

Step-By-Step Guide: How to Include Configured Fields in Advanced Dashboards and Advanced Reports

A Step-by-Step Guide to Adding, Configuring, and Displaying Configured Fields

March 2026 | Version 1.0 | Confidential

Summary

This guide explains how to include configured field data into your advanced dashboards and advanced reports.

Configured field data is stored in a format where each configured field appears in its own row. To use these fields with other dashboards and reports, the data must first be transformed so that each configured field's data appears as a column.

This document provides the steps to:

1. [Add the configured field data table](#)
2. [Transpose the data from rows to columns](#)
3. [Join the transposed table to an existing report or dashboard](#)
4. [Confirm the configured fields are available for use](#)
5. [Troubleshoot common issues](#)

Important Notice Regarding Screenshots

The screenshots included in this guide are provided for illustrative purposes only. The appearance of your workspace may vary slightly depending on system updates, user permissions, configuration settings, or feature availability within your environment.

While menu names, layout positioning, or visual styling may differ, the overall process and functionality described in this document remain consistent. If you do not see an option exactly as shown, please refer to similarly named features within the same section of the platform.

If you experience difficulty locating a feature referenced in this guide, please contact your support representative for assistance.

1. Add the Configured Field Data Table

1.1 Open the Dashboard or Report Workbook

- Click **Platform** to expand the navigation menu.
- Navigate to the advanced dashboard or advanced report where you want to add configured field data.
- The default dashboard or report workbook cannot be edited. Create a copy so you can make changes. For instructions on creating a copy of the dashboard or report, refer to [Creating a New Dashboard](#).
- Click the Edit button to enable editing of the data.

