

Setting Dashboard Page Actions

Last Modified on 09/26/2023 1:56 pm EDT

Overview

Additional options can be added to Dashboards by applying Page Actions. A **Page Action** pop-up will appear on a Dashboard when a user clicks a Data Point or outside the Chart panel, depending on the Page Action configuration. The Page Action configuration and the type of Chart will dictate which additional options appear on the **Page Action** pop-up.

User Account Requirements

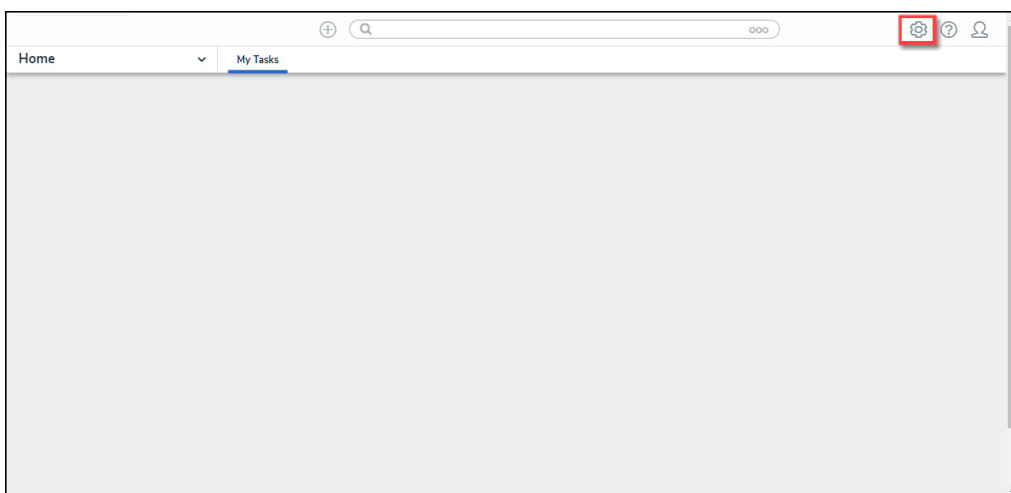
The user account you use to log into Resolver must have Administrator permission to use the Dashboard Data Set Builder.

Related Information/Setup

Please refer to the [Embedding a Dashboard in an Activity](#) article for further information regarding embedding a Dashboard in an Activity and the **Dashboard Widget**.

