

Adding a Chart to a Dashboard

Last Modified on 05/14/2024 10:54 am 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

Resolver's Dashboard Builder allows Administrators to build custom Dashboards using the Dashboard Data Sets published within their Org.

Charts are connected to Data Sets and can be applied to multiple Dashboards.

Before using the Dashboards feature, at least one Dashboard Data Set needs to be created and published.

The following instructions apply to Bar, Line, Symbol, Funnel, Pie, Min/Max, and Word Cloud Chart Types.



Warning:

All changes or edits made to a Chart are globally applied across all instances of that Chart. [Create a duplicate Chart](#) to apply changes or edits that will not affect the original Chart.

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](#)

To add styles to your Chart, please see follow the link below:

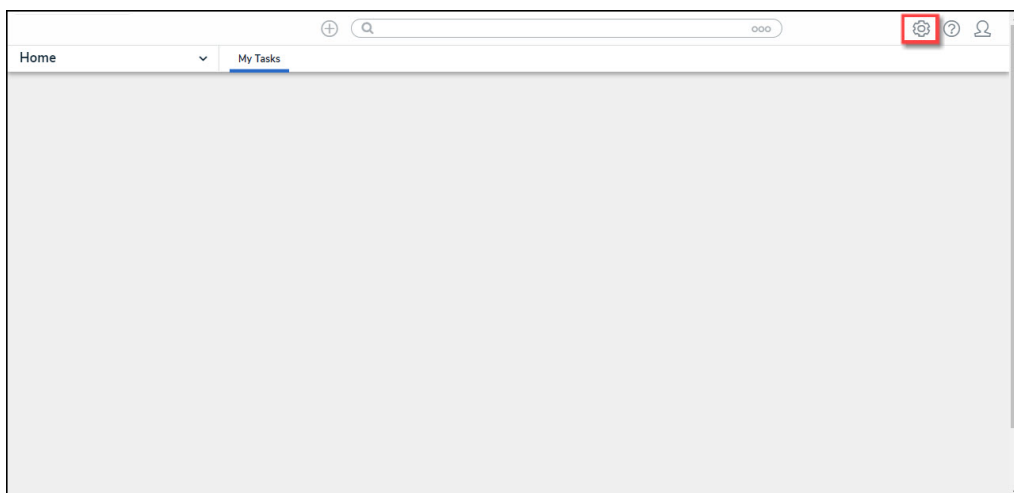
- [Adding Styles to a Chart](#)

For Information on Adding a Chart Type not covered by these instructions please see the corresponding articles below.

- [Adding a Multi-Series Chart to a Dashboard](#)
- [Adding a Combo Chart to a Dashboard](#)
- [Adding a Table to a Dashboard](#)
- [Adding a Crosstab to a Dashboard](#)
- [Adding a Heatmap to a Dashboard](#)
- [Adding a Box and Whiskers Chart to a Dashboard](#)

