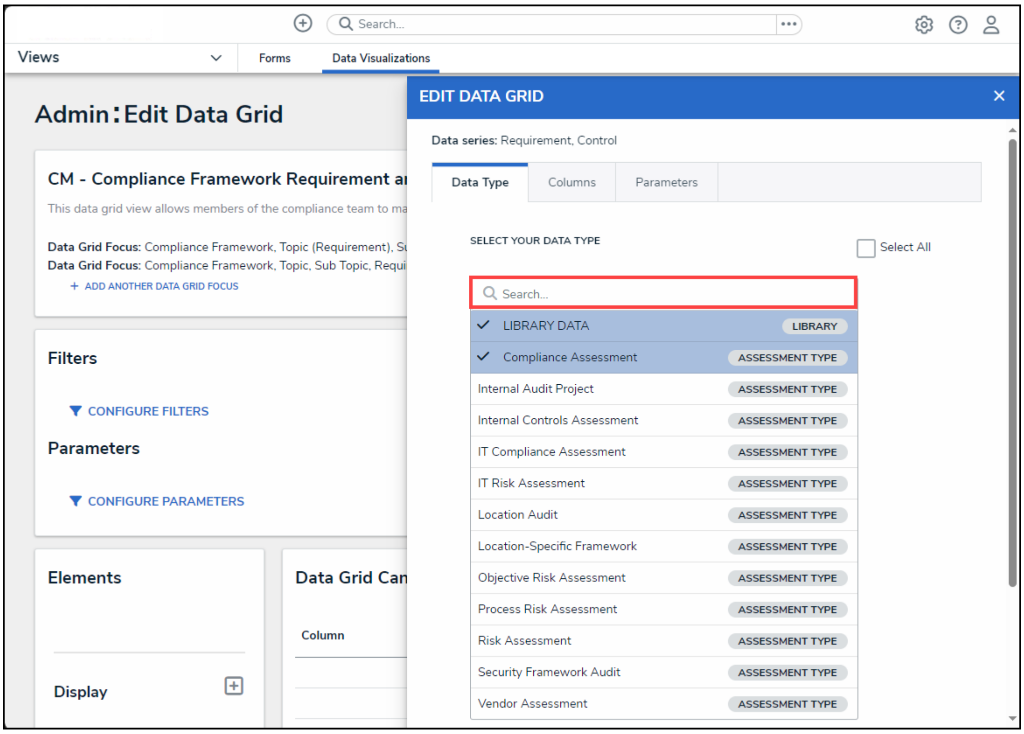
Done Button

7. From the ***Admin: Edit Data Grid*** screen, hover the cursor over the **Data Grid Canvas** and click the **Edit** icon.



