

Adding a Multi-Series Chart to a Dashboard

Last Modified on 11/24/2023 2:21 pm EST

Our new Dashboard feature is available upon request for the initial launch phase. Please contact your Customer Success Manager if you'd like to schedule implementation with our Services team.

Overview

Resolver's Dashboard Builder allows Administrators to build custom Dashboards using the Dashboard Data Sets published within their Org.

Before using the Dashboards feature, at least one Dashboard Data Set needs to be created and published.

The following instructions apply to Multi-Series Bar, Multi-Series Line and Multi-Series Symbol Chart Types.

Multi-series Charts present a single value in more than one Category. Users must add a single Category, Value and Series field to create something similar to a Pivot Chart. A Multi-series Chart consists of two dimensions and a measure.

Warning:

(!) All changes or edits made to a Chart are globally applied across all instances of the Chart unless you duplicate the Chart and apply changes or edits to the duplicated Chart.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to use the Dashboard Data Set Builder.

Related Information/Setup

To create a new Dashboard Data Set, please follow the link below:

Create a New Dashboard Data Set

After creating a Dashboard Data Set, the user must publish it before it can be used with the



Dashboard Data Set Builder. Please follow the link below for more information on Publishing a Dashboard Data Set.

• Publishing/Unpublishing a Dashboard Data Set

To add styles to your Chart, please follow the link below:

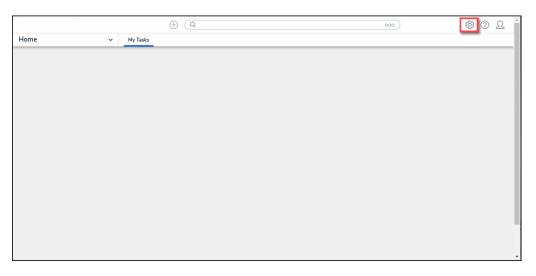
• Adding Styles to a Chart

Please see the corresponding articles below for Information on Adding a Chart Type not covered by these instructions.

- Adding a Chart to a Dashboard
- Adding a Combo Chart to a Dashboard
- Adding a Table to a Dashboard
- Adding a Crosstab to a Dashboard
- Adding a Heatmap to a Dashboard
- Adding a Map to a Dashboard
- Adding a Box and Whiskers Chart to a Dashboard

Navigation

1. From the *Home* screen, click on the **System** icon.



System Icon

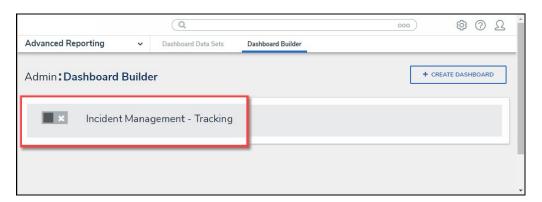
 From the *Admin Overview* screen, click on the **Dashboard Builder** tile under the Advanced Reporting section.



Admin Overview	~	Q		<u>ک</u> ۞ ٷ
Data Model			Views	
Object Types		Object Type Groups	Configurable Forms	Data Visualizations
e Helds	Assessments	Data Definitions	Advanced Reporting	
				oard Builder

Dashboard Data Sets Tile

3. From the *Dashboard Builder* screen, click on a **Dashboard Name**.



Dashboard Name

Adding a Multi-Series Chart to a Dashboard

For illustration purposes, were are going to use the Multi-Series Bar Chart Type in the instructions below. However, you can apply these instructions to Multi-Series Line and Symbol Chart Types.

1. From the *Canvas Layout* screen, click the **Add Chart** button.



	Q		0	··· 章 ②	<u>م</u> '
Advanced Reporting	➤ Dashboard Data Sets	Dashboard Builder			
Incident Manageme	ent - Tracking 🛛 🥒			PUBLISH	
	in 🖾 T 🗔 🤇) = - \$ - ₽ - 4 -			
				Data	»
			Filters	Search Data	Q
				☆ Incident Management (8208	84) >

Add a Chart Button

2. From the *Chart* screen, click on a **Dashboard Data Set** from the **Data Panel**.

Note:

Only published Dashboard Data Sets will appear on the Data Panel.