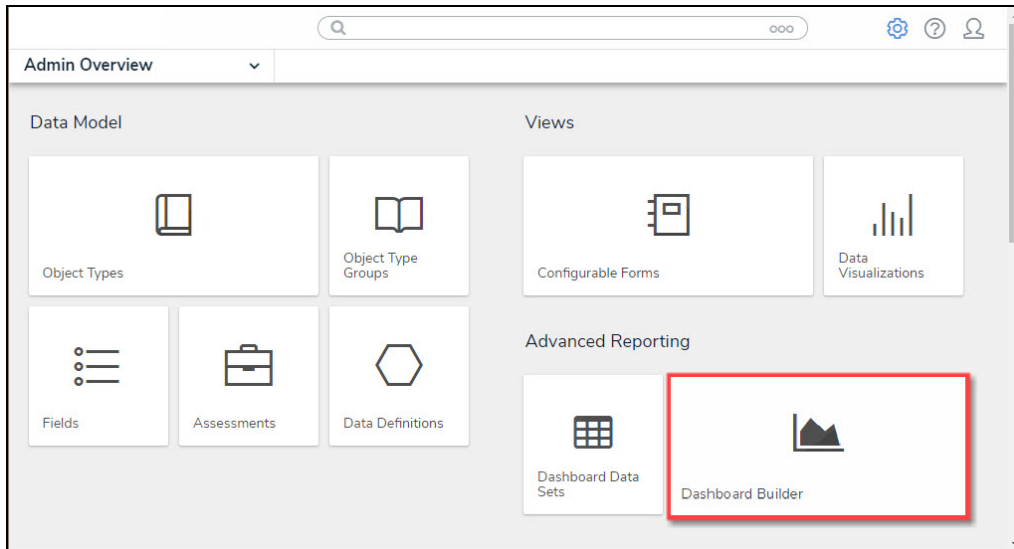
Navigation

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



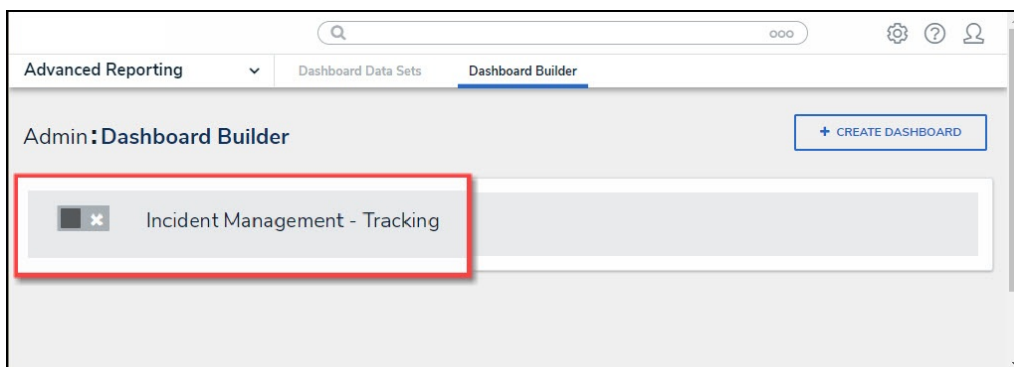
System Icon

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



Dashboard Data Sets Tile

3. From the **Dashboard Builder** screen, click on a **Dashboard Name**.



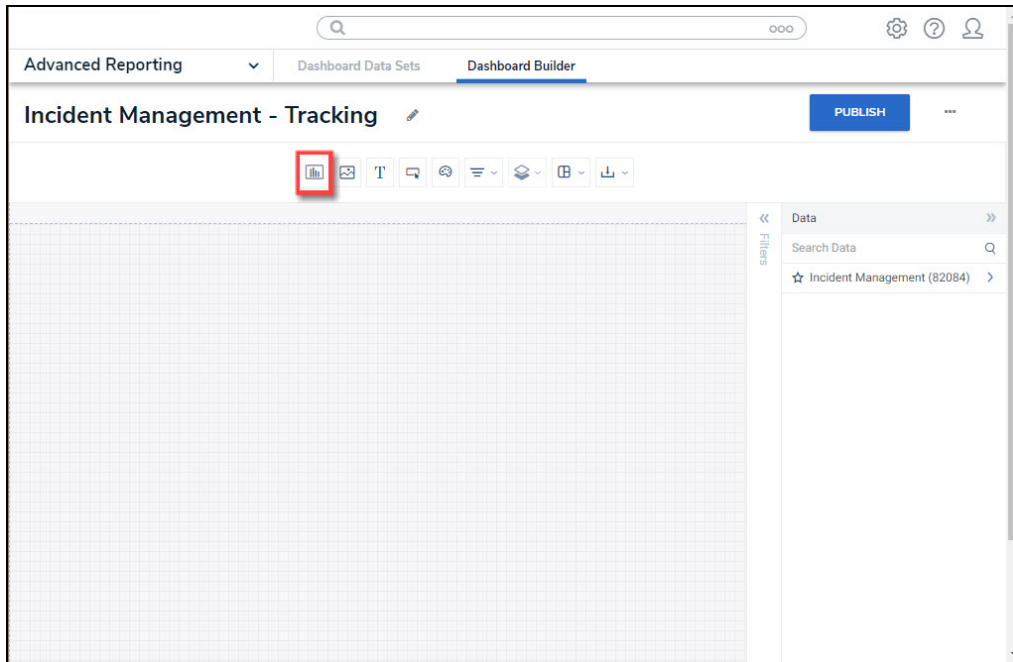
Dashboard Name

Adding a Chart to a Dashboard

Only Unpublished Charts can be edited.

For illustration purposes, we are going to use the Bar Chart Type in the instructions below; however, you can also apply these instructions to Line, Symbol, Funnel, Pie, Min/Max, and Word Cloud Chart Types.

