Publishing a Dashboard

Last Modified on 09/22/2023 1:30 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

Administrators can publish a Dashboard when it is complete to allow other user access to the charts/reports within the Dashboard. Dashboards must be published to embed a Dashboard in a system Activity so users can view them.

User Account Requirements

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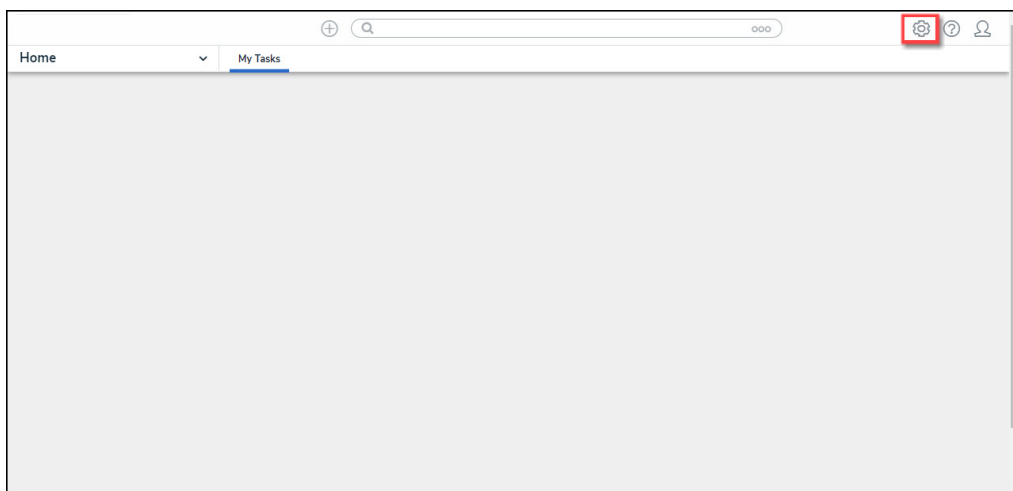
Related Information/Setup

Please follow the link below for more information on Embedding a Dashboard in an Activity.
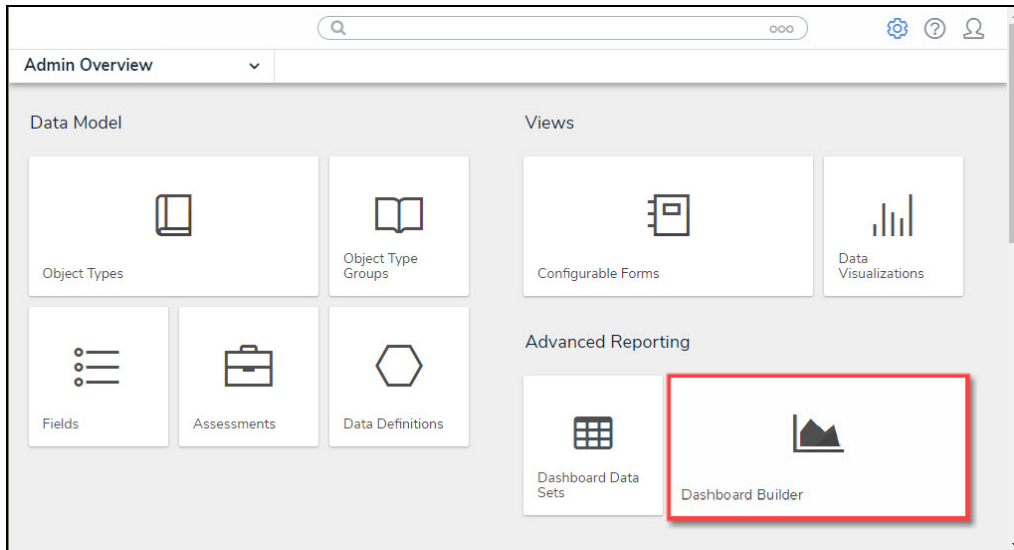
- Embedding a Dashboard in an Activity

Navigation

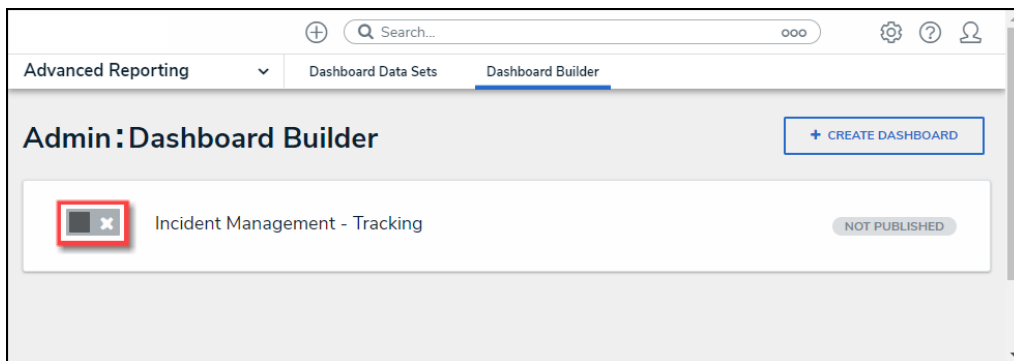1. From the **Home** screen, click on the **System** icon.