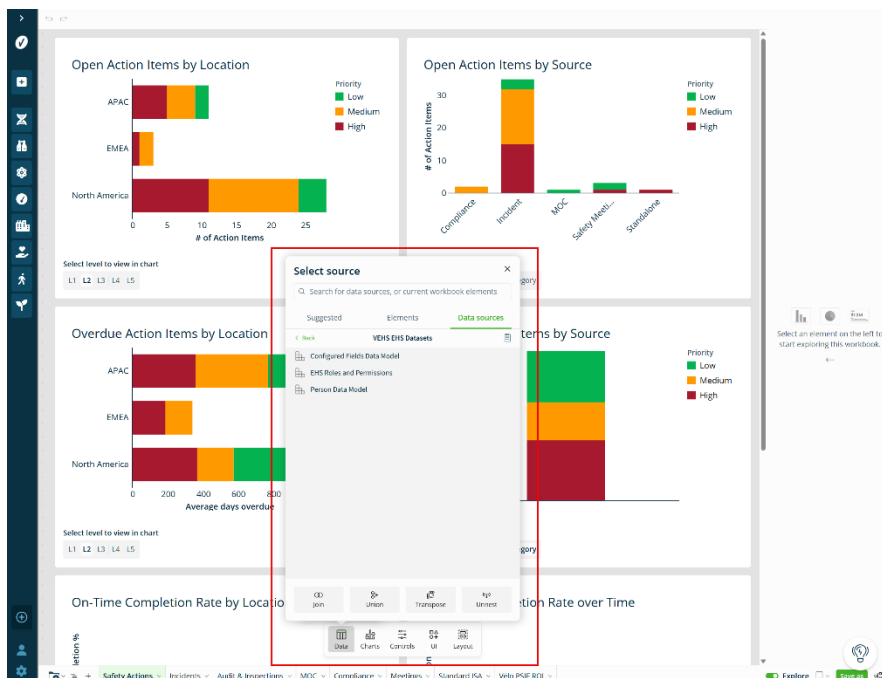


1.2 Add the Configured Field Dataset

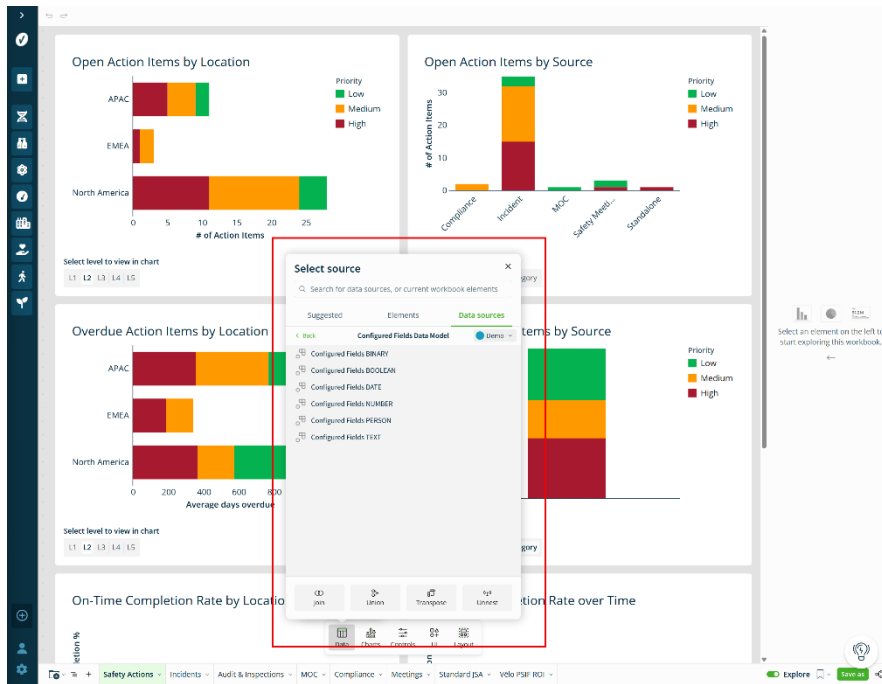
- From the add element bar at the bottom, click **Data** to add a data table.



- ii. Select **Table**.
- iii. In the **Select source** window, navigate to the **Data source** tab and locate and open VEHS EHS Datasets.
- iv. Select the **Configured Fields Data Model**.



- v. Review the available datasets and choose the one that matches the type of configured field you want to report on (such as text, date, number, or yes/no).
- vi. Add the selected dataset to your dashboard page before proceeding to the next step.



The table you added shows one row for each configured field value for a record.

2. Transpose Configured Field Rows into Columns

Important Note Before You Begin

Configured field data is provided through the *Configured Fields* data model. Within it, data is organized into separate datasets based on value type (for example text, date, number, or yes/no).

You may need to select the appropriate dataset(s) depending on the fields used in your report.

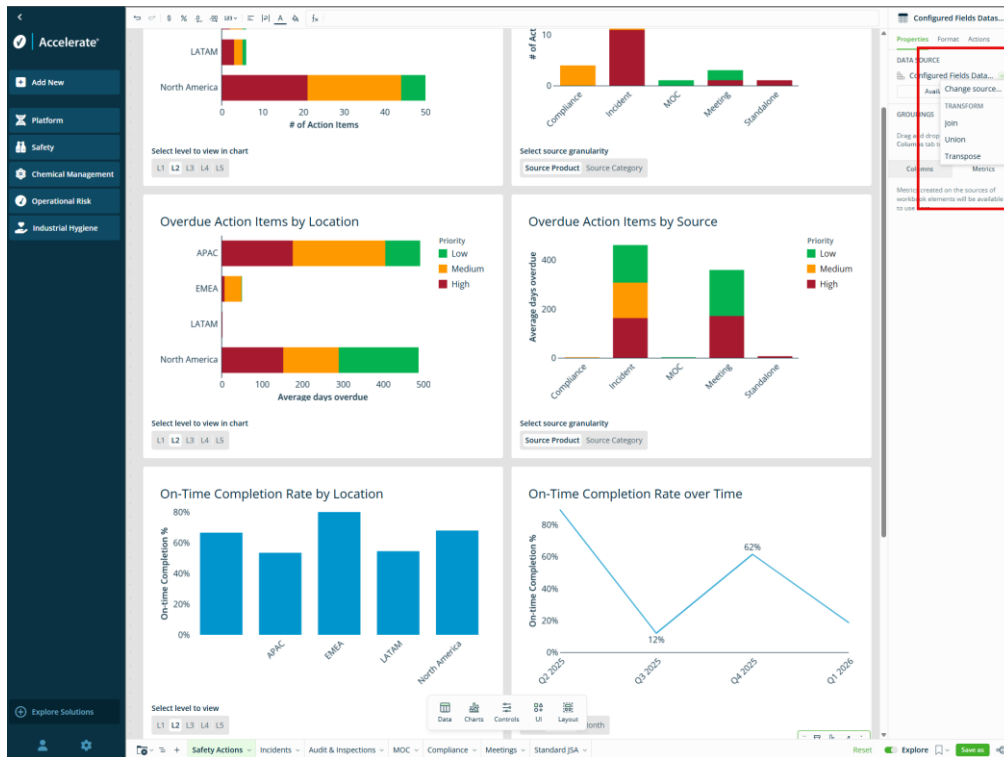
The steps below demonstrate the process using one configured fields dataset. Repeat the same steps for any other datasets as needed.

