Advanced Reporting Guide

Everbridge Suite

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Advanced Reporting

Introduction

Everbridge **Advanced Reporting** is a next-generation reporting solution that enables users to evaluate their Organization's many important use cases. Built on Google Looker, Advanced Reporting is a unified interface that aims to provide consistent reporting capabilities across all of the Everbridge products leveraged by an Organization.

For full instructions on the more complex aspects of Looker, see their documentation.

Availability

Advanced Reporting is available to customers who have purchased the following Everbridge Suite/CEM-based solutions:

- Incident Management
- CEM Business Operations
- CEM People Resilience

Supported Roles

While support for additional user roles will be added in later iterations, the launch version of Advanced Reporting is available for the following roles:

- Organization Administrator
- Incident Administrator

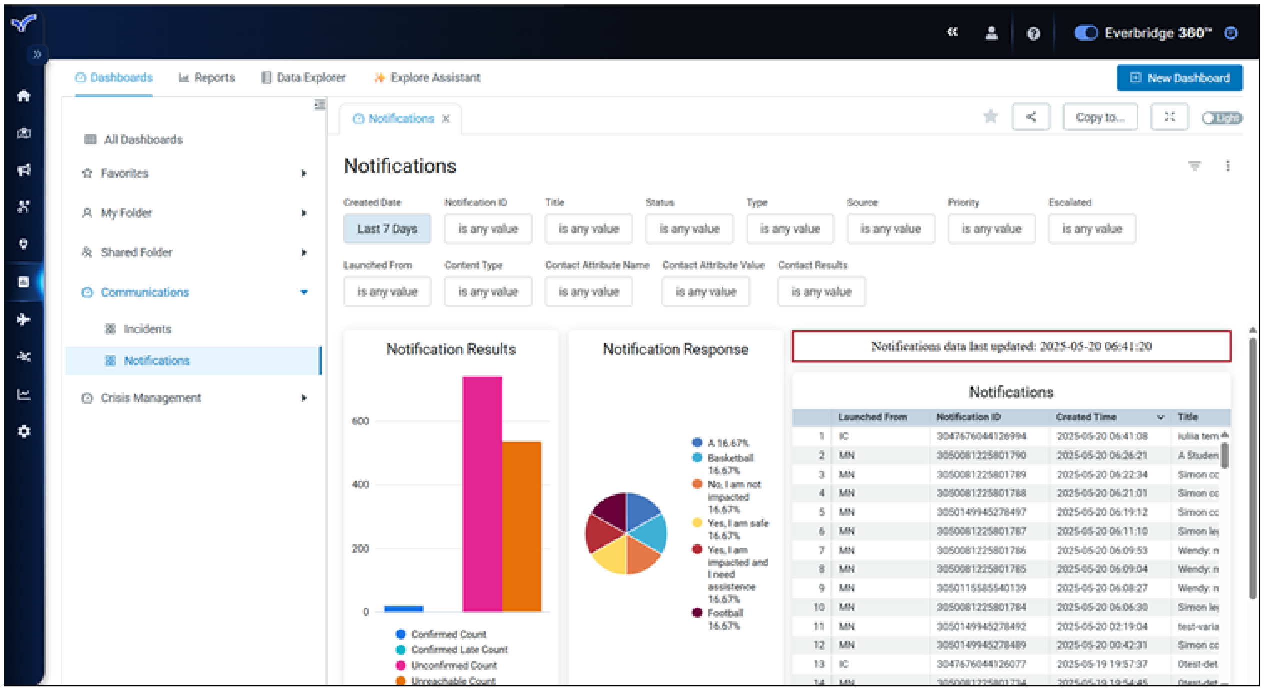
For additional flexibility, Advanced Reporting also supports Custom Role configuration for the following permissions:

- View/Run Reports
- Create, Edit, and Delete Reports
- Export Data
- Schedule Report Delivery

For more on Custom Roles, see the Custom Roles Guide and the Custom Roles Permissions Grid on the **Roles** page in the Manager Portal.

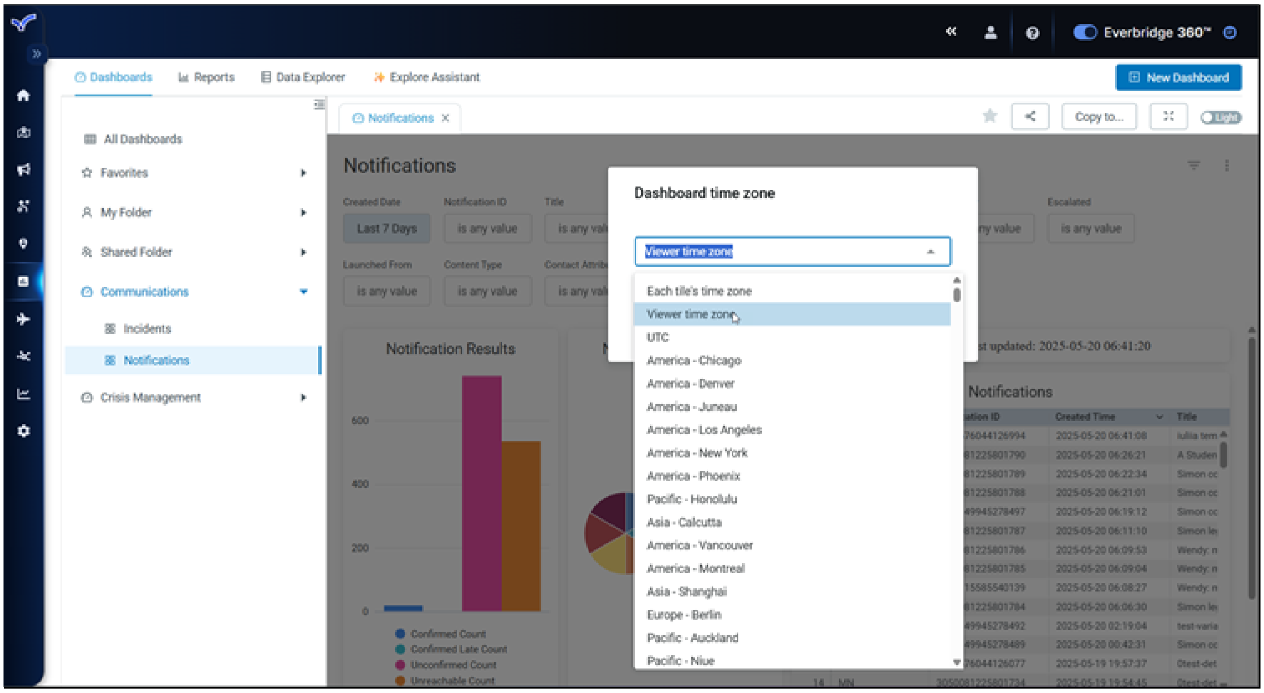
Data Refresh

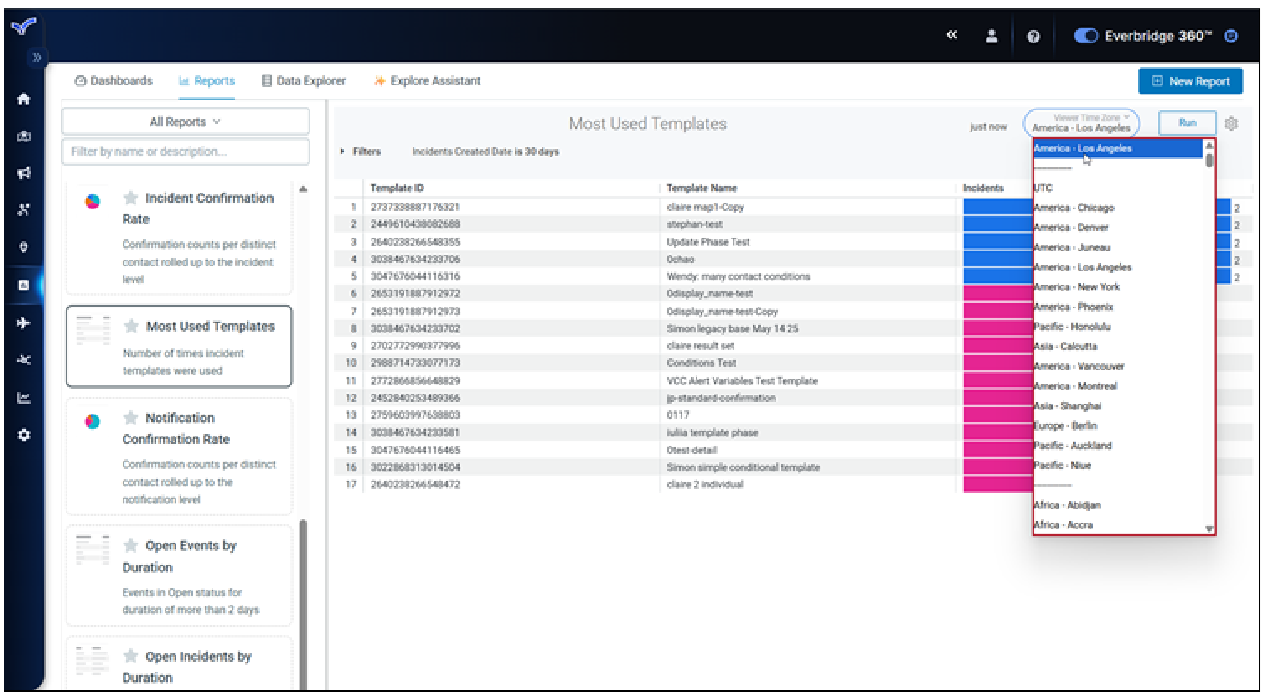
The Incident, Notification, and contact data is refreshed every four hours. The default dashboards come with a timestamp displaying when it was last refreshed.



Time Zones

All data found within the dashboards, reports, or data explorer are displayed in the viewer's time zone by default. If needed, this can be changed by clicking on the kebab menu icon and selecting the Time Zone that the data should be displayed in.



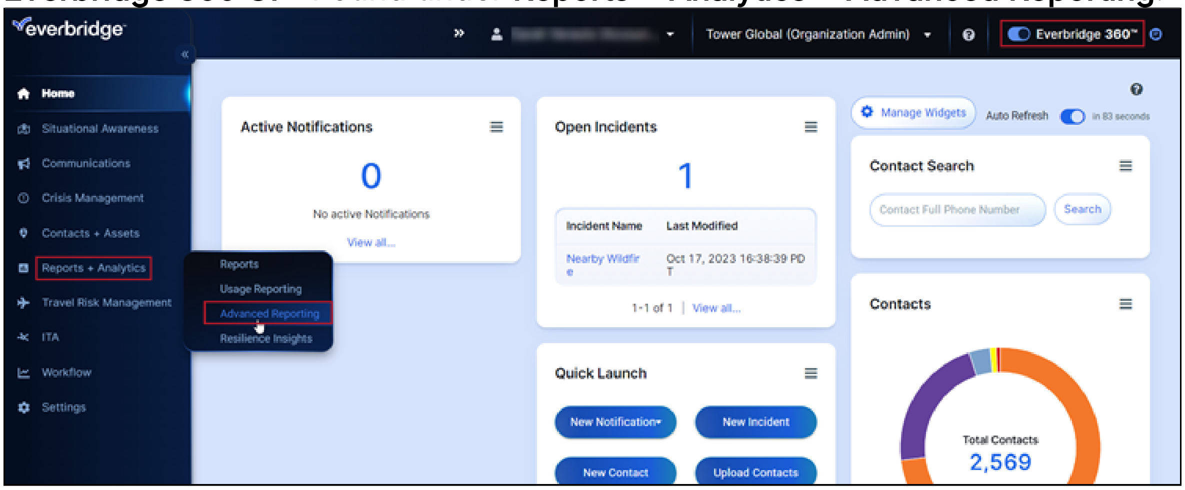


NOTE: The data within a scheduled report will still be displayed in UTC regardless of the selected time zone.

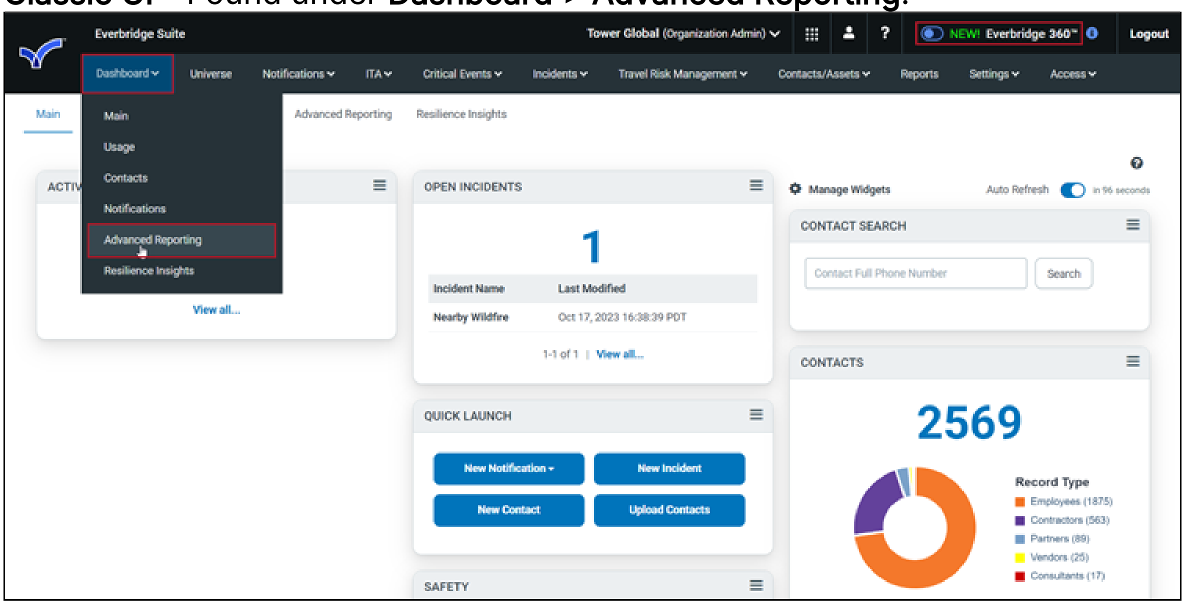
Accessibility

Advanced Reporting can be accessed in two ways, depending on the applied Manager Portal user interface:

- **Everbridge 360 UI** - Found under **Reports + Analytics** > **Advanced Reporting**.



- **Classic UI** - Found under **Dashboard** > **Advanced Reporting**.



Dashboards

Dashboards, which can be found under the **Dashboards** tab of Advanced Reporting, refer to the preconfigured and user-defined interfaces that present a comprehensive overview of an Organization's actionable data. Each dashboard consists of **Widgets**, which are standalone visualizations built off of attributes in the data. Reporting data goes back in an 18-month rolling time window. Resilience Insights customers can also see up to three years of historical data for Incidents and Notifications.

Custom dashboards can be created from different data points, and preconfigured Incidents and Notifications dashboards are provided to all applicable users. See Creating a Dashboard for more information.

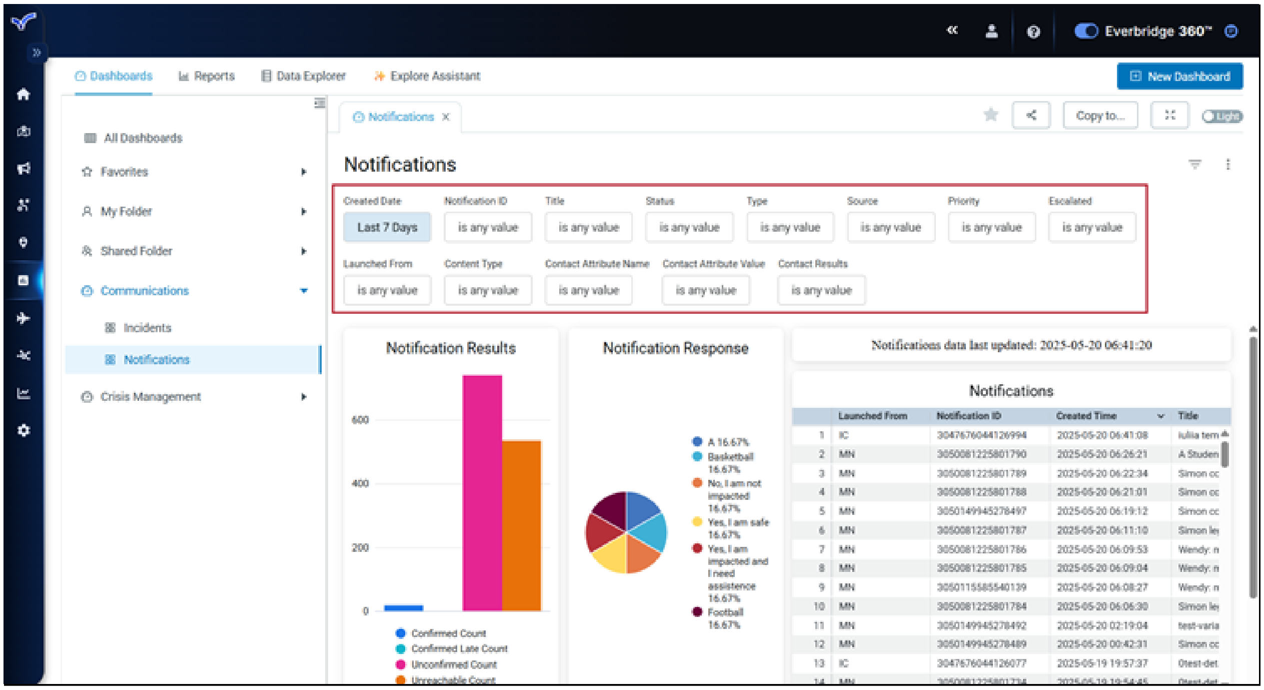
NOTE: Resilience Insights customers can also utilize Risk Event and Alert-specific dashboards.

The following table contains the descriptions of these preconfigured dashboards:

Dashboard	Description
Incidents	Displays all the Incidents launched by an Organization over a specific period. The Incident data can be filtered across ID, Template, Variables, and Contacts, among other filters.
Notifications	Displays all the Notifications generated by an Organization over a specific period. The Notification data can be filtered across ID, Status, Type, Source, Priority, Escalation, and Contacts, among other filters.
Critical Events	Displays all Critical Events generated by an Organization over a specific period.

Filters

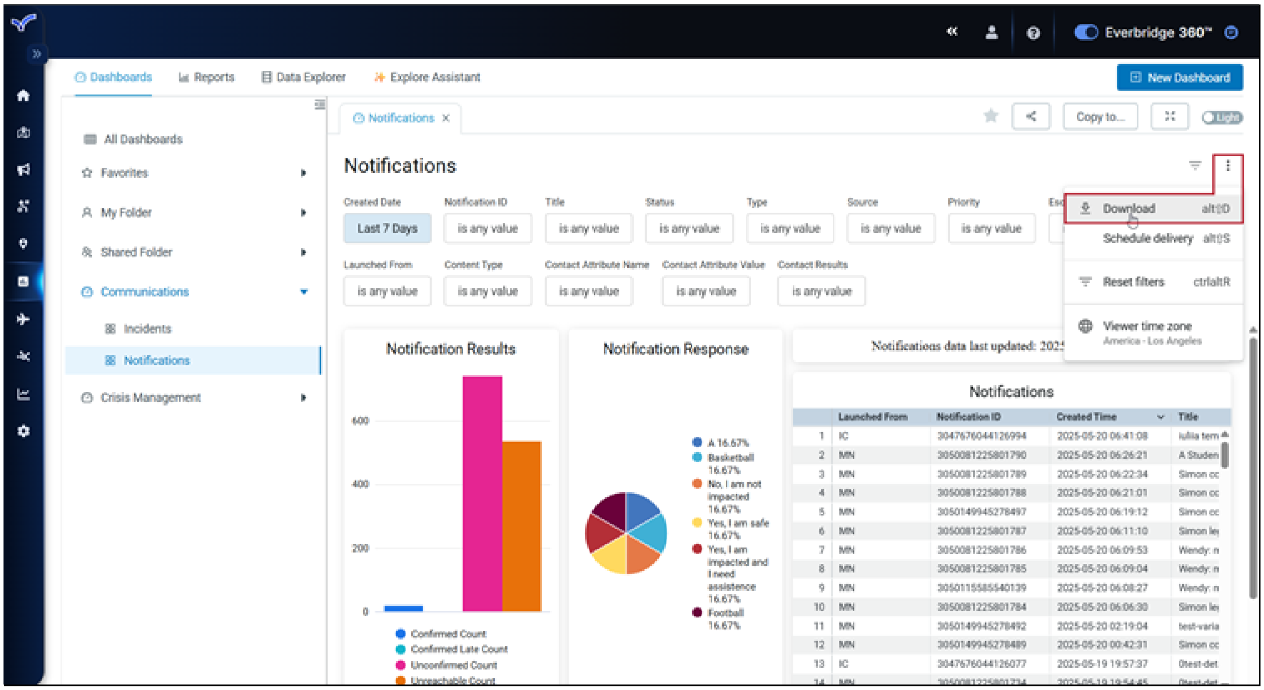
Each dashboard contains a row of filters. Each dashboard filter selected will affect the data displayed in each report widget and table. Use the filters to narrow the data to the criteria that meet your use case.



NOTE: Each dashboard has a set of default filters.

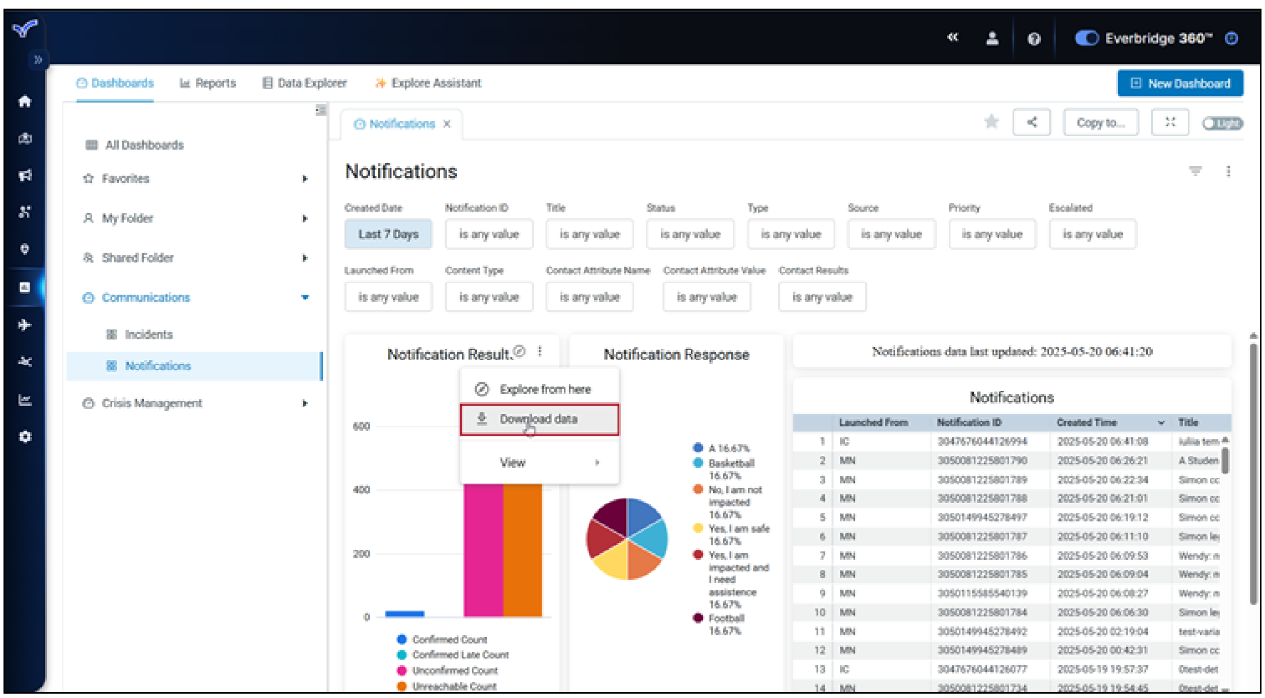
Download Dashboard Data

Each dashboard contains a **Download** menu item, allowing users to download the dashboard as a static PDF to share with the stakeholders in their Organization. Dashboard downloads are currently limited to 5,000 rows.



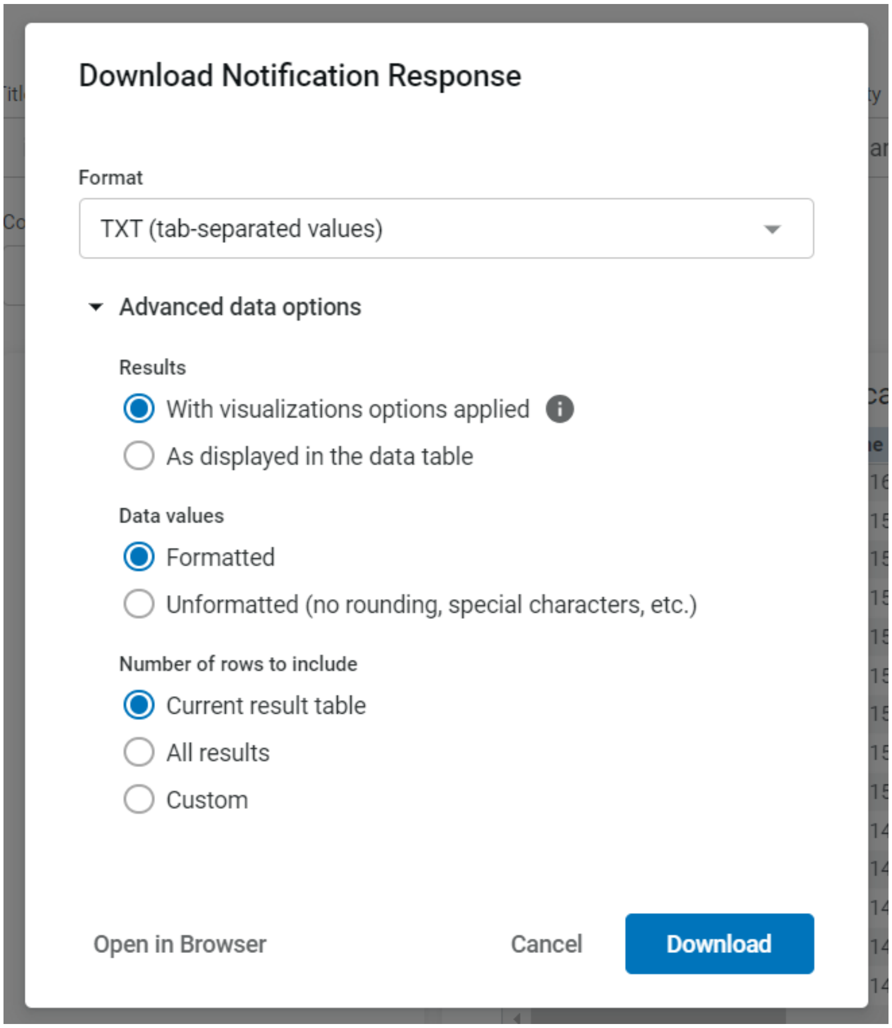
Download Widget Data

Each widget within the dashboard also contains a **Download** menu item. Widget downloads are currently limited to 5,000 rows.