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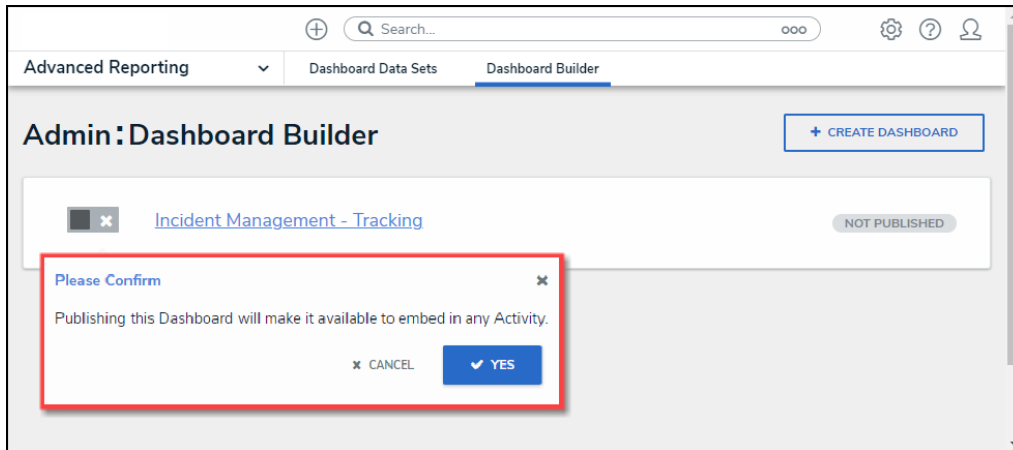

Dashboard Data Sets Tile

Publishing a Dashboard

1. From the ***Dashboard Builder*** screen, click on a toggle switch next to the **Dashboard's
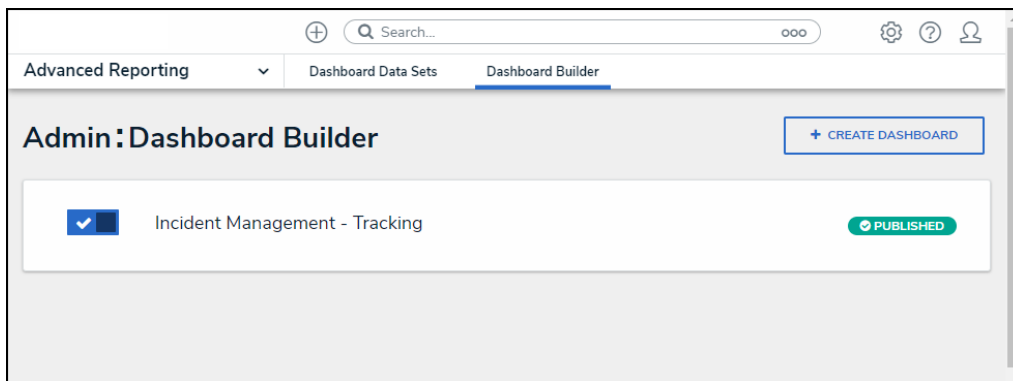Name**.

Toggle Switch

2. A ***Confirmation*** pop-up will appear, indicating that when the Dashboard is published, it is
available to embed in an Activity. Embedding a Dashboard in an Activity makes the
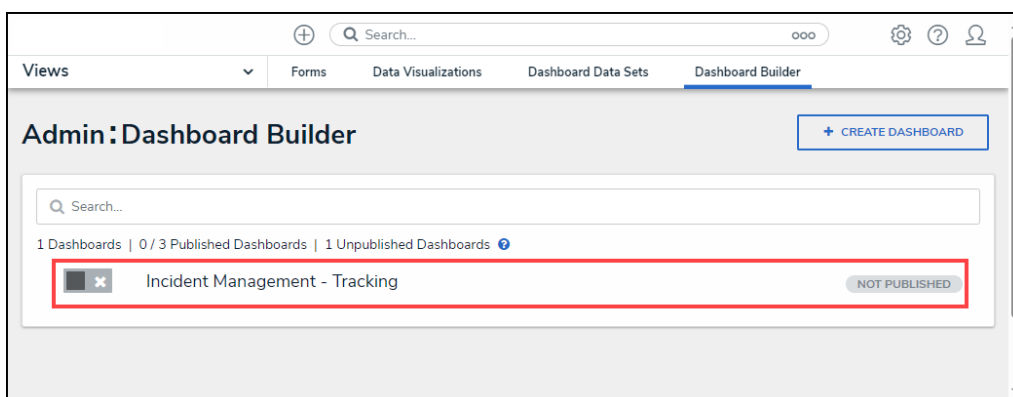Dashboard available to other users within the system.