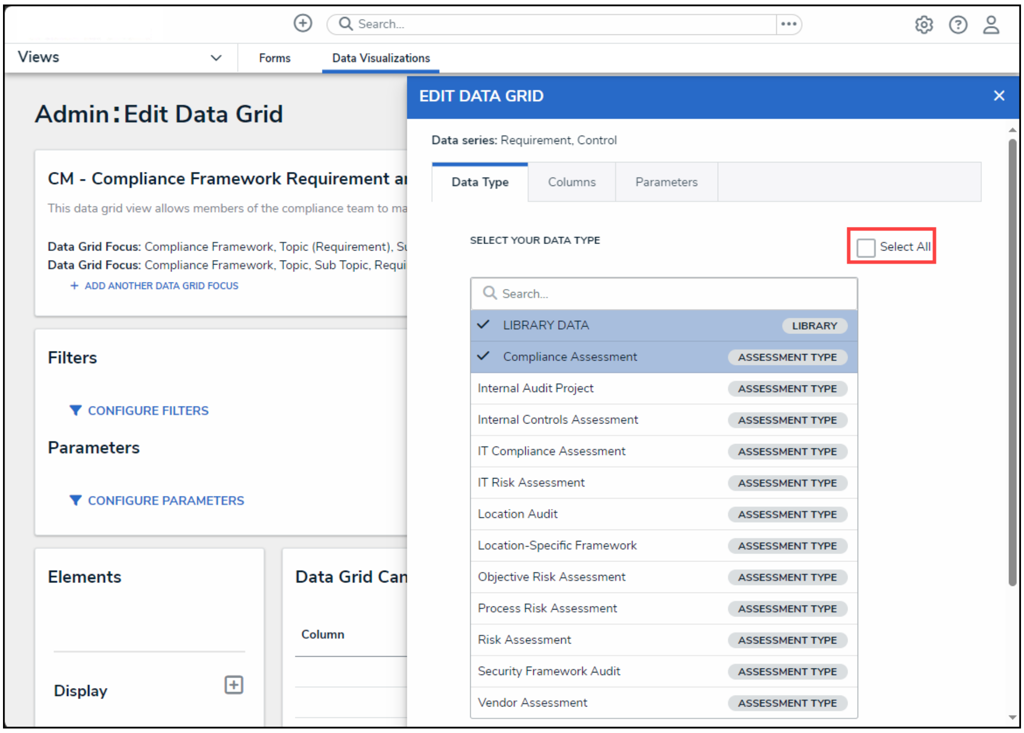
Edit Icon

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



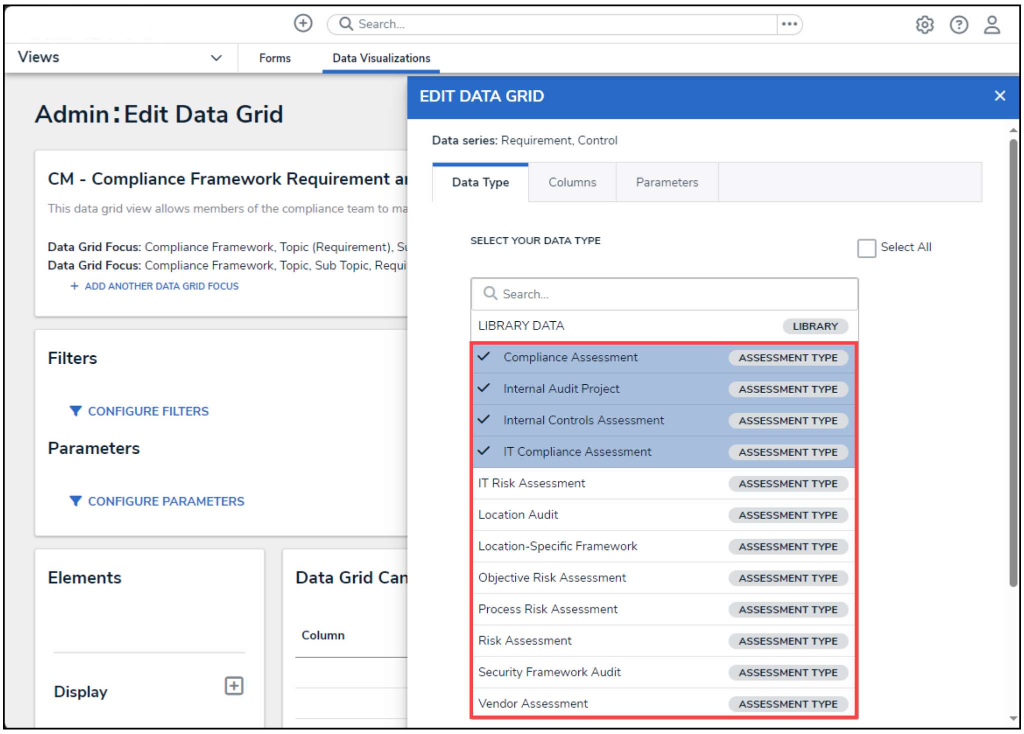
Search Field

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



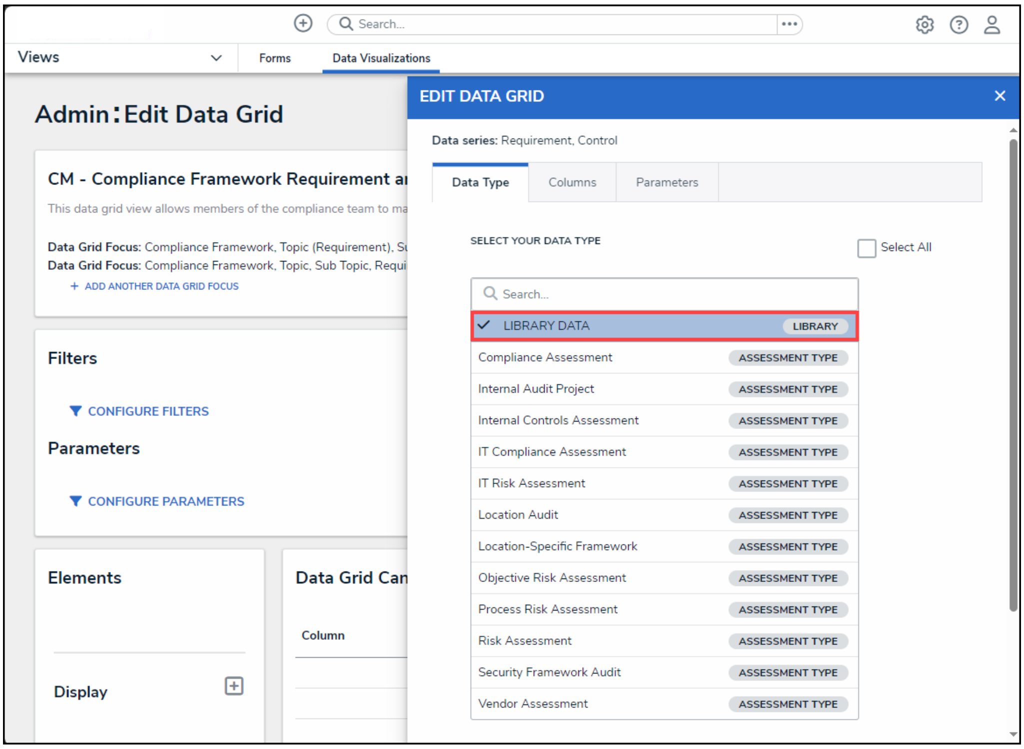
Select All Checkbox

10. 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.



