

Adding Formulas 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

The user can select any formula to use in their Dashboard Data Set. When accessed in the Dashboard Builder, the formula label and value will be options for use on Charts.

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.

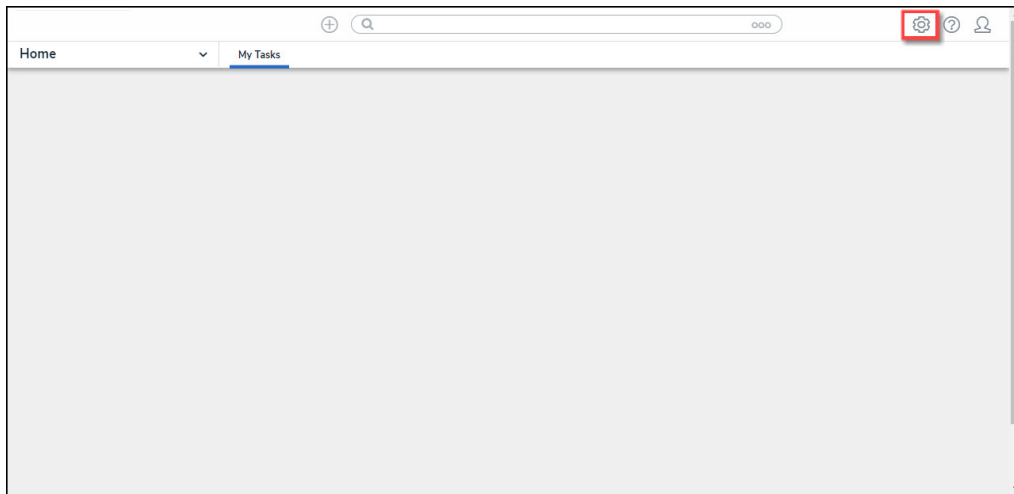
- [Unlinking Fields, Formula, and Properties on a Dashboard Data Set](#)

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

- [Deleting a Data Dashboard Set](#)