1. From the **Canvas Layout** screen, click the **Add Chart** button.

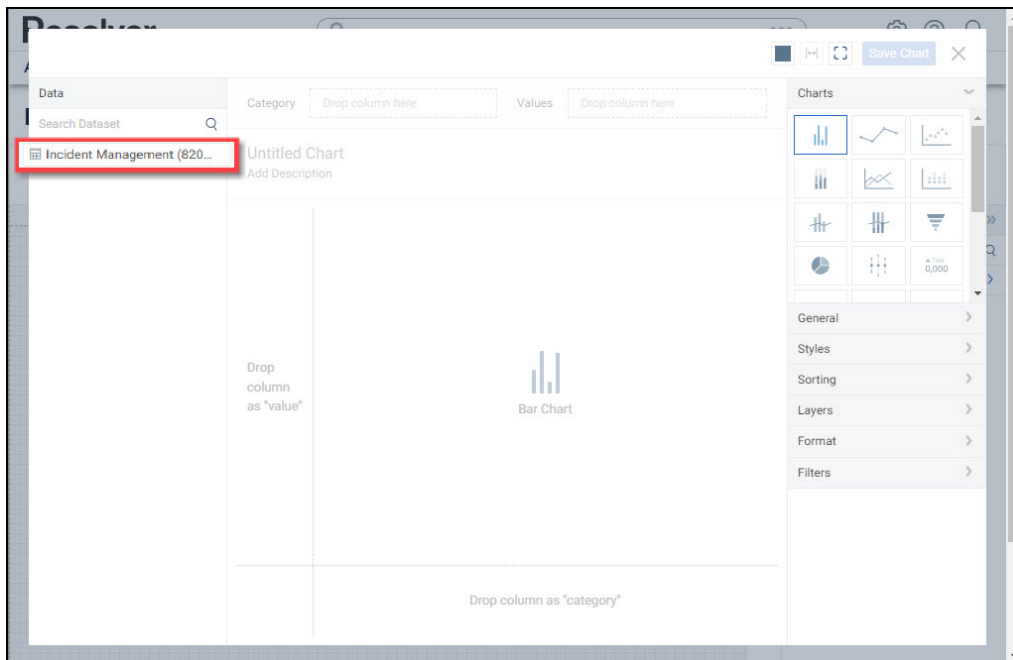


Add a Chart Button

2. From the **Chart** screen, click on a **Dashboard Data Set** from the **Data Panel**.

Note:

Only published Dashboard Data Sets will appear on the Data Panel.



Dashboard Data Set

3. Click in the **Chart Header (Untitled Chart)** field and enter a **Chart Name**. The first 36

characters will show in the **Chart Header**.

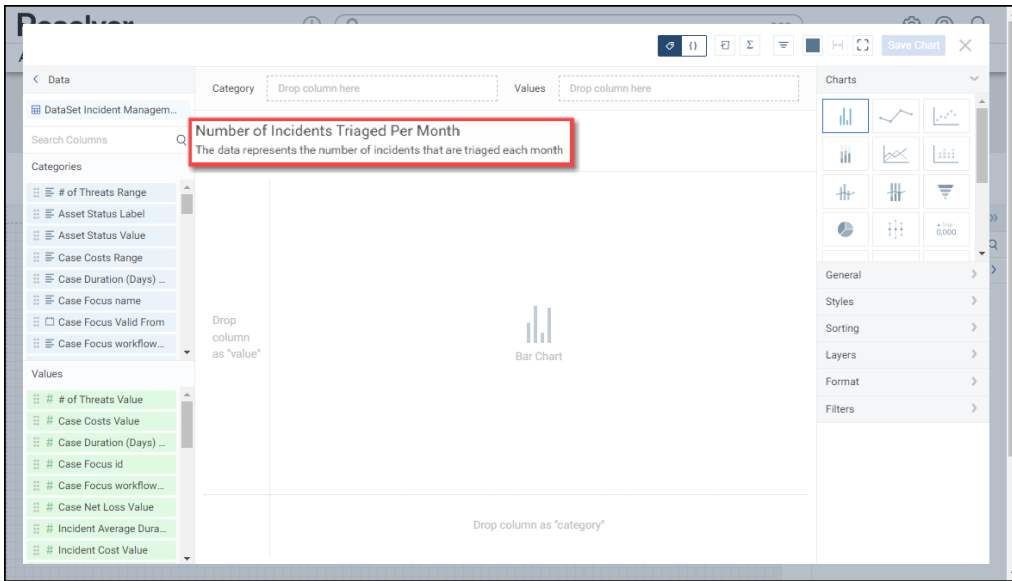


Chart Header and Description

3. Click in the **Add Description** field and enter a **Chart Description**. The **Chart Description** will appear on the **Data Panel** under the **Chart** section and popup when hovering your cursor over a **Chart Name**.

