

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.



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Administrator Settings Menu

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

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Publishing a Dashboard

 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**.

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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.

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Yes Button

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