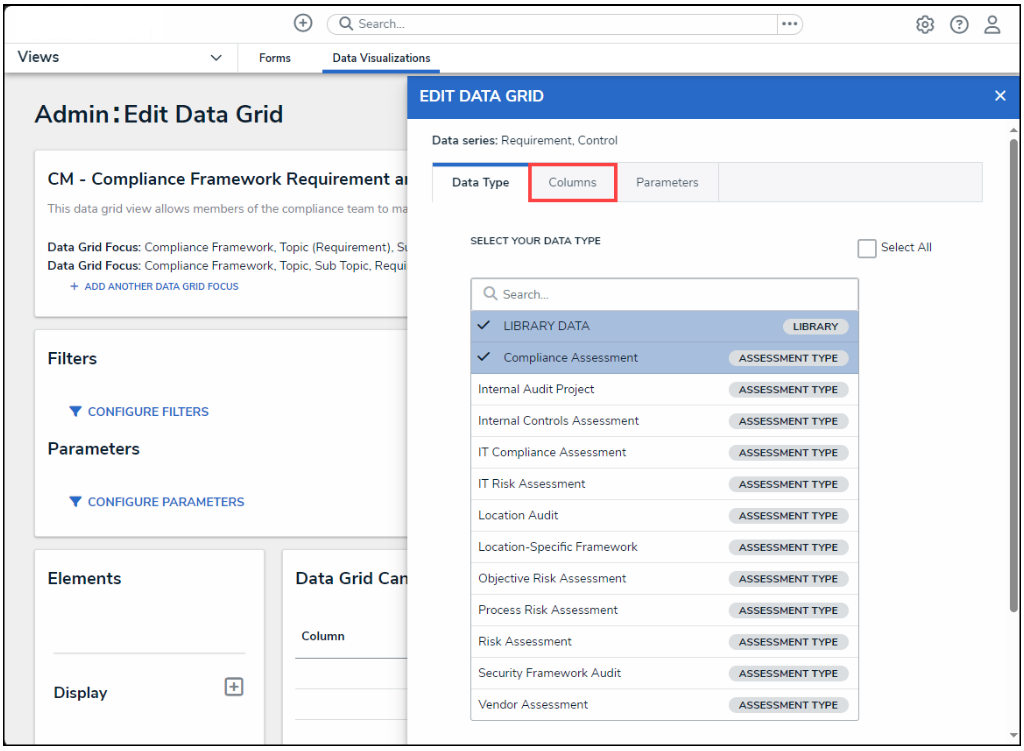
Data Type

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



Library Data

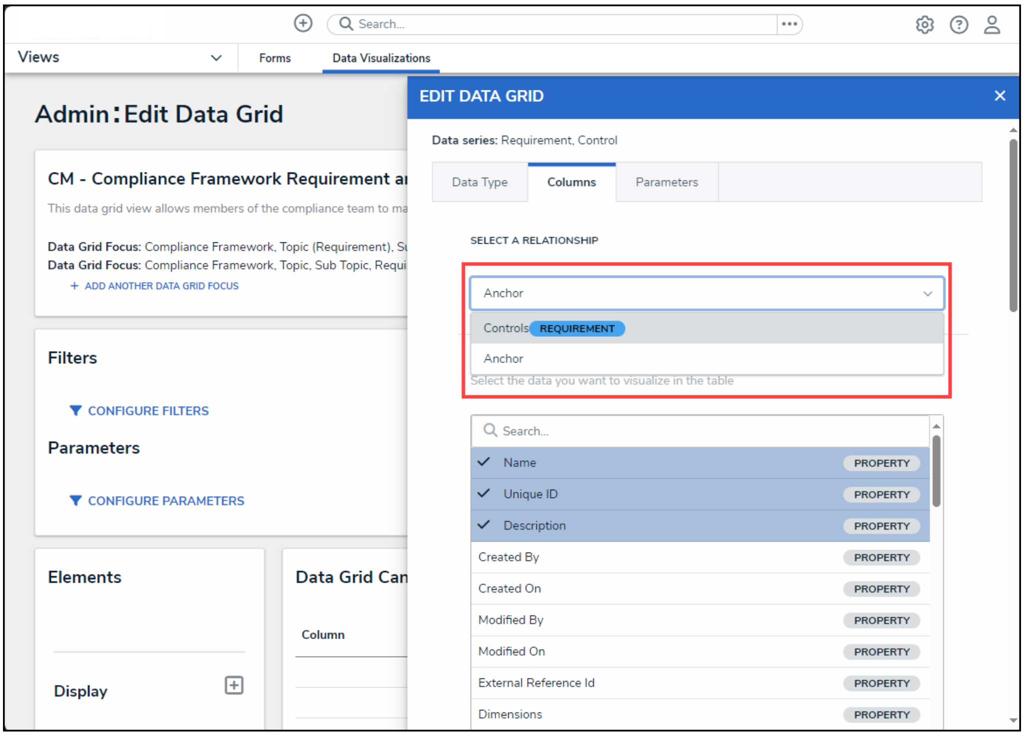
12. From the ***Data Type*** tab, select the ***Columns*** tab.



Columns Tab

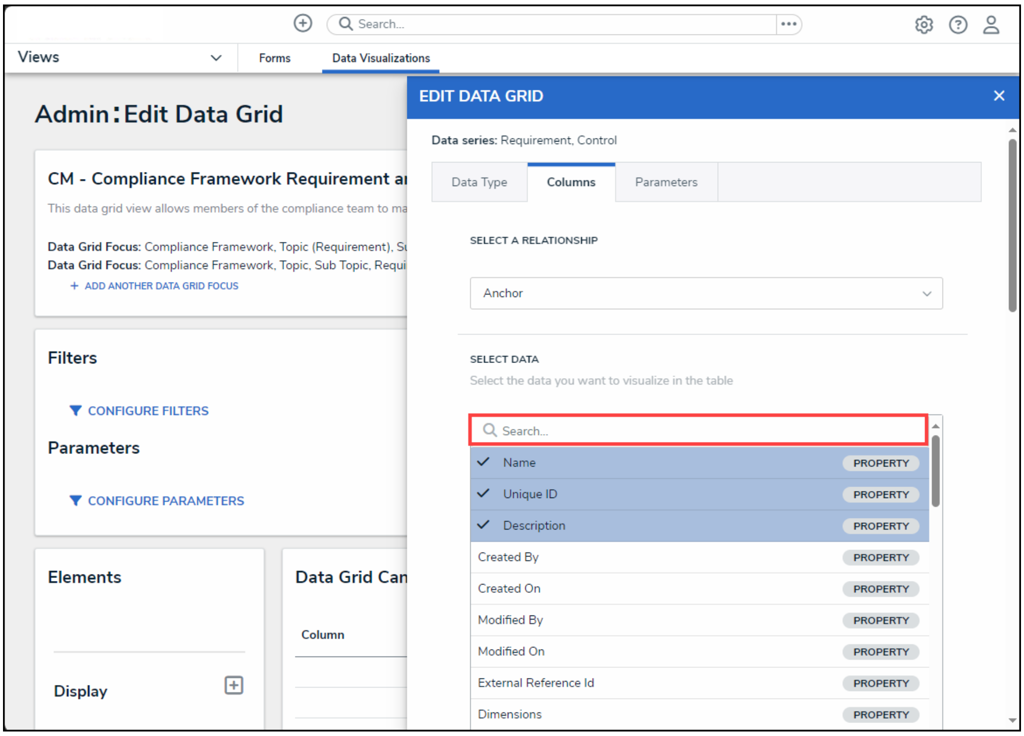
13. From the ***Columns*** tab, select a relationship from the **Select a Relationship** dropdown

menu. The relationship selected controls the data that appears on the **Select Data** dropdown menu.