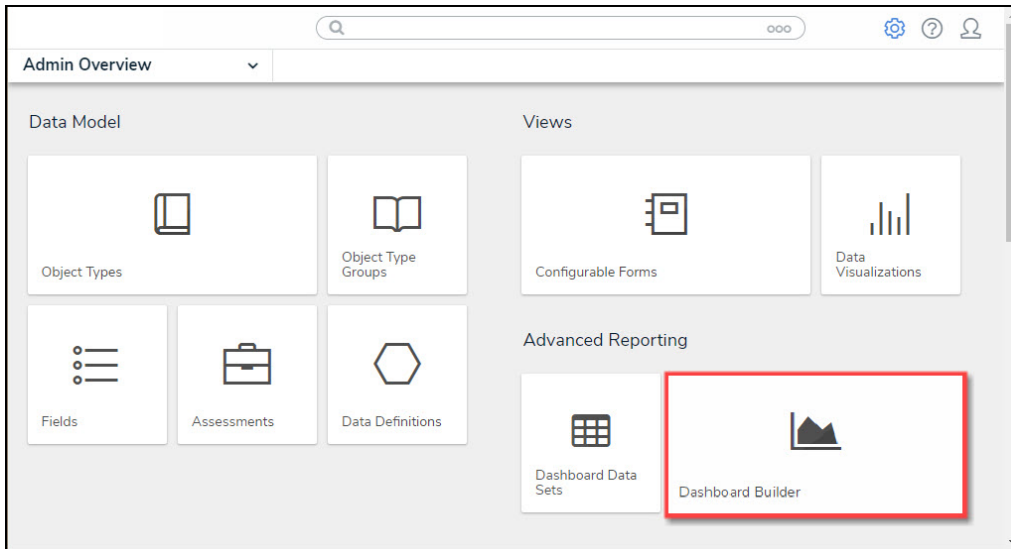
Navigation

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



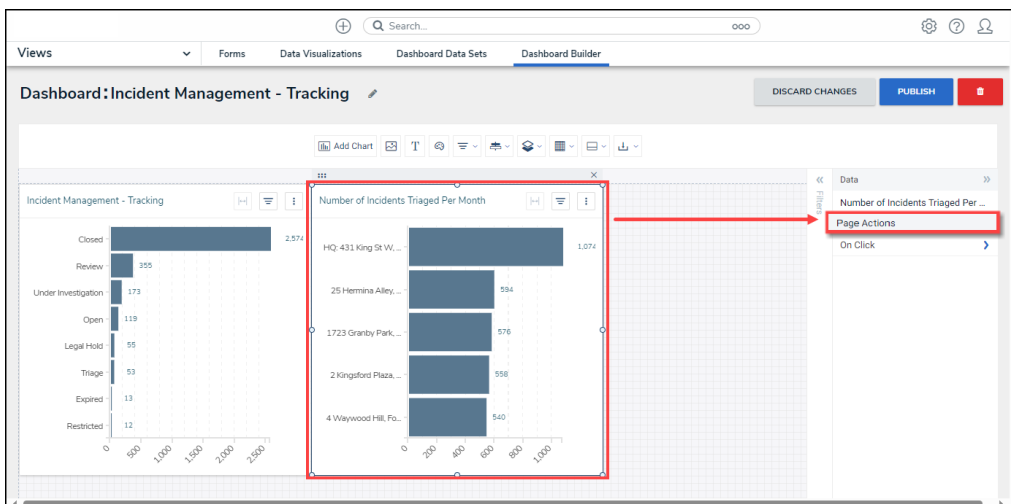
System Icon

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



Dashboard Data Sets Tile

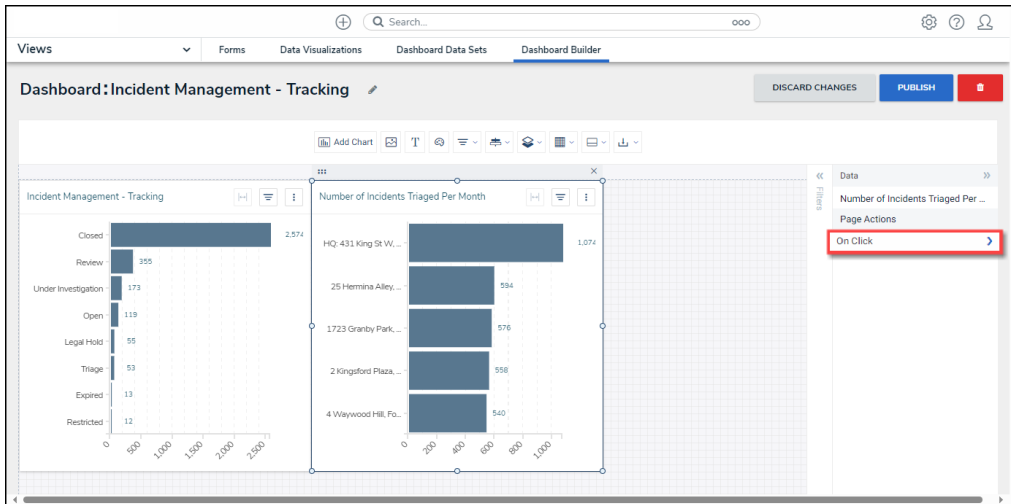
- From the **Dashboard Builder** screen, clicking on a **Chart** will activate the **Page Action** option under the **Data Panel**.