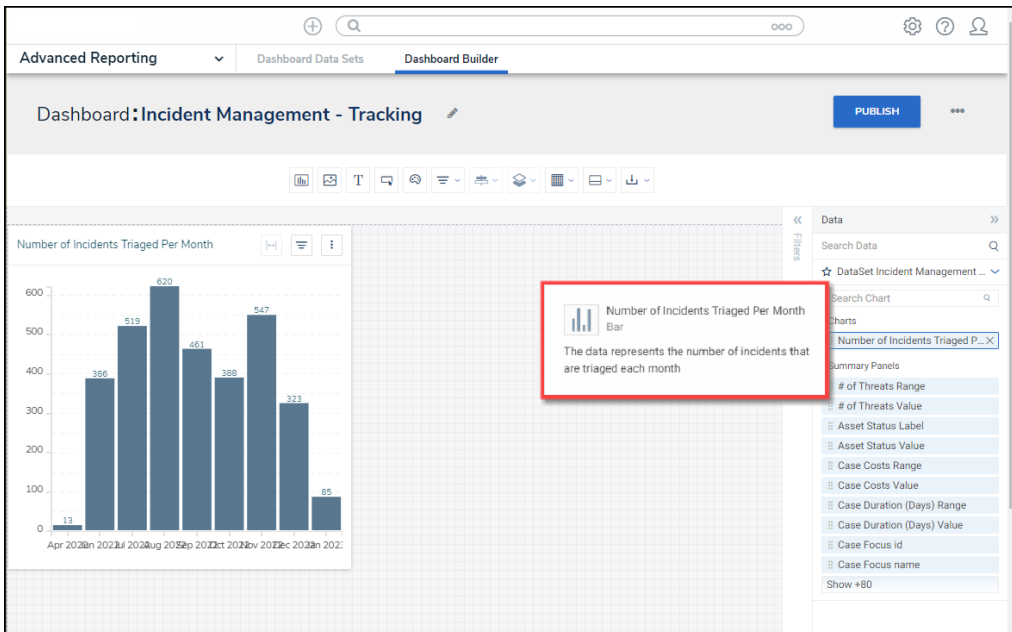


Chart Description

5. Dashboard Data Set **Categories** and **Values** will appear under the **Dashboard Data Set Name** on the **Data Panel**.
 - **Categories (Blue):** Categories are text and data columns used to group data (e.g., Sales Region, Department Name, Order Dates, etc.).

- **Values (Green):** Values are numeric columns used to calculate data. Values can also be aggregated (e.g., Average Price Per Product, Total Sales Revenue, etc.).

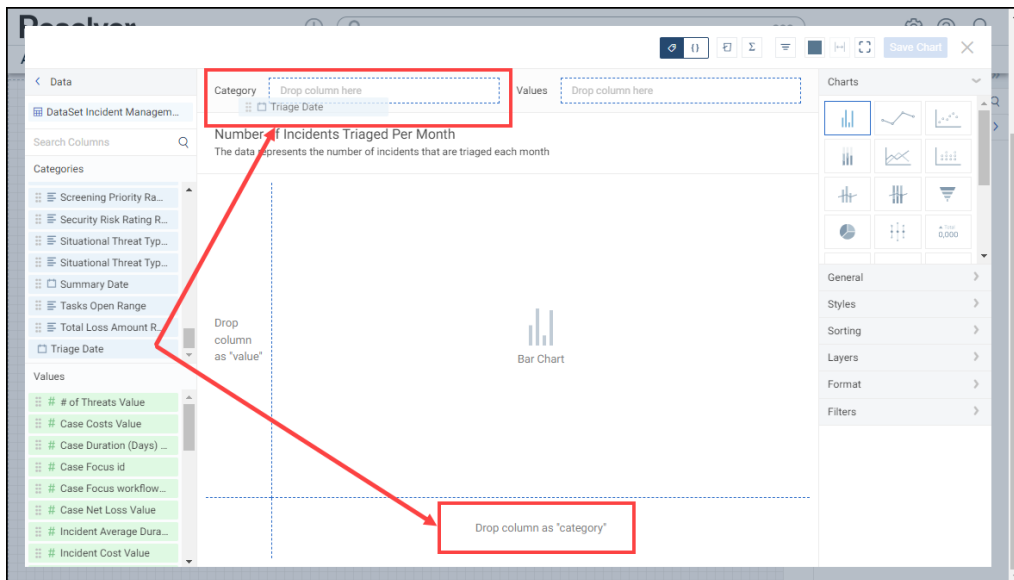
6. **Categories** and **Values** have a **Data Type** icon next to the **Dashboard Data Set Name**. Data Type icons indicate the Category and Value Data Type:

• **Text:** 

• **Numeric:** 

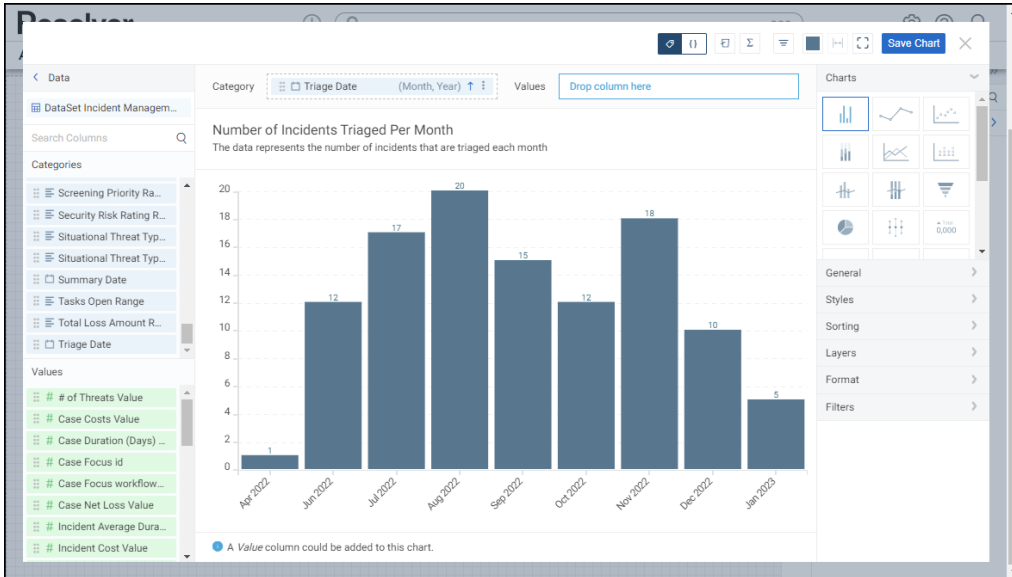
• **Date:** 

7. Drag and drop a **Category** from the **Data Panel** onto the **Category** section at the bottom of the Chart (traditional x-axis) or within the **Category** field at the top.



