

Adding Fields to the Dashboard Data Set

Last Modified on 09/15/2023 1:38 pm EDT

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

Fields added to the Dashboard Data Set will only appear as options in the Dashboard Builder when the Dashboard Data Set has been published.



Note:

A Dashboard Data Set can have a maximum of 100 fields.

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](#)

After adding fields to the Dashboard Data Set, you can unlink specific Fields for the Dashboard Data Set. Please follow the link below for more information on Unlinking Fields on a Dashboard Data Set.

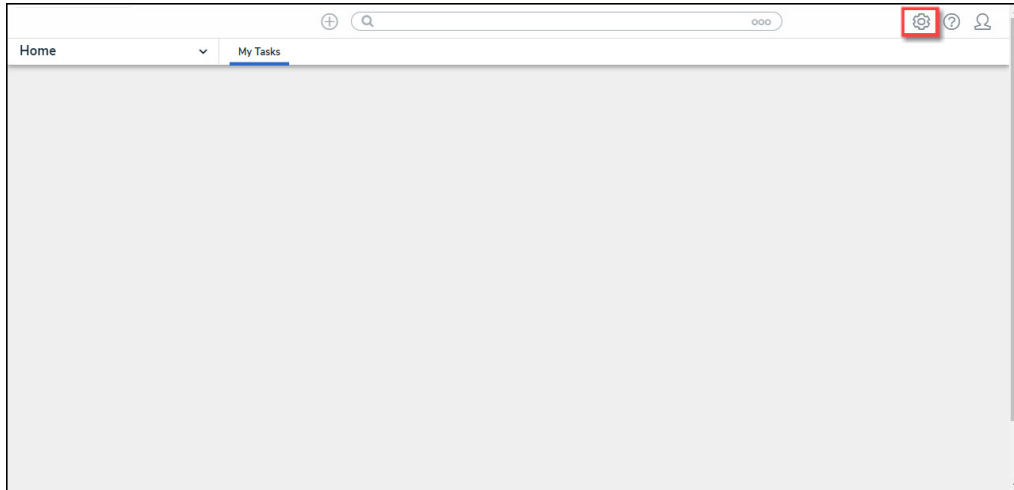
- [Unlinking Fields, Formula, and Properties on a Dashboard Data Set](#)

For more information on how to delete a Dashboard Data Set, please follow the link below.

- [Deleting a Data Dashboard Set](#)