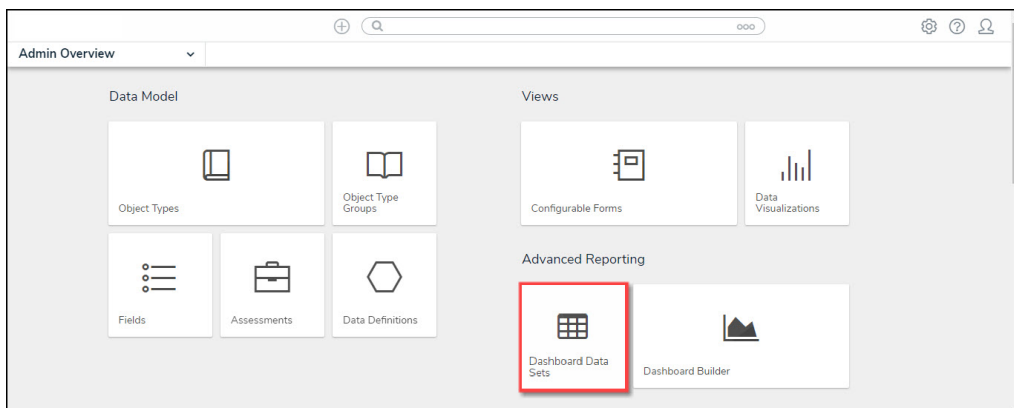
Navigation

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



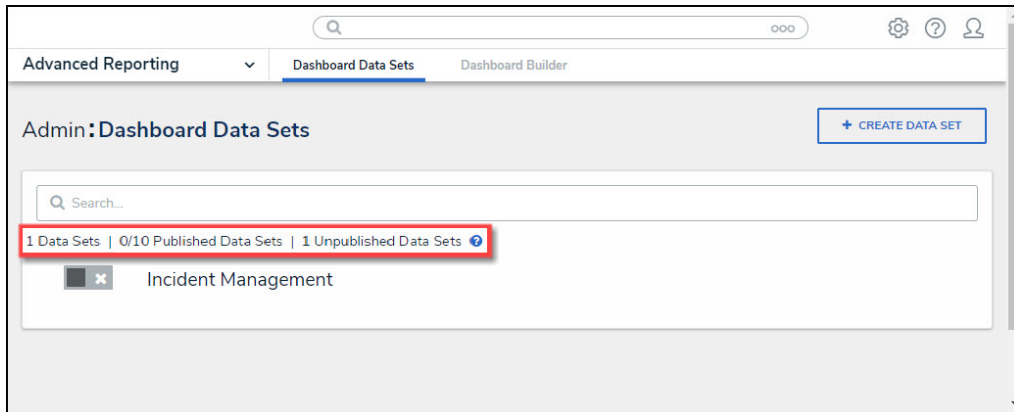
System Icon

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



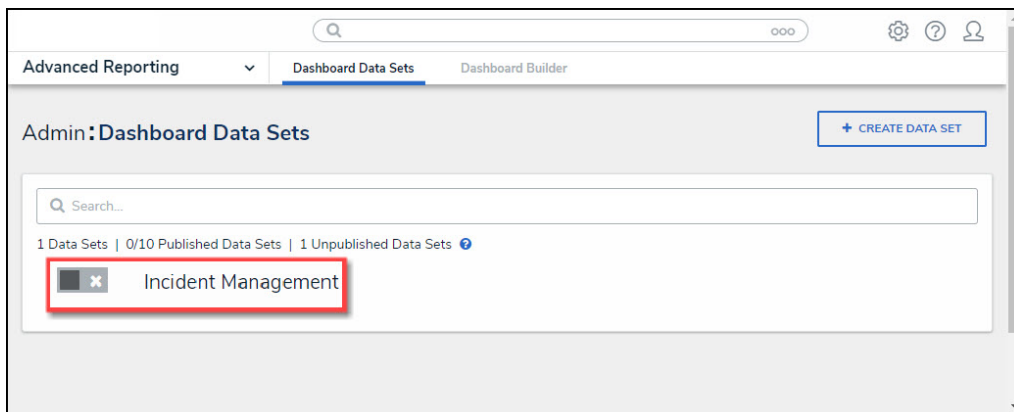
Dashboard Data Sets Tile

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.