Configured field data is stored with one row per field value. To make it usable in dashboards and reports, each field needs to appear as a column instead. This is done using a process called transposing.

2.1 Transpose the Table

- i. Select the **Configured Fields Dataset** table you just added.

- ii. In the side pane on the right, on the Properties tab, go to the Data Source section and click the chevron (▾) beside the **Configured Field Dataset** name to display the available actions.
- iii. Select Transform → Transpose.



- iv. The Transpose dialog opens. A table shows the current **Configured Field Dataset** data.
- v. On the left side, apply these settings:
 - **Type:** Row to Column
 - **Column to transpose:** Field Name
 - **Value column:** Value
 - **Aggregate:** Max
 - **Output columns:** All columns

Transpose table

Type: ☒ Row to column ☐ Column to row

Column to transpose:

Value column:

Aggregate:

Output columns: ☒ All columns

☒ AccelerateCustomField ☒ AccelerateCustomFieldId ☒ AccelerateCustomFieldId ☒ Entity Id ☒ Entity Name ☒ Entity Custom Field Name ☒ Element

☒ ExceptionDate ☒ IsTemporary

☒ Number of People ☒ Person External Integration... ☒ Privacy Case Explanation ☒ Recommendation

Original source	Custom Field Name	AttributeId	Entity Id	Value	Entity Name	Entity Custom Field Name
AccelerateCustomField	Custom Field Name	AttributeId	Entity Id	Value	Entity Name	Entity Custom Field Name
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	10303	295	active	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	2669	19	4	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21961	1488	Test element 1962024-07-31T14:05:419-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21788	1253	Test element 1962024-07-30T22:28:5278-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21601	1340	Test element 1962024-07-30T22:28:47293-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21740	1300	Test element 1962024-07-31T12:17:25860-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21764	1316	Test element 1962024-07-31T12:14:53360-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21676	1452	Test element 1962024-07-31T14:05:1999-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21788	1312	Test element 1962024-07-31T22:22:43395-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21721	1291	Test element 1962024-07-30T22:07:14013-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21894	1308	Test element 1962024-07-31T14:43:14030-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	9960	146	CDP2	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21941	1640	Test element 1962024-07-31T16:37:48591-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	22026	1672	Test element 1962024-07-31T15:00:48554-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21175	1319	Test element 1962024-07-30T22:33:299-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21734	1496	Test element 1962024-07-31T12:16:04072-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	20504	1464	Test element 1962024-07-31T14:05:1970-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21075	1267	Test element 1962024-07-30T21:42:44416-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	10299	282	active	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21132	1311	Test element 1962024-07-30T22:18:58539-0500	ANALYSTITEM	ANALYSTITEM_Element
53d93be-a3b6-4630-8022-5ac1a43c5ea8	Element	21748	1304	Test element 1962024-07-31T12:19:15442-0500	ANALYSTITEM	ANALYSTITEM_Element