Select a Relationship Dropdown Menu

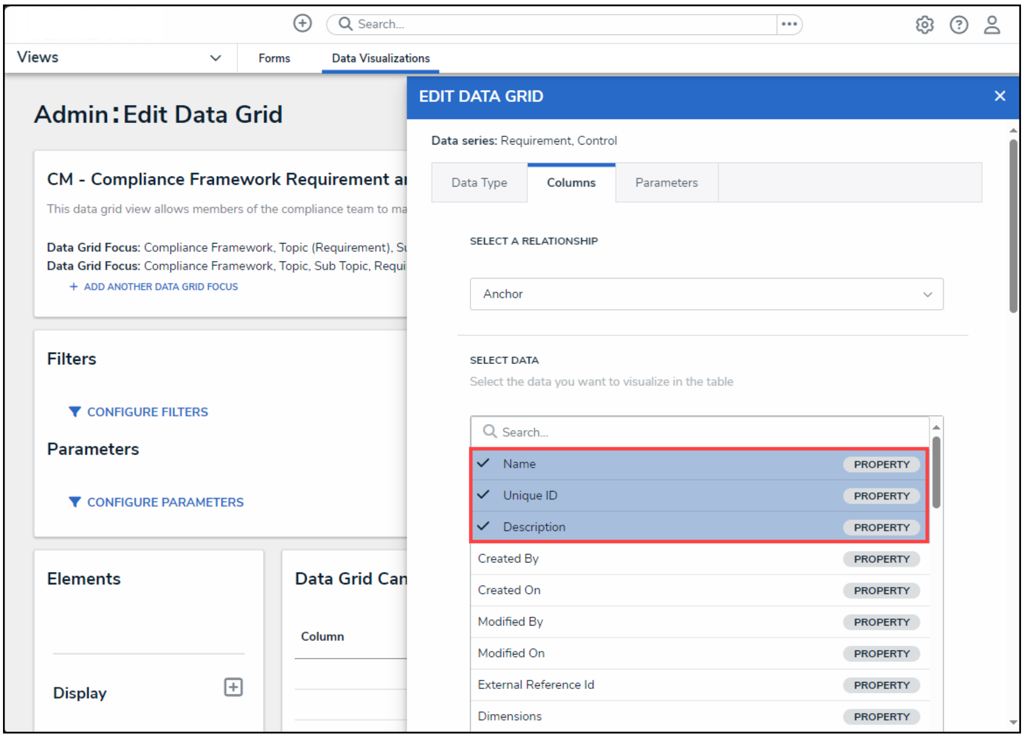
14. **(Optional)** Enter a keyword in the **Search** field to narrow your search.



Select Data Search Field

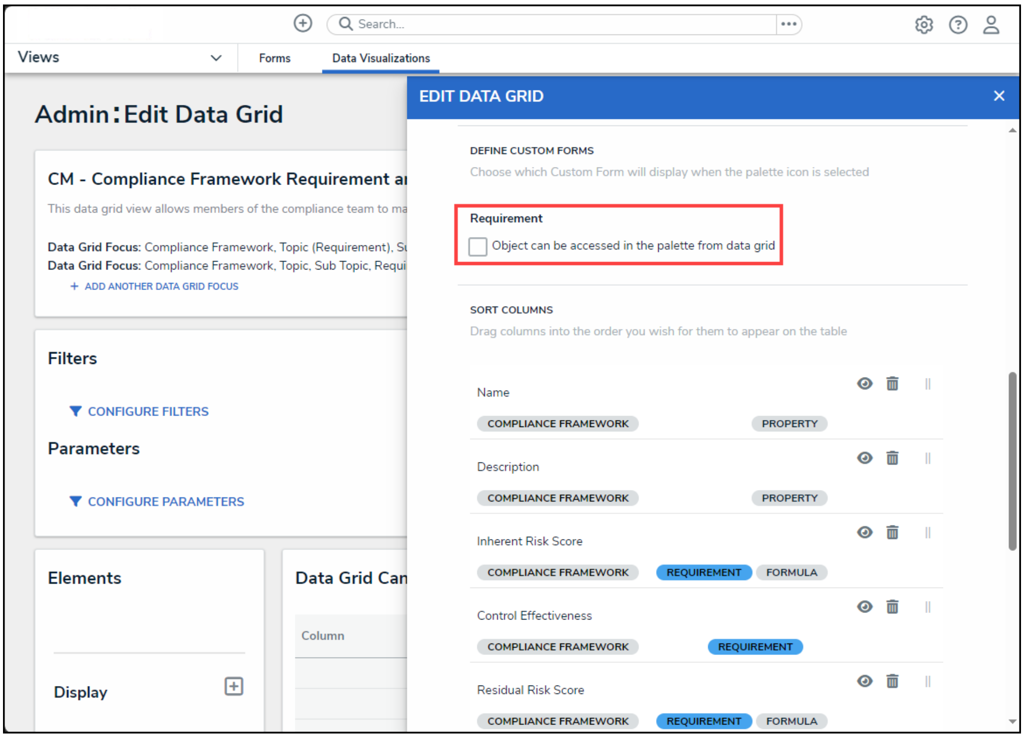
15. Click on a property, workflow state, field, formula, relationship, reference, or role to add the

information to the table using a data column.



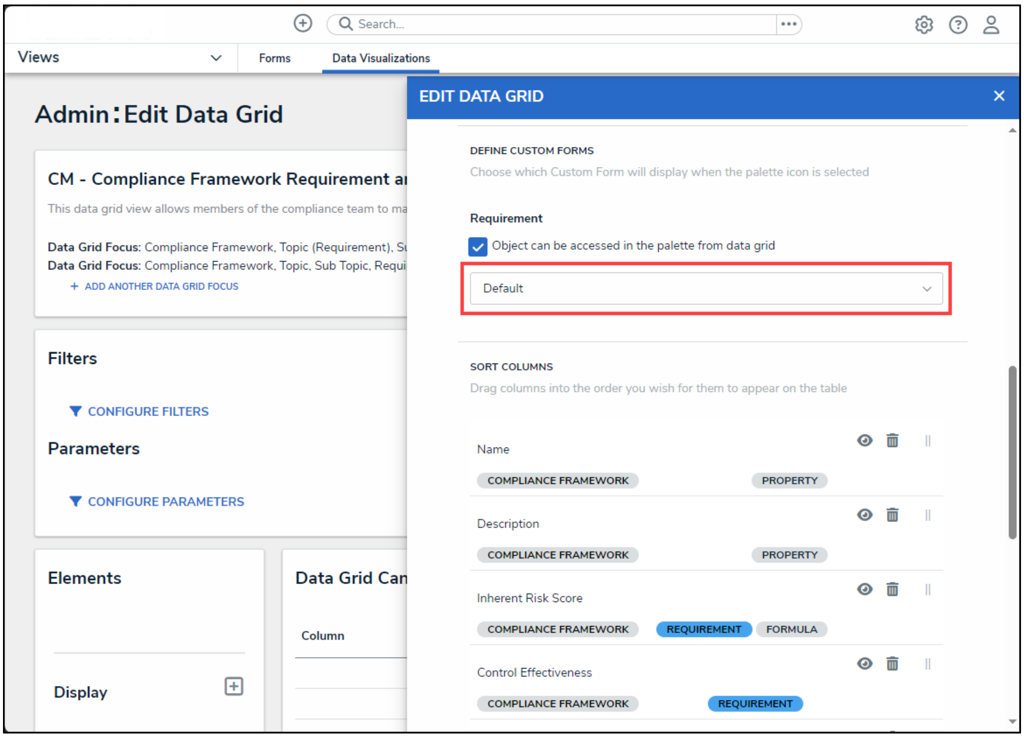
Select a Column Element

16. **(Optional)** Select the **Object can be accessed in the palette from data grid** checkbox, to allow users to open an object in a pop-up while viewing the data grid.



