

# Adding Properties to the Dashboard Data Set

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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

Users can choose up to 100 properties per data set. Object ID, Object Name and Workflow State properties are pre-selected for every Object Type in a Data Set because they are required to support the underlying tables that drive the Dashboard Data Sets and cannot be unlinked.



**Note:**

*Pre-selected properties count towards the 100 properties per Data Set maximum (e.g., 5 pre-select properties mean you can only add another 95 properties to the data set).*

## 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.

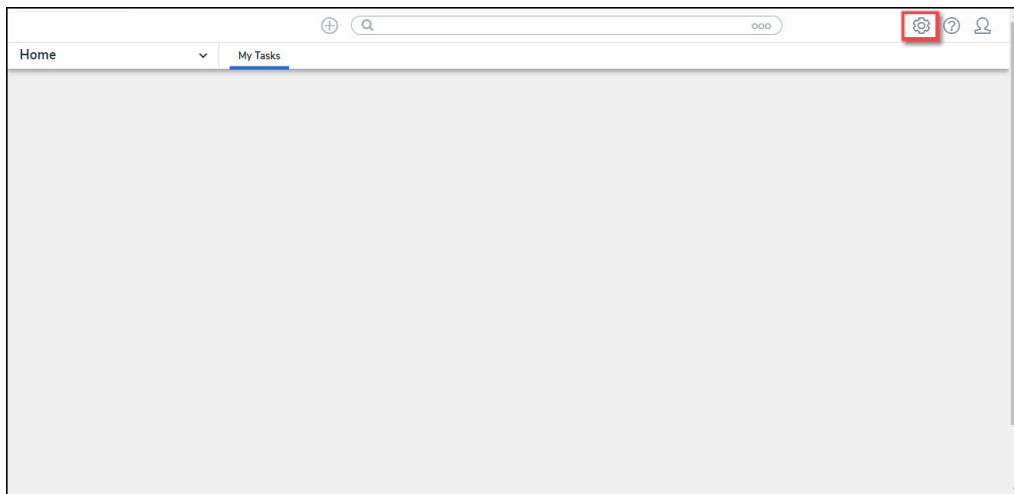
- [Unlinking Fields, Formula, and Properties on a Dashboard Data Set](#)

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

- [Deleting a Data Dashboard Set](#)

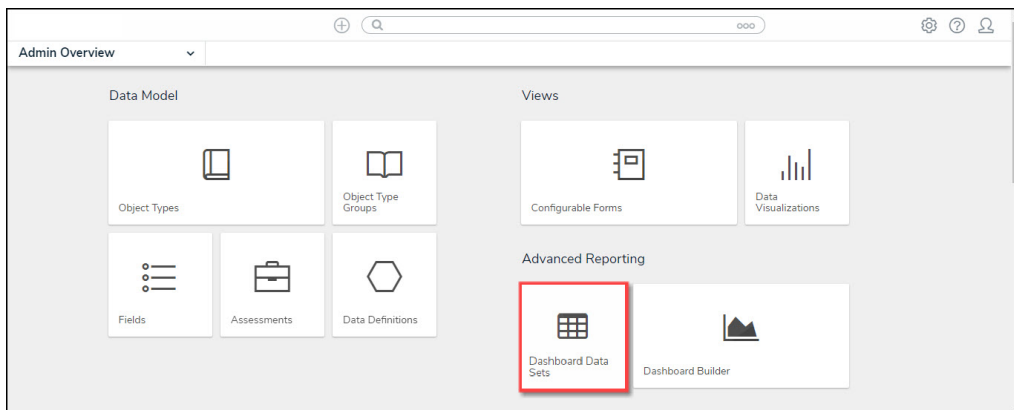
## Navigation

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.