1,473 rows - 7 columns

Output preview

AccelerateCustomField	AttributeId	Entity Id	Entity Name	Entity Custom Field Name	Element	ExceptionDate	IsTemporary	Number of People
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21231	1291	ANALYSTITEM	ANALYSTITEM_Element	Test element 1962024-07-30T22:07:14013-0500	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21371	1236	ANALYSTITEM	ANALYSTITEM_Element	Test element 1962024-07-31T06:15:58316-0500	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21919	1624	ANALYSTITEM	ANALYSTITEM_Element	Test element 1962024-07-31T14:24:48168-0500	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	2663	19	ANALYSTITEM	ANALYSTITEM_Element	null	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21533	1636	ANALYSTITEM	ANALYSTITEM_Element	null	FALSE	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	9961	146	ANALYSTITEM	ANALYSTITEM_Element	null	FALSE	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21175	1319	ANALYSTITEM	ANALYSTITEM_Element	Test element 1962024-07-30T22:33:299-0500	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21862	1388	ANALYSTITEM	ANALYSTITEM_Element	Test element 1962024-07-31T06:49:37867-0500	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21274	2149	ANALYSTITEM	ANALYSTITEM_Element	element	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21039	1263	ANALYSTITEM	ANALYSTITEM_Element	Test element 1962024-07-30T21:42:44541-0500	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21201	1327	ANALYSTITEM	ANALYSTITEM_Element	Test element 1962024-07-30T22:30:12333-0500	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21769	1326	ANALYSTITEM	ANALYSTITEM_Element	null	null	FALSE	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21203	1331	ANALYSTITEM	ANALYSTITEM_Element	null	null	FALSE	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21464	1332	ANALYSTITEM	ANALYSTITEM_Element	null	null	FALSE	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	2664	19	ANALYSTITEM	ANALYSTITEM_Element	4	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	3828	34	ANALYSTITEM	ANALYSTITEM_Element	active	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	12165	900	ANALYSTITEM	ANALYSTITEM_Element	Test element 1962024-07-30T22:11:19859-0500	null	FALSE	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	21133	1319	ANALYSTITEM	ANALYSTITEM_Element	Test element 1962024-07-30T22:11:19859-0500	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	28235	2236	ANALYSTITEM	ANALYSTITEM_Recommendation	null	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	11110	737	ANALYSTITEM	ANALYSTITEM_Recommendation	null	null	null	null
53d93be-a3b6-4630-8022-5ac1a43c5ea8	28113	2262	ANALYSTITEM	ANALYSTITEM_Recommendation	null	null	null	null

1,473 rows - 9 columns

Cancel Submit

What This Does

- Field Name** contains the name of each configured field, with a different row for each configured field and each entry to that field.
- Value** contains the data entered each time. For example, where **Field Name** is **Severity**, the associated **Value** may display **High**.

CUSTOM FIELDS RAW

Custom Field Name	AttributeId	Entity Name	Value	Entity Id	Entity Custom Field Name
ExceptionDate	29247	TASK	2024-09-08 00:00:00.000	4477	TASK_ExceptionDate
IsTemporary	29248	TASK	TRUE	4477	TASK_IsTemporary

SUMMARY ^ 2 rows - 6 columns

- Entity Name** tells you what type of record the data is from (for example, Incident or Task). This makes it easier to understand your data when multiple record types are included, and keeps everything organized in the final table.
- The Row to Column transposition creates one column for each configured field. As shown in the transposed table (second screenshot), fields such as **Exception Date** and **Is Temporary** no longer appear as row values; instead, they are displayed as separate columns.
- Aggregation (Max)** ensures only one value is shown for each field. If multiple values exist, this setting selects one, so the data appears as a single row instead of duplicates.

- **Output columns (All columns)** keeps all original fields from the dataset, including identifiers (such as Record ID), so the data can be joined and no information is lost.

Transpose of CUSTOM FIELDS RAW

Custom Field Name	Attributeid	Entity Name	Entity Id	TASK_ExceptionDate	TASK_IsTemporary
ExceptionDate	29247	TASK	4477	1	0
IsTemporary	29248	TASK	4477	0	1

SUMMARY ^ 2 rows - 6 columns

After this step:

- Instead of seeing multiple rows for the same Incident (one row per configured field), each Incident will now appear once.
- The configured fields will be displayed as individual columns rather than separate rows.

2.2 Prepare Data for Join

- Rename the transformed table to something clear, such as **Transposed Configured Fields**.

This makes it easier to identify when creating joins.

To rename the table, click the current table name shown at the top of the transformed table and enter a new name.

- Rename columns to make them easier to understand.

For example:

- **Entity ID** can be renamed to **Record ID**.
- **Entity Name** can be renamed to **Category**.