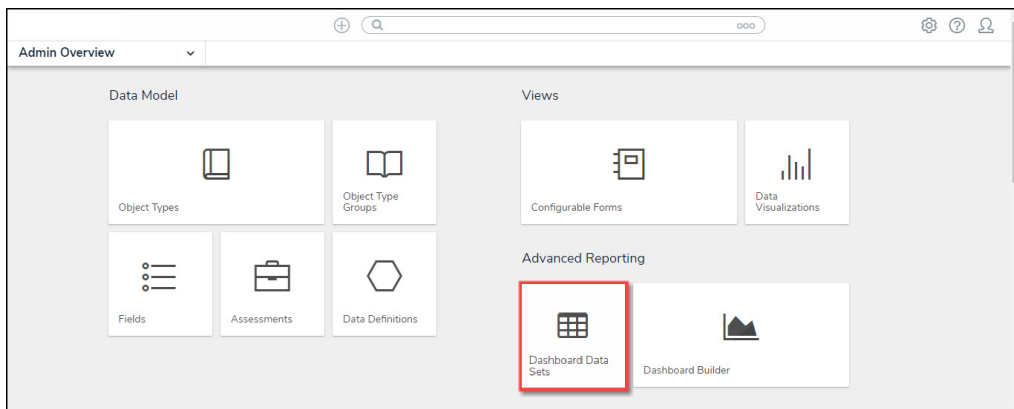
Navigation

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



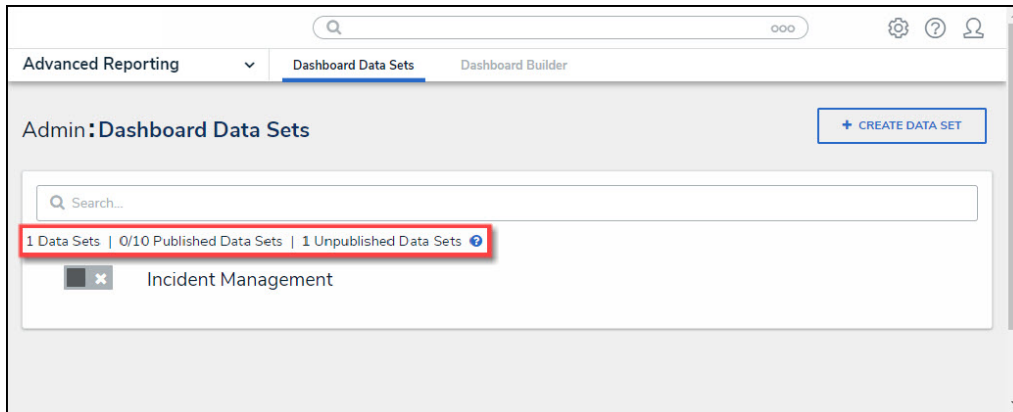
System Icon

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



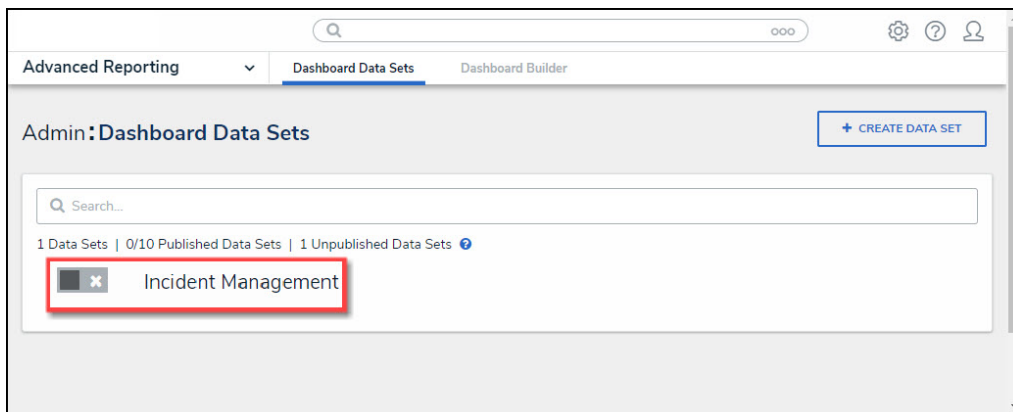
Dashboard Data Sets Tile

3. The **Dashboard Data Sets** screen lists the following information below the **Search** field:
 - **Number of Data Sets (Data Sets):** The total number of Dashboard Data Sets.
 - **Published Data Sets:** The total number of published Dashboard Data Sets that can be used within the Dashboard Builder. Published Dashboard Data Sets will be out of 10. You can only have 10 Published Dashboard Data Sets within the system.
 - **Unpublished Data Sets:** The total number of unpublished Dashboard Data Sets. Unpublished Dashboard Data Sets cannot be used within the Dashboard Builder.



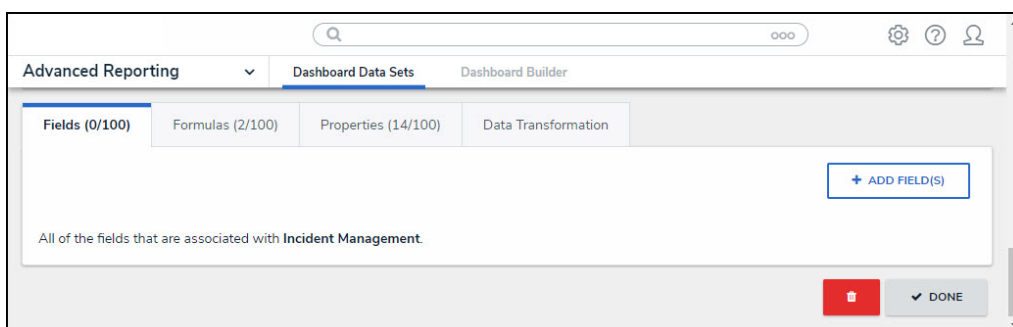
Total Dashboard Data Set Fields

4. Click the **Dashboard Date Set Name** to select a **Dashboard Data Set** from the list.



Dashboard Data Set

5. From the **Edit Data Set** screen, scroll to the **Fields** tab.



Fields Tab

Adding Fields to the Dashboard Data Set

1. Click the + **Add Fields** button on the **Fields** tab.

Advanced Reporting | Dashboard Data Sets | Dashboard Builder

Admin: Edit Data Set

Publish
When you are finished configuring your Dashboard Data Set you must publish your updates. **PUBLISH**