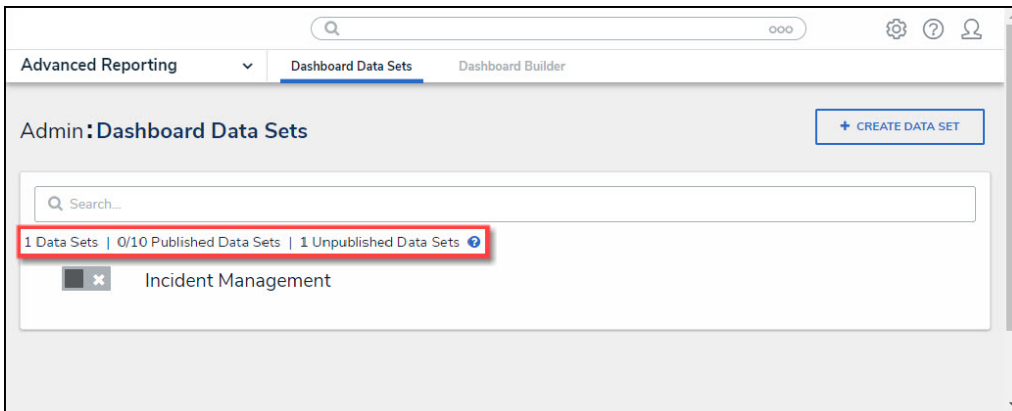


*Dashboard Data Sets Tile*

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

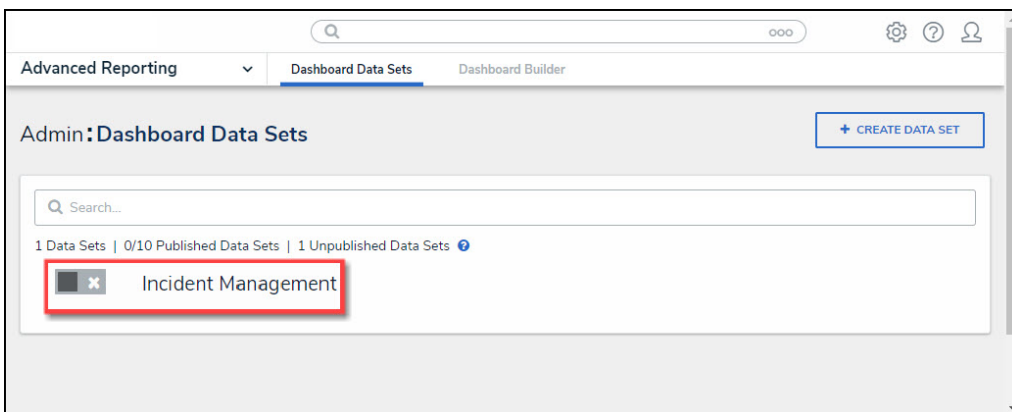
10. You can only have 10 Published Dashboard Data Sets within the system.

- **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.