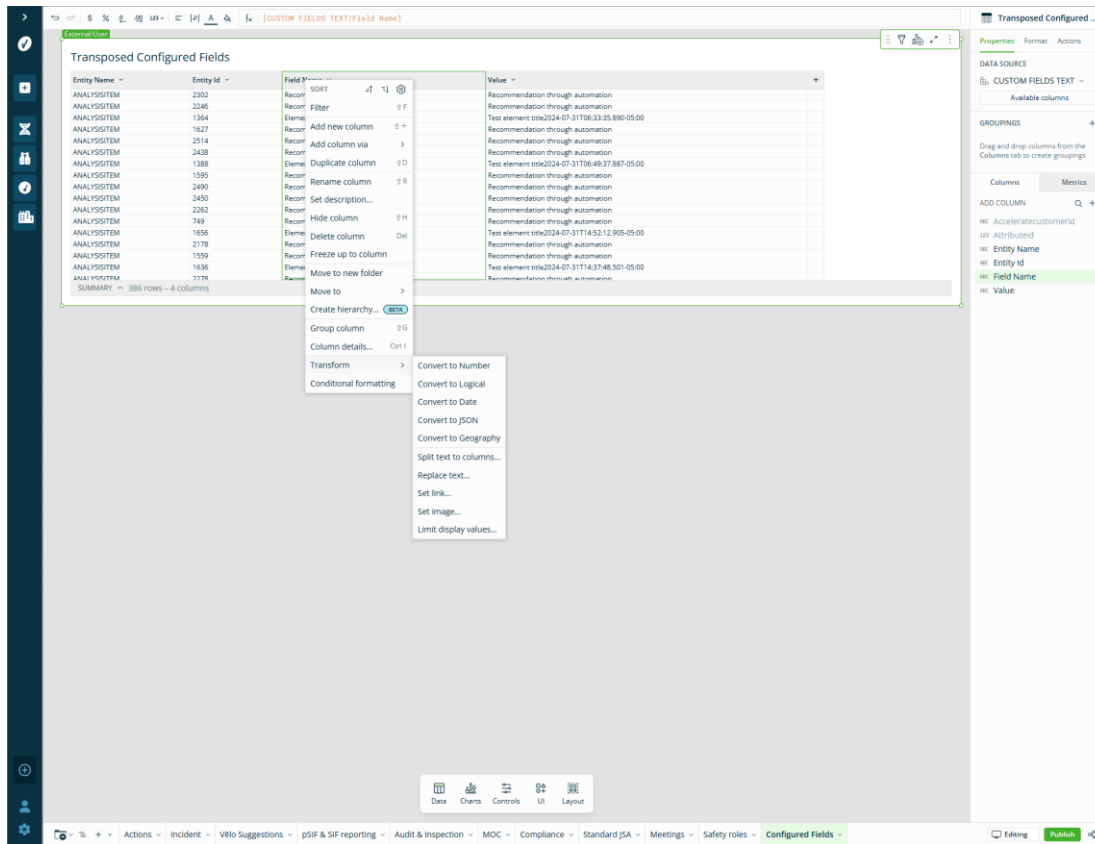
To rename a column, double-click the column header and enter a new name.

- Change the **Entity ID** column to a number (if needed).

Sometimes the **Entity ID** is treated as text instead of a number, which can cause issues when joining tables.

To fix this:

- Find the **Entity ID** column and right click to bring up the menu.
- Select **Transform** and then **Convert to Number**.