Data can be downloaded in the following formats:

- TXT (tab-separated values)
- Excel spreadsheet (Excel 2007 or later)
- CSV
- JSON
- HTML
- Markdown
- PNG (image of visualization)

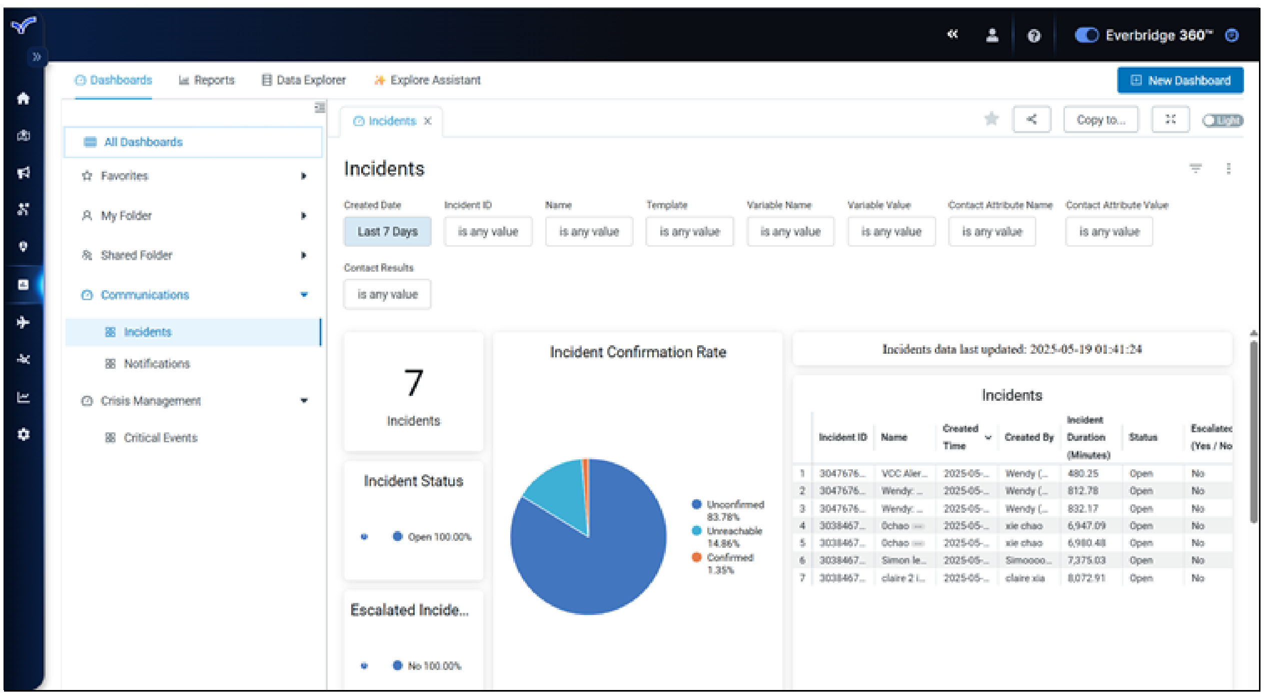


Incidents Dashboard

The **Incidents Dashboard** displays all the Incidents launched in an Organization over a specific period. The Incident data can be filtered across ID, Template, Variables, and Contacts among other filters.

This dashboard helps users understand the Incidents that have been launched in their Organization, and how recipients responded. Users can answer the following types of questions through this preconfigured dashboard:

- How many Incidents did our Organization launch historically?
- How did our contacts respond to these Incidents?
- How effective were different delivery methods in confirmation of the Incidents?
- How many Incidents were escalated?



Incidents Dashboard Filters

The following filters can be applied to the Incidents Dashboard:

Filters	Description
Created Date	The date when the Incident was created.
Incident ID	The ID of the Incident that was created.

Name	The name of the Incidents that were created.
Template	The template that was used to launch the Incident.
Variable Name	The name of the variable attached to the Incident.
Variable Value	The corresponding value of the variable attached to the Incident.
Contact Attribute Name	The name of the attribute attached to a contact.
Contact Attribute Value	The corresponding value of the attribute attached to a contact.
Contact Results	The result of sending an Incident to a contact; whether they have confirmed, not confirmed, or were unreachable.

Incidents Dashboard Widgets

The Incidents Dashboard is comprised of the following widgets:

Widget	Data	Visualization Type	Description
Incidents Count	Incidents	Single Value	The total count of Incidents that were launched over a time period.
Incidents Status	Incidents	Pie Chart	Displays the status of the Incidents that were launched over a time period; whether they are open or closed.
Escalated Incidents	Incidents	Pie Chart	Displays whether the Incidents launched over a time period are escalated or not.
Incident Confirmation Rate	Incidents	Pie Chart	Displays how contacts responded to Incidents launched over a time period (Yes or No).
Incidents	Incidents	Table	Tabular view of individual Incidents launched over a time period containing granular details including duration,

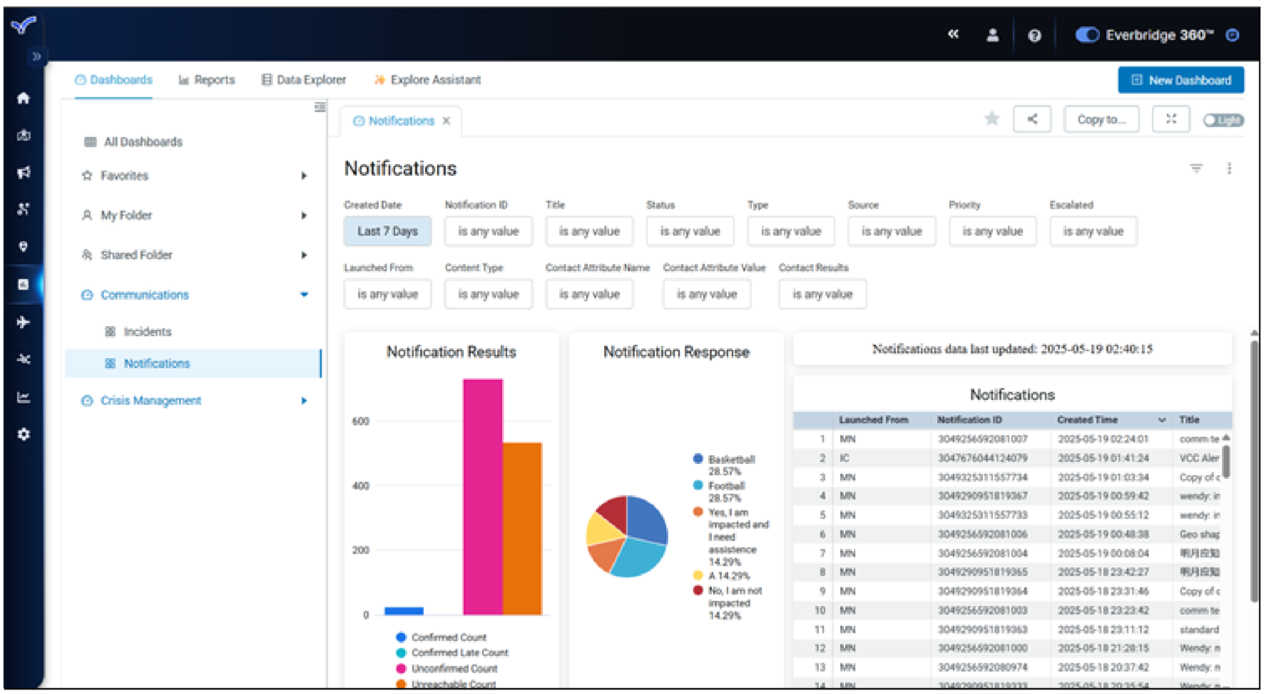
			average time to acknowledge, status, and more.
Confirmation Rate by Delivery Method	Incidents	Pie Chart	Displays different delivery methods to reach contacts and how they responded (Yes or No) to Incidents launched over a time period.
Confirmation Rate by Attribute	Incidents	Bar Chart	Displays different user-defined contact attributes and the percentage of contacts that confirmed Incidents launched over a time period.
Incident Contacts	Incidents	Table	Tabular view of individual contacts, their attributes, and their responses to Incidents launched over a time period.

Notifications Dashboard

The **Notifications Dashboard** displays all of the Notifications generated in an Organization over a specific period. The Notification data can be filtered across ID, Status, Type, Source, Priority, Escalation, and Contacts, among other filters.

The Notifications Dashboard helps users understand the Notifications that have been launched in their Organization, and how recipients responded. Users can answer the following types of questions through this preconfigured dashboard:

- How many Notifications did our Organization launch historically?
- How did our contacts respond to these Notifications?
- How much time did it take our contacts to respond to the Notifications?
- What were the confirmation results for these Notifications?



Notifications Dashboard Filters

The following filters can be applied to the Notifications Dashboard:

Filters	Description
Created Date	The date when the Notification was created.
Notifications ID	The ID of the Notification that was created.

Title	The title of the Notifications that were created.
Status	The status of the Notifications that were created; whether they were completed or not.
Type	The type of Notifications that were created; whether they were polling, standard, or conference.
Source	The source of the Notifications that were created.
Priority	The priority of the Notifications that were created.
Escalated	Whether the Notifications that were created were escalated or not.
Content Type	The type of content within the Notifications that were created.
Contact Attribute Name	The name of the attribute attached to a contact.
Contact Attribute Value	The corresponding value of the attribute attached to a contact.
Contact Results	The result of sending a Notification to a contact; whether they have confirmed, not confirmed, or were unreachable.

Notifications Dashboard Widgets

The widgets below make up the Notifications Dashboard:

Widget	Data	Visualization Type	Description
Notification Results	Notifications	Bar Chart	Displays the results of the Notifications that were launched over a time period; whether contacts confirmed, confirmed late, did not confirm, or were unreachable.
Notification Response	Notifications	Bar Chart	Displays the responses of contacts that confirmed for Notifications launched over a time period.

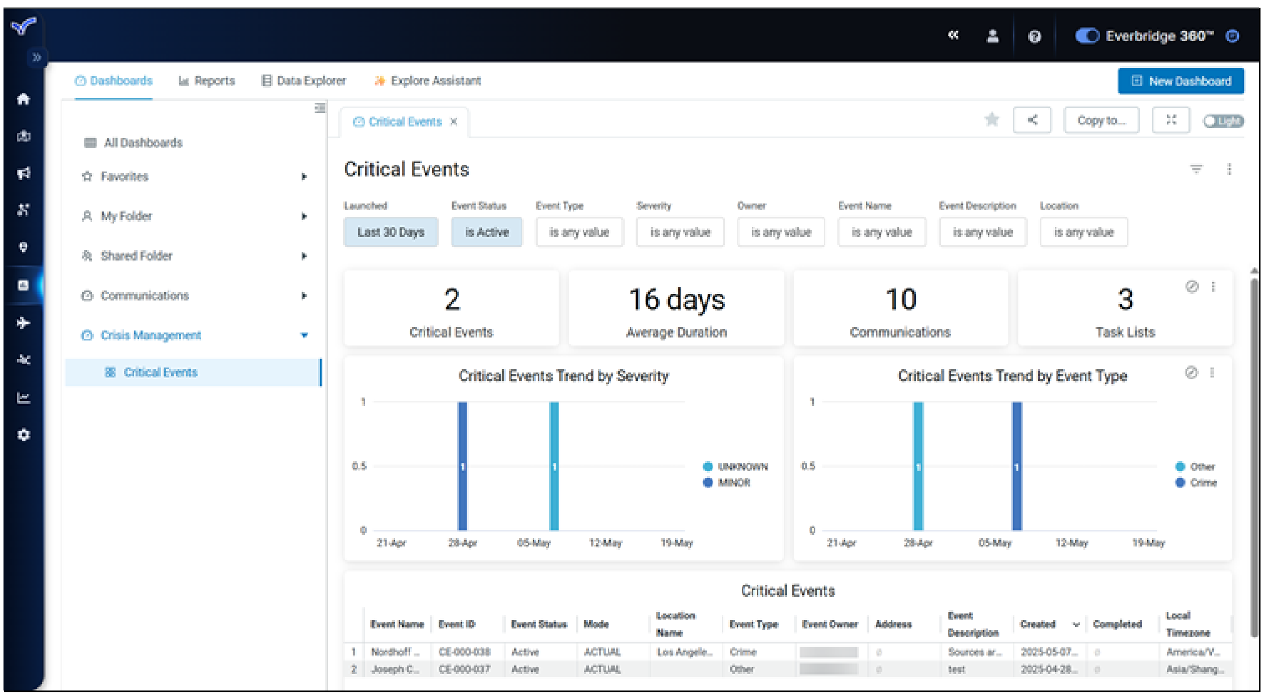
Notifications	Notifications	Table	Tabular view of individual Notifications launched over a time period containing granular details including time, status, source, priority, and more.
Notification Contacts	Notifications	Table	Tabular view of individual contacts, their attributes, and their responses to Notifications launched over a time period.

Critical Events Dashboard

The **Critical Events Dashboard** displays all the Critical Events launched in an Organization over a specific time period. The Critical Event data can be filtered across time, status, Event Type, Severity, Location, and more.

This preconfigured dashboard helps users answer the following types of questions:

- What trends can we determine by looking at Critical Event Severity or Event Type?
- How long does it take to resolve Critical Events on average?
- How many Communications have been sent out connected to a Critical Event?
- How many Task Lists have been assigned and to whom?



Critical Events Dashboard Filters

The following filters can be applied to the Critical Events Dashboard:

Filters	Description
Launched	When the Critical Event was launched.
Event Status	The status of the Critical Event.
Event Type	The Critical Event's Event Type.

Severity	The Critical Event's Severity.
Owner	The Owner of the Critical Event.
Event Name	The name of the Critical Event.
Event Description	The description of the Critical Event.
Location	Where the Critical Event occurred.

Critical Events Dashboard Widgets

The Critical Events Dashboard is comprised of the following widgets:

Widget	Data	Visualization Type	Description
Critical Events	Critical Event	Single Value	Shows the number of active Critical Events.
Average Duration	Critical Event	Single Value	The average duration of Critical Events for this Organization.
Communications	Critical Event	Single Value	The number of Communications sent for active Critical Events.
Task Lists	Critical Event	Single Value	The number of Task Lists launched with Critical Events.
Critical Event Trend by Severity	Critical Event	Column	Critical Event trends by Severity.
Critical Event Trend by Event Type	Critical Event	Column	Critical Event trends by Event Type.
Critical Event Details	Critical Event	Table	A table displaying Critical Events and their key details: • Event Name • Event ID • Event Status • Mode • Location Name • Event Type

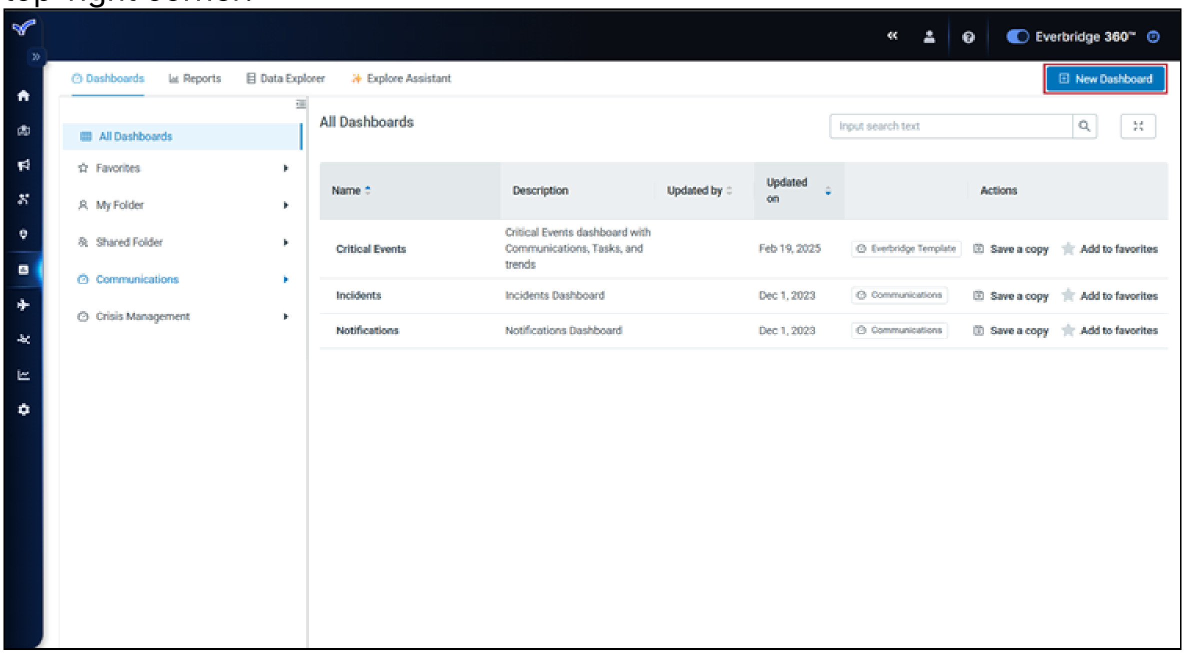
			• Event Owner • Address • Event Description • Created • Completed • Local Timezone

Create New Dashboard

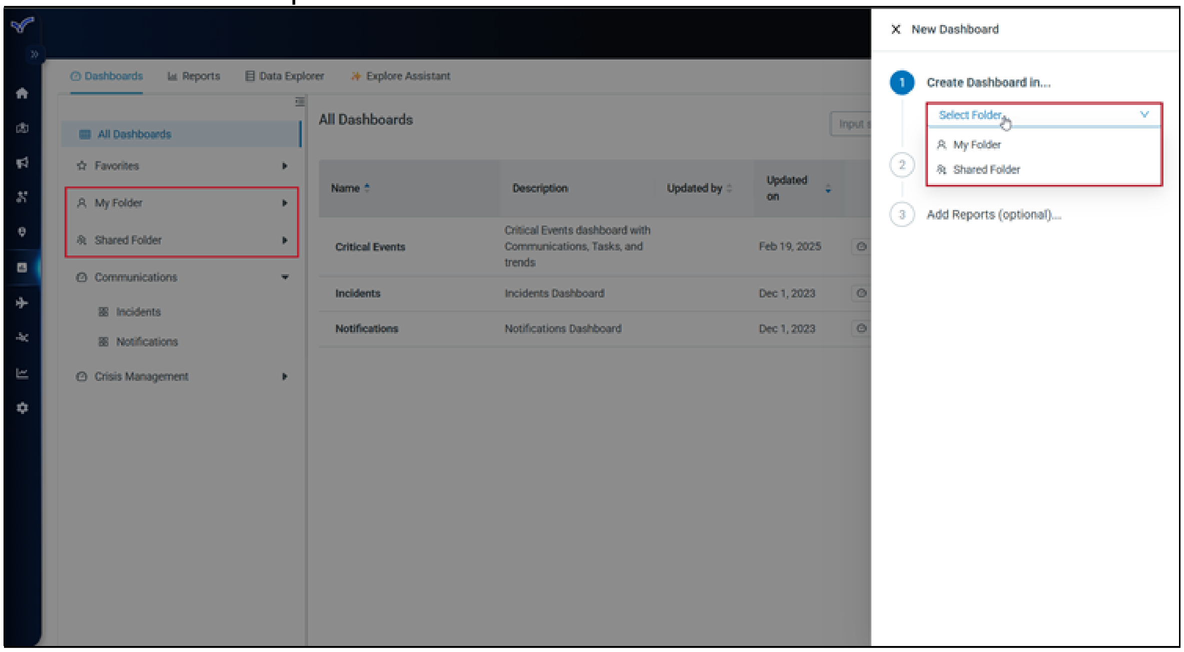
In addition to the preconfigured dashboards, users can create their own custom dashboards to display the data that matters most to them.

To create a dashboard:

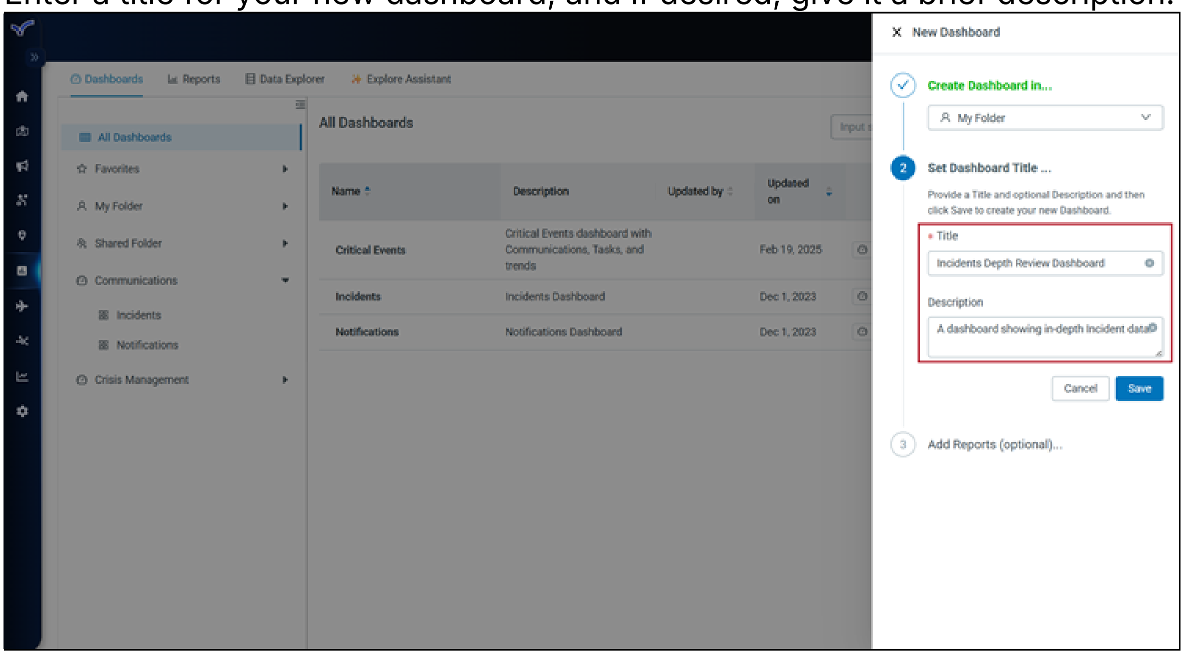
1. From the **Dashboards** tab in Advanced Reporting, click **New Dashboard** in the top-right corner.



2. The **New Dashboard** side panel will open. Select the desired destination folder from the dropdown menu.

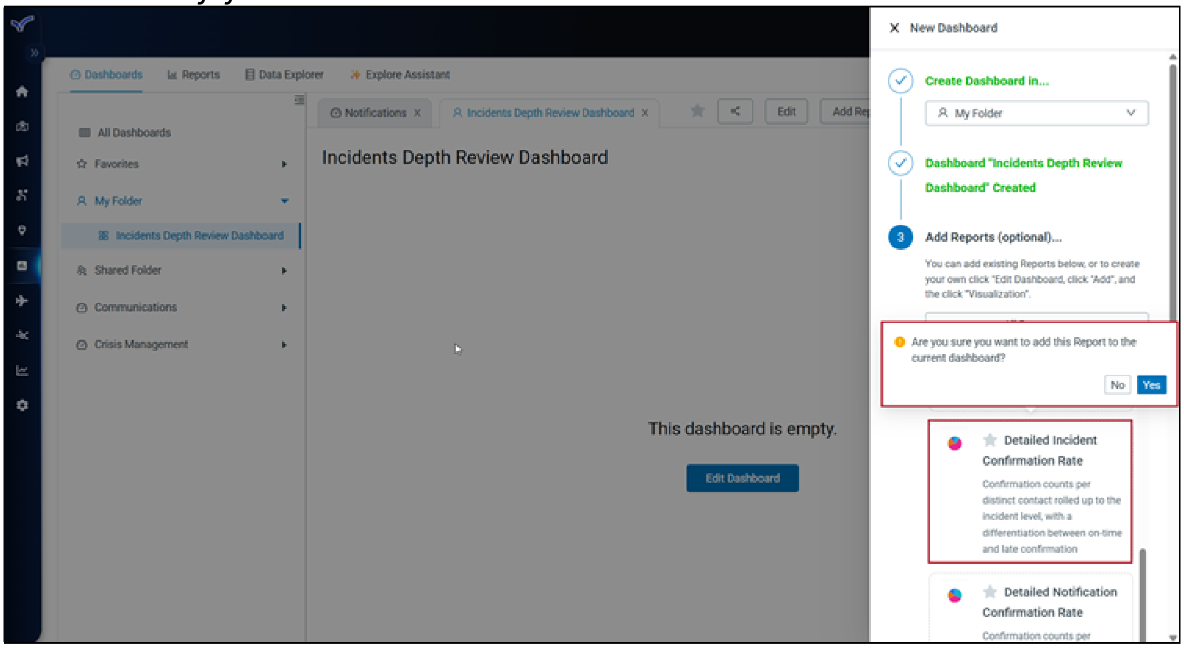


3. Enter a title for your new dashboard, and if desired, give it a brief description.

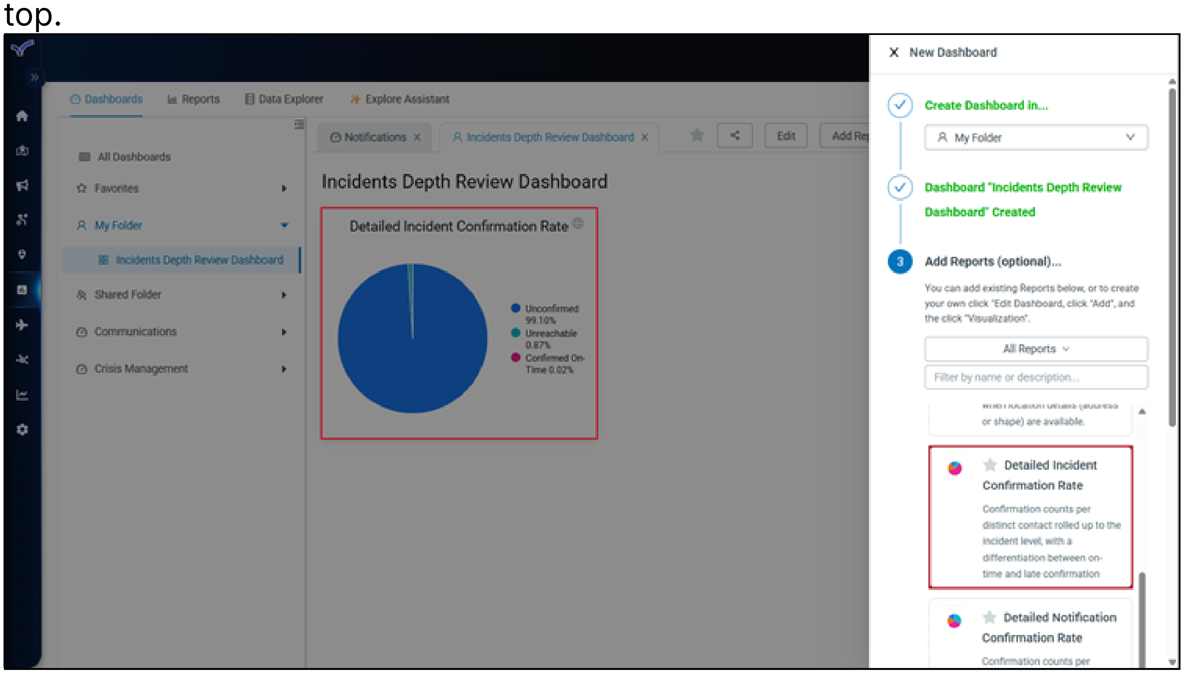


4. Click **Save** to advance to the optional **Add Reports** section. The preview of the new dashboard can be seen to the left of the panel.
5. The **Add Reports** section of the modal expands, offering a list of Communication and (if purchased) Resilience Insights reports that can be attached to this dashboard. Use the filters or locate any desired reports, and

then click any you wish to add. Click **Yes** to confirm the selections.