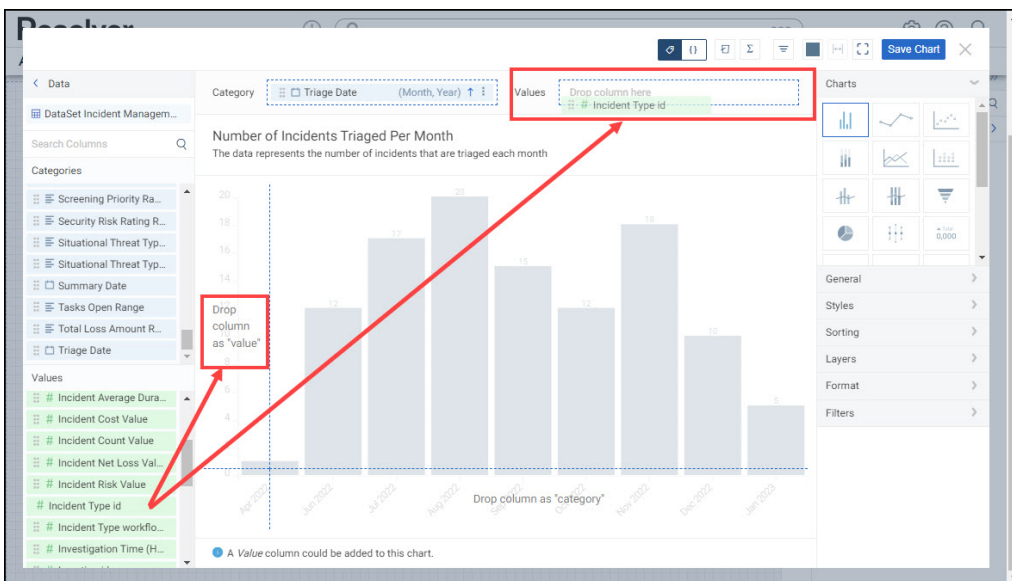
Drag and Drop a Category

8. The **Category** data will populate the **Chart**. Bar Chart is the system default for Chart types.



Chart

- (Optional)** Drag and drop a **Value** from the **Data Panel** into the **Value** section at the Side of the Chart (traditional y-axis) or within the **Value** field at the top.



Drag and Drop a Value

- You can select different **Chart Types** from the **Charts** section on the **Configuration Panel** by clicking on the corresponding **Chart** icon.

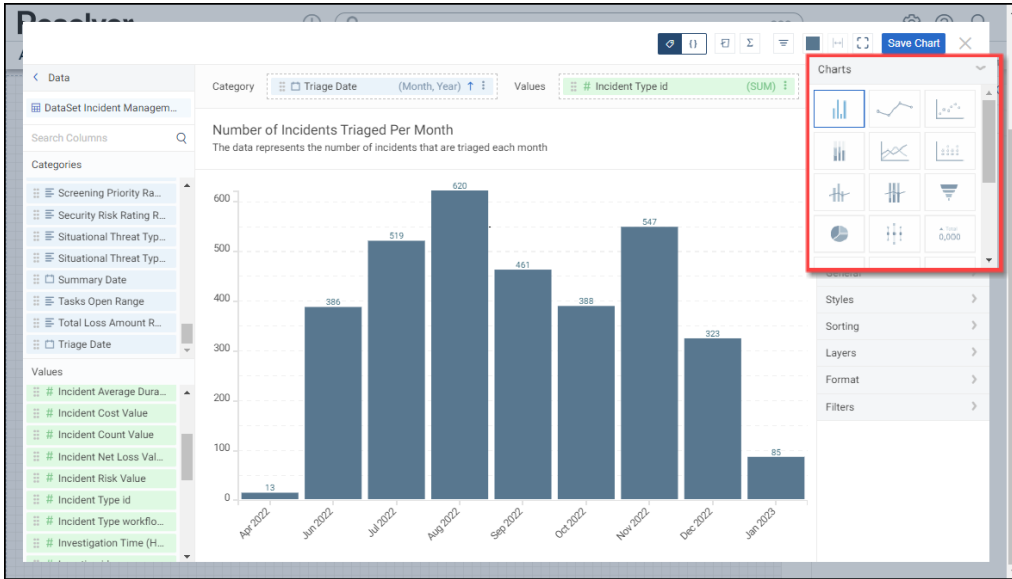
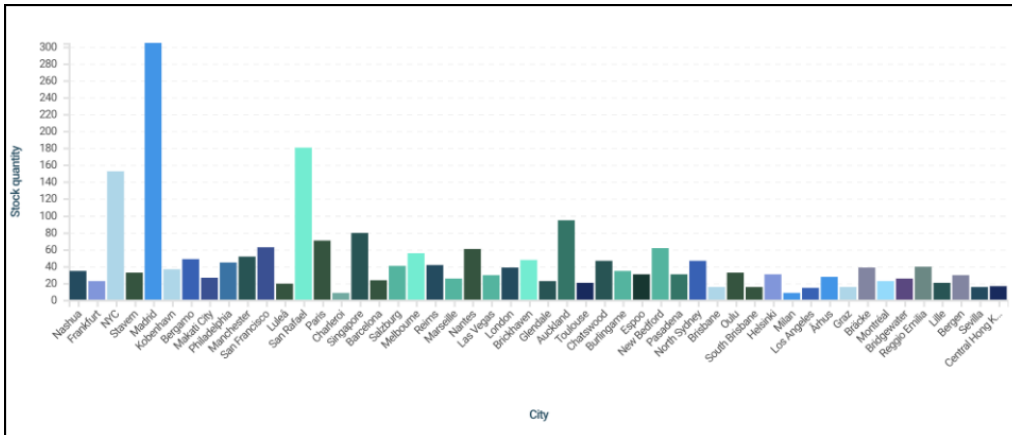