Page Action

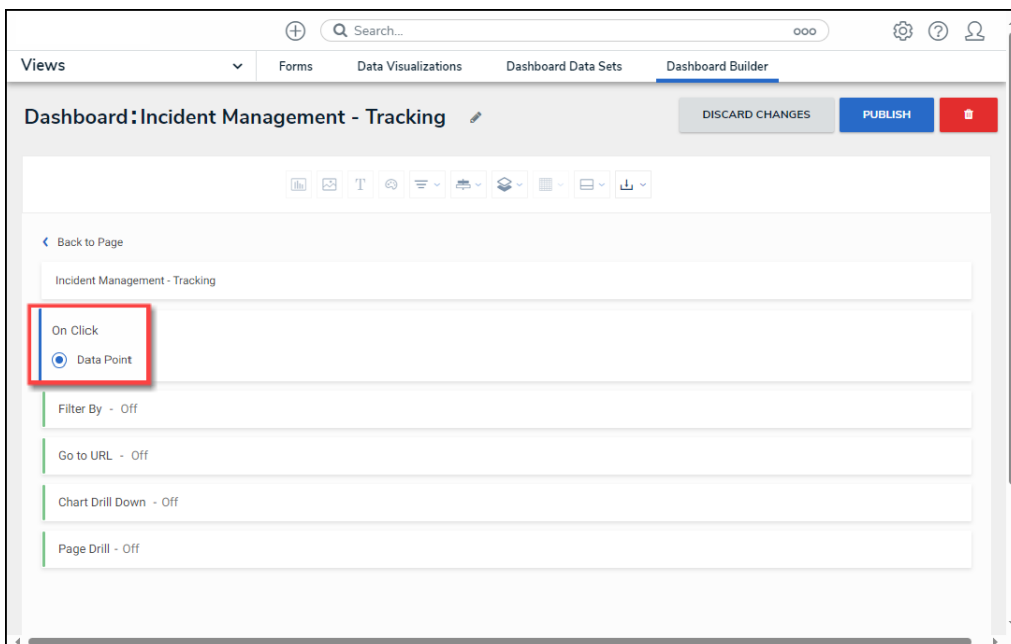
Setting Dashboard Page Actions (Drill Downs)

- From the **Data** section, click the **On Click** link to expand **Page Action** options.



On Click Link

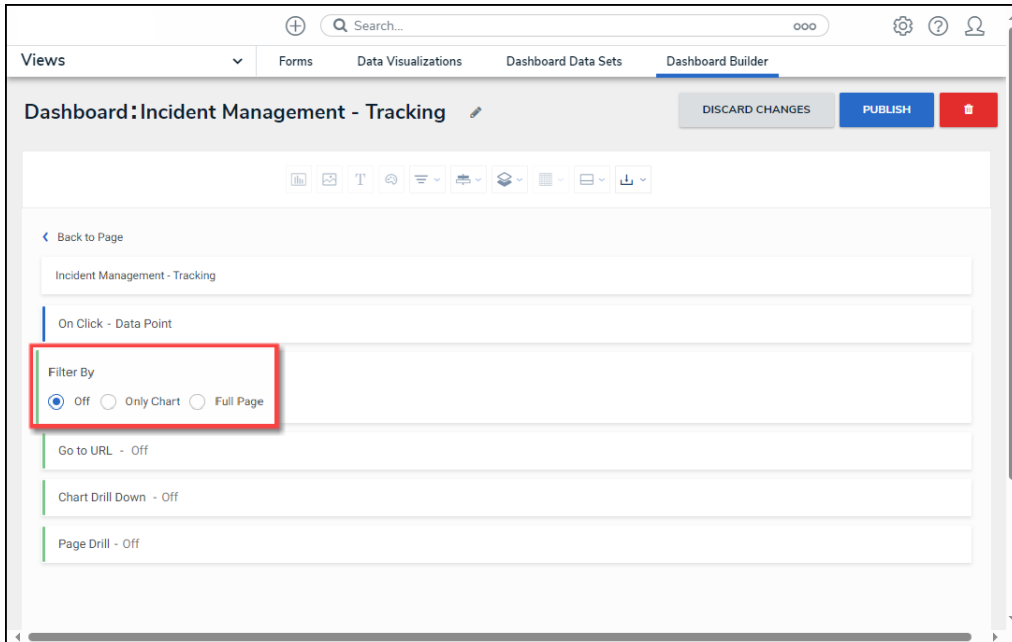
2. From the **Page Actions** screen, select an **On Click** option from the dropdown list by selecting the corresponding radio button:
 - **Data Point:** The **Data Point** option creates a Page Action trigger when a Data Point is selected from a Chart.
 - **Panel:** The **Panel** option creates a Page Action trigger when the user clicks outside the Chart.