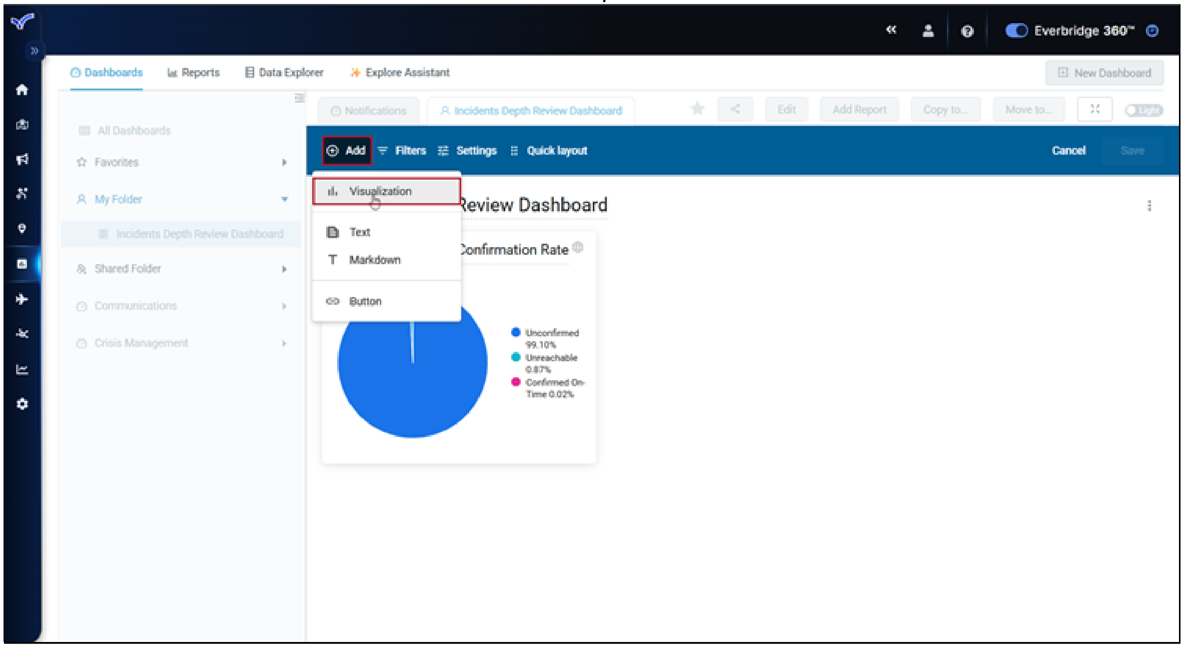


6. The report will appear in the preview to the left of the panel. Add as many reports as needed (if any), then close the side panel by clicking the **X** at the top.

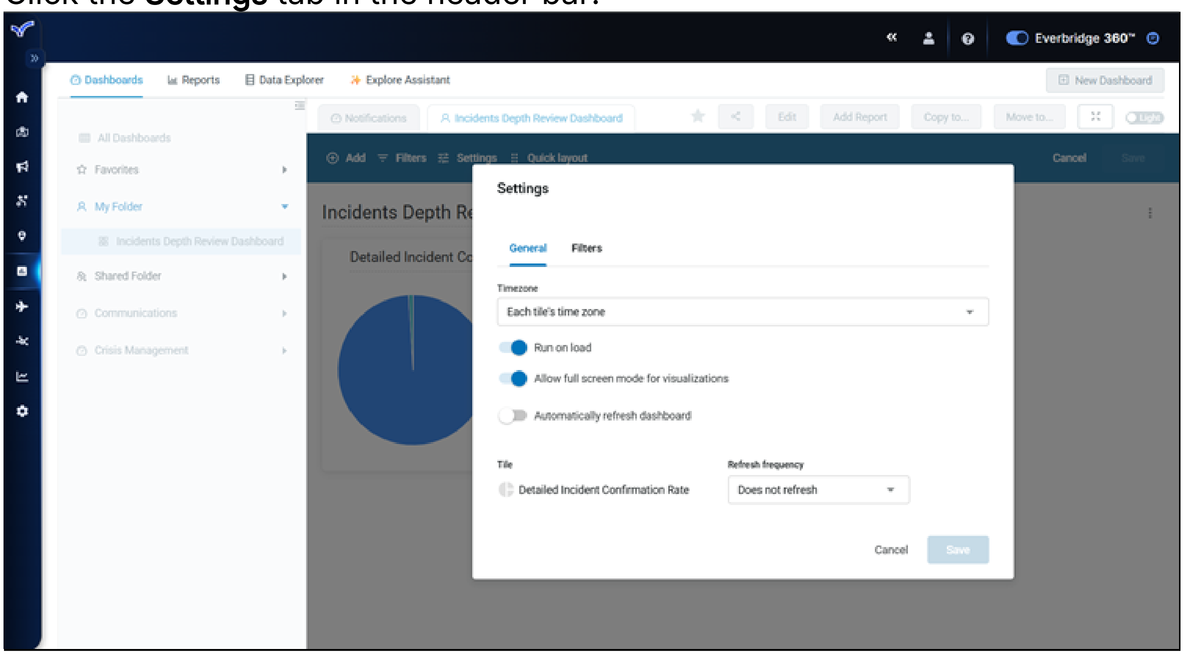


7. Click **Add** > **Visualization** to create a visualization for this dashboard. See Creating Visualizations for more details. Text, buttons, and markdown

content can be added to the dashboard, as well.



8. Click the **Settings** tab in the header bar.

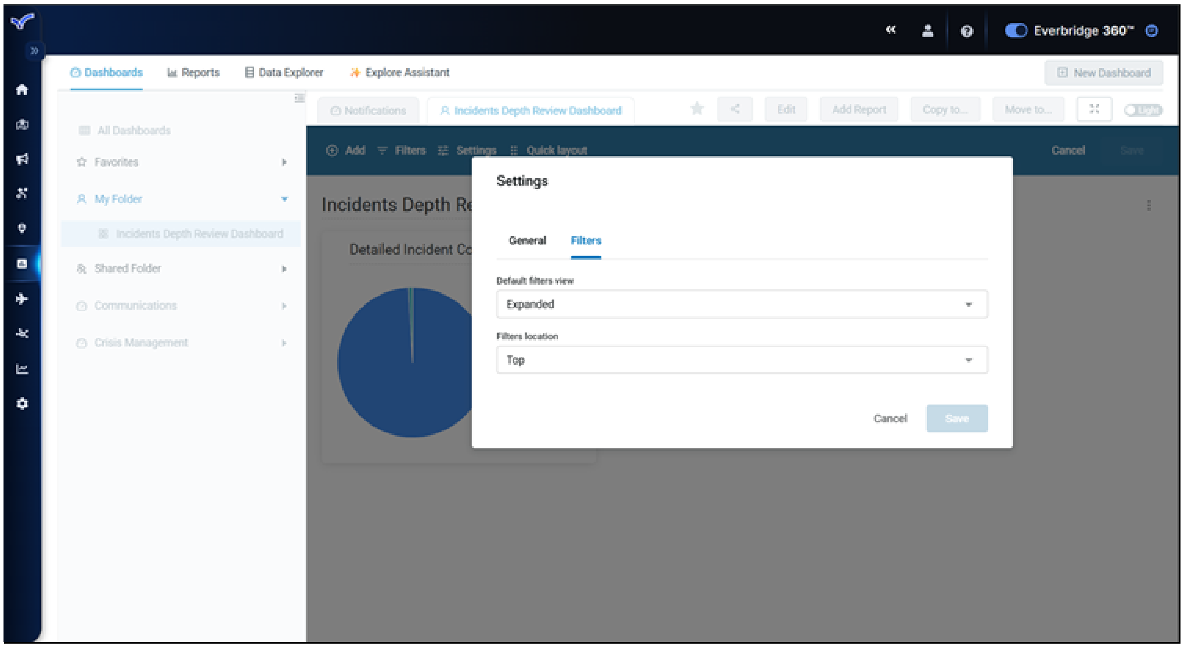


Configure the following items as needed under the **General** subtab:

- Timezone
- Run on load
- Allow full-screen mode for visualizations
- Automatically refresh dashboard

9. Set the refresh frequency for the individual tiles on the dashboard.
10. Click **Save** once the selections have been made on the **General** subtab.

11. Click the **Filters** subtab to set the default filters view and filters location.



12. Once satisfied with the content and layout of the dashboard, click **Save**. It can always be edited again later as needed.

Managing Dashboards

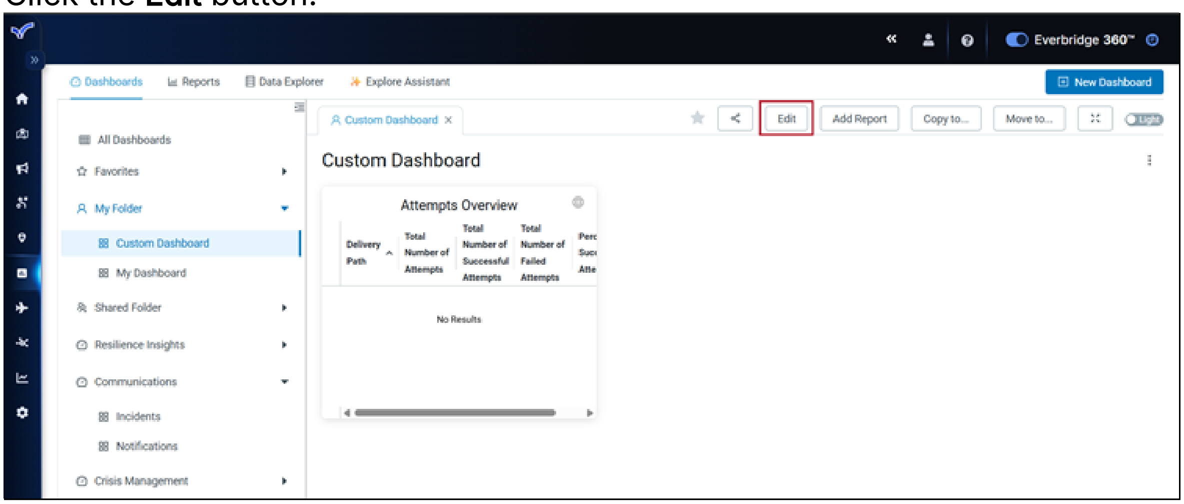
Custom Dashboards can be edited and deleted directly from the Dashboard interface.

NOTE: The default Incidents, Notifications, and Critical Events Dashboards can't be edited or deleted.

Editing Dashboards

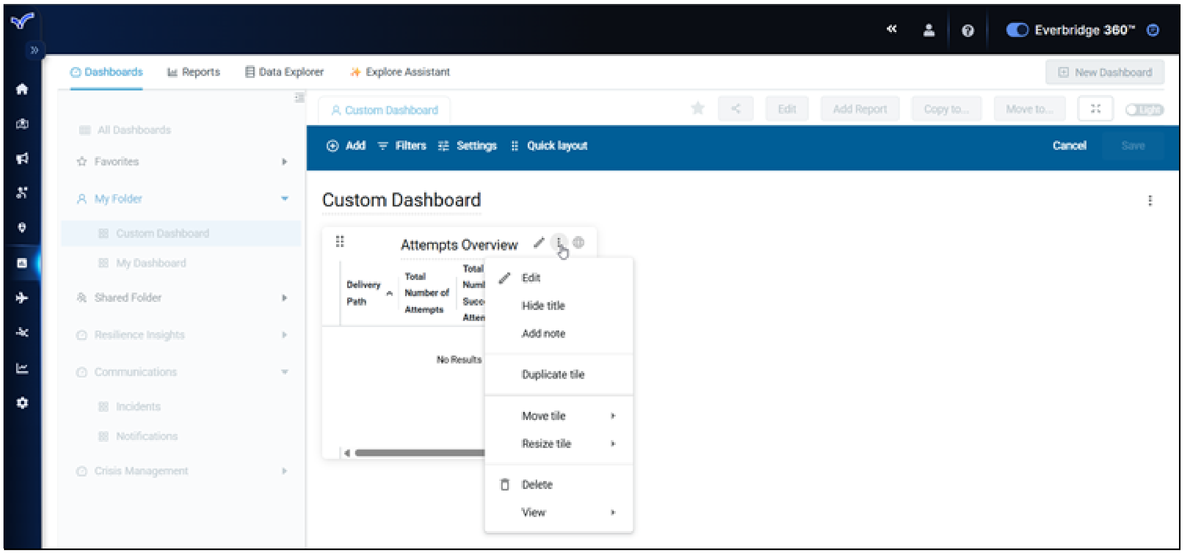
To edit a Dashboard:

1. Select the desired Dashboard from the list.
2. Click the **Edit** button.



3. The Dashboard will be put into **Edit** mode. Make whatever changes necessary, such as adding or editing tiles, editing settings, or adjusting

filters.

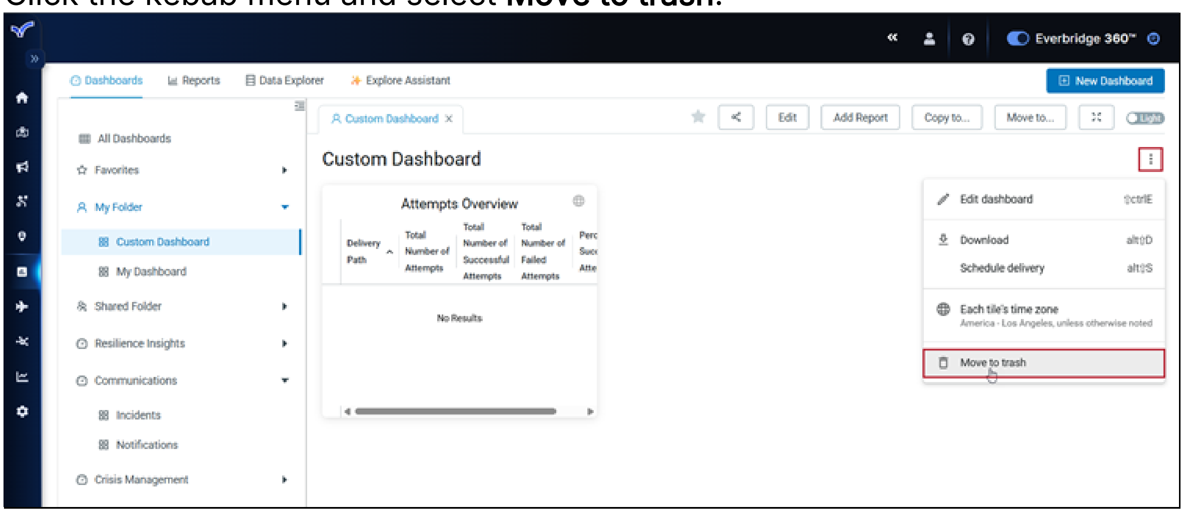


4. Click **Save**.

Deleting Dashboards

To delete a Dashboard:

1. Select the desired Dashboard from the list.
2. Click the kebab menu and select **Move to trash**.

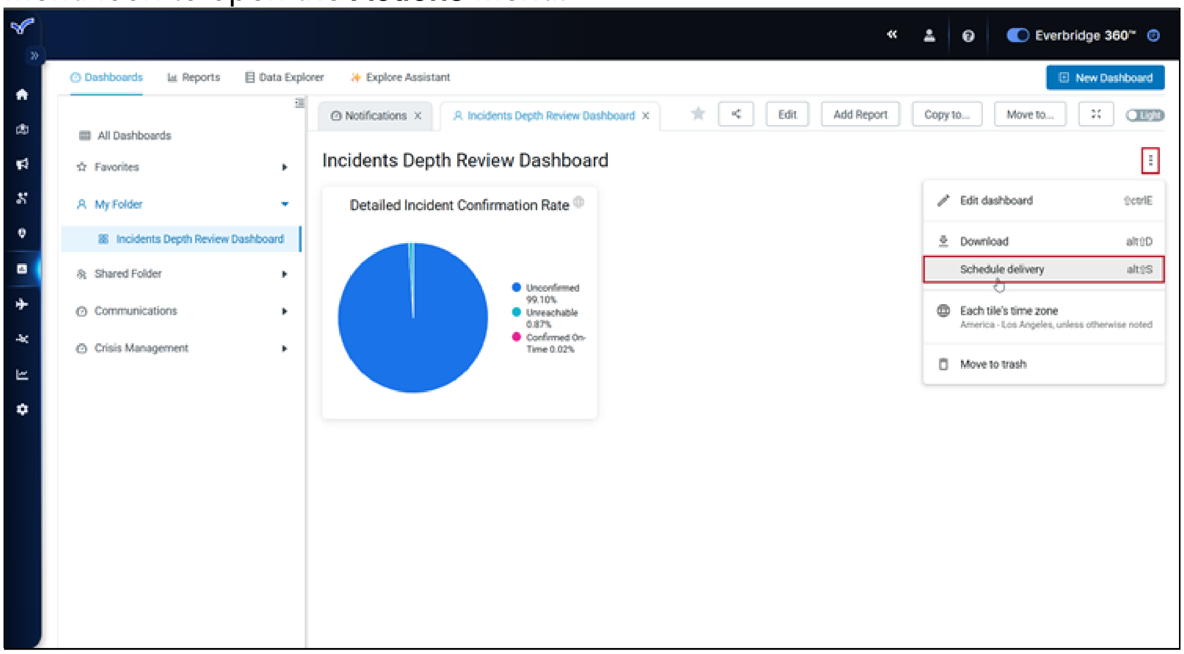


3. Click **Move to trash** again on the confirmation modal to proceed with deleting the Dashboard.

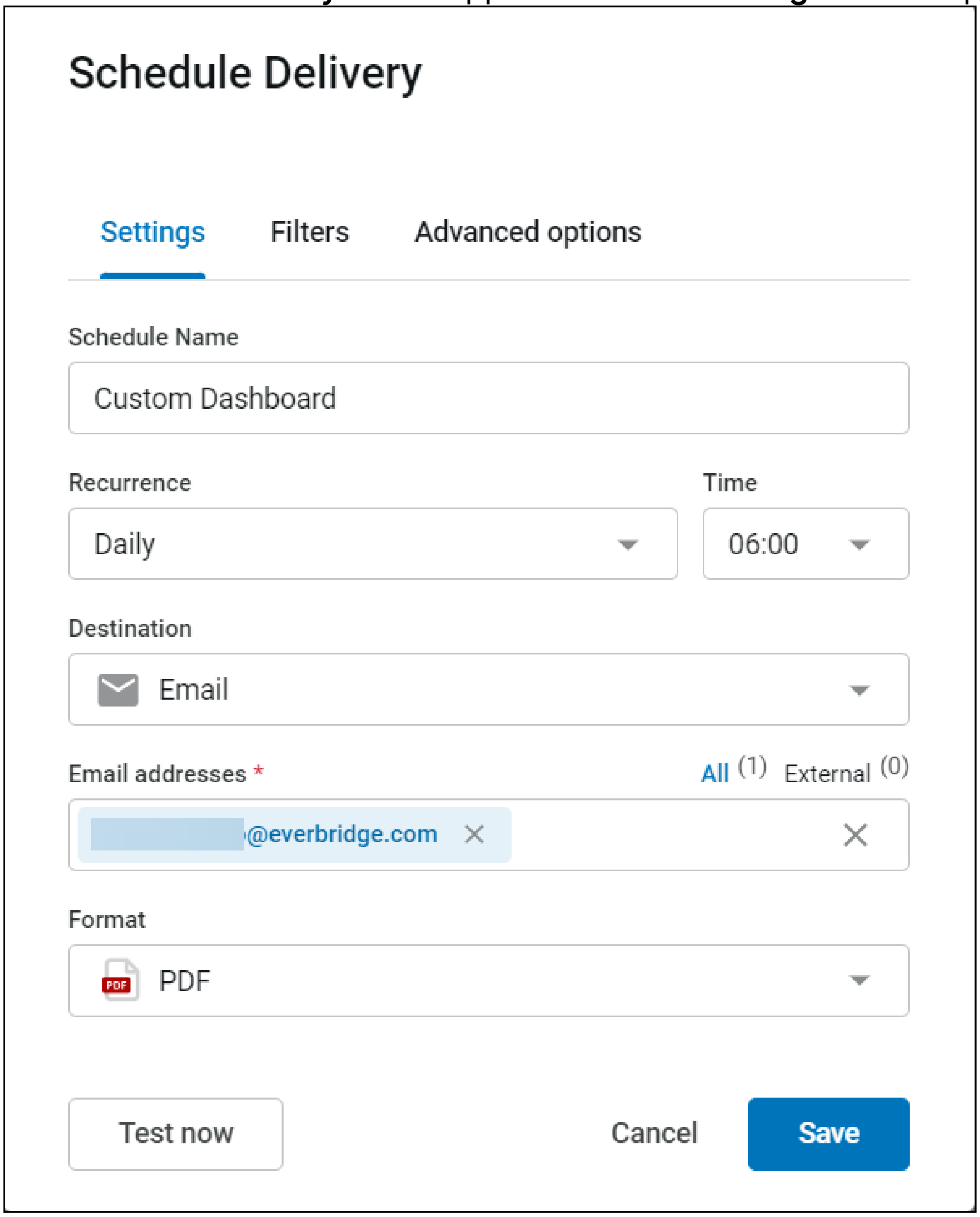
Schedule Dashboard Delivery

Dashboards can be scheduled to be sent out to stakeholders at specified intervals. To do so:

1. Locate the desired dashboard in the **Dashboard** tab, then click the kebab menu icon to open the **Actions** menu.



2. The **Schedule Delivery** modal appears with the **Settings** subtab open.

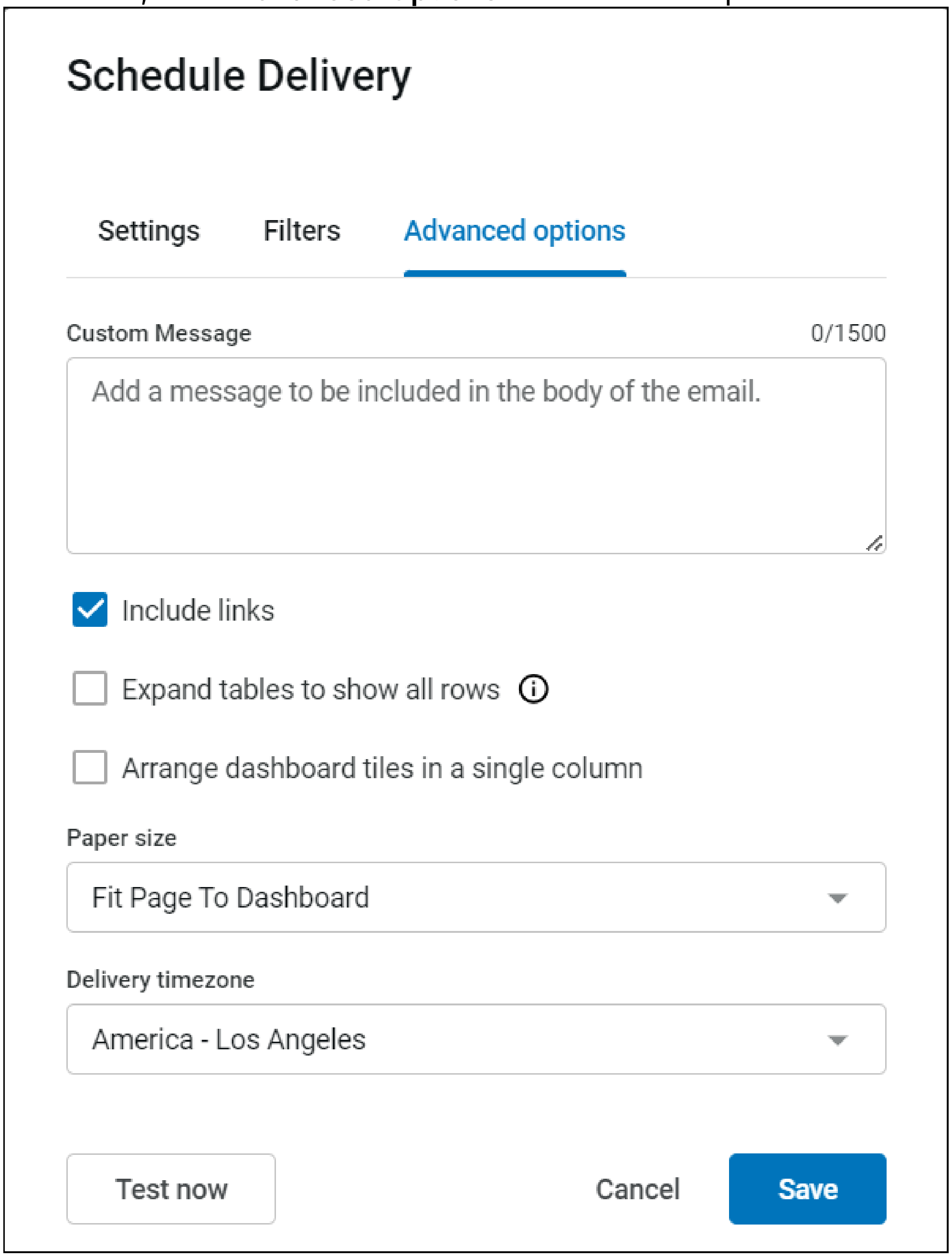


Specify the following:

- **Schedule Name**
- **Recurrence**
    - Send Now
    - Monthly
    - Weekly
    - Daily
    - Hourly
    - Minutes
    - Specific Months
    - Specific Days

- **Time**
- **Email addresses**
- **Format**
  - CSV ZIP file
  - PDF
  - PNG visualization

3. If needed, click **Advanced Options** for additional options.

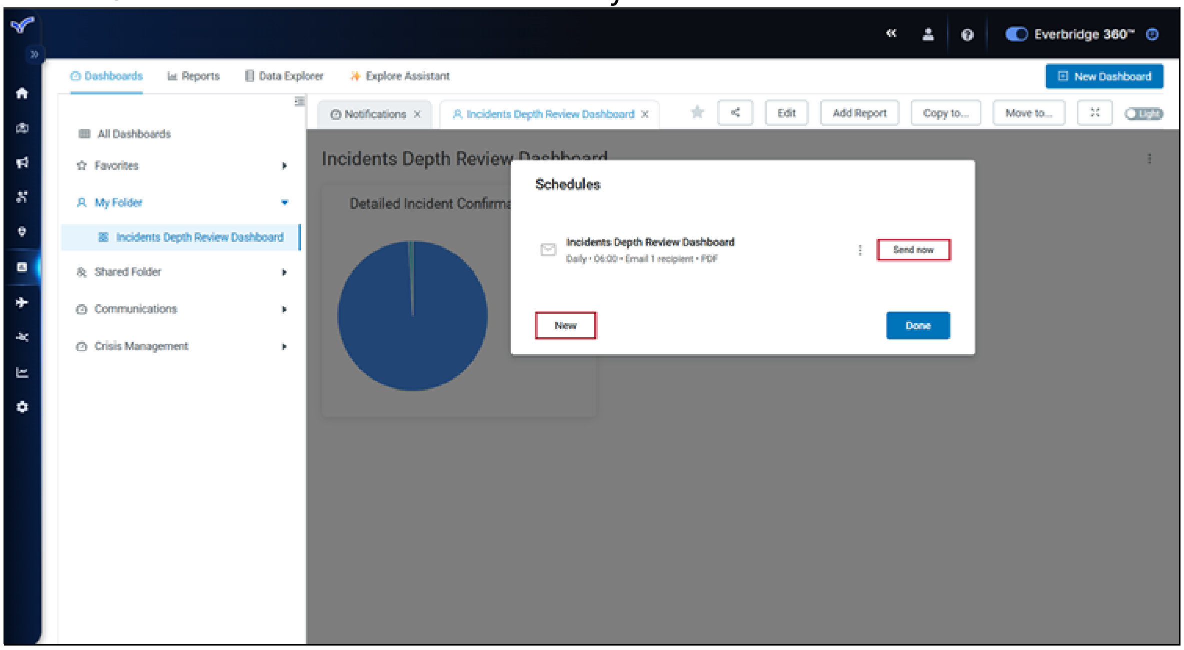


Configure the following:

