

Publishing a Dashboard

Last Modified on 01/29/2025 4:42 pm EST

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 or Data Management advanced permissions to publish a dashboard.

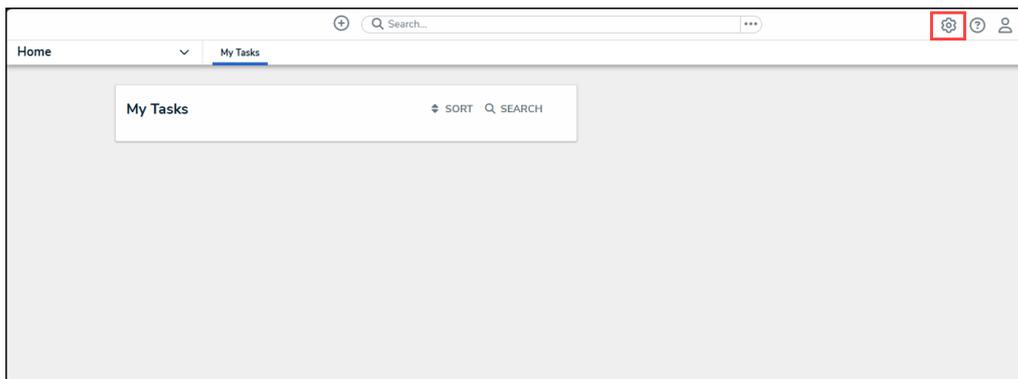
Related Information/Setup

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

- [Embedding a Dashboard in an Activity](#)