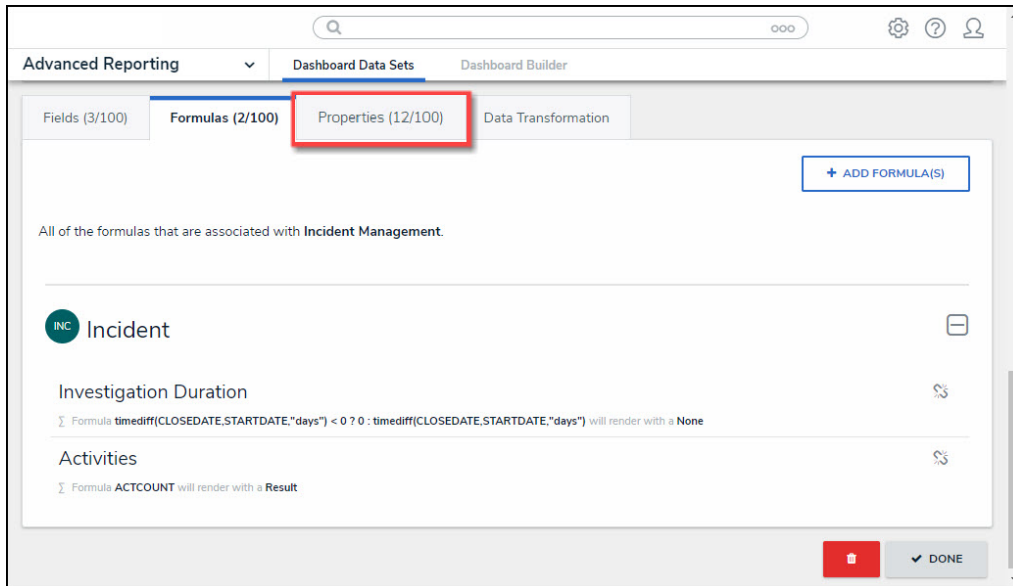


*Dashboard Data Set*

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

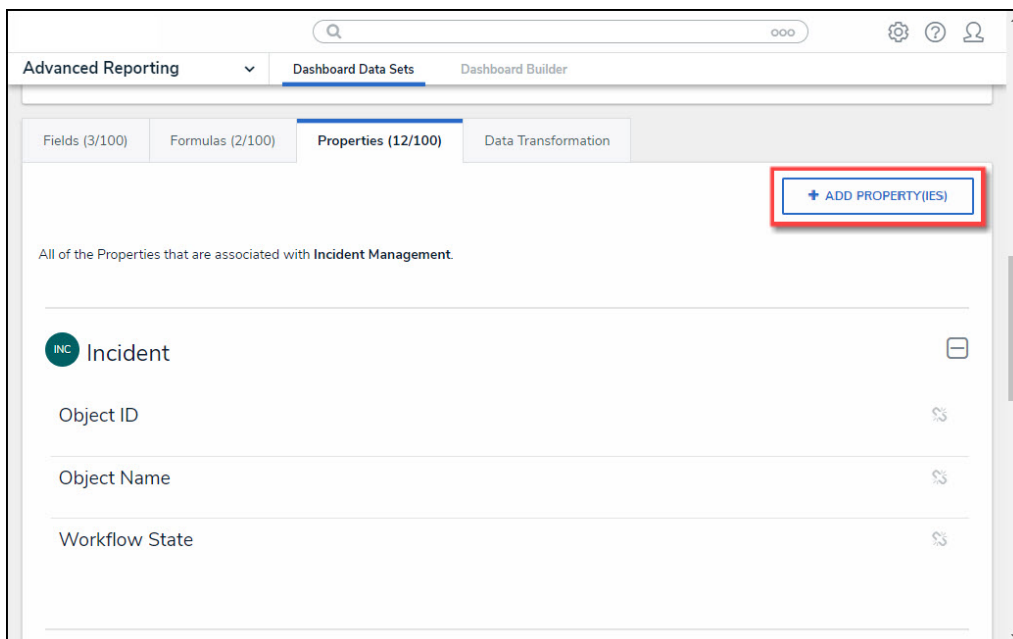
## Adding Properties to the Dashboard Data Set

1. From the **Edit Data Set** screen, scroll to the tab section and click the **Properties** tab.



*Properties Tab*

- From the **Properties** tab, click the **+ Add Properties** button.