On Click Options

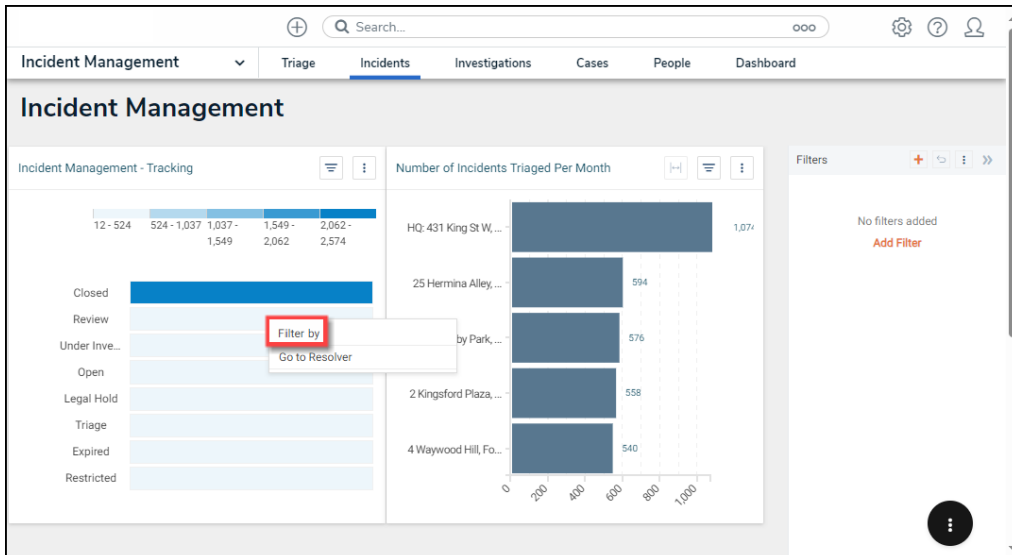
3. Select a **Filter By** option from the dropdown list by selecting the corresponding radio button:
 - **Off:** The **Off** option disables the **Filter By** option.
 - **Only Chart:** The **Only Chart** option only applies the filter to the selected Chart.

- **Full Page:** The **Full Page** option applies the filter to all charts on the **Canvas** section on the **Dashboard Builder** screen, using the same Data Set.



Filter By Options

- The **Filter By Option** will appear on the **Dashboard Builder** and **Dashboard Widget** screens when a user clicks a Data Point on a Chart (Data Point) or clicks outside the Chart (Panel).