3. Join the Transposed Table to a Report

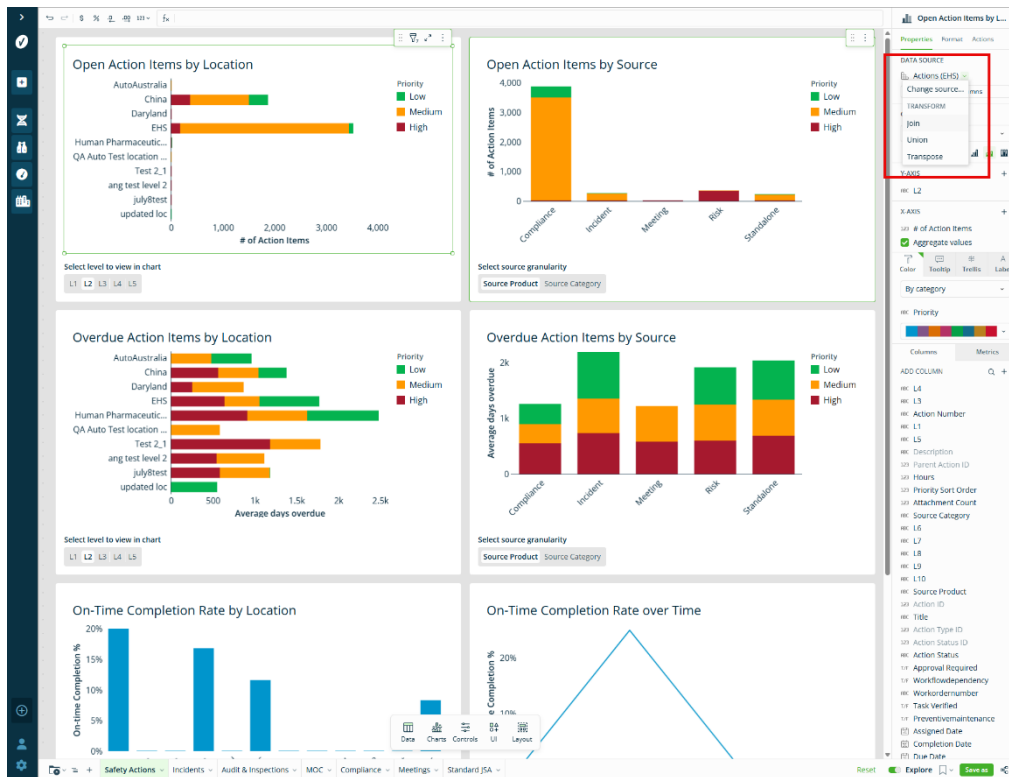
Now that the data is in a usable format, it can be joined to an existing table or chart.

Example Scenario

You have configured fields associated with Incidents and would like them to appear in a report.

3.1 Open the Existing Dashboard and/or Report

- i. Open the table or chart you would like to add configured fields into (for example, Incident reports).
- ii. Navigate to the Data Source section.
- iii. Select the chart or table to which you want to add the information from the configured fields.
- iv. Select Join.



3.2 Select the Transposed Table

- i. When the Select Source window appears:
 - o Navigate to the Elements tab.
- ii. Select **Transposed Configured Fields** (or whichever name you assigned to the transposed table).

Select source

Q Search for data sources, or current workbook elements

Suggested

Elements

Data sources

Root Cause (Current page)

Hazard Type by Root Cause

Copy of Hazard Type by Root Cause

Page 2

Root Cause by Hazard Type

Page 1

Custom Fields Data Table

Custom Fields

Page 3

Q Search...

AccelerateCustomerid

HK Custom Field Name

HK Attributeid

HK Entity ID

HK Value

HK Entity Name

HK Entity Custom Field Name

Custom Field Name

Attributeid

Entity ID

Value

Entity Name

Entity Custom Field Name

Element	10303	265	sofload	ANALYSISTEM	ANALYSISTEM_Element
Element	2669	19	e	ANALYSISTEM	ANALYSISTEM_Element
Element	21969	1648	Test element 0062024-07-31T14:48:55.419-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21188	1323	Test element 0062024-07-30T22:26:52.016-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21007	1240	Test element 0062024-07-30T20:22:47.203-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21740	1500	Test element 0062024-07-31T12:17:20.860-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21764	1516	Test element 0062024-07-31T12:24:53.066-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21976	1652	Test element 0062024-07-31T14:50:11.899-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21758	1512	Test element 0062024-07-31T12:22:43.305-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21121	1291	Test element 0062024-07-30T22:07:14.613-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21894	1608	Test element 0062024-07-31T13:42:14.630-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	9962	146	CZKXZ	ANALYSISTEM	ANALYSISTEM_Element
Element	21941	1640	Test element 0062024-07-31T14:37:48.501-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	22026	1672	Test element 0062024-07-31T15:00:48.554-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21175	1319	Test element 0062024-07-30T22:23:29.959-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21734	1496	Test element 0062024-07-31T12:16:04.072-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	22004	1664	Test element 0062024-07-31T14:55:51.972-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21075	1267	Test element 0062024-07-30T21:42:44.416-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	10299	263	sofload	ANALYSISTEM	ANALYSISTEM_Element
Element	21152	1311	Test element 0062024-07-30T23:18:59.539-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21746	1504	Test element 0062024-07-31T12:19:15.442-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21411	1356	Test element 0062024-07-31T06:30:13.233-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	3830	35	than	ANALYSISTEM	ANALYSISTEM_Element
Element	21109	1283	Test element 0062024-07-30T22:03:55.983-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21983	1656	Test element 0062024-07-31T14:52:12.905-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21103	1279	Test element 0062024-07-30T22:02:40.515-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21951	1644	Test element 0062024-07-31T14:43:23.561-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21387	1340	Test element 0062024-07-31T06:23:39.301-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21371	1336	Test element 0062024-07-31T06:15:58.310-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21991	1660	Test element 0062024-07-31T14:53:58.621-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	8048	138	sofload	ANALYSISTEM	ANALYSISTEM_Element
Element	21911	1620	Test element 0062024-07-31T14:04:49.168-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21158	1315	Test element 0062024-07-30T22:21:17.782-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21053	1255	Test element 0062024-07-30T21:36:47.472-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	31419	2759	pressure	ANALYSISTEM	ANALYSISTEM_Element
Element	21429	1368	Test element 0062024-07-31T06:35:50.529-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21462	1388	Test element 0062024-07-31T06:49:37.887-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21139	1303	Test element 0062024-07-30T22:13:13.420-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21770	1520	Test element 0062024-07-31T12:27:05.769-05:00	ANALYSISTEM	ANALYSISTEM_Element
Element	21417	1360	Test element 0062024-07-31T06:31:58.567-05:00	ANALYSISTEM	ANALYSISTEM_Element