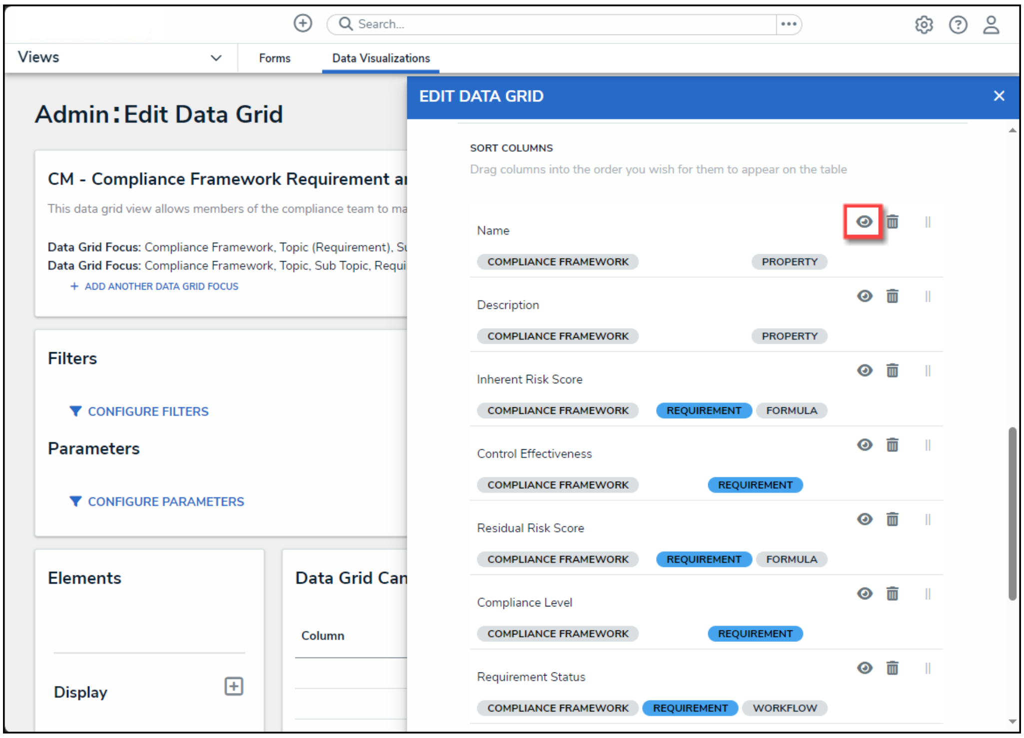
Default Custom Forms Dropdown

17. A dropdown menu that will appear under the **Object can be accessed in the palette from data grid** field. Select the form that will appear which form is displayed when the user clicks the palette icon under the Name column on the Data Grid.



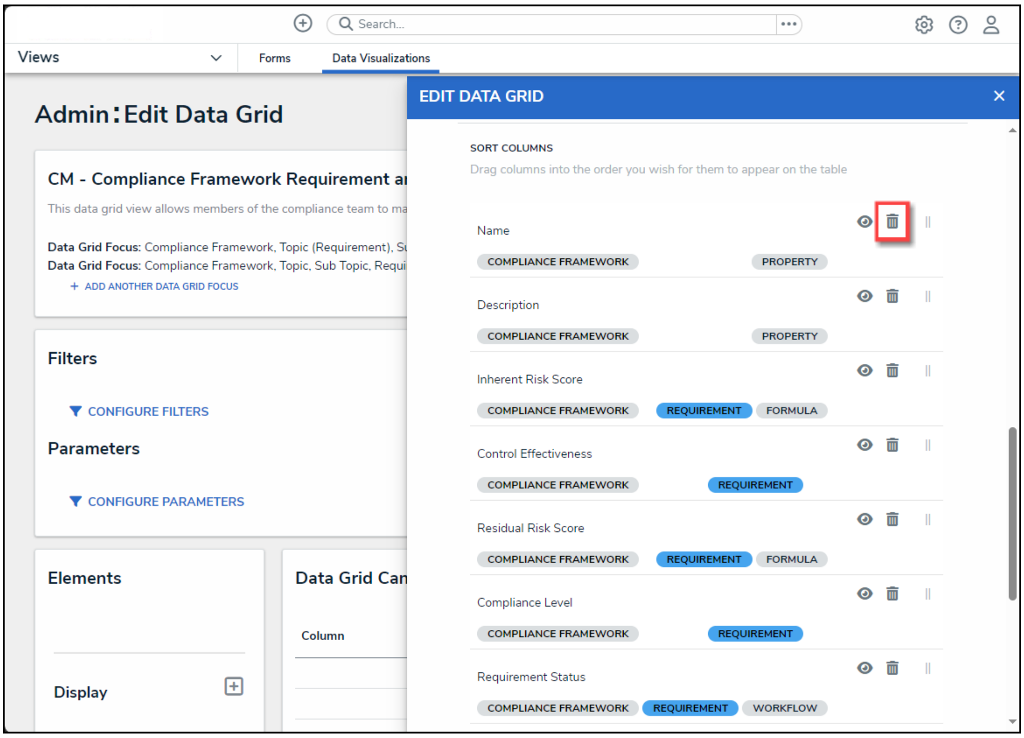
Form Dropdown Menu

18. **(Optional)** From the **Sort Columns** section, click the **Read-Only** icon to mark a column as read-only and prevent users from editing their cells in the grid.