Incident Management

Name
Incident Management

Description
Summarize critical insights for the security program

Anchor
Incident

Select Data Paths
Clicking relationship and object type nodes below will define the paths that act as your data definition

- INC Incident ✓
 - Involved Location(s)
 - IL Involved Location ✓
 - Primary Incident Type
 - IT Incident Type ✓
 - Related Cases (Reference)
 - C Case ✓

CANCEL **UPDATE**

Fields (0/100) | Formulas (0/100) | Properties (12/100) | Data Transformation

+ ADD FIELD(S)

All of the fields that are associated with **Incident Management**.

✓ DONE

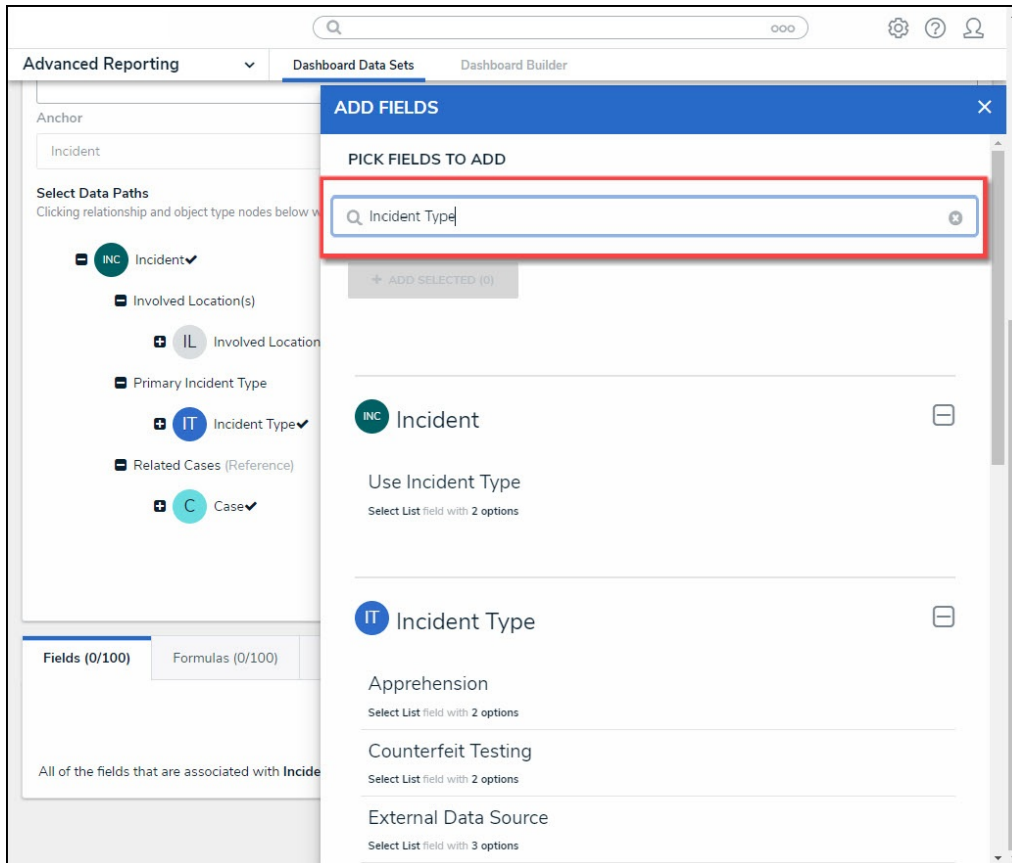
+ Add Fields Button

- From the **Add Fields** pop-up, enter an **Object Type** or **Field Name** in the **Search** field to narrow the **Fields** list down.