- Custom message
- Include links

- Expand tables to show all rows
- Arrange dashboard tiles in a single column
- Paper size
- Delivery Timezone

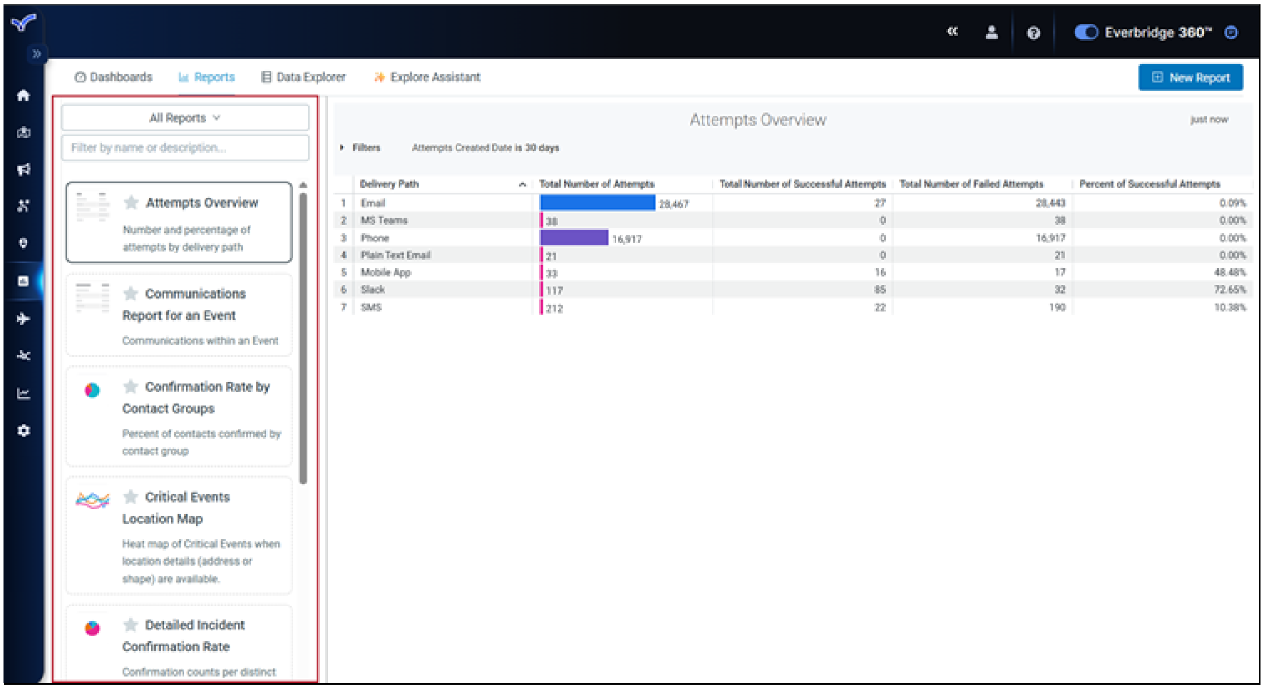
4. Click **Save**. The dashboard will refresh, and the scheduled delivery will appear. Optionally, click **Send now** to send the dashboard out immediately, or click **New** to create an additional delivery schedule for this dashboard.



5. Once finished, click **Done** to close the modal.

Reports

The **Reports** tab consists of a library of premade visualizations and tables that answer common Communications and Resilience Insights questions in a stand-alone, shareable format.



Default Reports

The following reports have been preconfigured for ease of access and use. Note that the default reports cannot be edited. However, users can save their own versions of these reports (including their data points, filters, and visualizations), enabling them to make modifications as needed. These saved versions will appear in a specified folder.

See Saving Reports for more information.

Communications Reports

Communications	Description
Attempts Overview	Number and percentage of attempts by delivery path.
Confirmation Rate by Contact Groups	Percent of contacts confirmed by contact group.

Most Used Templates	Number of times Incident Templates were used.
Open Incidents by Duration	Open Incidents and how long they have been open for (beyond seven days).
Trends of Failed Attempts	Failed attempts over time via delivery path.

Resilience Insights Reports

NOTE: Resilience Insights reports are only available to Resilience Insights customers.

Resilience Insights	Description
Affected Assets Alerts	Count of alerts for each Asset affected by Risk Event.
Alert Rate	Percentage of Risk Events that got converted into alerts.
Alert Rate by Source	Percentage of Risk Events that got converted into alerts by source.
Alert Trend	Trend of total number of alerts by created date.
Alerts	Total number of alerts created.
Alerts Tend by Category	Trend of total alerts created each day by category.
Attempt Acknowledgement Rate per Delivery Path	Percent of acknowledged attempts by day per delivery path.
Attempt Average Time to Acknowledge per Delivery Path	Average acknowledgment time in minutes per delivery path.
Attempt Failure Rate	Percent of failed attempts by day per delivery path.
Attempt Success Rate	Percent of successful attempts by day per delivery path.
Average Alert Acknowledge Time (in hours)	Average hours to alert acknowledgment per severity.
Average Incident Launched Time (in hours)	Average hours to Incident creation in hours per severity.
Average Time to Acknowledge (in minutes)	Average acknowledgment time in minutes per severity.

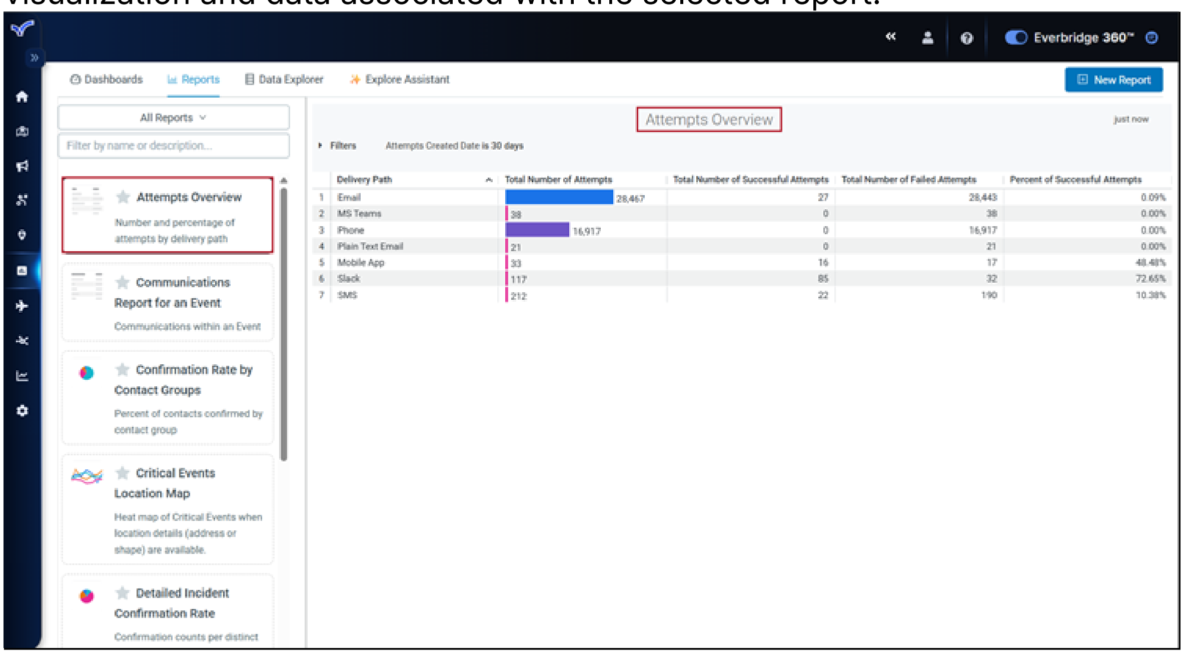
Critical Events Created	Total number of Critical Events created.
Cumulative Count of Impacted Assets	Total number of impacted Assets.
Details	Details and status of each alert created.
Escalation Notification	Percentage breakdown of Incidents that were and were not escalated.
Incident Mean Time to Acknowledge (MTTA)	Mean time to acknowledgment in minutes by creation date.
Incident Mean Time to Resolve (MTTR)	Mean time to resolution in minutes by creation date.
Incidents Closed	Total number of Incidents closed by date.
Incidents Created Count	Total number of Incidents created by date.
Incidents Created Trend	Trend of total Incidents created by date.
Incidents Status	Total number of Incidents created by current status.
Notification Count by Incident	Trend of maximum, minimum, average, and mean Incident Notification count.
Risk Event Categories	Percent of total Risk Events by category.
Risk Event Severity	Count of Risk Events by severity.
Risk Event Trend	Trend of total number of Risk Events by date per severity.
Risk Events	Heat map of total Risk Events.
Risk Events Alerts	Details of Risk Event alerts.
Risk Events Alerts Map	Heat map of Risk Event alerts and impacted Assets count.
Risk Events Count	Total number of Risk Events.
Risk Events Source	Total Risk Events by source.
Top 10 Incidents by Notification Count	Incident name and Notification count for top Incidents by Notification count.
Top 10 Most Used Templates	Top 10 Incident Templates by count of Incidents created.
Top 10 Most Used Variable Name & Value Combinations	Top 10 variable name and value combinations with a count of Incidents created.

Top 5 Categories	Total number of Risk Events for top 5 categories.
Total Alerts	Total alerts by severity.
Total Alerts Created	Total number of alerts created.
Total Number of Risk Events	Total number of Risk Events created.

View Reports

To view a report from the **Reports** tab:

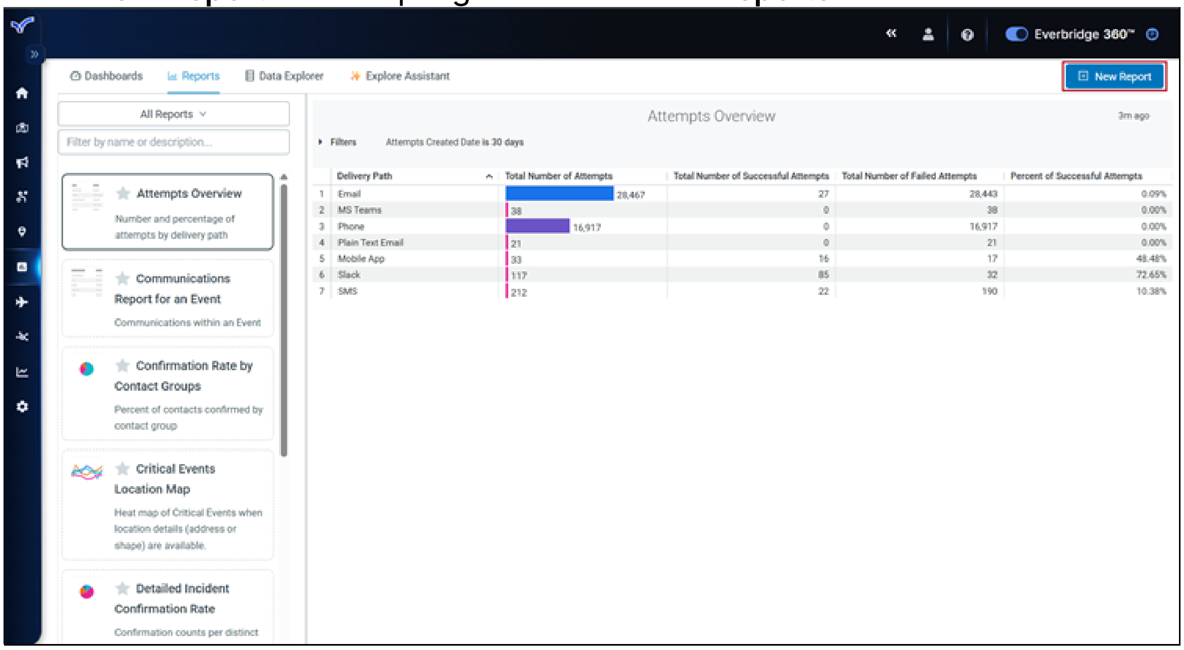
1. Scroll down the list to find a specific report, or, optionally, enter search terms to find it. You can also hover the cursor over **All Reports** and choose from one of the following options to filter the results:
    - All Reports
    - Favorites
    - My Folder
    - Shared Folder
    - Quick Reports
        - Communications
        - Resilience Insights
2. Click the desired report. It will populate to the right with the built-in visualization and data associated with the selected report.



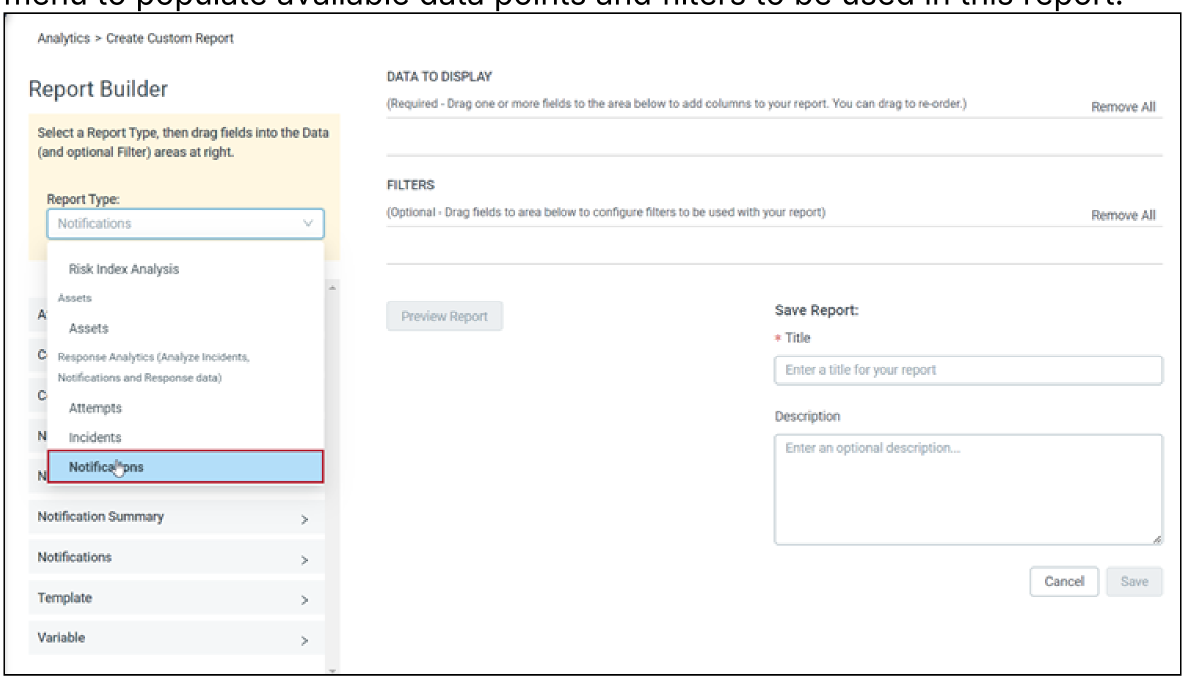
Create Reports

Users can also create new reports in addition to using the preconfigured reports. To do so:

1. Click **New Report** in the top-right corner of the **Reports** tab.

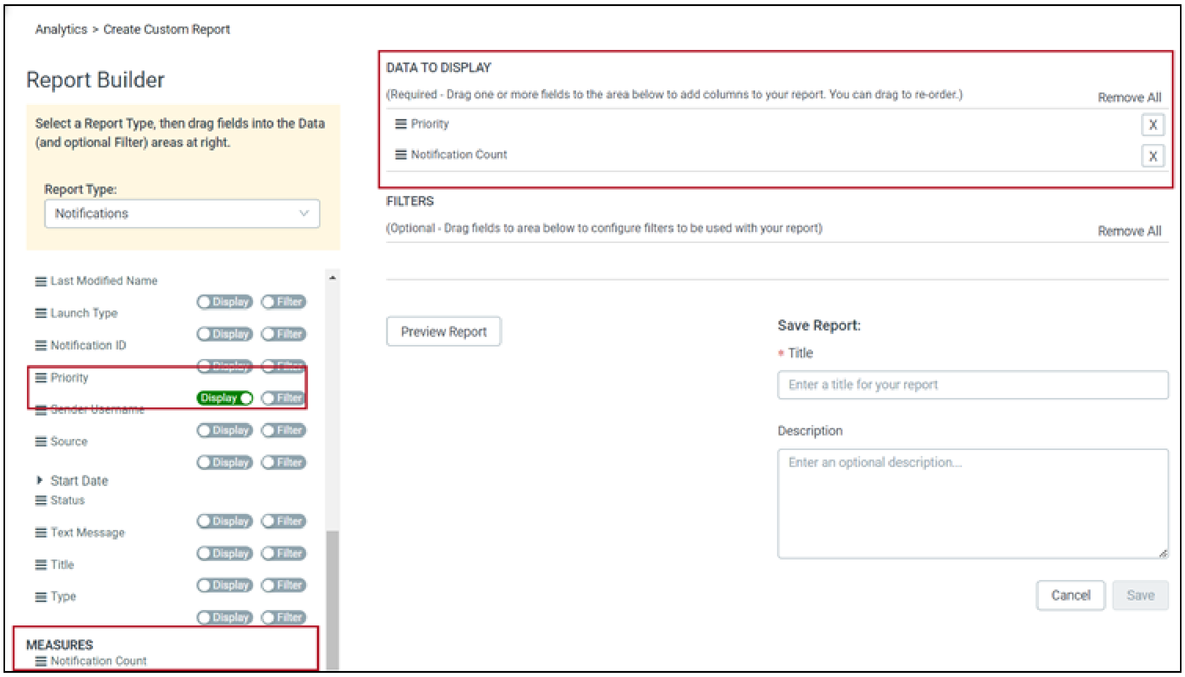


2. The **Report Builder** appears. Select the **Report Type** from the drop-down menu to populate available data points and filters to be used in this report.

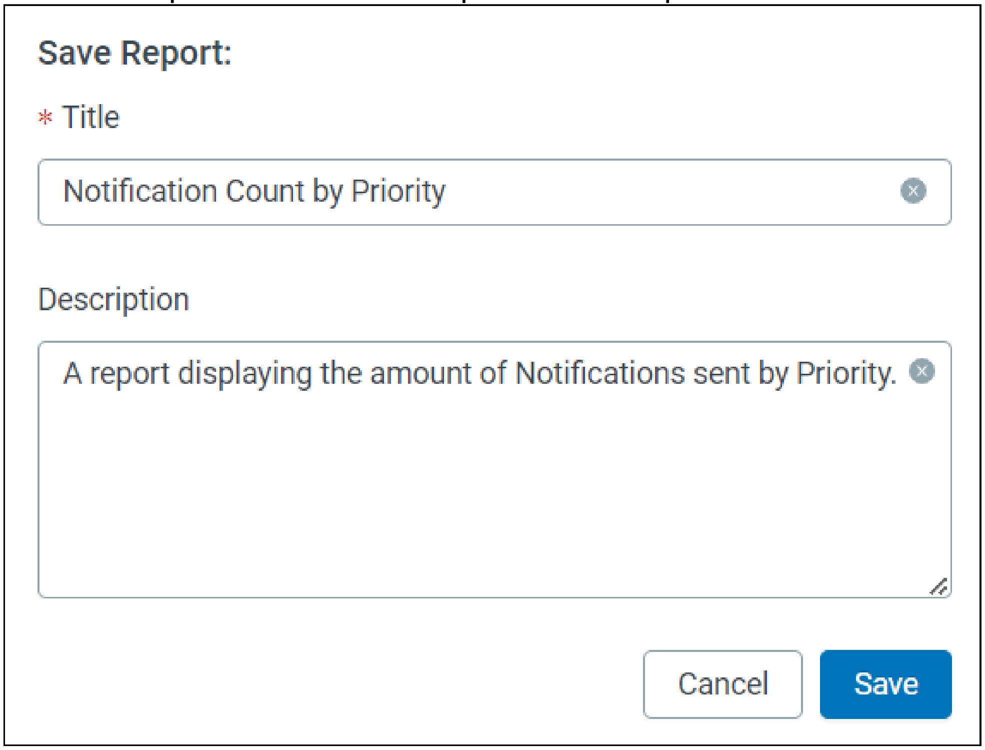


3. Once the Report Type has been selected, add data points to display as columns in the report by either clicking the **Display** toggle or dragging the data point to the **Data to Display** section. They can be rearranged as needed once they've been added.

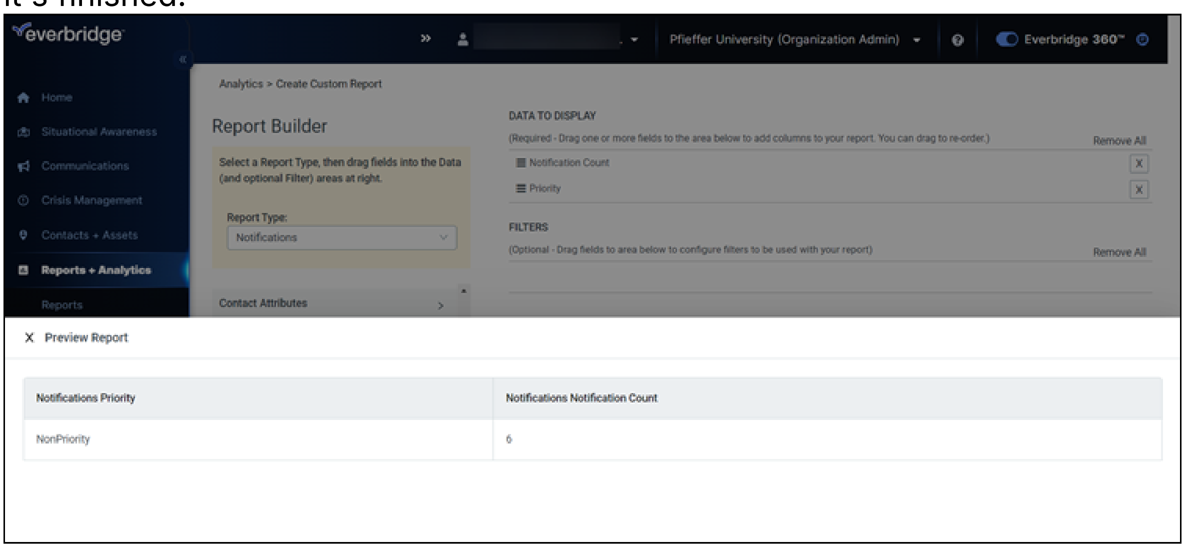
   We're trying to create a report that shows the number of Notifications sent by Priority in the image below, so the **Priority** field and **Notification Count** measure have been included.



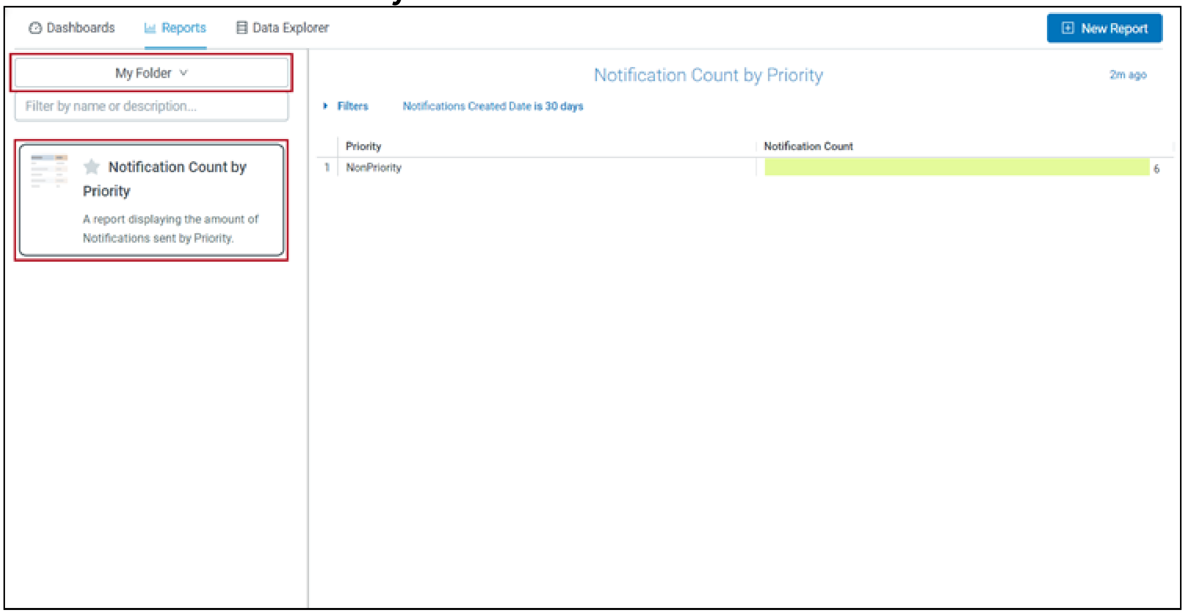
4. Give the report a title and an optional description.



5. Click **Preview Report** for a quick review of how the report will appear once it's finished.



6. Once satisfied with the previewed results, click **Save**. This report can now be accessed and run from **My Folder**.