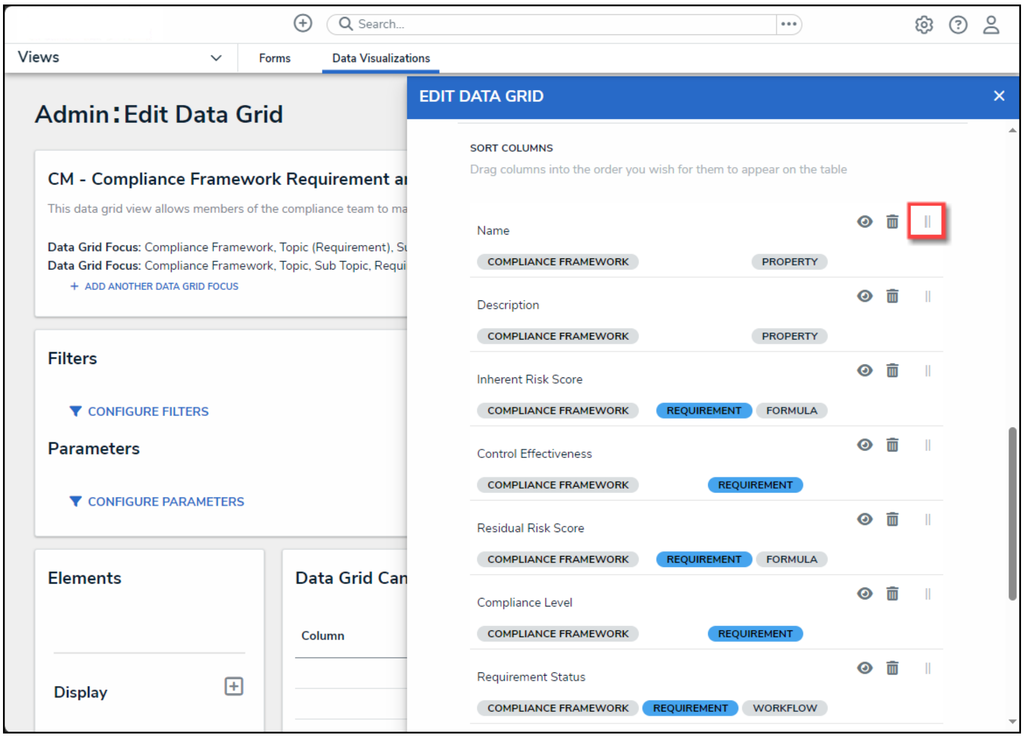
View Icon

19. **(Optional)** Click the **Delete** icon to remove a column from the table.



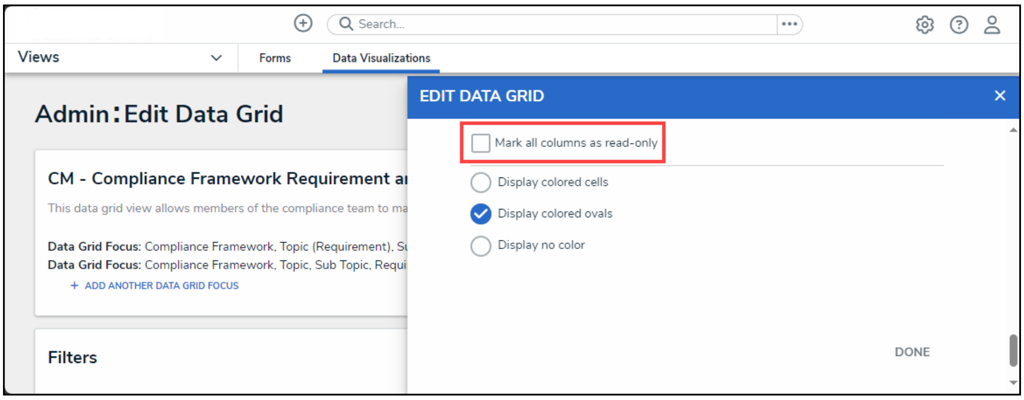
Delete Icon

20. **(Optional)** Click the **Move** icon to rearrange the columns on the table.



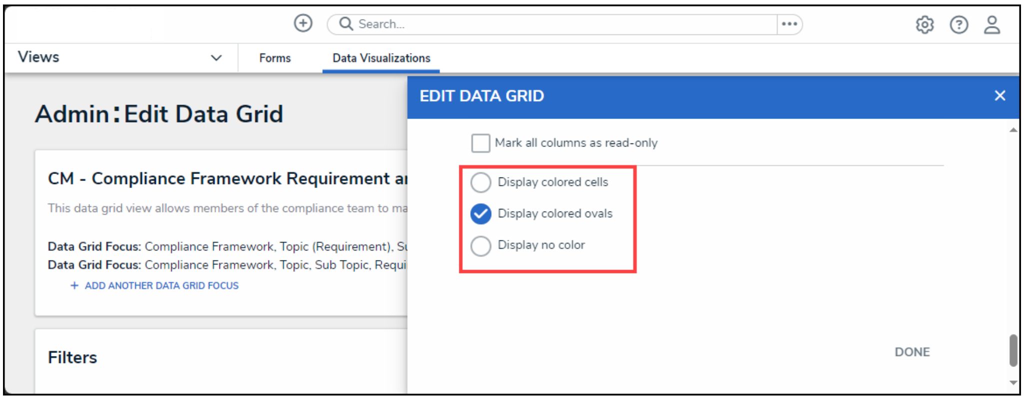
Move Icon

21. **(Optional)** Select the **Mark all columns as read-only** checkbox will mark all columns on the table as read-only.



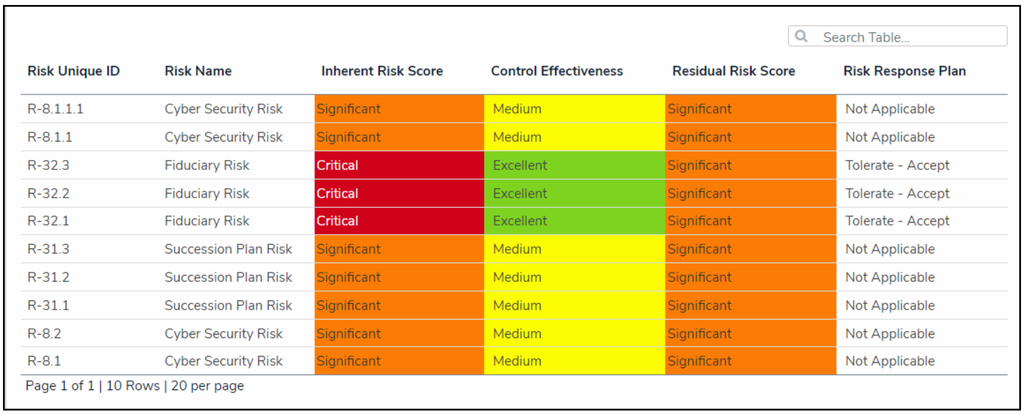
Mark all columns as read-only Checkbox

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

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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.