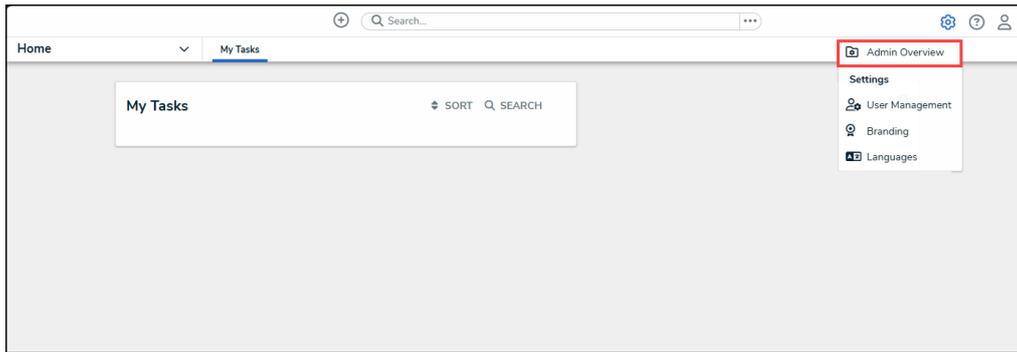
Navigation

1. From the **Home** screen, click the **Administration** icon.



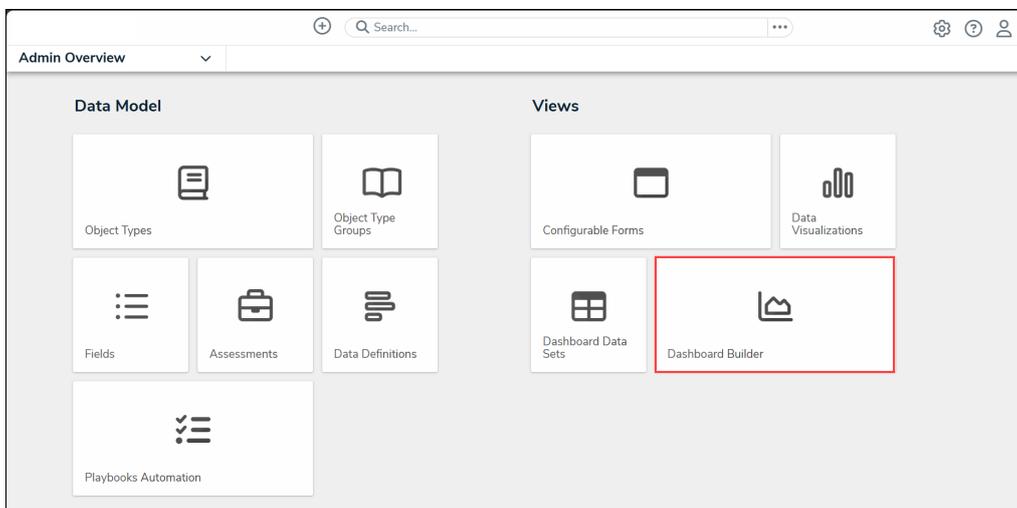
Administration Icon

2. From the **Administrator Settings** menu, click the **Admin Overview** link.



Administrator Settings Menu

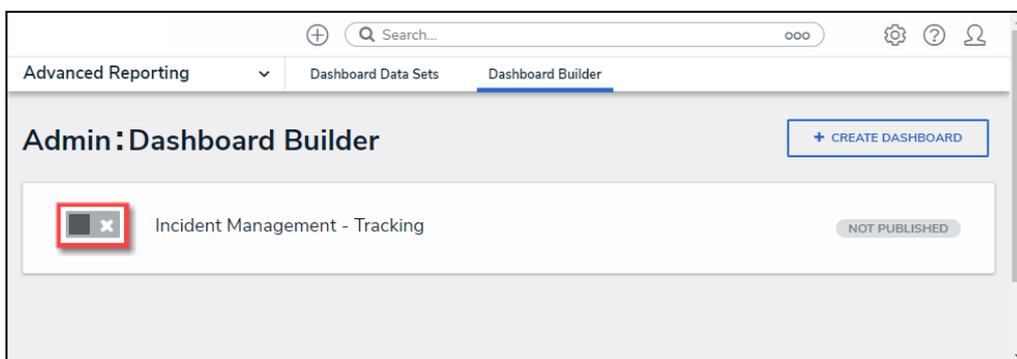
3. From the **Admin Overview** screen, click on the **Dashboard Builder** tile under the **Views** section.



Dashboard Builder Tile

Publishing a Dashboard

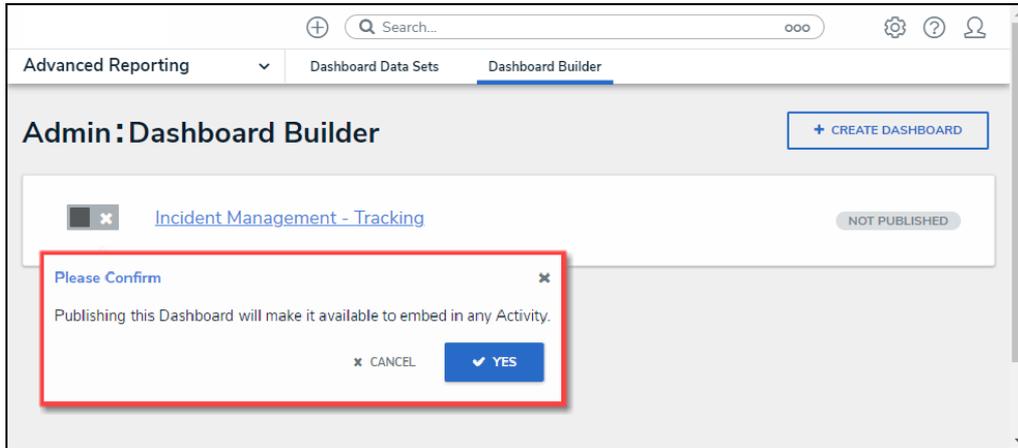
1. From the **Dashboard Builder** screen, click on a toggle switch next to the **Dashboard's Name**.



Toggle Switch

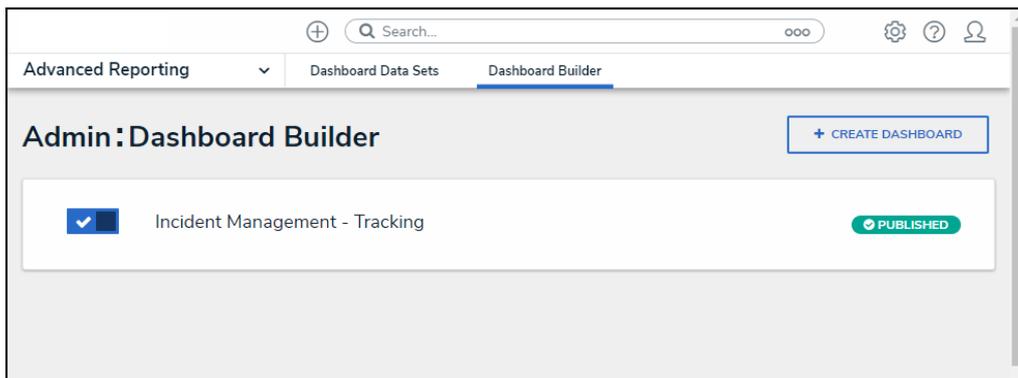
2. A **Confirmation** pop-up will appear, indicating that when the Dashboard is published, it is