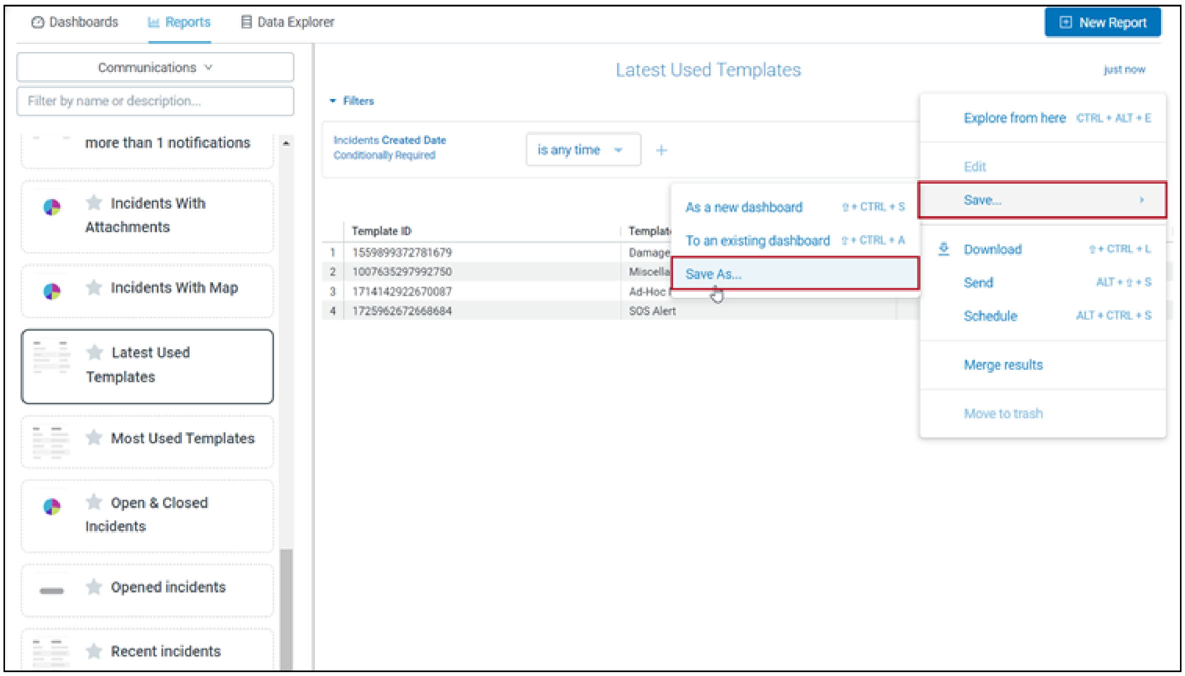


Save Reports

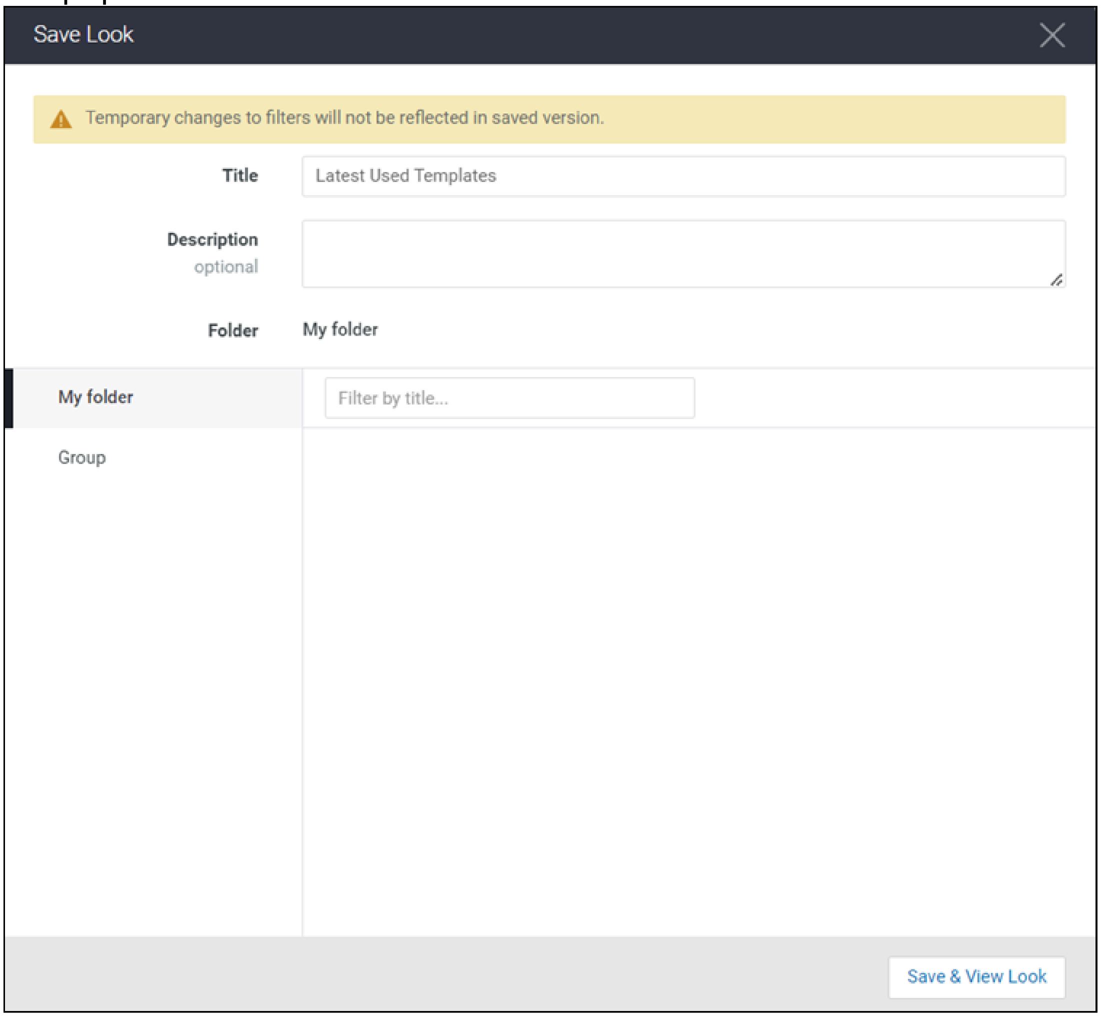
Both default and custom reports can be saved to a user's folder or an Organizational folder. Once saved, these copied reports can be further customized by inheriting the data points and visualizations from the uneditable default report to better meet specific use cases.

To save a report:

1. Select the desired report from the **Reports** tab. In this example, we selected a default report: Latest Used Templates.
2. Click the cogwheel icon to open the **Actions** menu, then select **Save** > **Save As...**

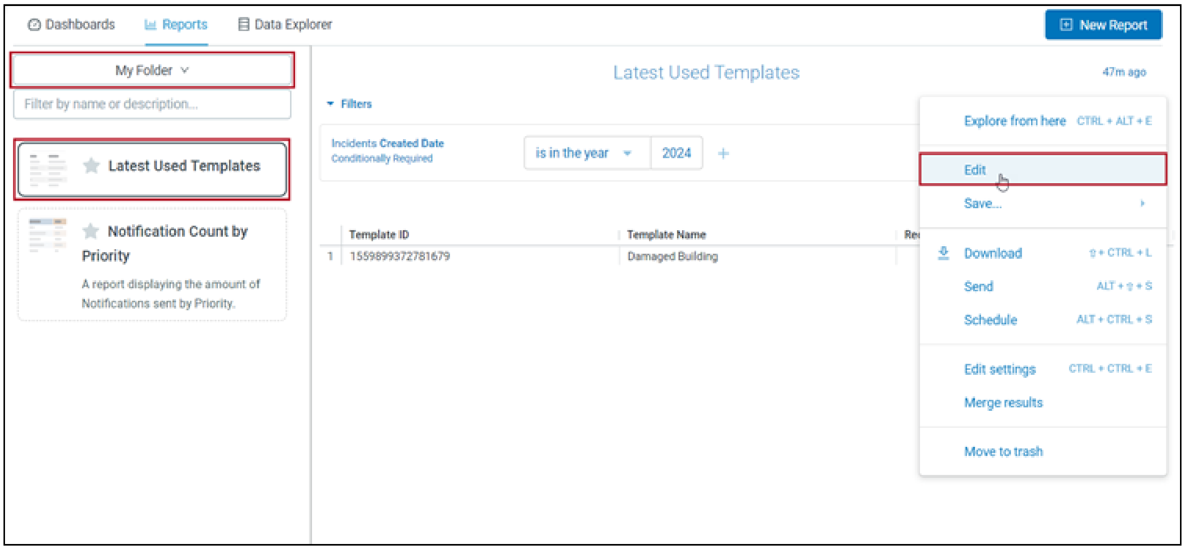


3. The **Save Look** modal appears. Enter a title and an optional description that will populate in the list view.



4. Choose which folder the report should be saved in.
5. Click **Save & View Look** once the selections are made.
6. Check the folder that this report was saved to. Once located, click the **Actions** menu, which has more options now on this version of the report than the default, unchangeable version. It's now editable and can be adjusted to

meet different use cases.



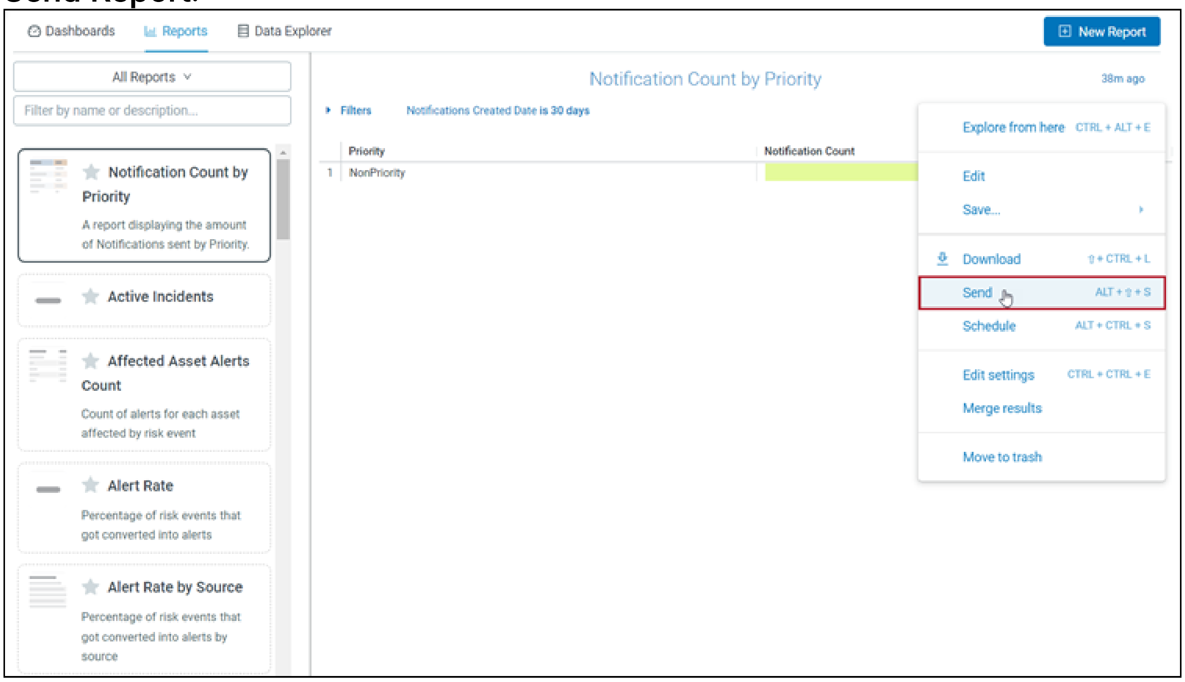
Send and Schedule Reports

Reports can be sent to recipients immediately or scheduled to be sent at a recurring date and time.

Send Report

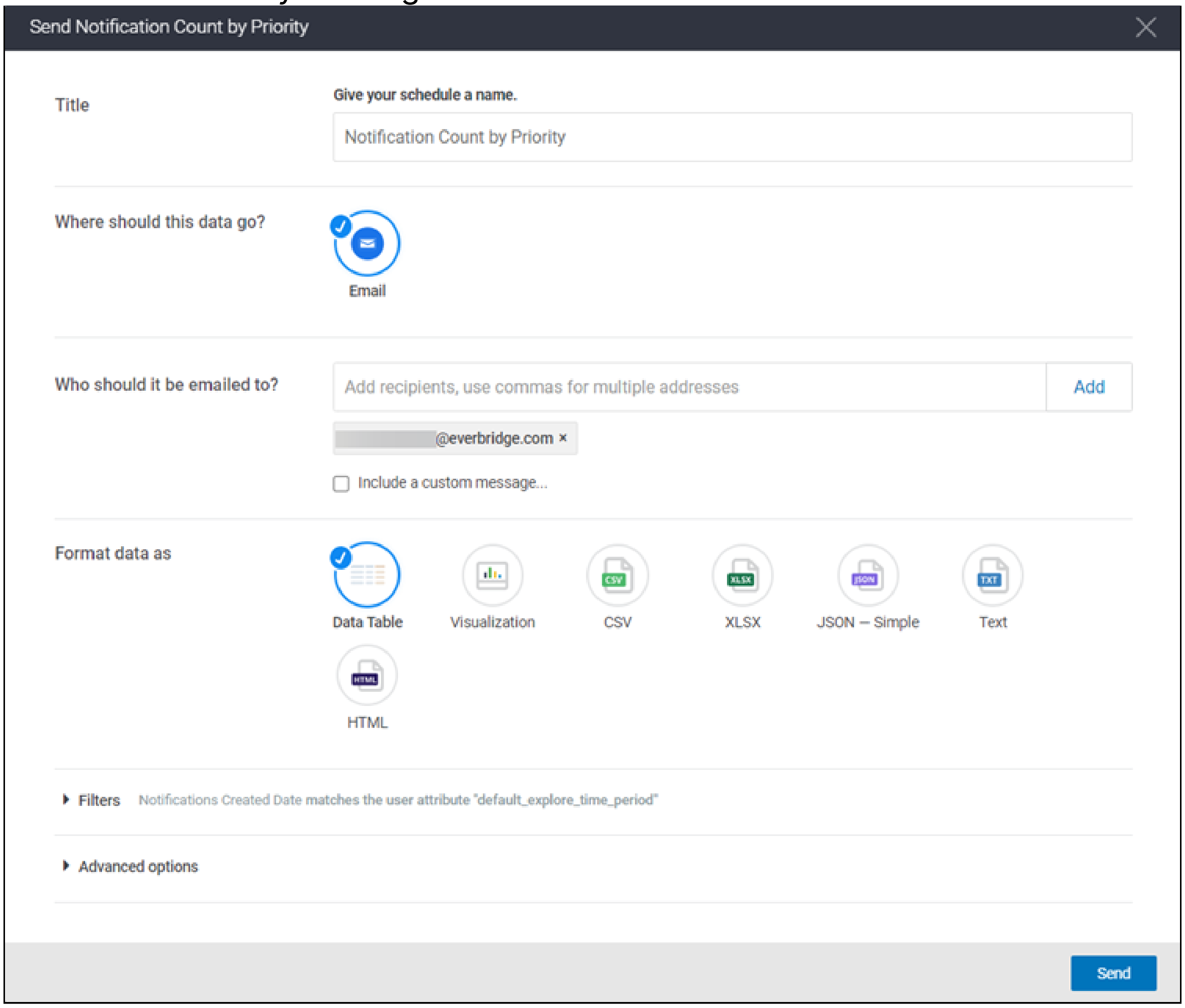
To send a report immediately:

1. Click the cogwheel icon to open the drop-down Actions menu, and select **Send Report.**



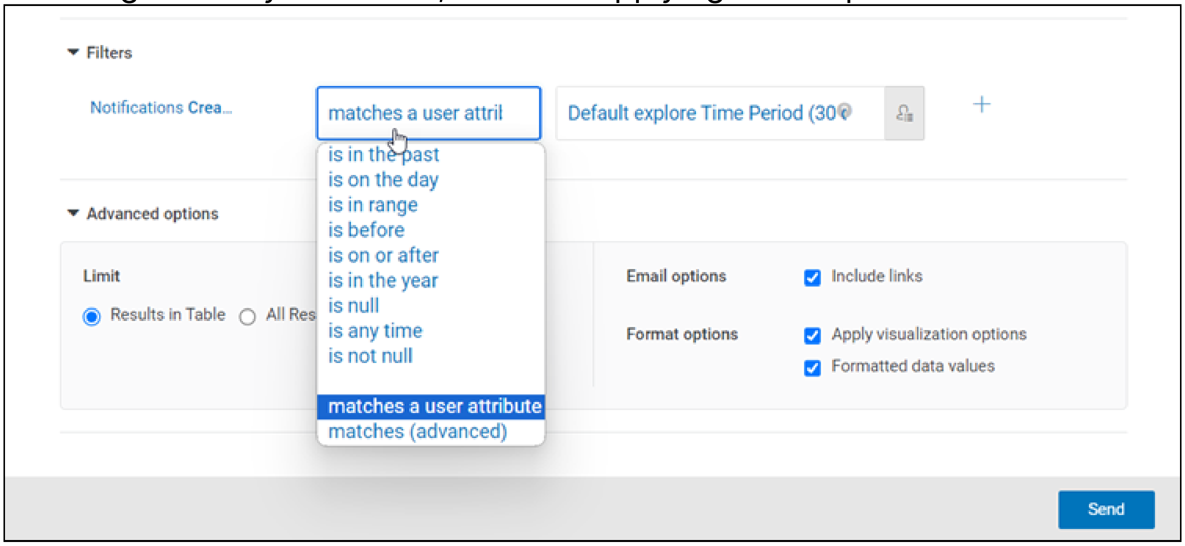
2. The **Send Report** modal opens. Enter a title and the recipients' email addresses. Note that the sender's email address is included by default but

can be removed by clicking the **X.**



3. Select the data format for the report from one of the following options:
    - Data Table
    - Visualization
    - CSV
    - XLSX
    - JSON - Simple
    - Text
    - HTML

4. If more granularity is needed, consider applying some optional data filters:

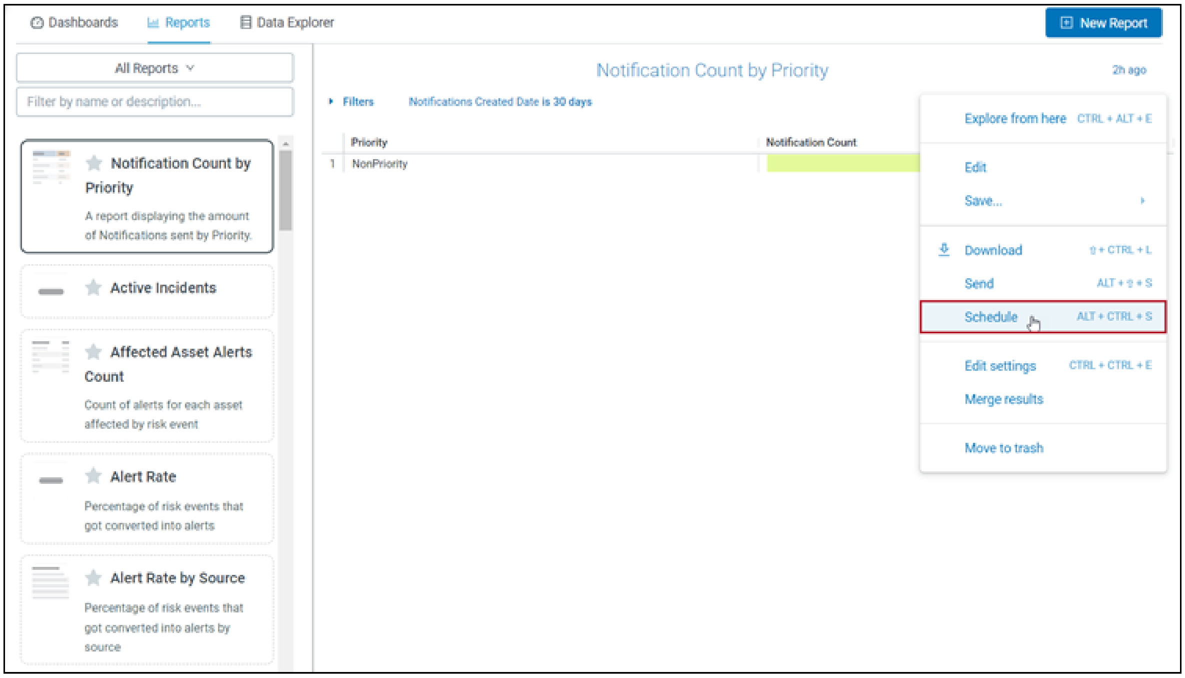


5. Additional optional settings can be configured under **Advanced Options**:
    - **Limit**
        - Results in table
        - All results
    - **Email Options**
        - Include links
    - **Format Options**
        - Apply visualization options
        - Formatted data values
6. Click **Save** once all of the selections have been made. The report will be sent to the recipients' email addresses using the specified parameters.

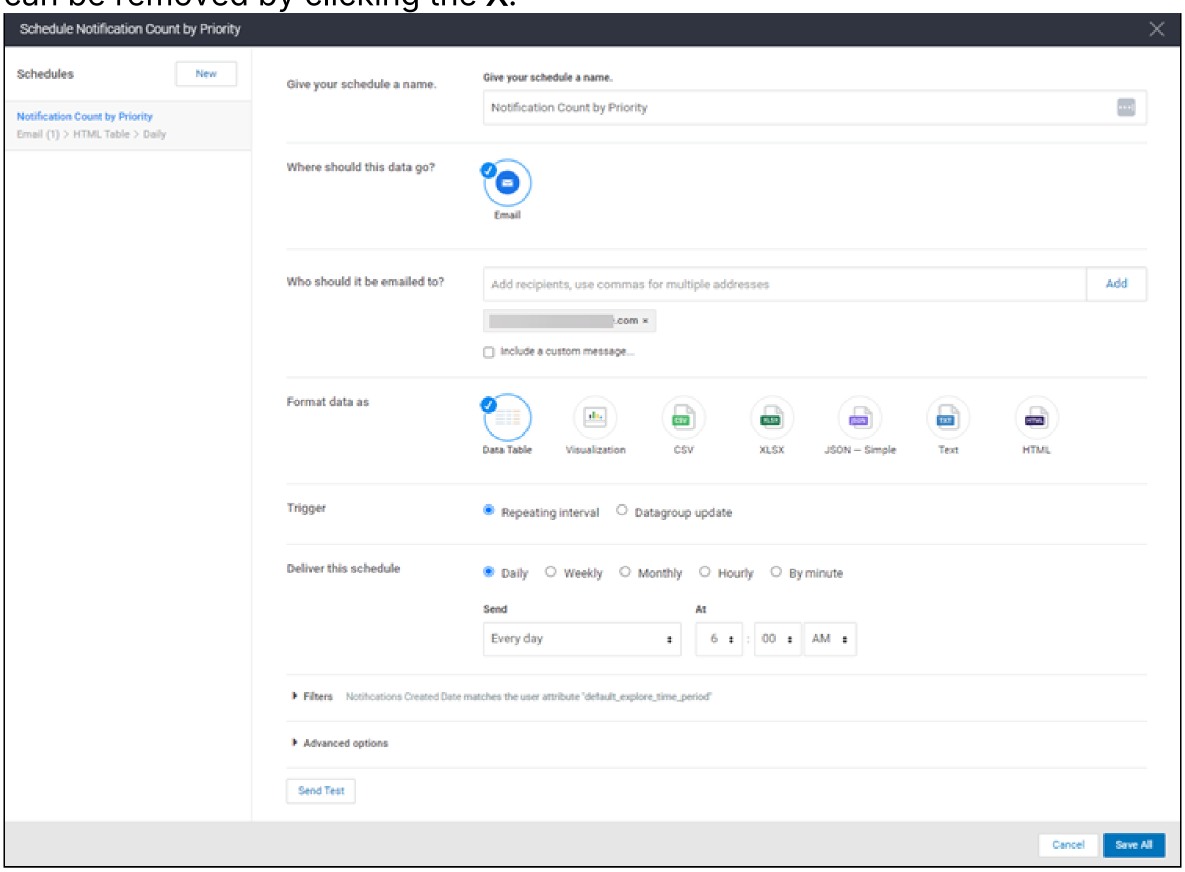
Schedule Report

Reports can be scheduled to be sent to recipients at specific intervals or as a datagroup update. To schedule a report:

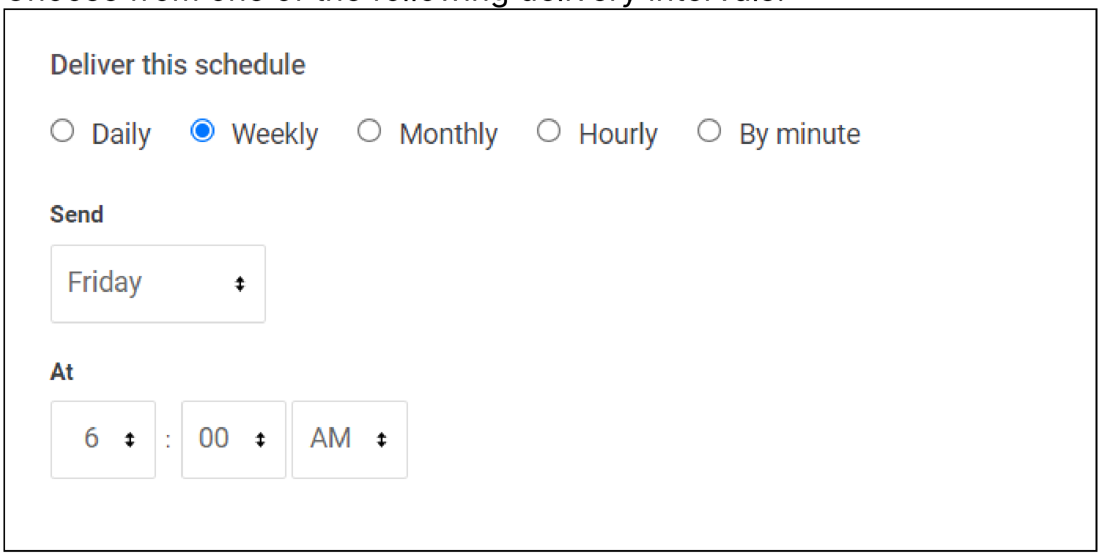
1. Click the cogwheel icon to open the drop-down **Actions** menu, and select **Schedule**.



2. The **Schedule Report** modal appears. Enter a title and the recipients' email addresses. Note that the sender's email address is included by default but can be removed by clicking the **X**.