Pasalyan	()			~	6	n î
,			- H C	Save C	hart X	
Data	a a Category Drop column have Values Drop column have cident Management (820 Untitled Chart Add Description Drop column as "value" Drop column as "category" Drop column as "category"					
			- dd	\checkmark	4 ⁴ 9 ⁴ 9	Â.
Incident Management (820			iii	<u>k</u>	1111	
			Values Drop column here Values Drop column here			
			0	H	* Tetal 0,000	с >
			Image: Charts Drop column here Image: Charts Image:			
	Deer	11		>		
	Add Description	ll.l	Sorting	Sorting		
	as "value"	Bar Chart	Layers)	×.
	Category Drop column here Category Drop column here Untitled Chart Add Description Charts I I I I I I I I I I I I I I I I I I I	3	×.			
			Ceneral > Styles > Format > Filters >			
		Drop column as "category"				
	Category Drop column here Q Q Untitled Chart Add Description III IIII IIII IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII					
						-

Dashboard Data Set

3. Click in the Chart Header (Untitled Chart) field and enter a Chart Name. The first 36



characters will show in the Chart Header.

Peeelver				6		\cap				
		σ () Ε Σ Ξ		Save C	hart >	×				
< Data	Category	Drop column here Values Drop column here	Charts			~				
DataSet Incident Managem	Number of Incidents Triaged Per Month									
Search Columns					1	1				
Categories	The data rep	evente nember of moderno that are theged coor month	10		1111					
$ \equiv #$ of Threats Range			#+	#	$\overline{\nabla}$					
≣ ≣ Asset Status Label					A 700					
≣ E Asset Status Value			•	H	0,000					
🗄 🗏 Case Costs Range						*				
${}_{ } \equiv$ Case Duration (Days)			General			>				
🗄 🚍 Case Focus name			Styles			>				
🗄 🖾 Case Focus Valid From	Drop		Sorting			>				
${\ensuremath{\mathbb H}} \equiv {\ensuremath{Case}}$ Focus workflow	 column as "value" 		Layers			>				
Values			Format			>				
# # of Threats Value	*									
∷ # Case Costs Value			Filters			1				
🗄 # Case Duration (Days)										
# Case Focus workflow										
# Case Net Loss Value										
# Incident Average Dura		Drop column as "category"								
# Incident Cost Value	-									

Chart Header and Description

 Click in the Add Description field and enter a Chart Description. The Chart Description will appear on the Data Panel under the Chart section and pop up when hovering your cursor over a Chart Name.

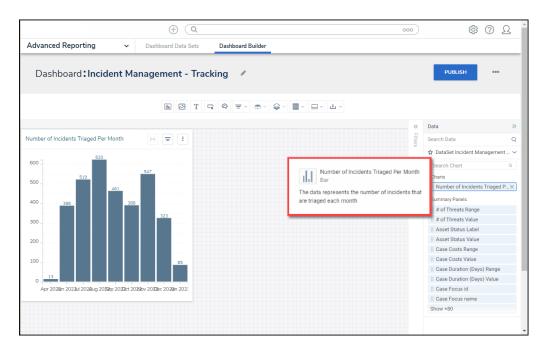


Chart Description

5. Select the **Multi-series Bar** Chart tile from the **Charts** panel.



Pasalyar				~		
			Ø () E Σ = ■ +	H Save Chart	• ×	8
III Data		Category Drop column here Values Drop column here		Charts	~ 8	5
N 🖩 DataSet Incident Managem		aregory Displotanin nee			100	
Search Columns		Number of Incidents Triaged Per Month The data represents the number of incidents that are triaged each month				
Categories		ne data representa ure number or incluenta una are mayeo each numm		III 🗠	<u></u>	ł
Observed Date/Time Observed Date/Time	*			₩ ₩	Ŧ	
E Dober Date/Time				6 H	-	
∷				î.		
∃				General	~	
II = Overall Case Value_ R						
🗄 🗂 Primary Incident Type				Tooltips	>	
I F Primary Incident Type				Max Data Points		
I Frimary Incident Type		Drop			_	
🗄 🧮 Priority Label		solumn		50	~	
II E Priority Value	•	is "value" Bar Chart		Styles	>	
Values				Sorting	>	
# # of Threats Value	Ê					
# Case Costs Value				Layers	>	
# Case Duration (Days)				Format	>	
# Case Focus id				Filters	>	
# Case Focus workflow_						
# Case Net Loss Value						
# Incident Average Dura						
# Incident Cost Value # Incident Count Value		Drop column as "category"				
		and continue autogory				
# Incident Net Loss Val	Ŧ				_	

Multi-series Bar Chart

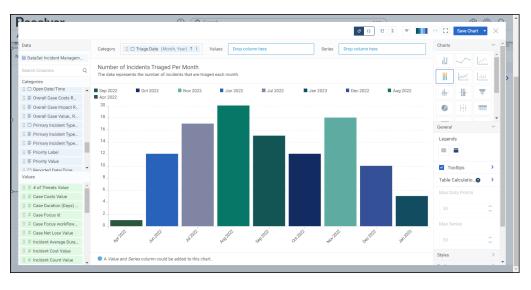
- Dashboard Data Set Categories and Values will appear under the Dashboard Data Set Name on the Data Panel.
 - **Categories (Blue):** Categories are text and data columns used to group data (e.g., Sales Region, Department Name, Order Dates, etc.).
 - Values (Green): Values are numeric columns used to calculate data. Values can also be aggregated (e.g., Average Price Per Product, Total Sales Revenue, etc.).
- Categories and Values have a Data Type icon next to the Dashboard Data Set Name.
 Data Type icons indicate the Category and Value Data Type:
- Text: 🗐
- Numeric: #
- Date:
- 8. Drag and drop a **Category** from the **Data Panel** onto the **Category** section at the bottom of the Chart (traditional x-axis) or within the **Category** field at the top.