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

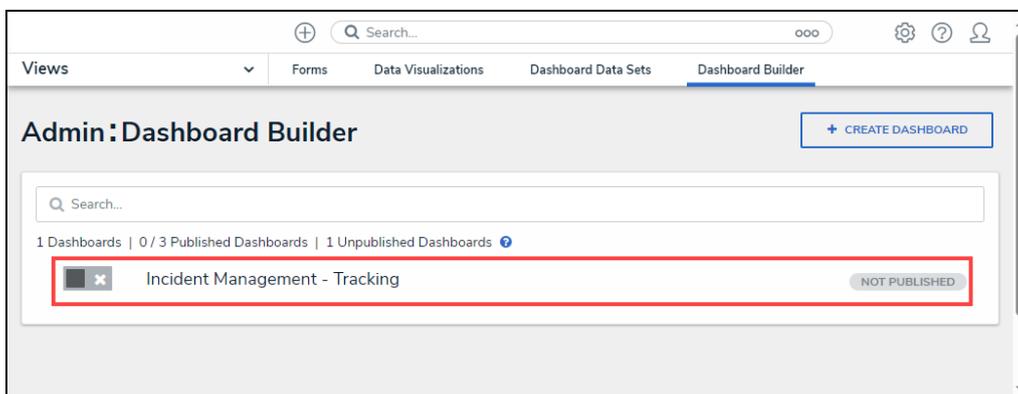
2. Click the **Yes** button to publish the Dashboard.



Published Dashboard

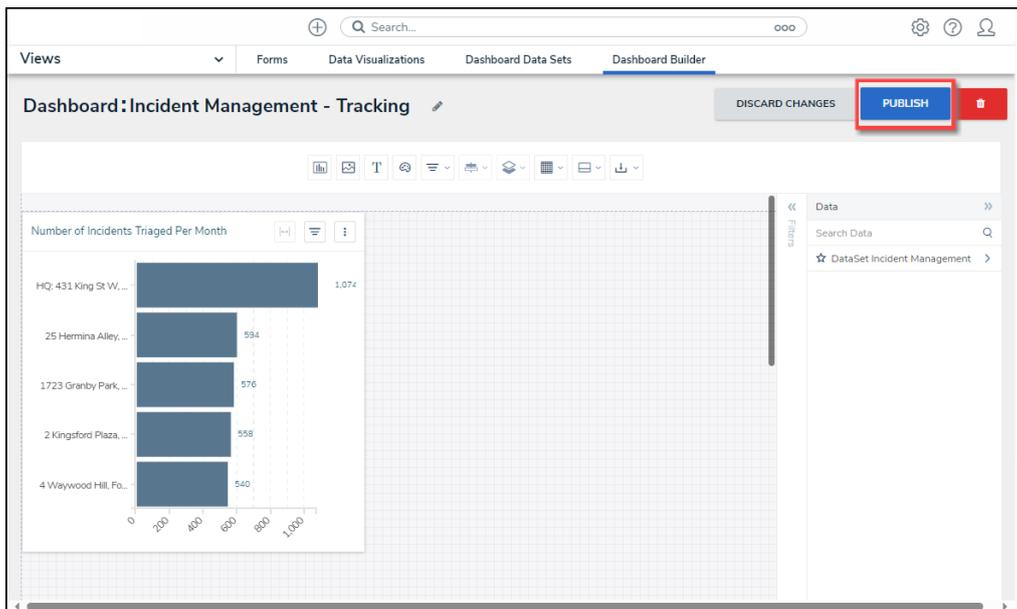
Alternate Method

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



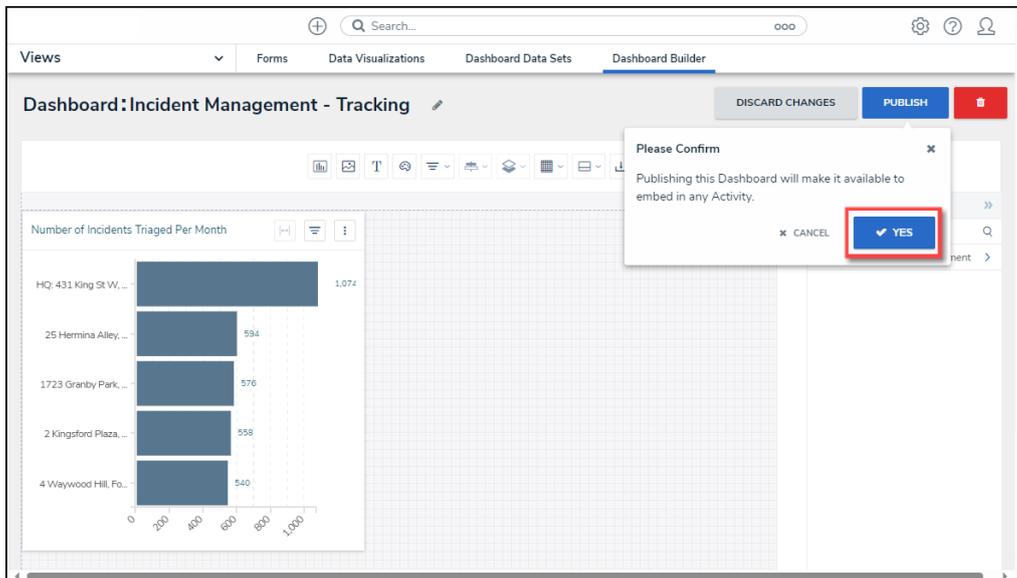
Dashboard's Name

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.