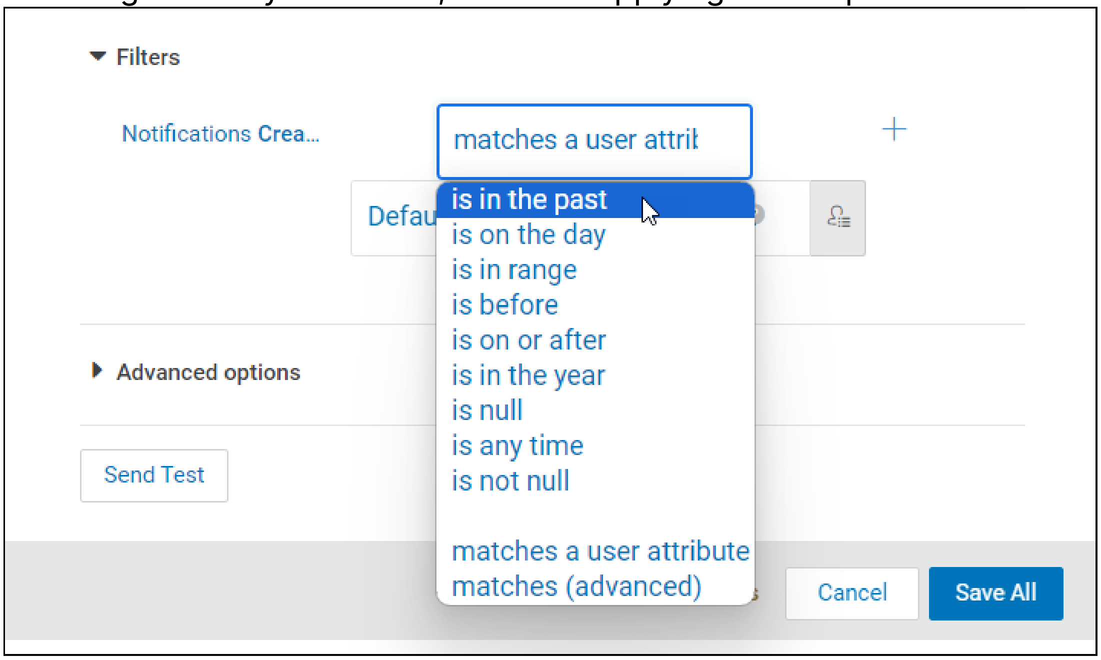
3. Select the data format for the report from one of the following options:
    - Data Table
    - Visualization
    - CSV
    - XLSX
    - JSON - Simple
    - Text
    - HTML
4. Specify if a repeating interval or a datagroup update should trigger the schedule. For this example, we'll set the trigger to **Repeating interval**.
5. Choose from one of the following delivery intervals:



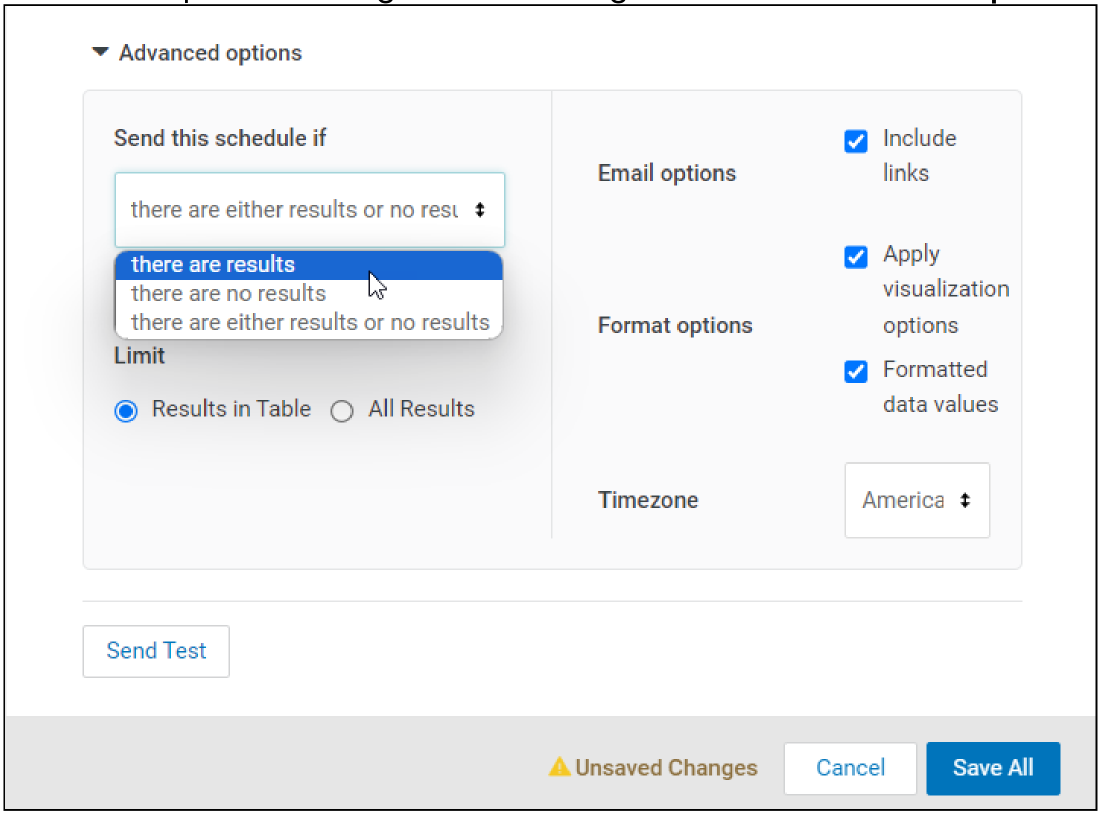
- **Daily**
    - Every day
    - On weekdays only
    - On specific days of the week
- **Weekly**
    - Select from Sunday through Saturday
- **Monthly**
    - Every month
    - At the start of every quarter
    - In specific months
- **Hourly**
    - 1 hour
    - 2 hours
    - 3 hours
    - 4 hours
    - 6 hours
    - 8 hours
    - 12 hours
- **By minute**

  - 5 minutes
  - 10 minutes
  - 15 minutes
  - 20 minutes
  - 30 minutes

6. If more granularity is needed, consider applying some optional data filters:

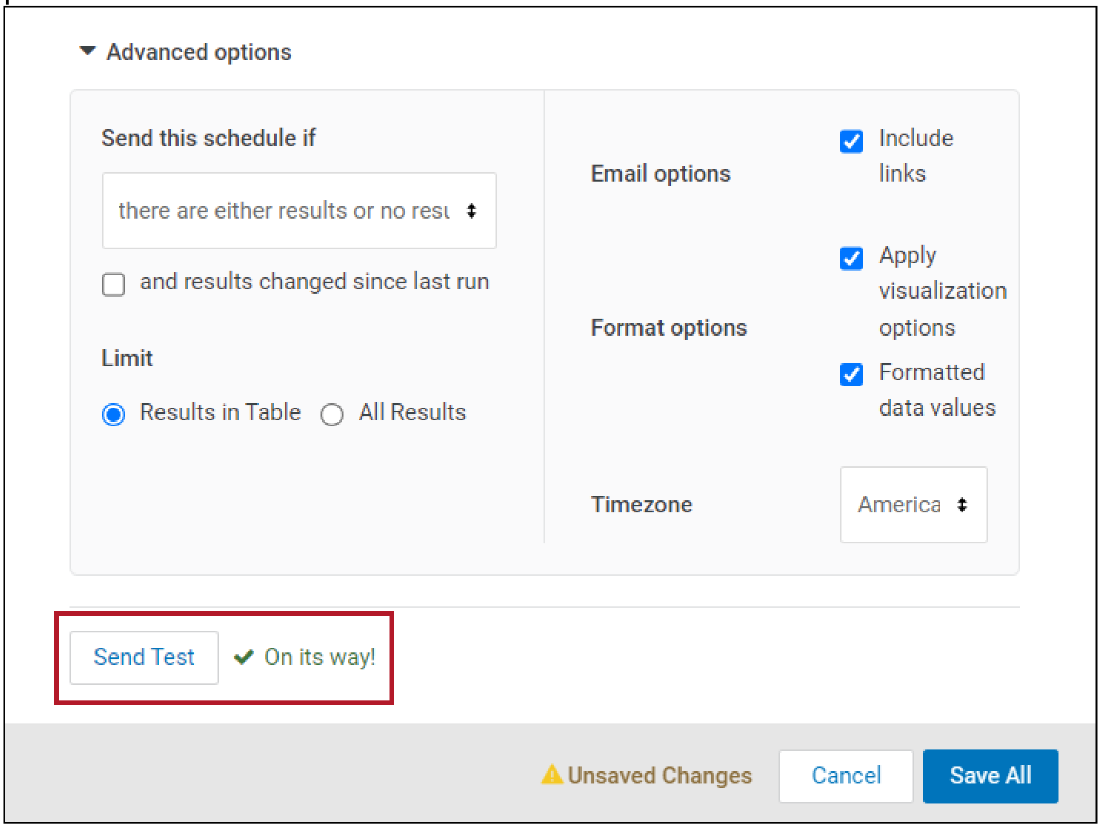


7. Additional optional settings can be configured under **Advanced Options**:



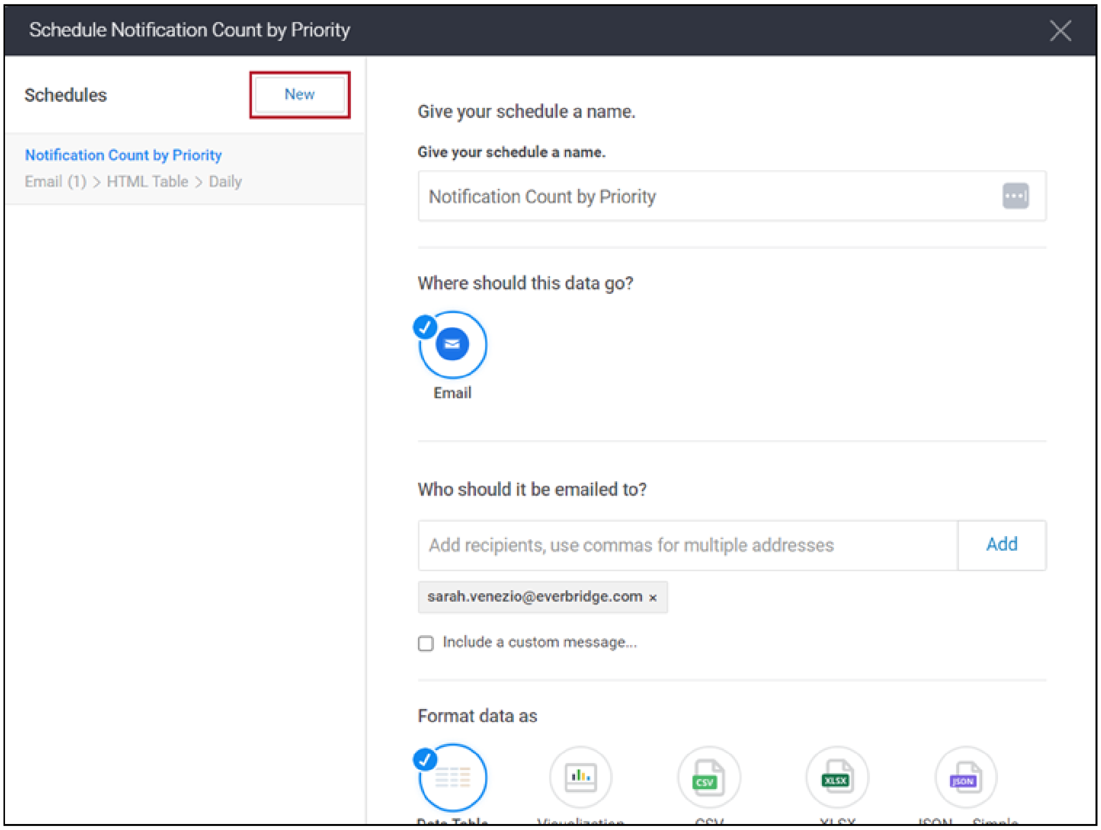
- **Limit**
  - Results in table
  - All results
- **Email Options**
  - Include links
- **Format Options**
  - Apply visualization options
  - Formatted data values
- **Timezone**

8. If desired, click **Send Test** to receive a test version of the report as a preview.



9. Click **Save All**. If multiple schedules need to be set for the same report, more can be created by clicking the **New** button at the top of the **Schedules**

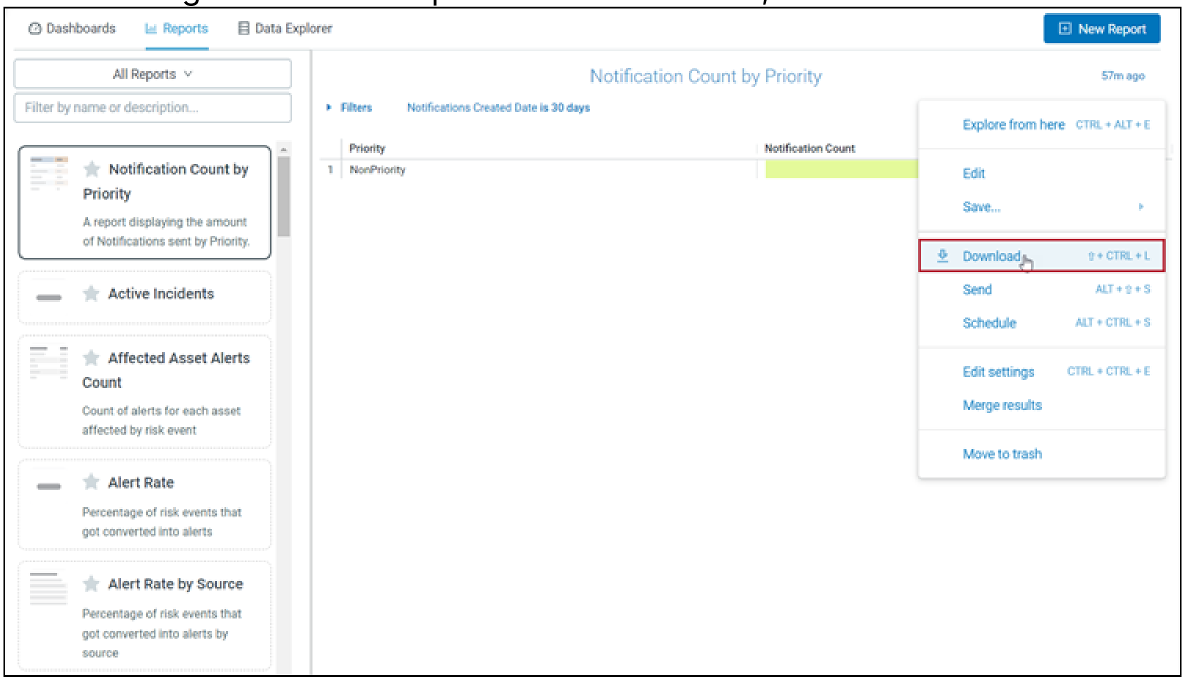
column.


Schedule Notification Count by Priority
Schedules
New
Notification Count by Priority
Email (1) > HTML Table > Daily
Give your schedule a name.
Give your schedule a name.
Notification Count by Priority
Where should this data go?
Email
Who should it be emailed to?
Add recipients, use commas for multiple addresses
Add
sarah.venezio@everbridge.com
Include a custom message...
Format data as

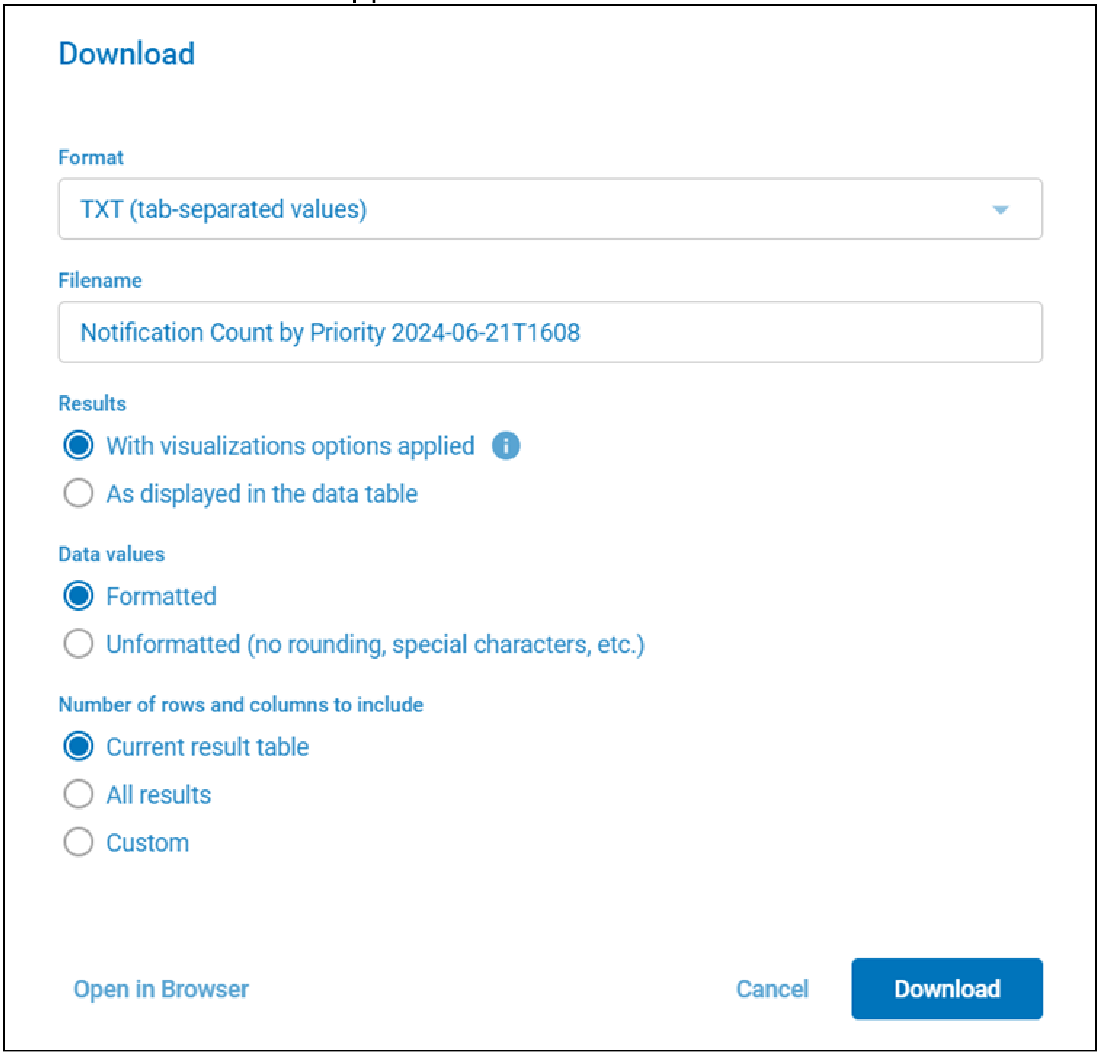
Download Reports

Reports can be downloaded in a variety of data formats and visualizations. To do so:

1. Select the report in question from the **Reports** tab.
2. Click the cogwheel icon to open the **Actions** menu, then select **Download**.



3. The **Download** modal appears.

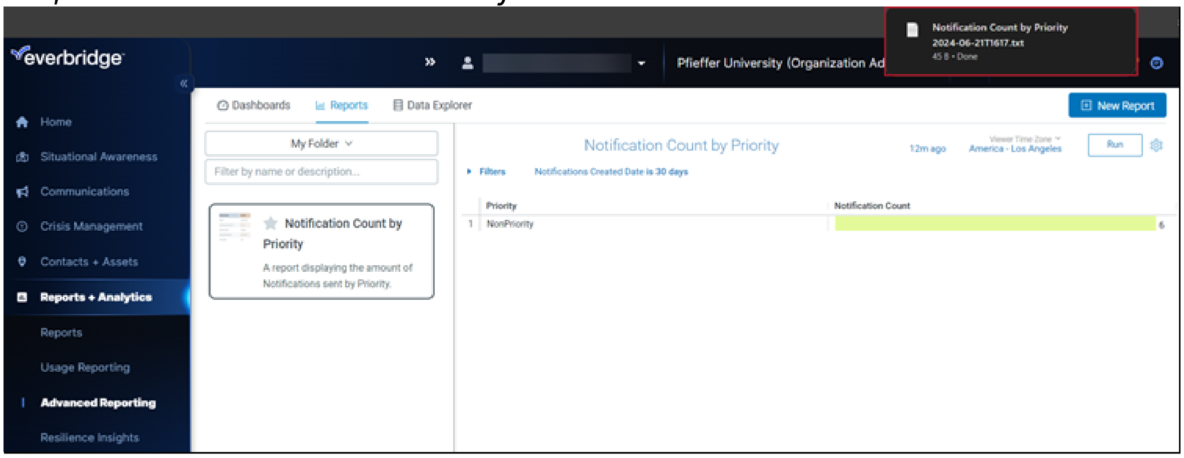


Make the following selections:

- **Format**
  - TXT
  - Excel Spreadsheet
  - CSV
  - JSON
  - HTML
  - Markdown
  - PNG (image of the visualization)
- **Filename**
- **Results**
  - With visualizations options applied
  - As displayed in the data table
- **Data values**
  - Formatted
  - Unformatted (no rounding, special characters, etc.)

- Number of rows and columns to include

4. If desired, click **Open in Browser** to see a web-based version of the report. If not, click **Download** to save it to your device.



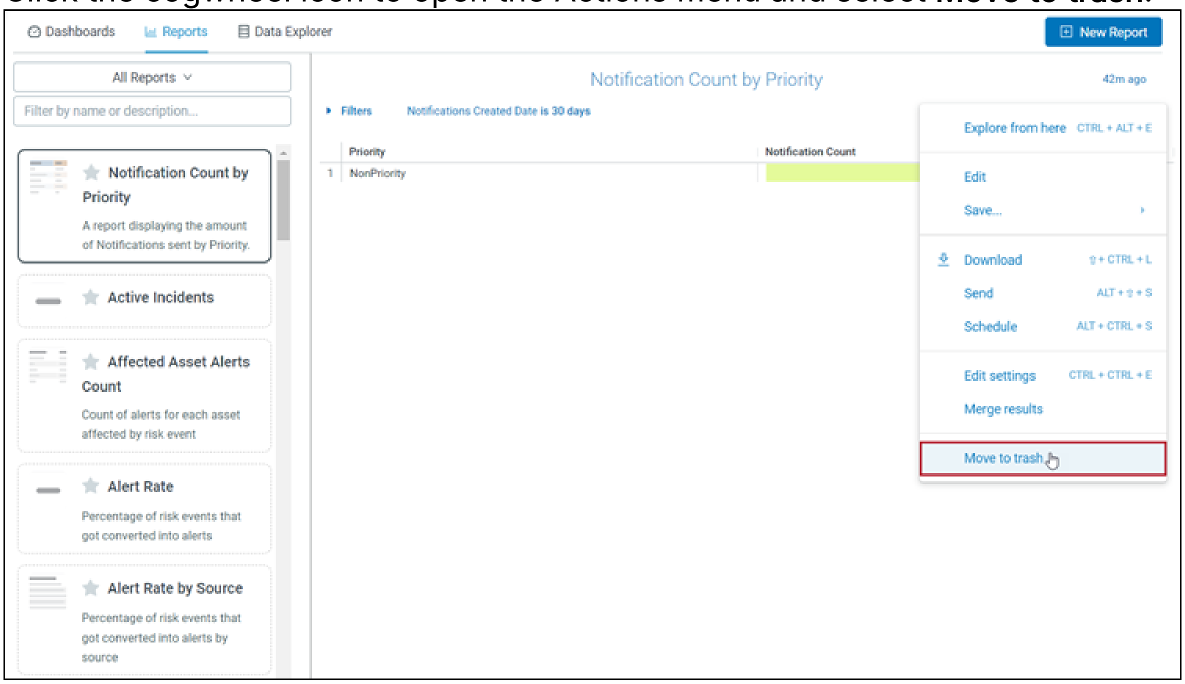
Deleting Reports

A custom report can be deleted if it's no longer needed.

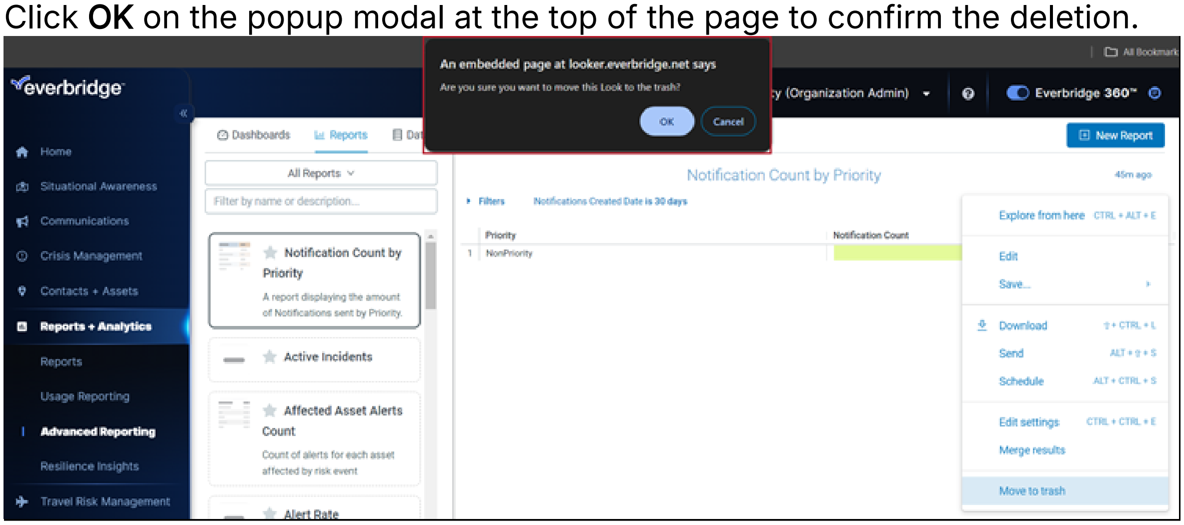
> **NOTE:** The default, out-of-the-box reports cannot be deleted.

To delete a report:

1. Select the report in question from the **Reports** tab.
2. Click the cogwheel icon to open the Actions menu and select **Move to trash**.



3. Click **OK** on the popup modal at the top of the page to confirm the deletion.



Data Explorer

New visualizations and table widgets can be created from the **Data Explorer** tab by pulling information from multiple data stores across Everbridge Suite.