Chart Types

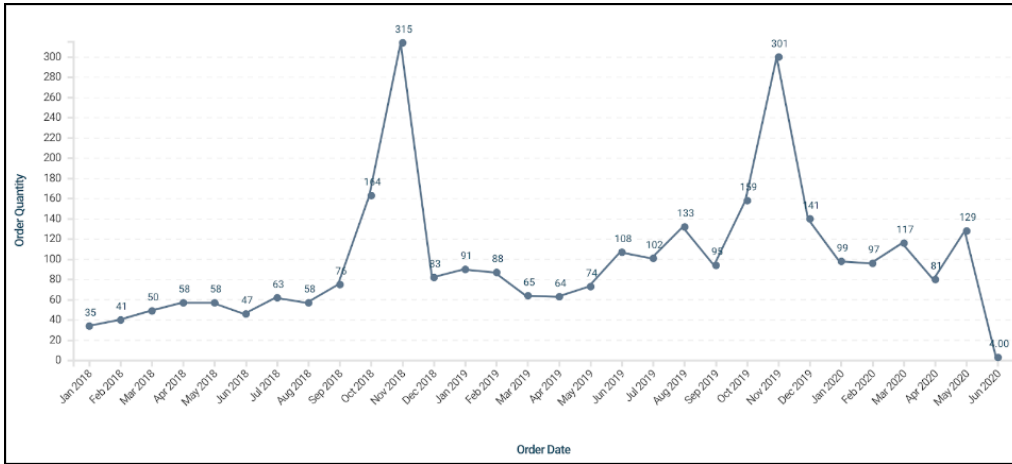
10. The following outlines the currently available **Chart Types**:

- **Bar Chart:** Bar Charts compare categorical aggregate values. For example, a Bar Chart compares the amount/percentage of a population that attends various categorical events. Users can create Horizontal or Vertical Bar Charts.



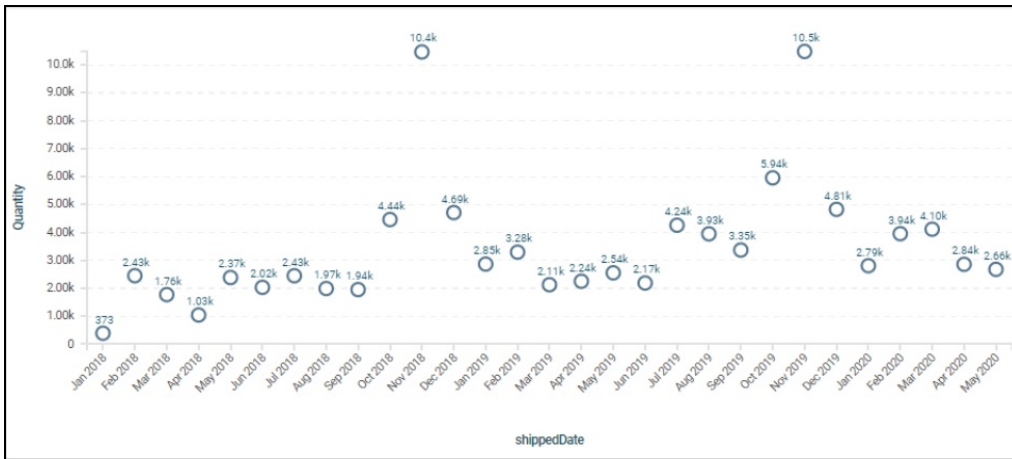
Bar Chart

- **Line Chart:** Line Charts show changes in an aggregated value over a continuous dimension (**Category**), usually time. For example, a Line Chart shows the number of orders placed over time.