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

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Display Colored Ovals

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

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

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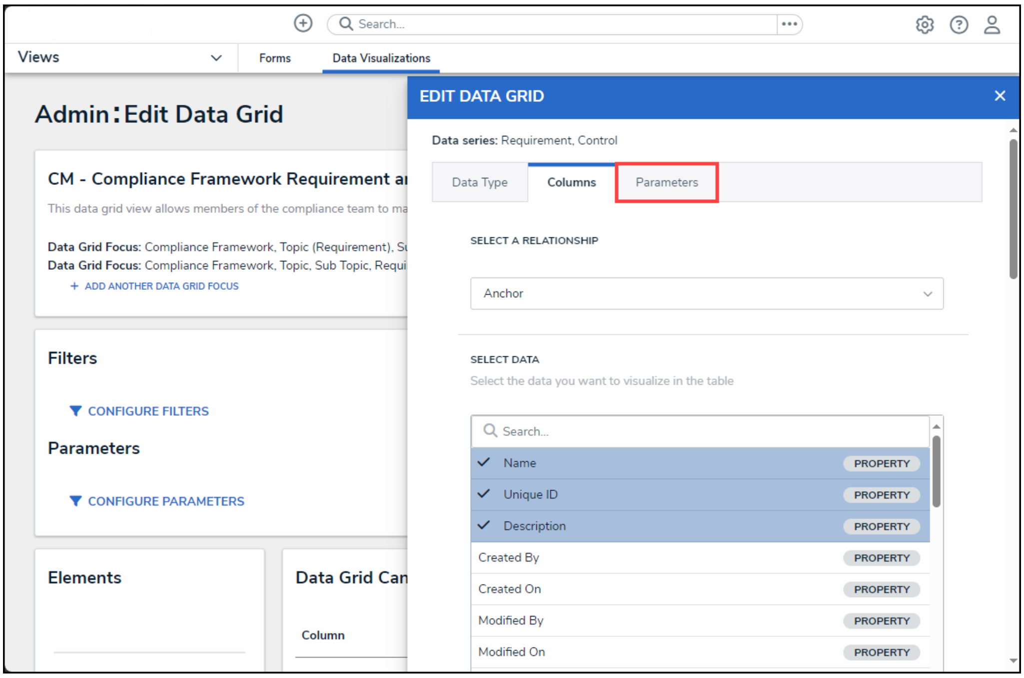
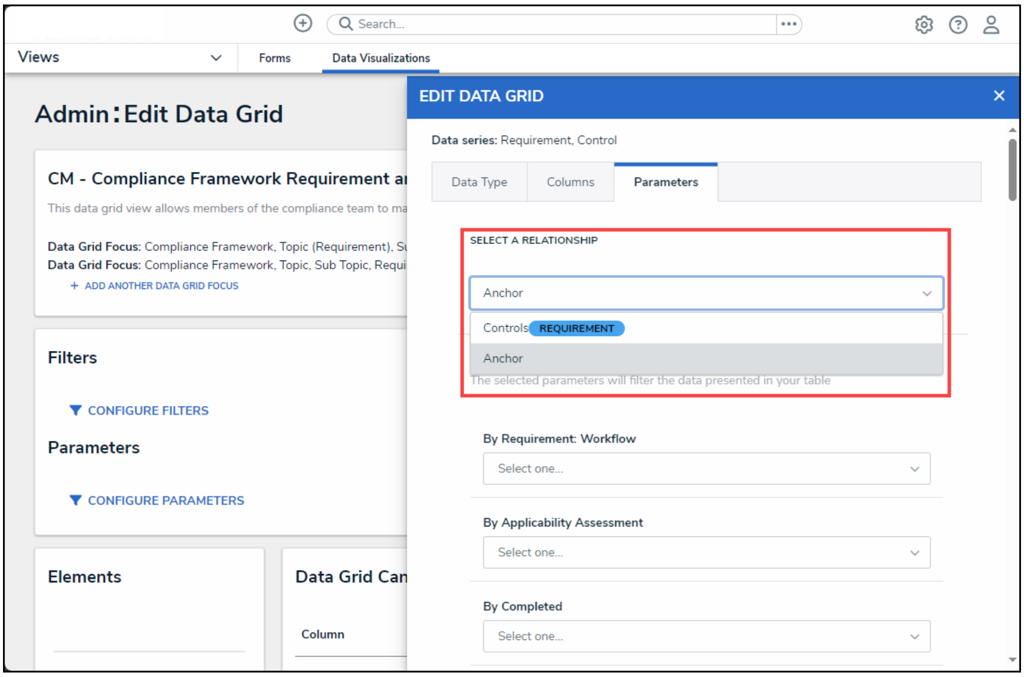
Display No Color

26. Click the ***Parameters*** tab.



Parameters Tab

27. From the ***Parameters*** tab, select a relationship from the **Select a Relationship** dropdown menu. The relationship selected controls the data that appears on the **Select Data** dropdown menu.