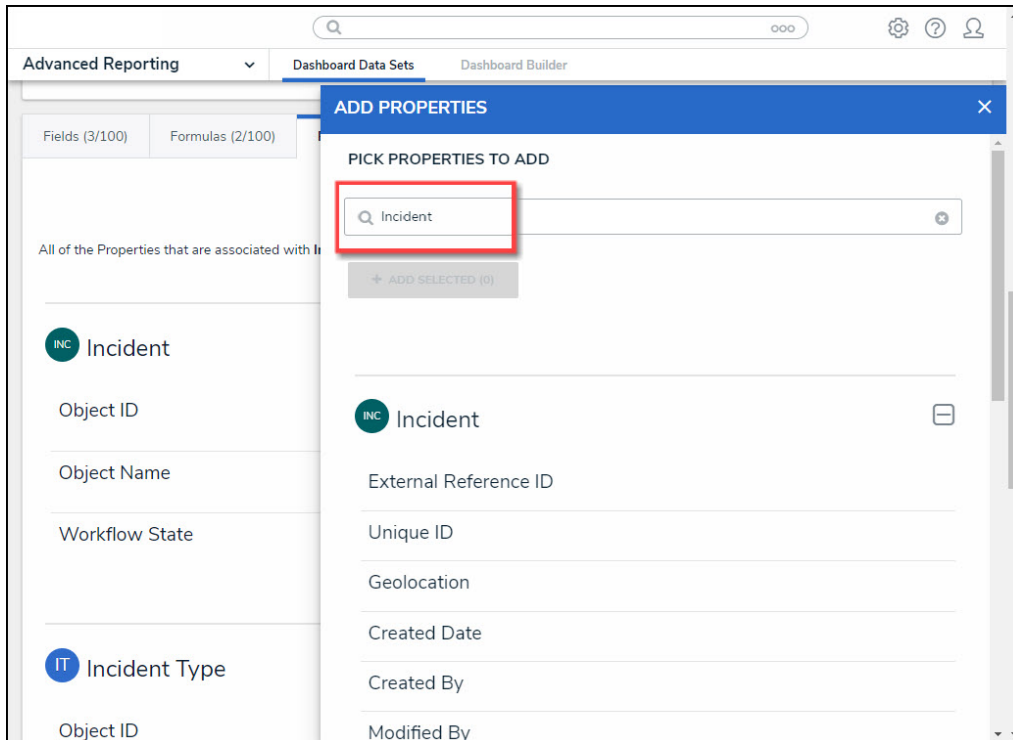


*+ Add Properties Button*

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

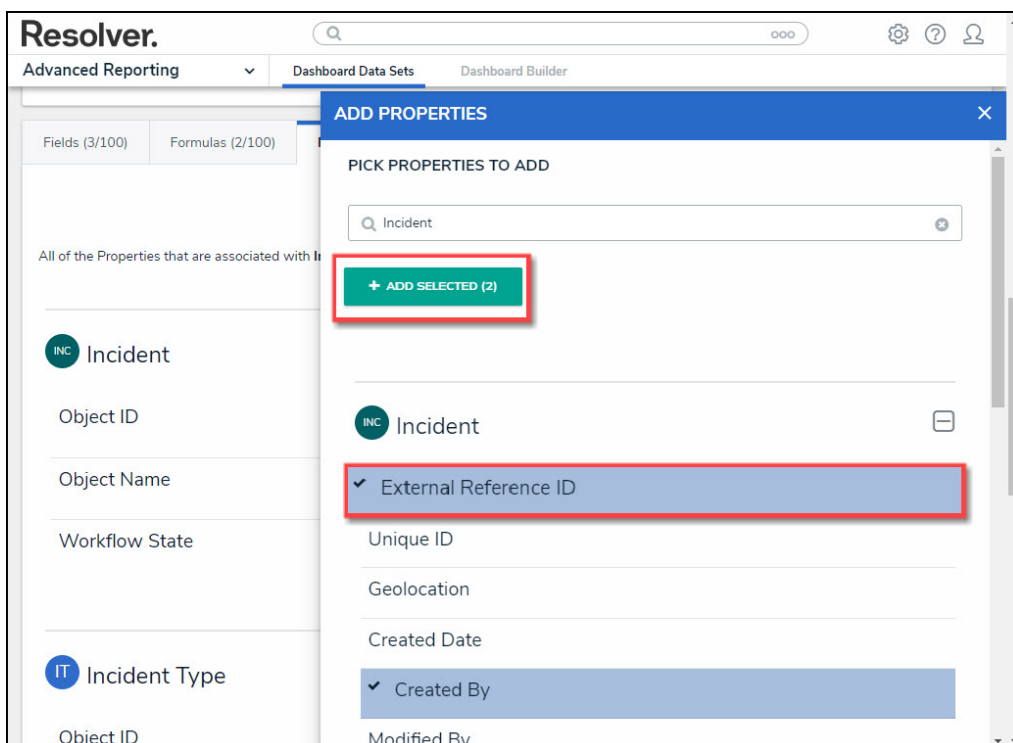


**Note:**  
*Properties are organized by Object Type.*



*Search Field*

4. Select the **Properties** you want to include in the Dashboard Data Set by clicking on a **Property**. As you add formulas to the Dashboard Data Set, the **+ Add Selected** button at the top of the **Add Properties** pop-up will track the number of fields you have selected.
5. When you have selected all the **Properties** to add to the Dashboard Data Set, click the **+ Add Selected** button to add the formulas to the Dashboard Data Set.