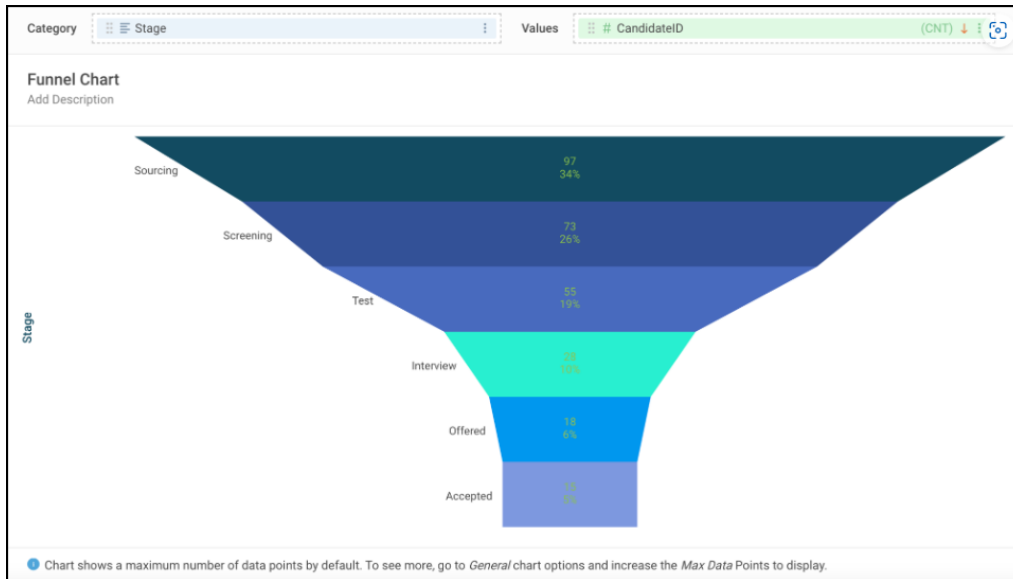
Line Chart

- **Symbol Chart:** Symbol Charts show aggregated values emphasizing the highest and lowest data points.



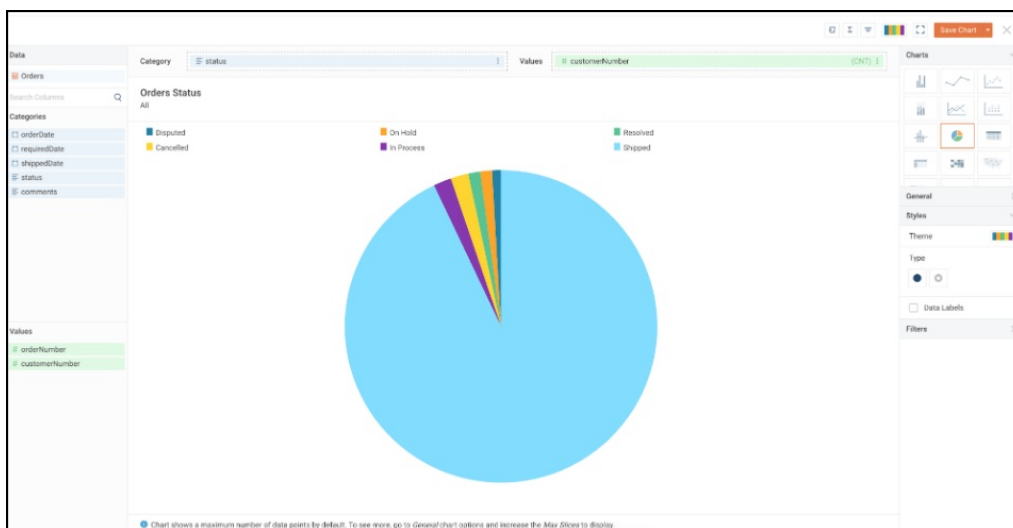
Symbol Chart

- **Funnel Chart:** Funnel Charts display data values as progressively decreasing/increasing proportions that add to the total. Each stage of the Funnel Chart is determined by the corresponding value (as a percentage of all values) and is represented in segments. The category order depends on the how the chart is sorted.