Note:

Fields are organized by Object Type.



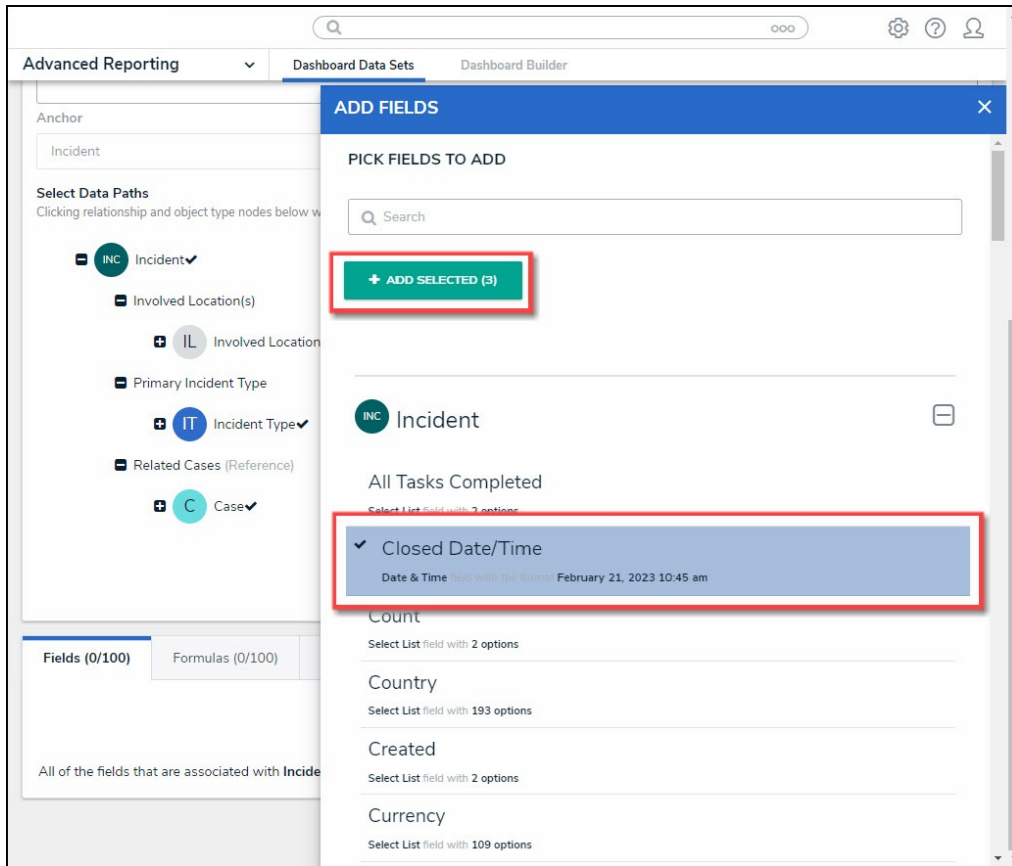
Search Field

3. Select the **Fields** you want to include in the Dashboard Data Set by clicking on a **Field**. As you add fields to the Dashboard Data Set, the **+ Add Selected** button at the top of the **Add Fields** pop-up will track the number of fields you have selected.
4. When you have selected all the desired **Fields**, click the **+ Add Selected** button to add the fields to the Dashboard Data Set. Fields added to the Data Set will no longer appear on the pop-up screen as a selectable field.



Note:

Single Select, Numeric, and Date/Time fields are the only fields available to add to a Data Set.



+ Add Selected Button

5. Selected **Fields** are listed under the **Fields** tab.

Advanced Reporting | Dashboard Data Sets | Dashboard Builder

Fields (3/100) | Formulas (0/100) | Properties (12/100) | Data Transformation

+ ADD FIELD(S)

All of the fields that are associated with Incident Management

- INC** Incident
Closed Date/Time
Date & Time field with the format February 21, 2023 11:06 am
- IL** Involved Location
Primary Location
Select List field with 2 options
- C** Case
Check Date
Date & Time field with the format February 21, 2023

🗑️ ✓ DONE

Fields Tab