+ Add Selected Button

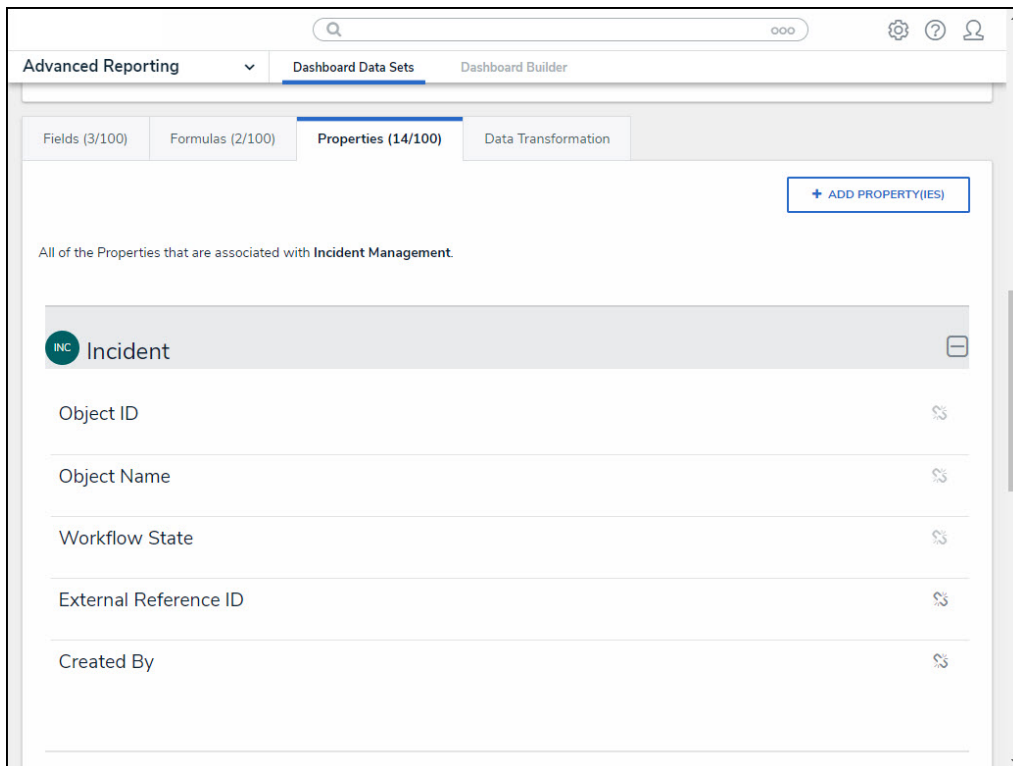
6. The following is a list of the properties available to select for Dashboard Data Sets:

- Properties with a Text format can be used with aggregations.
- The Assessment Object ID and Object Type ID Properties will be blank if the Object Type is not an Assessment Object.

Property Name	Pre-Selected	Format	Notes
Object ID	Yes	Numeric	
Object Name	Yes	Text	
Workflow State	Yes	Text and Numeric	Include the following fields: <ul style="list-style-type: none"> <li>• Label (Text)</li> <li>• Value (Numeric)</li> </ul>
External Reference ID	No	Text	
Unique ID	No	Text	
Geolocation	No	Text and Numeric	Include the following fields: <ul style="list-style-type: none"> <li>• Geolocation ID (Text)</li> <li>• State (Text)</li> <li>• City (Text)</li> <li>• Latitude and Longitude (Numeric)</li> <li>• Zip/Postal Code (Alphanumeric)</li> </ul>
Created Date	No	Date/Time	
Created By	No	Text and Numeric	Include the following fields: <ul style="list-style-type: none"> <li>• User ID (Numeric)</li> <li>• First Name (Text)</li> <li>• Last Name (Text)</li> </ul>
Modified By	No	Numeric	Include the following fields: <ul style="list-style-type: none"> <li>• User ID (Numeric)</li> <li>• First Name (Text)</li> <li>• Last Name (Text)</li> </ul>

Assessment Object ID	No	Text	The Assessment Object ID is the Library's Unique ID of an Assessment Object
Assessment Object Type ID	No	Text	The Assessment Object Type ID is the Parent's Unique ID of an Assessment Object, showing the clone.

7. Selected **Properties** are listed under the **Properties** tab.



*Properties Tab*