The following data stores can be used in the Data Explorer tab:

- Attempts
- Notifications
- Incidents
- Assets

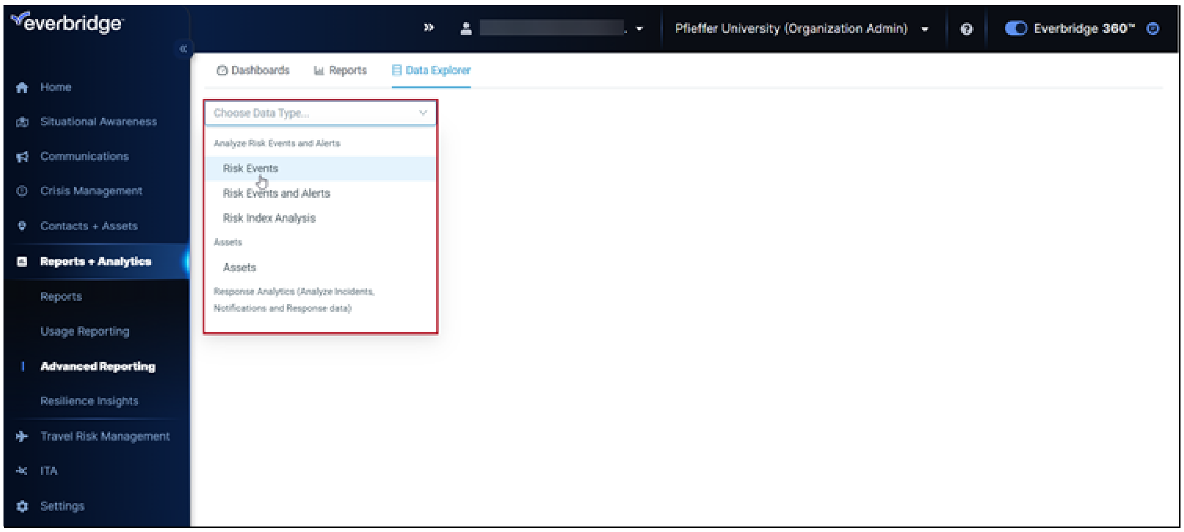
Resilience Insights customers also have access to additional items:

- Risk Events
- Risk Events and Alerts
- Risk Index Analysis

Create Visualizations

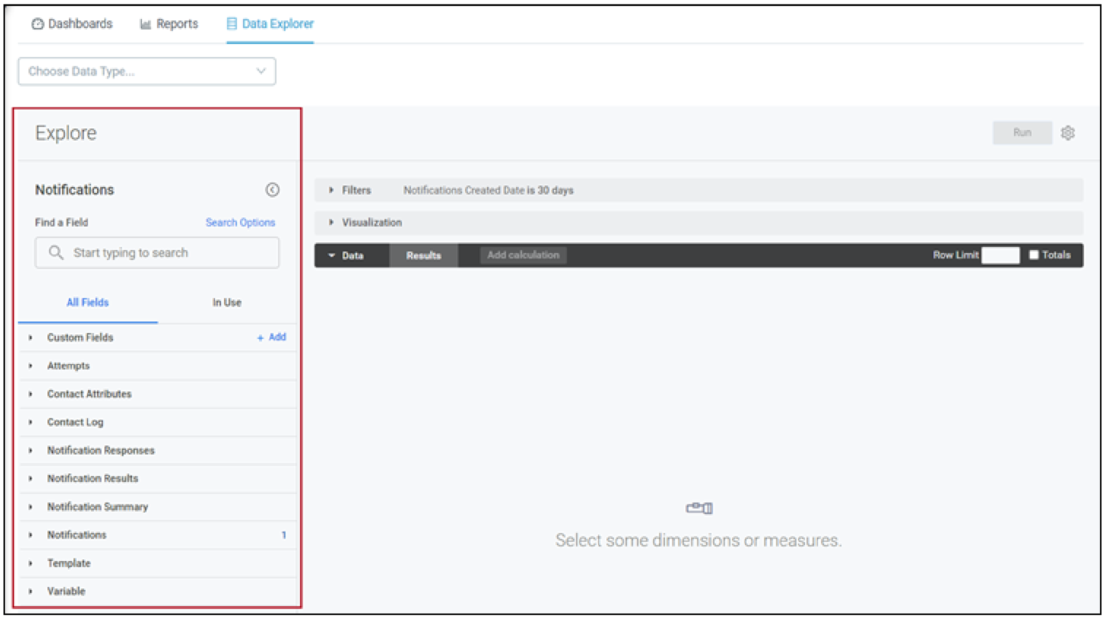
To create a new visualization or widgets:

1. Navigate to **Advanced Reporting** > **Data Explorer**.
2. Select the desired data type from the drop-down menu.

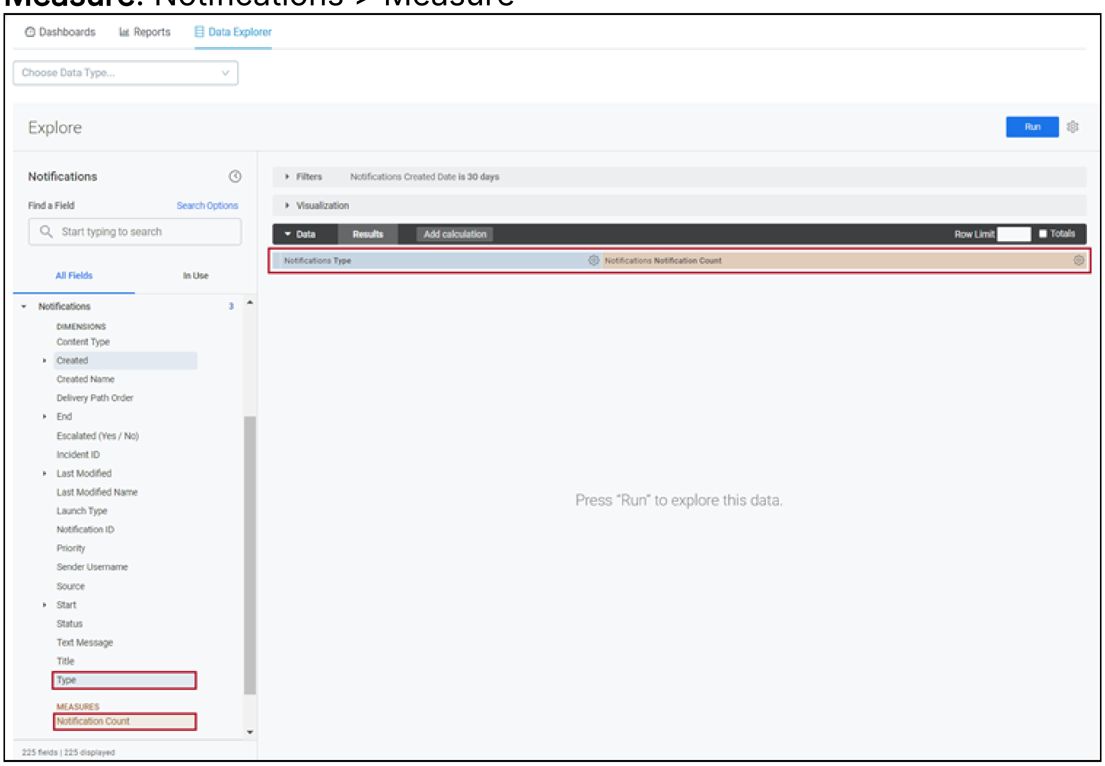


3. The **Explore** panel for the selected data type (Notifications, in this example) will appear, including a list of available fields to the left. Two items are required to create a visualization (bar chart, pie chart, line graph, etc.):
   - **Dimension** - Used to group or identify data for analysis. Think of dimensions as the x-axis or the independent variable.
   - **Measure** - Measures represent the quantities of the data (total counts, sums, or averages). A measure acts as the y-axis or the dependent

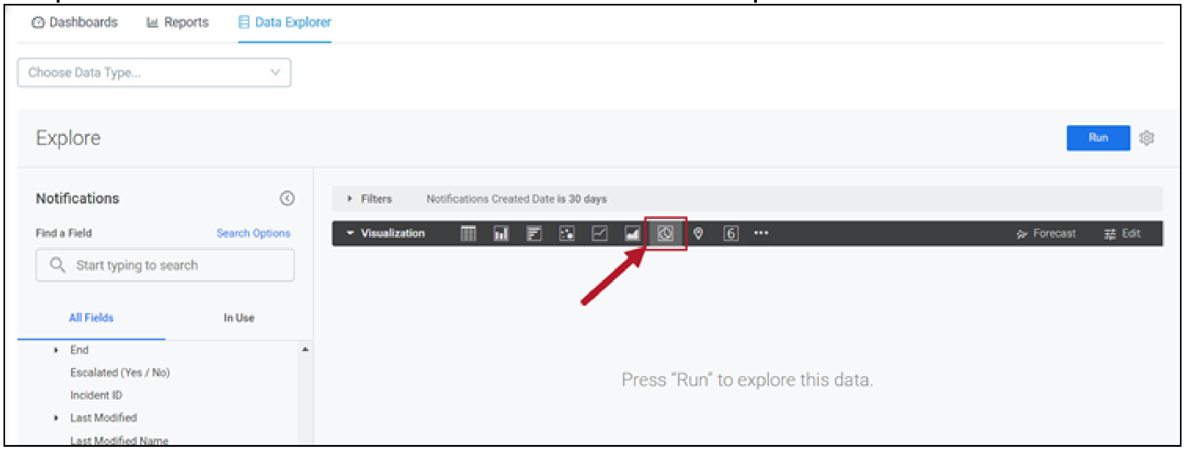
variable.



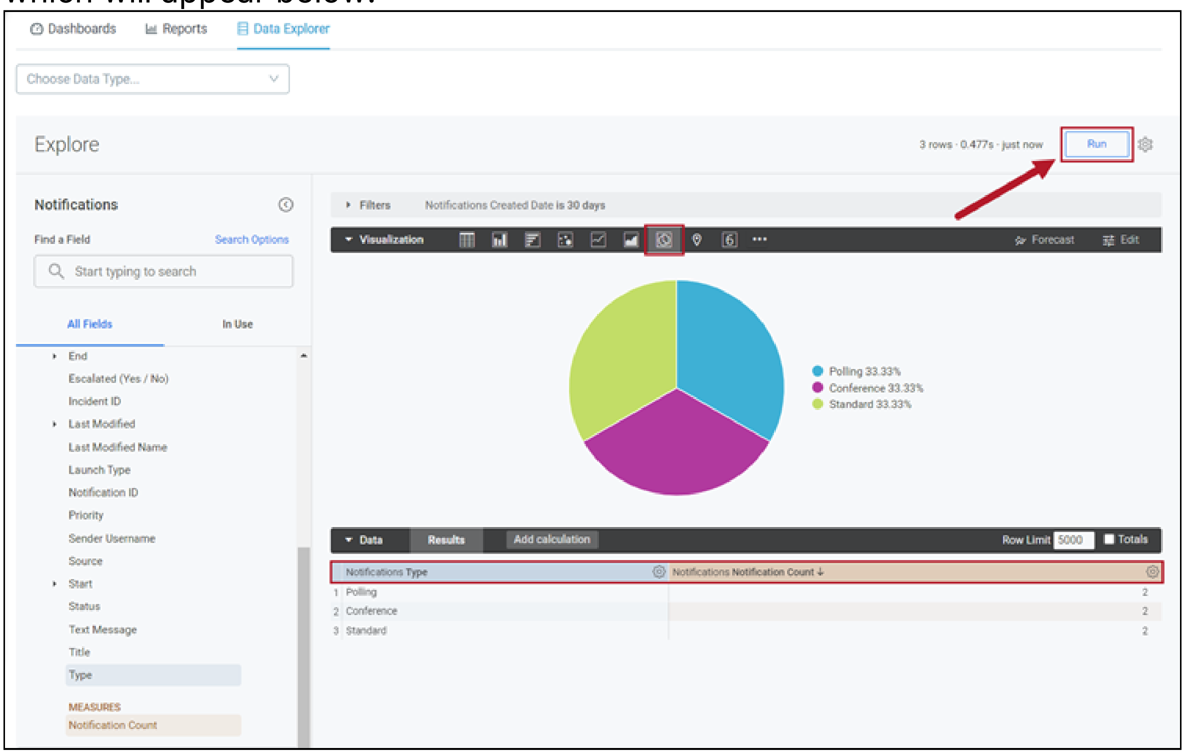
4. Choose a Dimension and a Measure, which will appear on the list to the right once selected. In this example, we want to create a visualization representing the breakdown of the Notifications launched by an Organization by Type. To do this apply:
   - **Dimension**: Notifications > Type
   - **Measure**: Notifications > Measure



5. Choose what kind of visualization should be created from the **Visualization** dropdown. We'll choose a **Pie Chart** for this example.

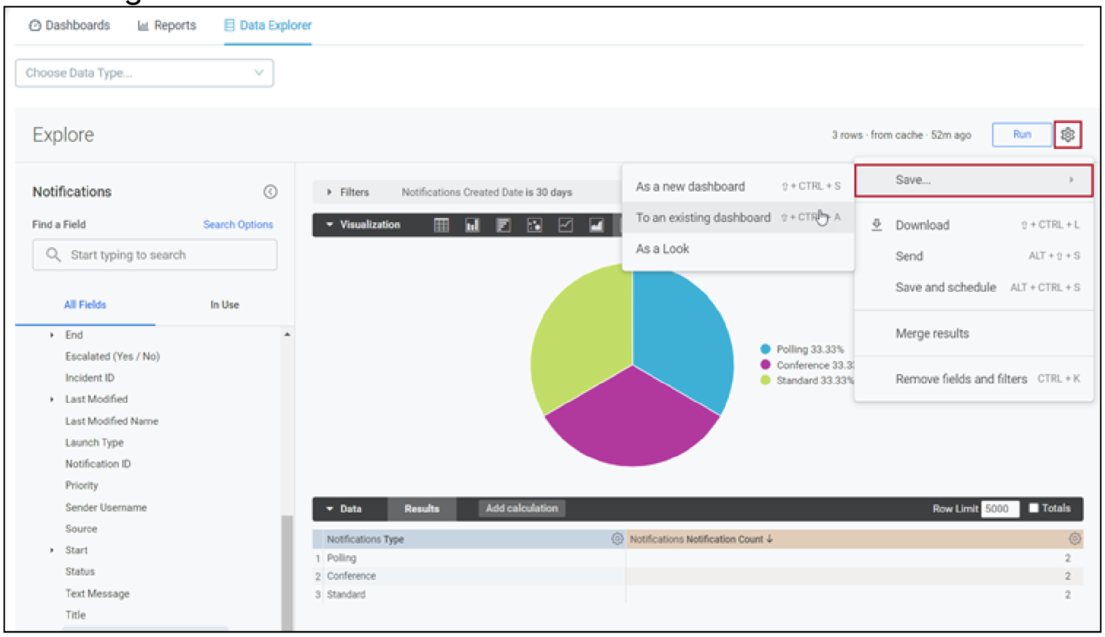


6. Once the Dimension, Measure, and Visualization values have been applied, click **Run** in the top-right corner of the page to generate the visualization, which will appear below.



7. This visualization can be saved by clicking on the cogwheel to open the menu, hovering over **Save**, and then selecting one of the following options:
   - **As a new dashboard** - Save this visualization as a dashboard.
   - **To an existing dashboard** - Save and add this visualization to an existing dashboard.

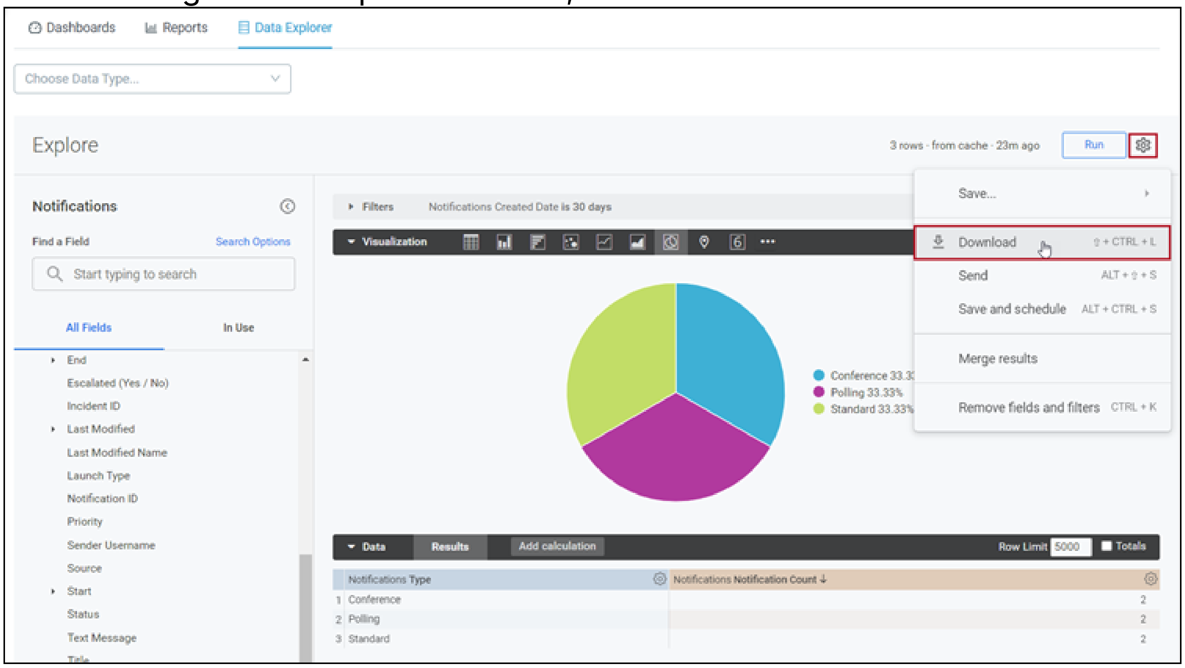
- **As a Look** - This saves applied filters, visualizations, fields, sorting, etc. to use again later.



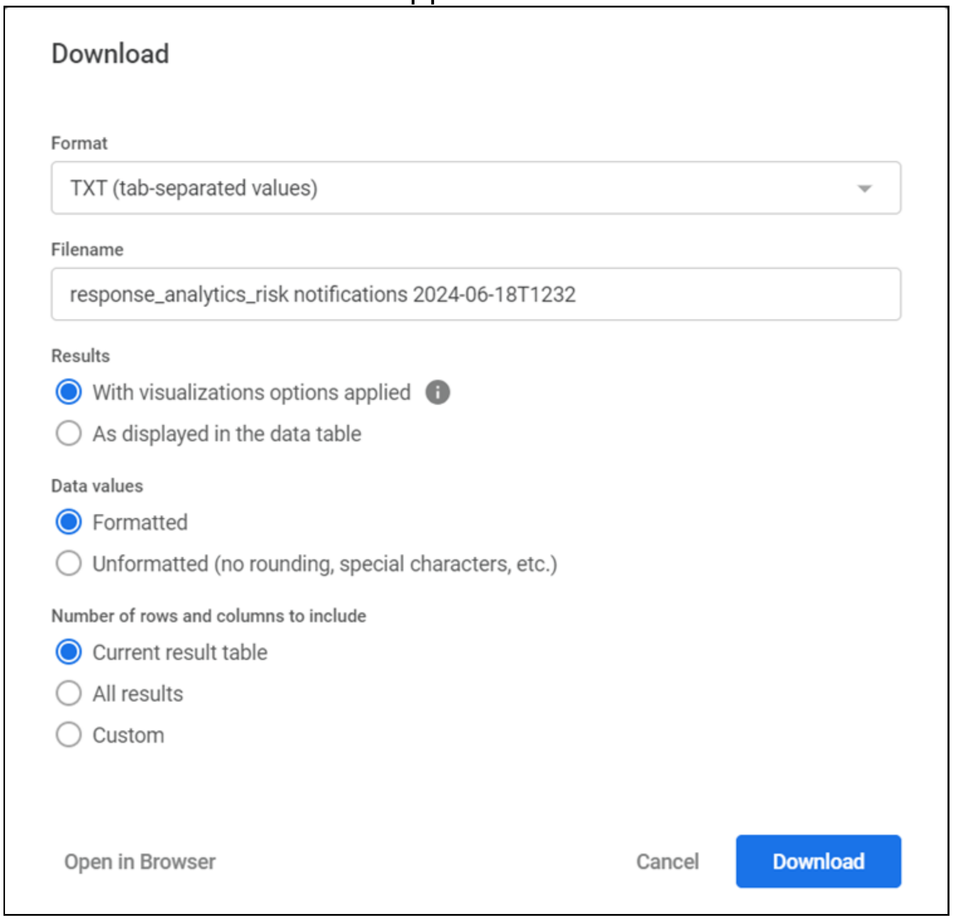
Download a Visualization

To download a visualization:

1. Repeat **Steps 1-6** of Creating Visualizations or navigate to an existing visualization.
2. Click the cogwheel to open the menu, then select **Download**.



3. The **Download** modal will appear.



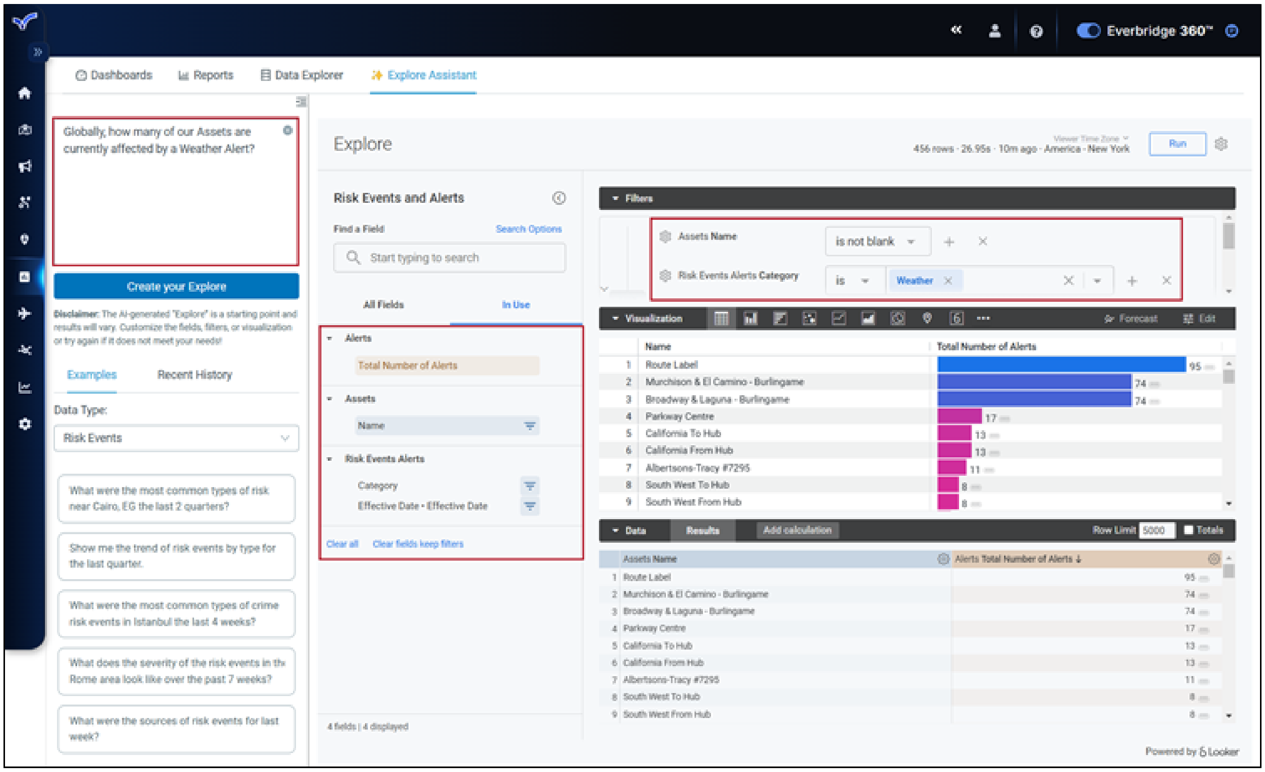
Set the following options:

- Format
  - TXT
  - Excel Spreadsheet
  - CSV
  - JSON
  - HTML
  - Markdown
  - PNG
- Filename
- Results
  - With visualization options applied
  - As displayed in the data table
- Data Values
  - Formatted
  - Unformatted
- Number of rows and columns to include
  - Current result table
  - All results
  - Custom

4. Click **Download**, or optionally, **Open in Browser** to view a browser-based version of the file, instead.

Explore Assistant

The AI-powered **Explore Assistant** helps users automatically create visualizations based on their Incident and Alert history, Assets, and Risk Events by entering a text-based prompt to be parsed into applicable fields and filters.

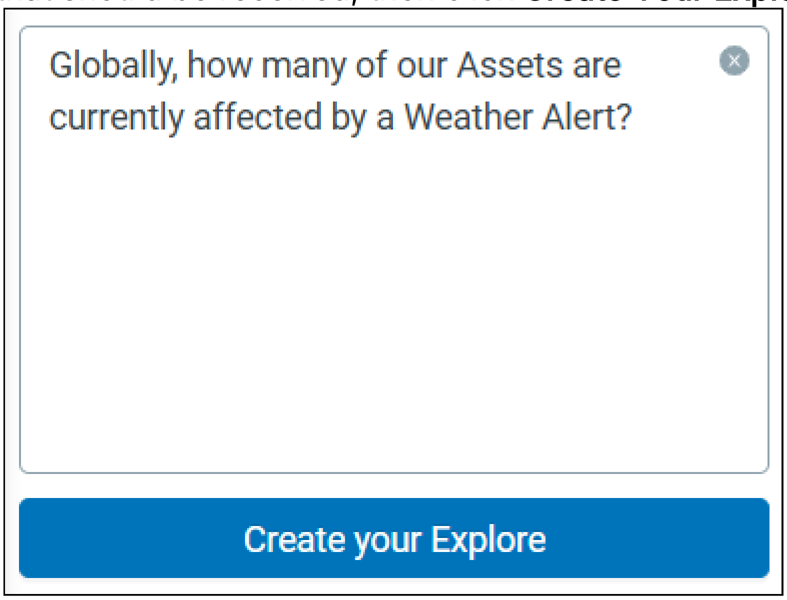


IMPORTANT: The AI-generated Explore serves as a starting point, and results may vary. Adjust the automated fields, filters, or visualization as needed to isolate the desired data or clarify the wording in the prompt and try again.

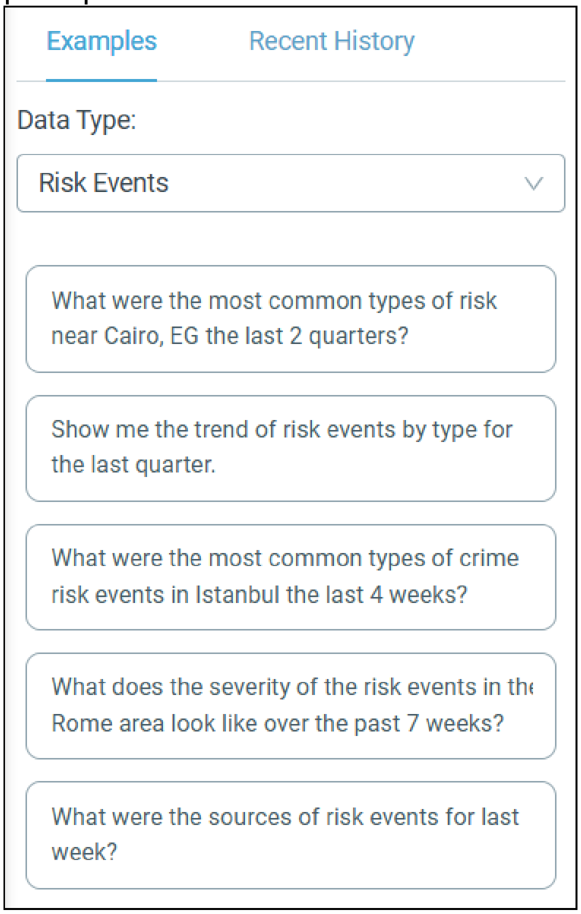
Using Explore Assistant

To start using Explore Assistant, navigate to **Advanced Reporting** > **Explore Assistant**. From there:

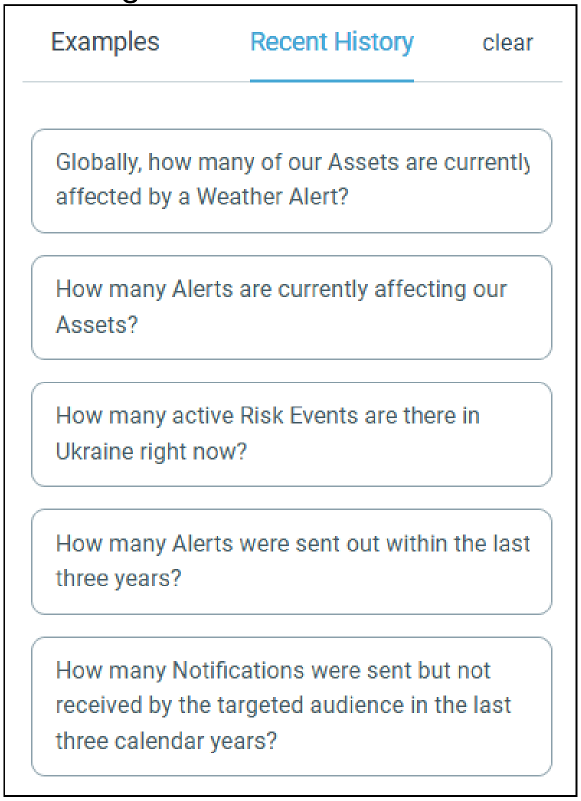
1. Enter a prompt in the field in the top-left corner describing the type of data that should be received, then click **Create Your Explore**.