Confirmation Pop-up

2. Click the **Yes** button to publish the Dashboard.
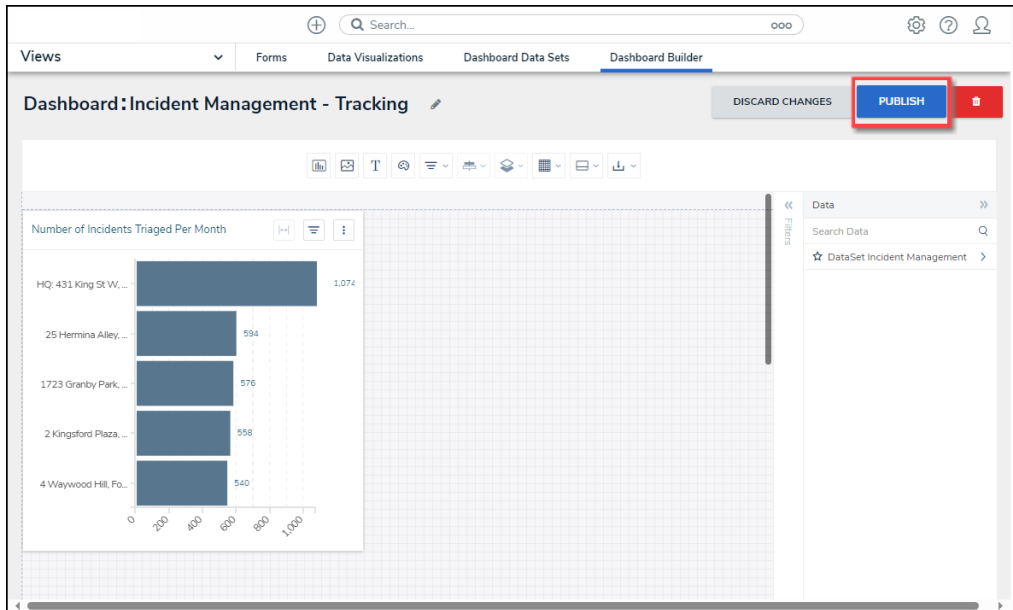

Published Dashboard

Alternate Method

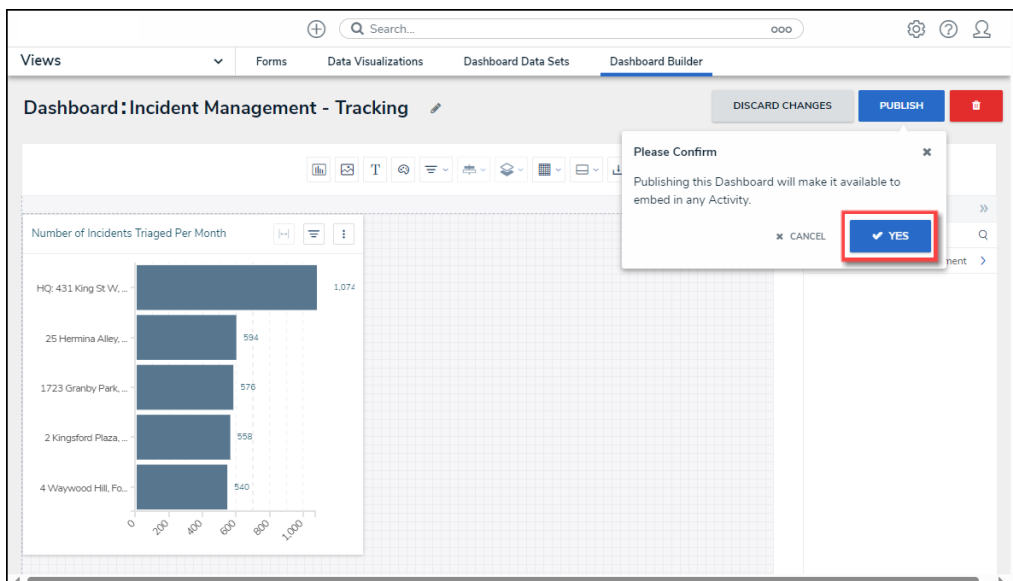1. From the ***Dashboard Builder*** screen, click on the **Dashboard's Name**.

Dashboard's Name

2. From the ***Dashboard*** screen, click on the **Publish** button.

Publish Button

3. From the **Confirmation** pop-up, click the **Yes** button to Publish the Dashboard.

Yes Button

4. Refresh the **Dashboard** screen. The **Status** indicator will now read Published instead of Not Published.