1,473 rows - 6 columns

Cancel

Select

3.3 Configure the Join

What to Do

- Select the correct ID column from each table:
 - From your existing chart or table (for example, Incident ID).
 - From the **Transposed Configured Fields** table (Record ID).
- Choose a Left Join so that:
 - All existing report rows remain.
 - Configured field data is added where available.

Note: The configured fields table uses **Entity ID**, which you may have renamed to **Record ID**.

What This Does

- A join connects two tables by matching shared information between them.
- One table contains your main records (for example, Incidents).
- The other table contains configured field values for those records.
- When the same ID is selected in both tables, the configured field columns are added to your chart or table.

Note: **Incident** is used here as an example. Depending on your report, this may be Audits, Inspections, Observations, or another primary record type.

4. Confirm the Configured Fields Are Available

Once the join is complete:

- The configured fields appear as new columns in the chart/table.
- They will behave like any other column.
- The join only applies to this chart or table. If you want to add configured fields to other charts or tables, you will need to repeat the join for each one.

For detailed instructions on adding and managing columns in dashboards and reports, refer to [Adding and Managing Columns](#).

5. Troubleshooting Common Issues

5.1 Configured Field Join Validation and Troubleshooting

If the configured fields do not appear in the dashboard or report output, check the following:

- Check your join configuration. Ensure the correct ID column is selected in both tables. Incorrect selection will prevent the configured field data from matching up with the correct records.
- Verify data type consistency between join columns. The join will not work if the fields you are joining on are stored as different types (e.g. one column is text and the other is a number).
- Confirm the transposed configured fields table contains data. You should see rows in the table after transposing. If no rows are returned, the configured fields will not appear in your chart or table.
- Ensure the join has been applied to the correct chart or table, and that the configured fields are selected in the column configuration panel.

5.2 Additional Diagnostic Tip

If you do not see Configured Fields datasets when adding a data source:

- iv. Ensure you are in the Data Sources tab within the Select Source window.
- v. Expand VEHS EHS Datasets and locate the **Configured Fields Data Model**.
- vi. Open the data model to view the available datasets.
- vii. The dataset list is displayed alphabetically. Scroll to locate the appropriate configured fields datasets (for example, text, date, number, or yes/no).

If the dataset is not visible after completing the steps above, it may not be enabled for your environment. Contact your system administrator or support team for further investigation.

6. What You've Learned to Do

To make configured fields available in dashboards and reports:

1. Add the **Configured Fields Dataset** data table.
2. Transpose the data using:
 - **Type:** Row to Column
 - **Column to transpose:** Field Name
 - **Value column:** Value
3. Join it to the existing report using a shared ID.
4. Use the new configured field columns within the report or dashboard.

Following these steps ensures configured fields are properly structured and fully usable within your advanced dashboards & reports.