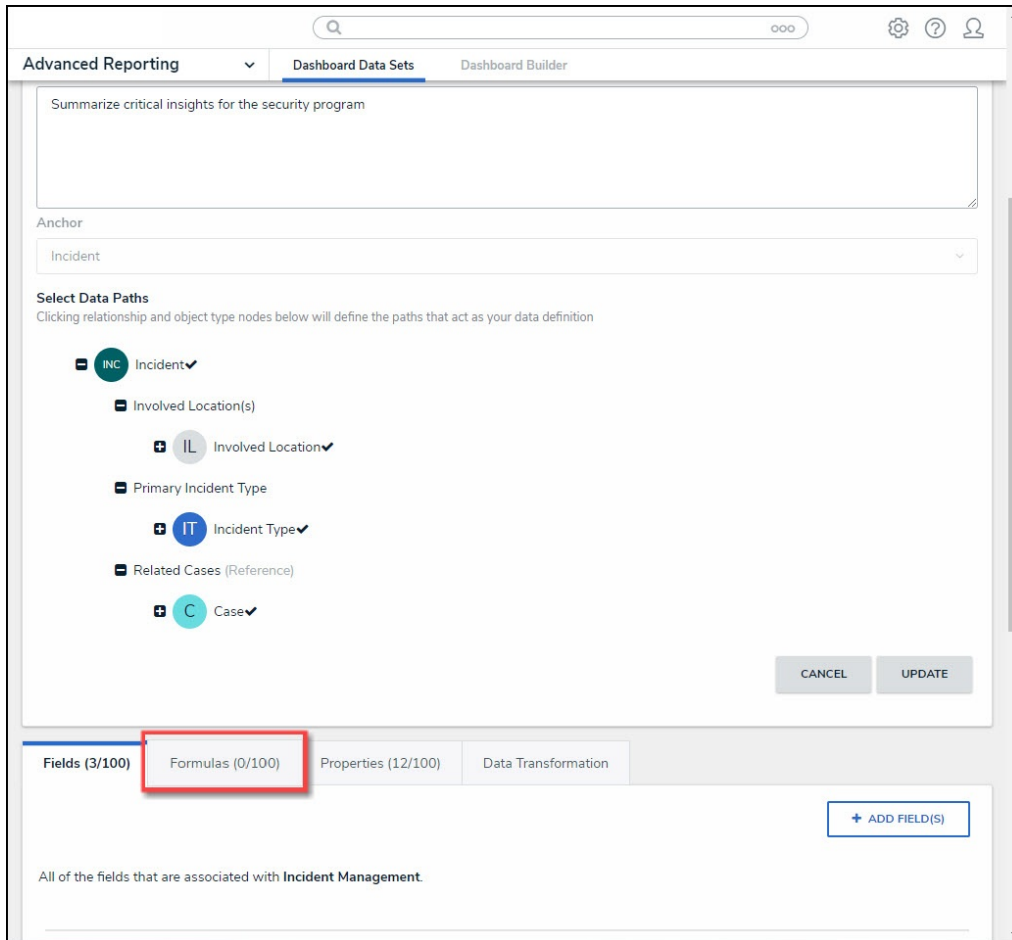
Total Dashboard Data Set Fields

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



Dashboard Data Set

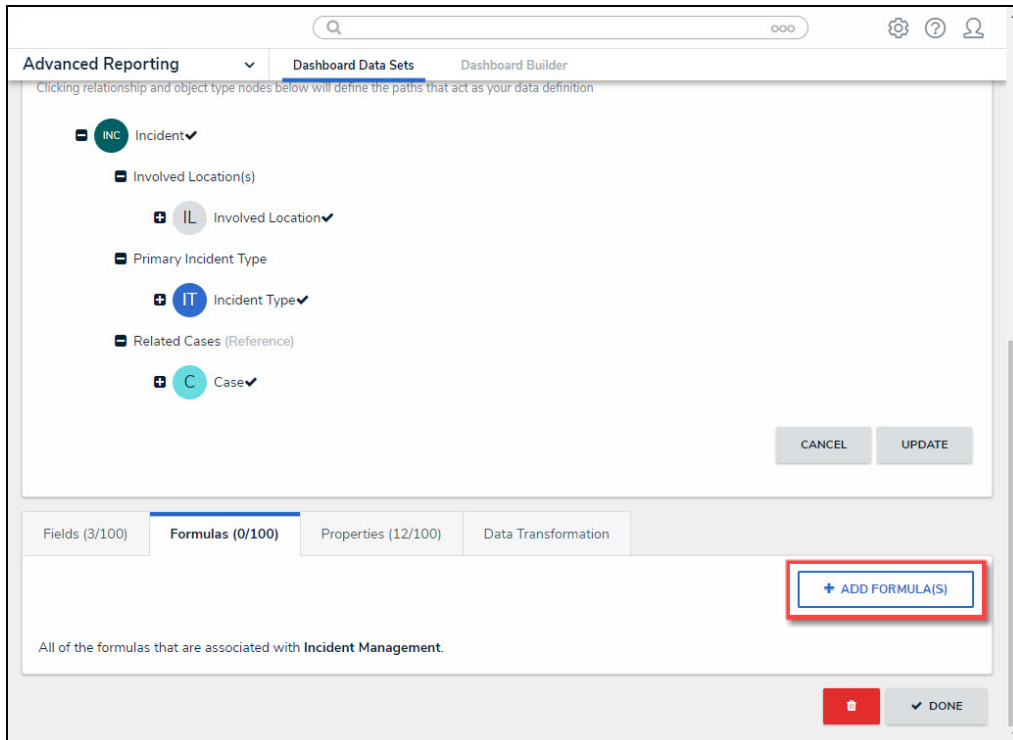
5. From the **Edit Data Set** screen, scroll to the **Tabs** section and select the **Formulas** tab.