Pasalyar		~ _	\cap
	Ø 0 € Ξ	H Save Chart 👻 🗙	:
Data	Category Drop column here Values Drop column here Series Drop column here	Charts ~	^ >>
N 🖩 DataSet Incident Managem	H 🗇 Triage Date		
Search Columns Q	Number of Incidents Triaged Per Month The data represent the number of incidents that are triaged each month		
Categories			· ·
🗄 🚍 Resolver Incident Cla		++ - ++ - ₹	
🗄 🐺 Resolver Incident Cla			
🗄 🐺 Screening Priority Ra			
🗄 🐺 Security Risk Rating R			4
🗄 🐺 Situational Threat Typ		General ~	
🗄 🐺 Situational Threat Typ		Legends	
🗄 🗂 Summary Date			
🗄 📰 Tasks Open Range			
🗄 📰 Total Loss Amount R.	Drop column	Tooltips	
🗂 Triage Date	as value" Multiseries Bar Chart	Table Calculatio	-
Values			-
🗄 # # of Threats Value		Max Data Points	
# Case Costs Value		50	
🗄 # Case Duration (Days)		50 🗸	
# Case Focus id		Max Series	
# Case Focus workflow			
🗄 # Case Net Loss Value		50 🗘	
# Incident Average Dura		Styles >	
# Incident Cost Value			-
# Incident Count Value	Drop column as "category"	Sorting >	
🗄 # Incident Net Loss Val		Layers >	-

Drag and Drop a Category

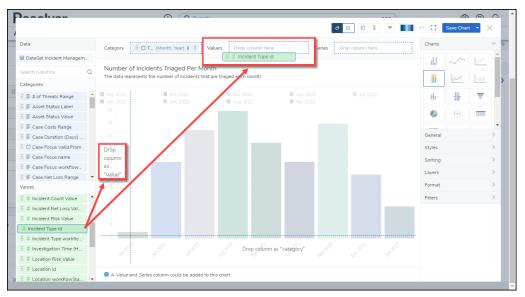
9. The **Category** data will populate the **Chart**. Bar Chart is the system default for Chart types.





 Drag and drop a Value from the Data Panel into the Value section at the Side of the Chart (traditional y-axis) or within the Value field at the top.





Drag and Drop a Value

11. Drag and drop a second Category from the **Data Panel** onto the **Series** field at the top.

									{} Σ	₹	ыс	Save Ch		×
ata	Category	🗄 🗂 Triage Da	te (Month, Year) ↑ : Valu	es ∷ #	Incident Type id	(SUM) : S	eries Drop colu	mn here		Charts			1
DataSet Incident Managem								🗄 🗖 Close	d Date/Time]	- U	\sim	100	î
earch Columns Q			riaged Per N	fonth that are triaged ea	sch month							1		Ш
ategories												<u></u>	:1:1	
Case Focus valid From	53	52	5		50	49	48	47	46		#	#	$\overline{\nabla}$	28
Case Focus name	45 37		43		34	4 1 3 3	 40 32 	3 9 3 1	38 30					
Case Pocus worknow Case Net Loss Range	29	28	-			25	24		22		•	H		
Check Date	21	20	1				16	15	14		_			٠
Closed Date/Time	600]										General			~
Closed Date/Time											Legend	ls		- 1
E Country Label	500 Drop													- 1
E Country Label	column as "value"													
E Country Value	as value		_								🗹 То	oltips	;	>
alues	300										Table (alculatio	0	
# Incident Count Value								-					-	<u> </u>
# Incident Net Loss Val	200							-			Max D	ata Points		- 1
# Incident Risk Value													~	
# Incident Type id	100												~	
# Incident Type workflo											Max Se	ries		
# Investigation Time (H_						Drop column as "o	d.							
# Location Risk Value	d a					prop column as 'c	ategory						0	
# Location id											Styles			



12. The bar size represents the value of each Category, and each value in the Series is represented by a color that can be distinguished by adding a legend to the chart.





Multi-series Bar Chart

13. Click the **Save Chart** button to save your changes.