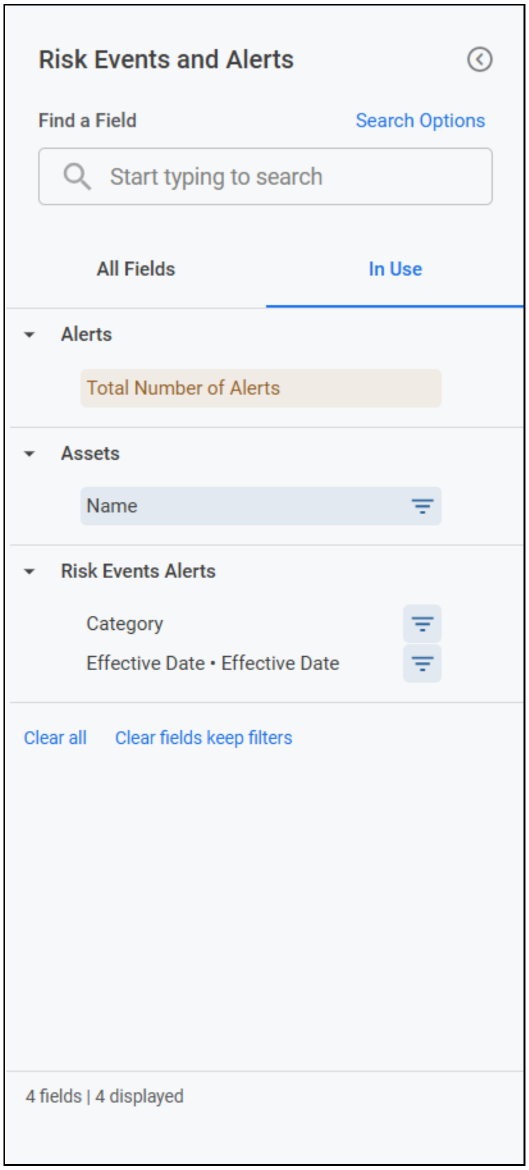
- Refer to the **Examples** section below for effective prompts to use in Explore Assistant. Examples are organized by data type: Risk Events, Assets, and Alerts. Simply click an example to run the corresponding prompt.

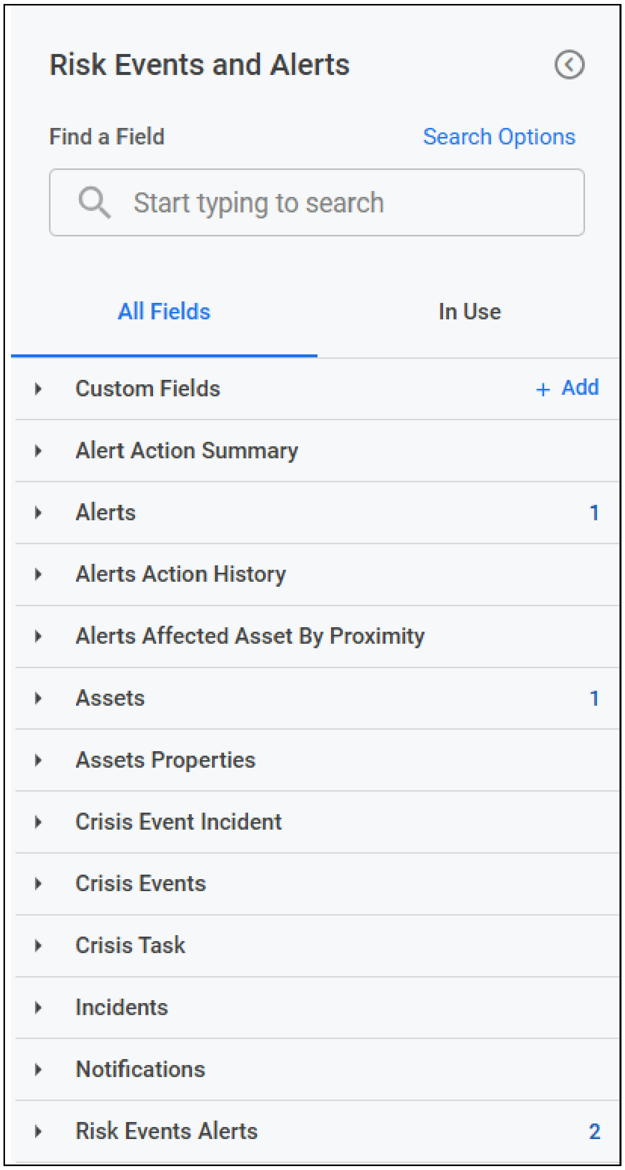


- Click **Recent History** to see a list of the most recently used prompts. A prompt can be run again by clicking on it, or the list can be wiped by selecting **Clear**.

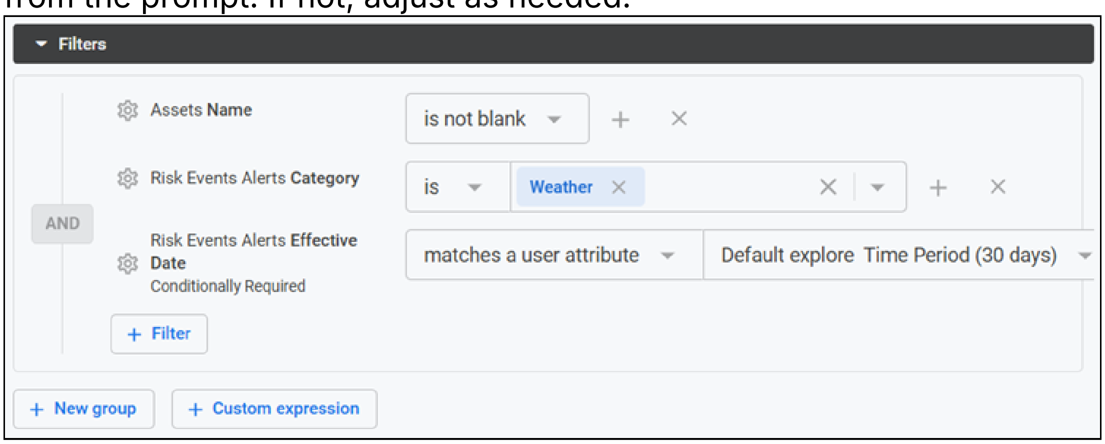


2. Explore Assist will automatically apply any relevant filters or fields based on the query and display the preliminary results in the **Explore** section. Review the following areas and adjust the criteria as needed:
   - The applied fields can be seen under the **In Use** tab. Switch to the **All Fields** tab to add more as needed.

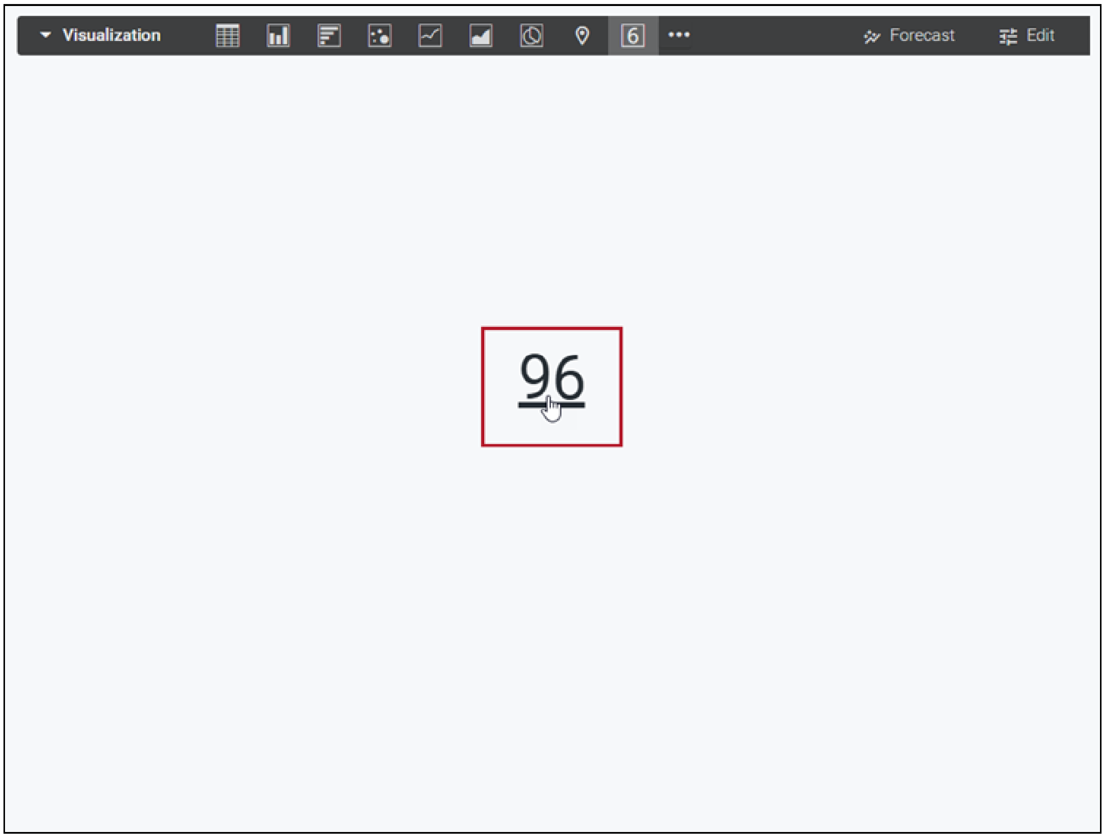

Risk Events and Alerts
Find a Field
Search Options
Start typing to search
All Fields
In Use
Alerts
Total Number of Alerts
Assets
Name
Risk Events Alerts
Category
Effective Date • Effective Date
Clear all
Clear fields keep filters
4 fields | 4 displayed

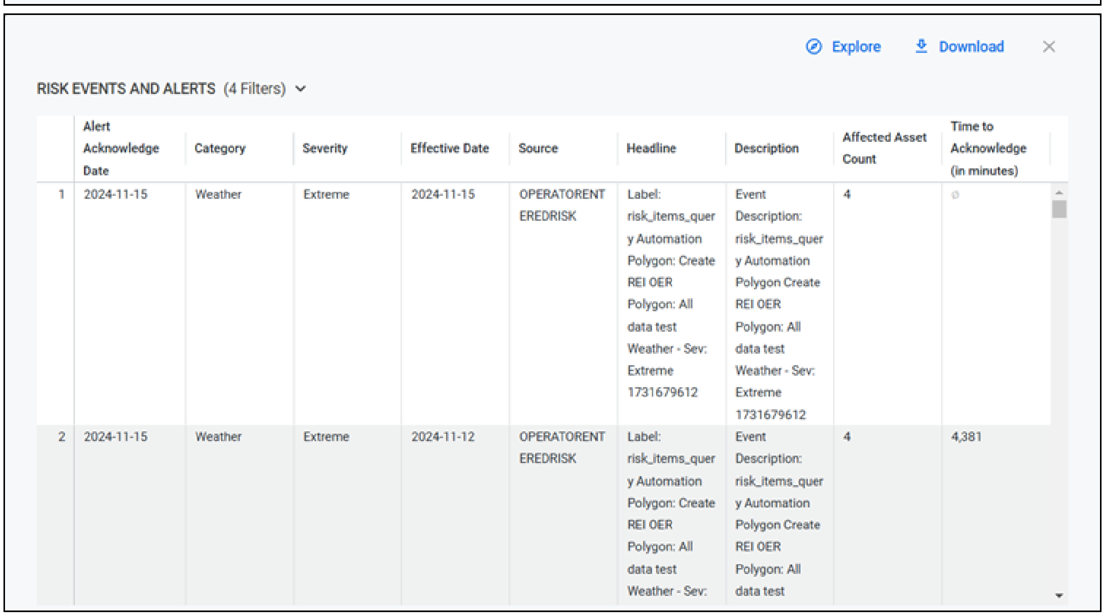


- Under **Filters**, check that the correct data points and filters were applied from the prompt. If not, adjust as needed.



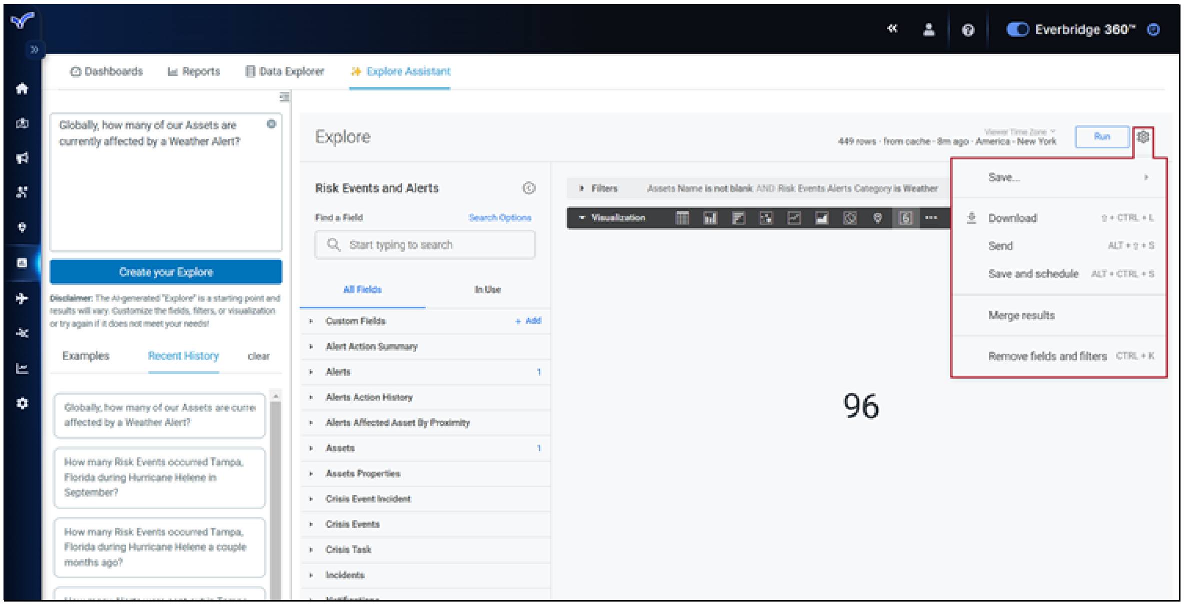
- Explore Assistant will choose a visualization that best meets the prompt's criteria, but it can easily be changed by clicking any of the different options in the Visualization section. Some visualizations provide more detailed information by clicking on the elements they contain.





	Alert Acknowledge Date	Category	Severity	Effective Date	Source	Headline	Description	Affected Asset Count	Time to Acknowledge (in minutes)
1	2024-11-15	Weather	Extreme	2024-11-15	OPERATORENT EREDRISK	Label: risk_items_query Automation Polygon: Create REI OER Polygon: All data test Weather - Sev: Extreme 1731679612	Event Description: risk_items_query Automation Polygon Create REI OER Polygon: All data test Weather - Sev: Extreme 1731679612	4	∅
2	2024-11-15	Weather	Extreme	2024-11-12	OPERATORENT EREDRISK	Label: risk_items_query Automation Polygon: Create REI OER Polygon: All data test Weather - Sev:	Event Description: risk_items_query Automation Polygon Create REI OER Polygon: All data test	4	4,381

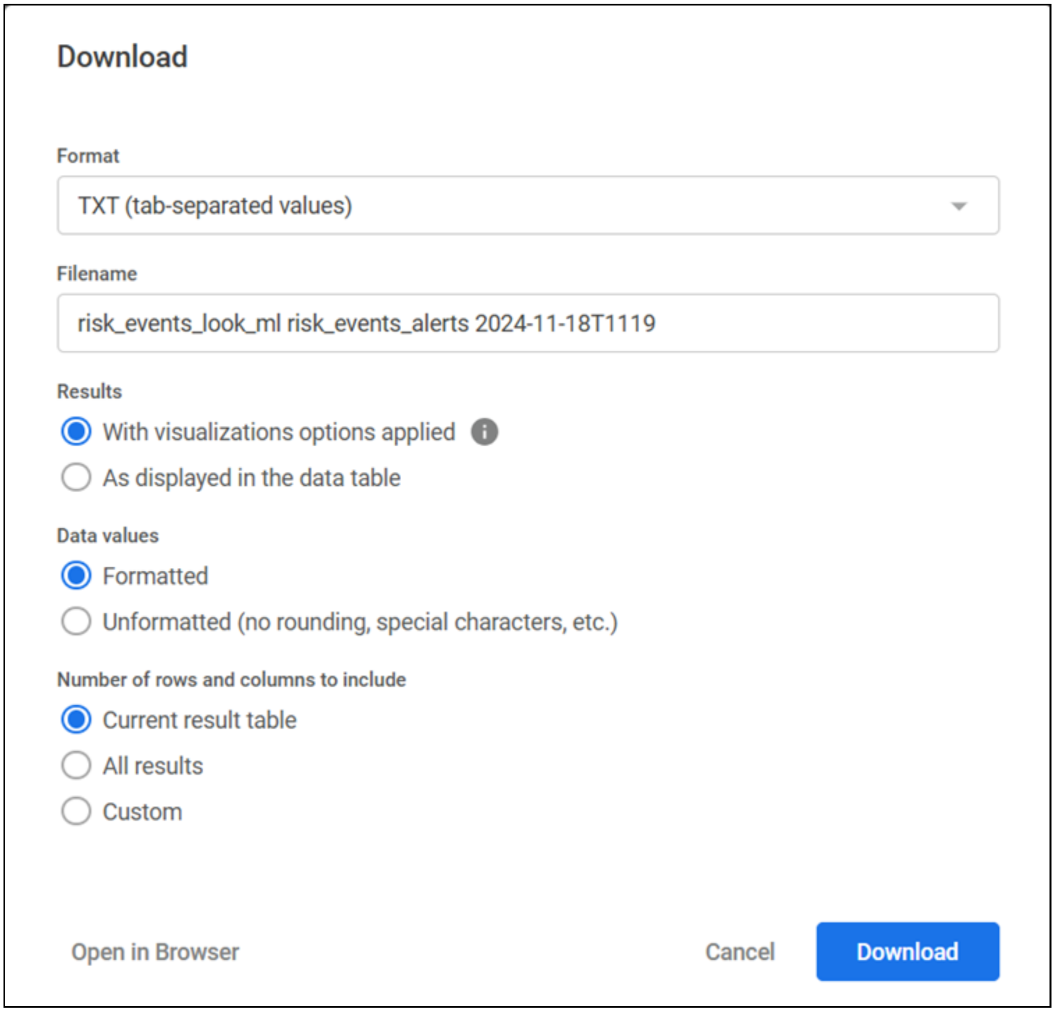
3. Once satisfied with the data and format of the Explore, it can be utilized in several ways by clicking the **Options** cogwheel in the top-right corner.



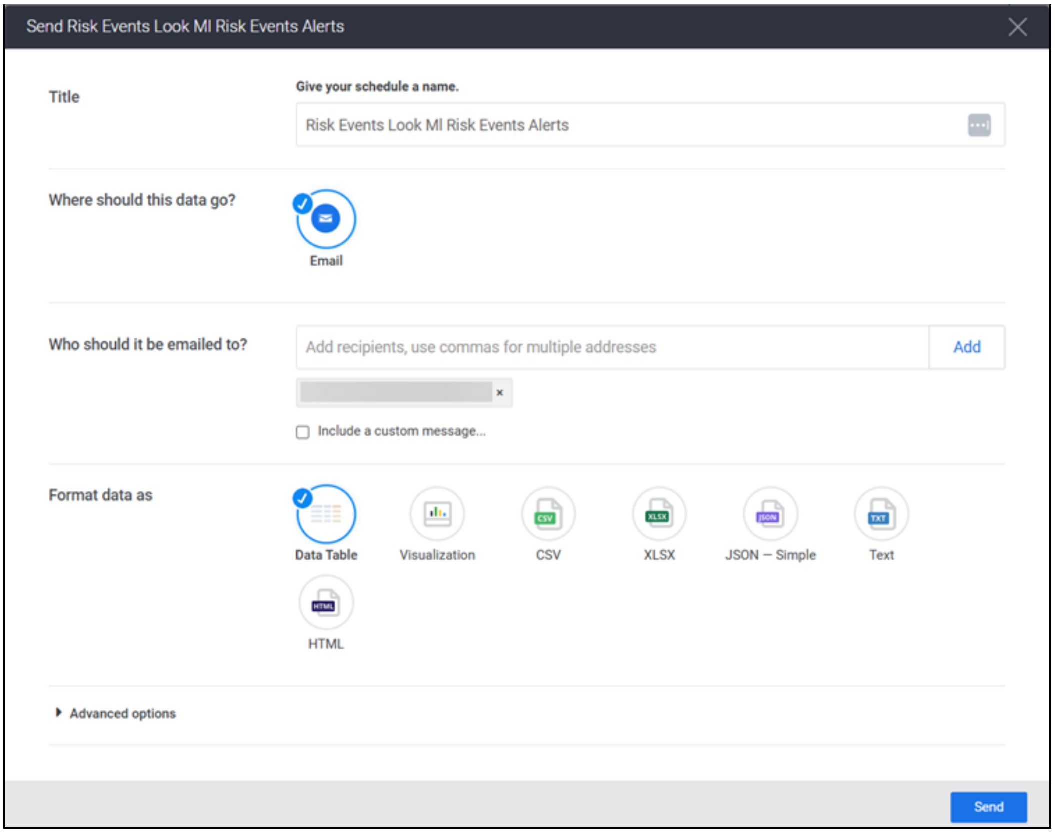
Select one of the following options:

- **Save**
  - As a new Dashboard
  - To an existing Dashboard
  - As a Look

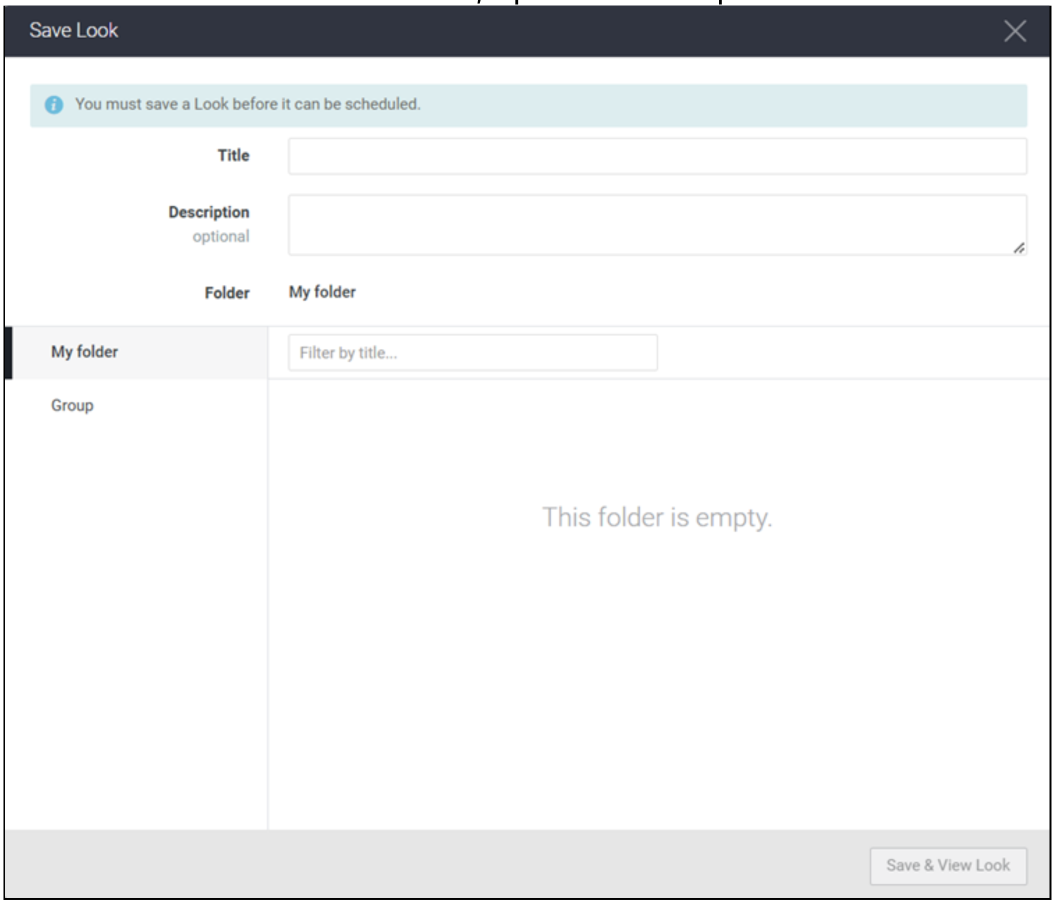
- **Download** - Choose a file format, data format, result types, and data values to download the results.



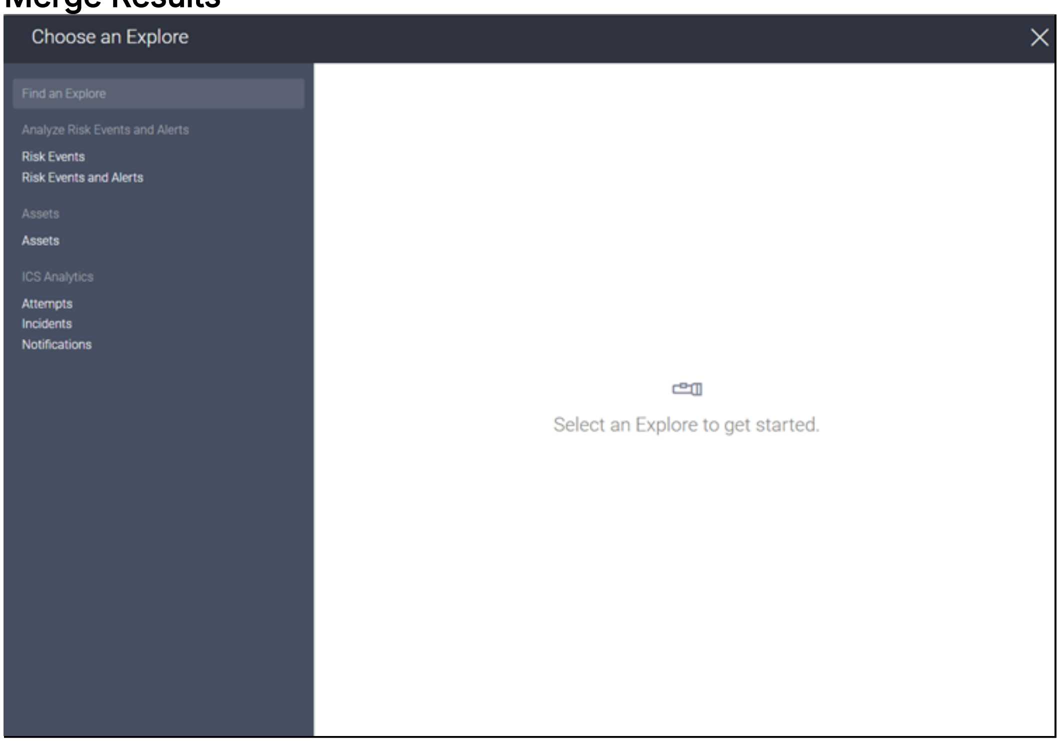
- **Send** - Add a name, data format, and recipient email addresses to send the results to other users.



- Save and schedule - Add a title, optional description



- **Merge Results**



- **Remove fields and filters**

Explore Assistant Feedback

Explore Assistant may not immediately provide the desired content, and learns from user input. If users are dissatisfied with a response, they're encouraged to leave detailed feedback in the field found at the top of the page, and then adjust their prompt or manually apply the desired fields as needed.