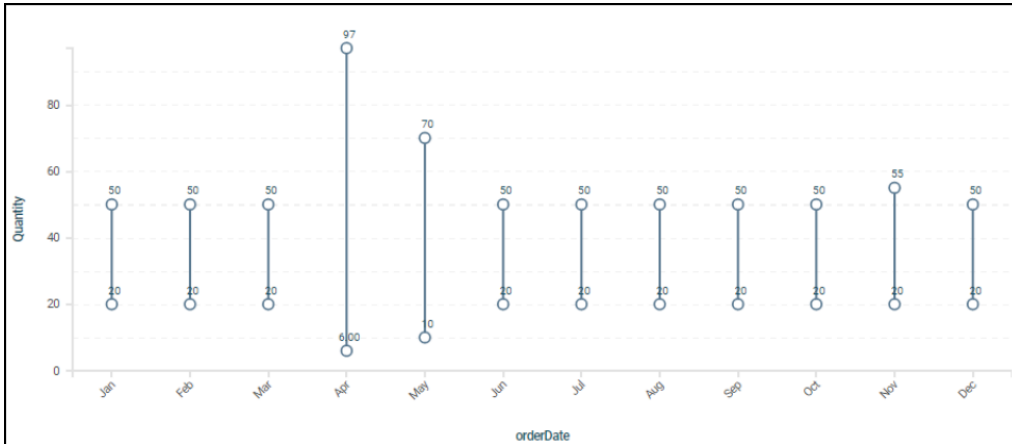
Funnel Chart

- **Pie Chart:** A Pie Chart is a circle divided into slices. The pie represents 100% of the data points selected. Each slice represents a different category.



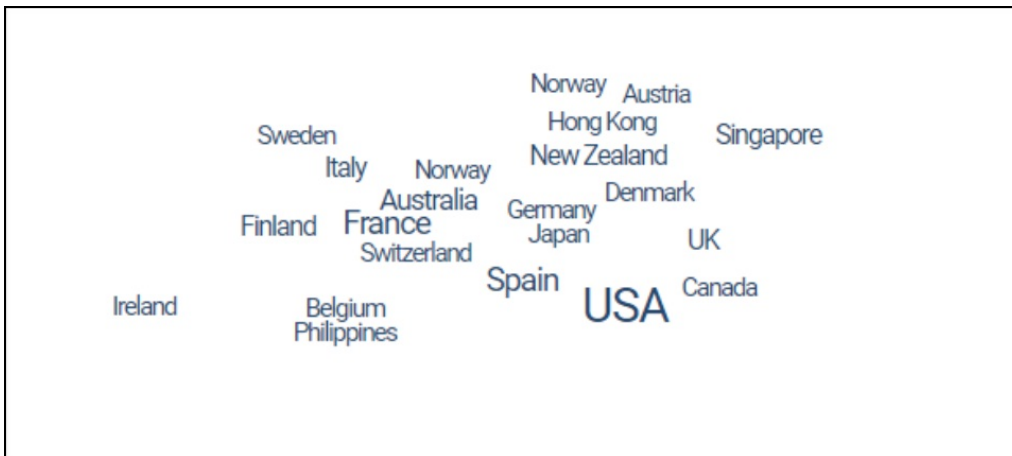
Pie Chart

- **Min/Max Chart:** A Min/Max Chart shows a category's *Minimum*, *Maximum*, and *Average* values, showing the range of a measure, like minimum and maximum temperature recorded for each day of the month.



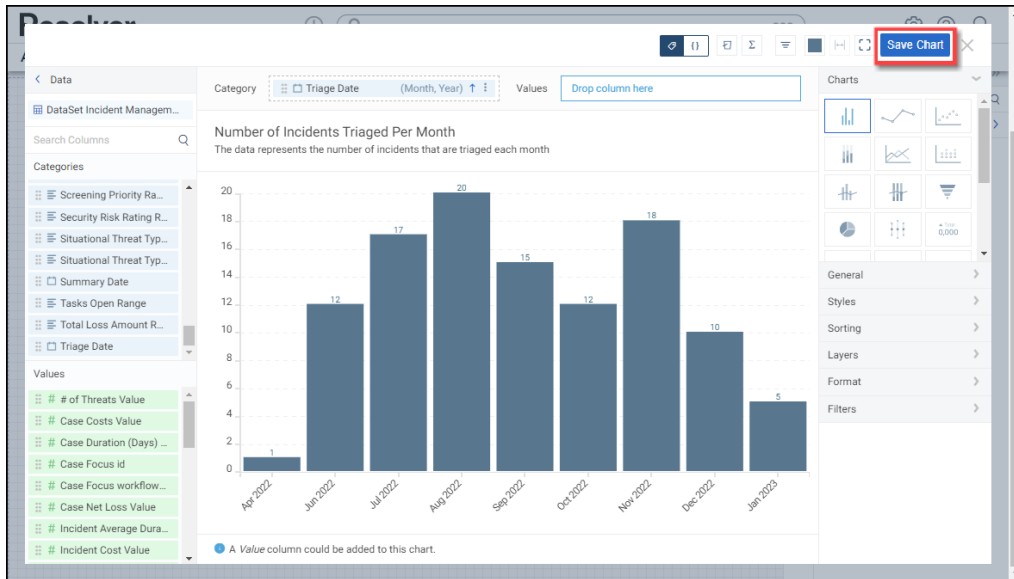
Min/Max Chart

- **Word Cloud:** A Word Cloud is a visual representation of text data in which the importance or frequency of individual words is represented using the font size. The more important or frequent a word is, the larger it appears.



Word Cloud

11. Click the **Save Chart** button to save your changes and return to the **Dashboard** screen



Save Chart Button