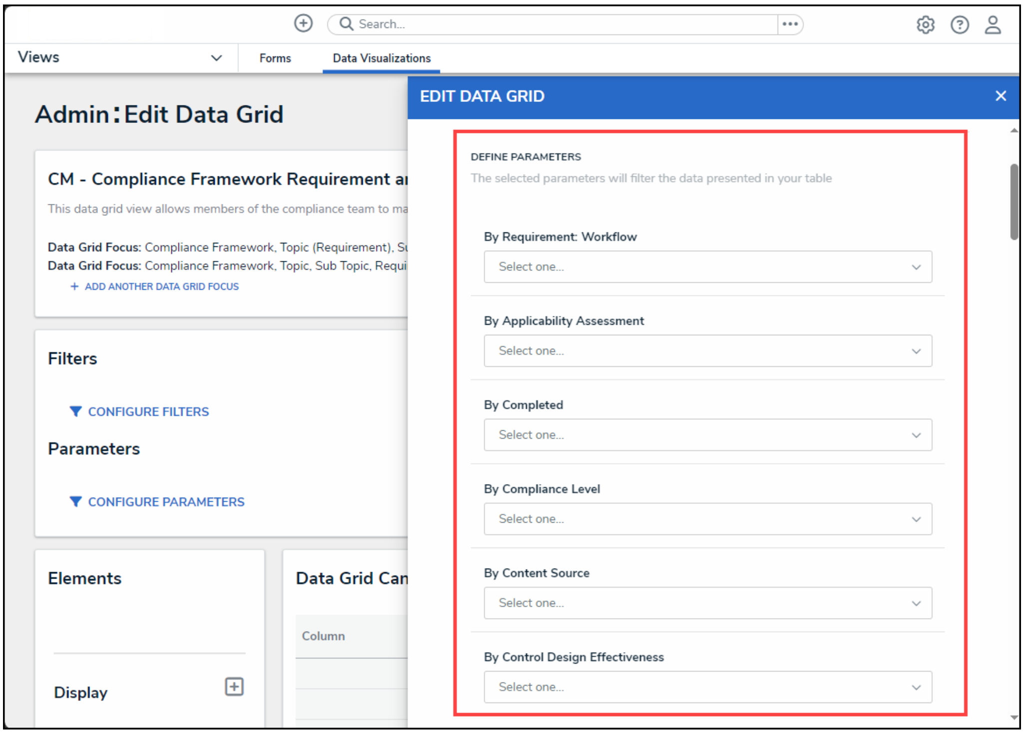


Select a Relationship Dropdown Menu

28. Users can apply **parameters** that use workflow states, formula ranges, select list options, or roles to filter what data is displayed on the table. Parameters can be applied to a table using relationships saved to the table's data definition, but not references.

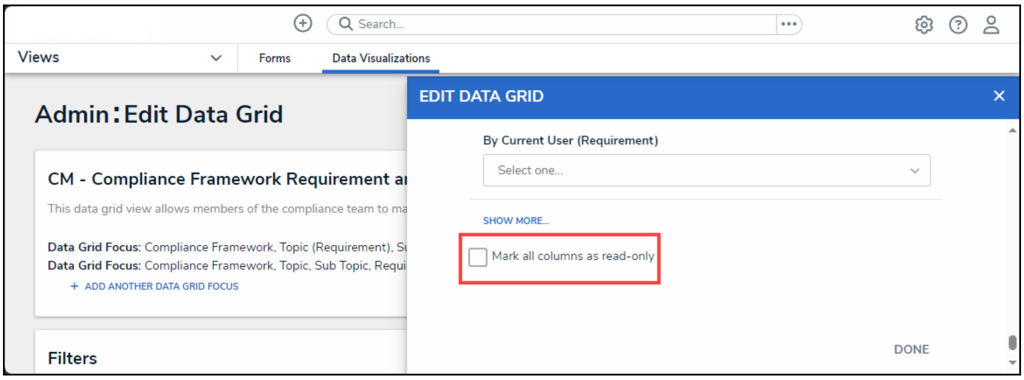
> ***Note:***
> *Tables with more than 10,000 data rows will not load correctly. Resolver recommends that filters or parameters are applied to filter the data and prevent errors.*

29. Under the ***Define Parameters*** section, enter parameters in the following field types to filter the data displayed in the Table:
    - **By Workflow State:** Filter the table data by the various Workflow State stages (e.g., Create, Triage, Review, Investigate, Close).
    - **By Select List Values:** Filter the table data by Select List values. A Select List is a field type that allows users to select one or more options (e.g., dropdown menu).
    - **By Formula Range:** Filter the table data by formula range (e.g., Low, Medium, High). A Formula uses numeric and variable values (e.g., select lists, numeric or date fields, or workflow states) to generate Incident Severity, Estimated Damage, or Incident Likelihood. Formulas are added to an Object Type through a Relationship or Reference.
    - **By Current Users:** Filter the table data by user or user group. When one or more user groups are selected, only users within those roles can view the data in the table. This feature is useful in creating customized reports for specific users. The Object Types in the Table's data series determine the available roles.
    - **By Date and Time:** Filter the table data by Date and Time range. All date-related options filter data in UTC (Universal Time Coordinated). Resolver recommends a date parameter 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.
        - **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.
    - **By Created On/Modified On:** Filter the table data by Created On/Modified On Date. All date-related options filter data in UTC. Resolver recommends a date parameter 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.
        - **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.



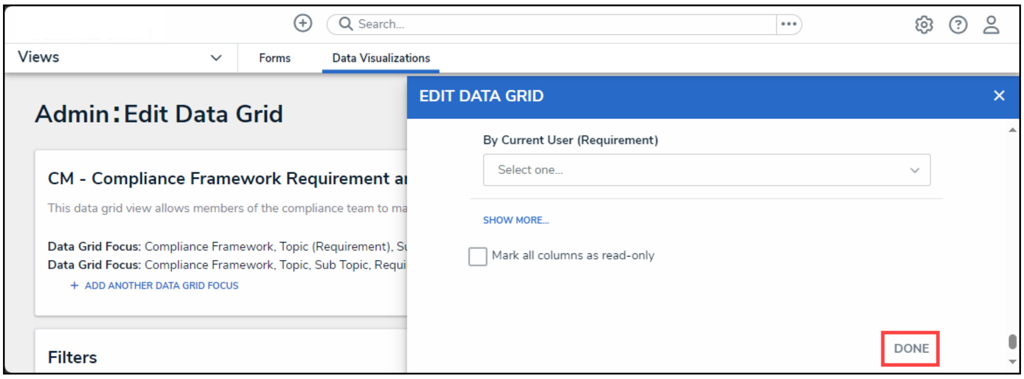
Define Parameter Fields

30. Click the **x** icon next to a parameter to remove it from the data grid.
31. Click a **Date Parameter** field and use the **Backspace** or **Delete** key to remove the value from the field.
32. **(Optional)** Select the **Mark all columns as read-only** checkbox to mark all parameters columns as read-only on the data grid.



Show SUM Totals for all Numeric Columns Checkbox

33. Click **Done** to close the ***Admin:* Edit Data Grid** screen.



Done Button

34. When you are done adding elements and configuring your report, you must add it to a report view to make it available to end-users. See the Views Overview and Create a Report View articles for more information.