Formulas Tab

Adding Formulas to the Dashboard Data Set

1. From the **Formulas** tab, click the **+ Add Formulas** button.



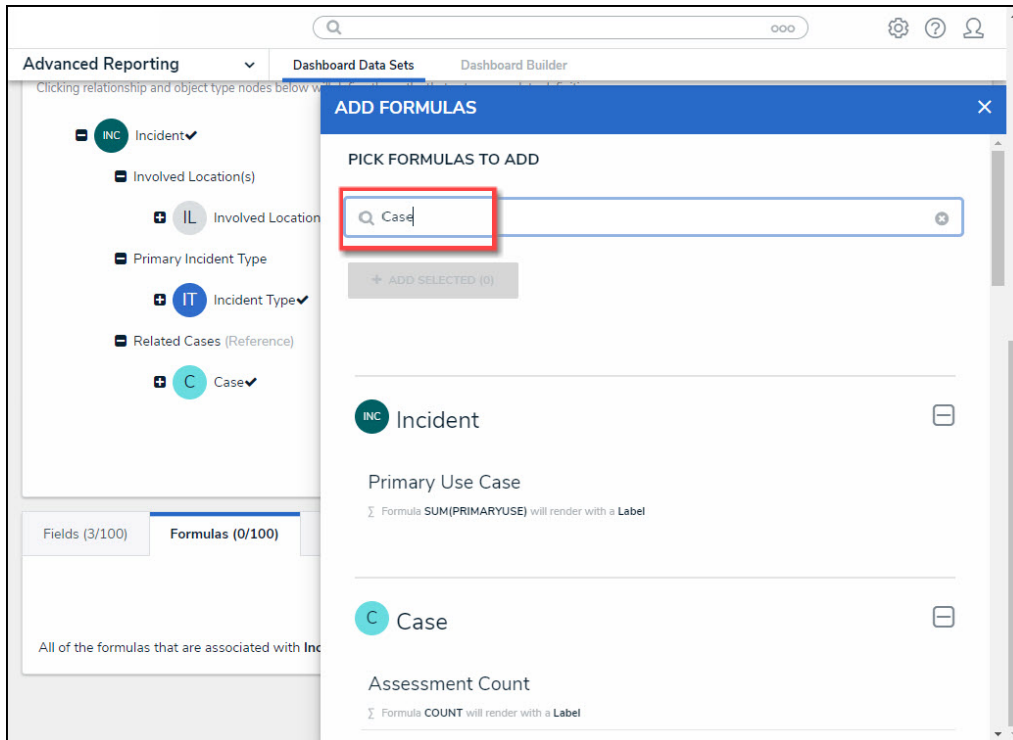
+ Add Formulas Button

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



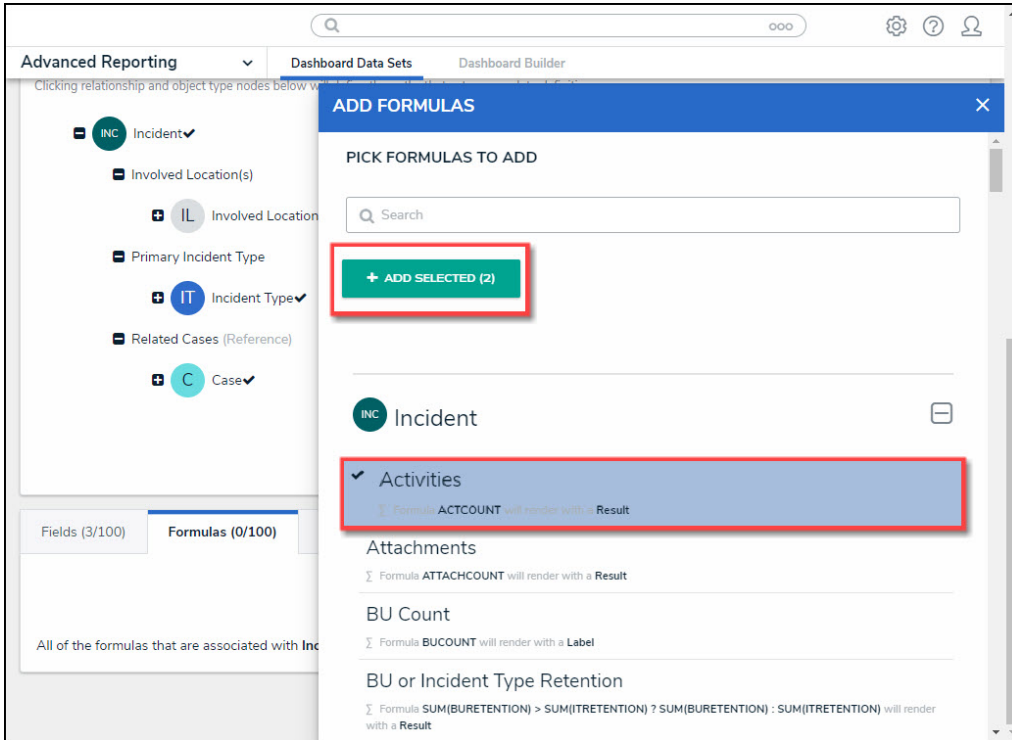
Note:

Formulas are organized by Object Type.



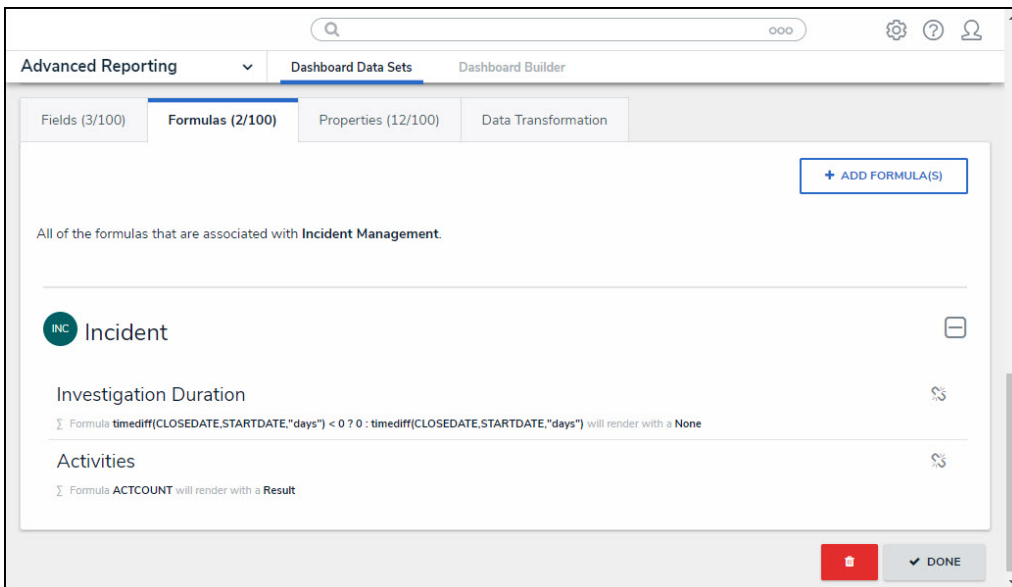
Search Field

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



+ Add Selected Button

6. Selected **Formulas** are listed under the **Formulas** tab.



Formulas Tab