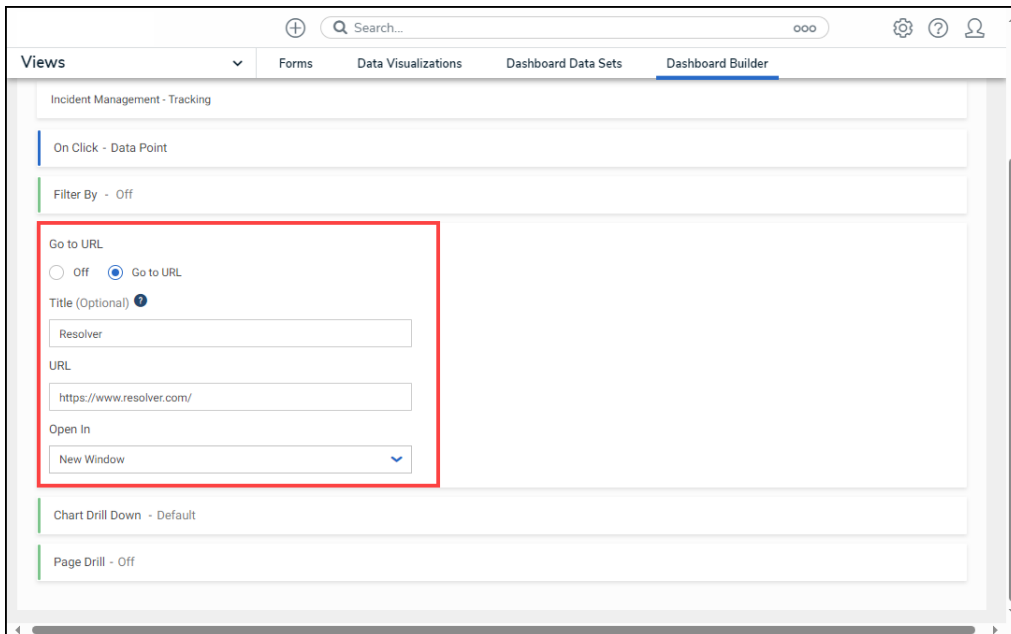


Filter By Option

- Select a **Go to URL** option from the dropdown list by selecting the corresponding radio button:
 - **Off:** The **Off** option disables the **Go to URL** option.
 - **Go to URL:** The **Go to URL** option allows users to set an external URL link to appear

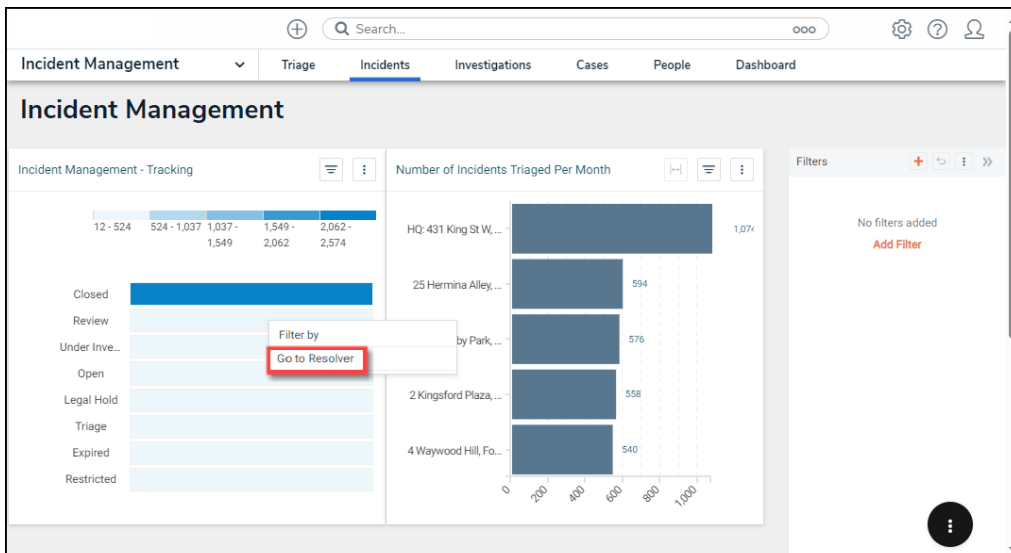
within the **Canvas** section on the **Dashboard Builder** screen.

- **Title:** The **Title** option allows users to enter a custom title for the URL. The Title will appear on the **Dashboard Builder** screen within the **Menu** options.
- **URL:** Enter a valid external URL.
- **Open In:** Select an open option from the **Open In** dropdown menu:
 - **Self:** Opens the external URL on the current screen.
 - **New Tab:** Opens a new browser tab to display the external URL.
 - **New Window:** Opens a new browser window to display the external URL.

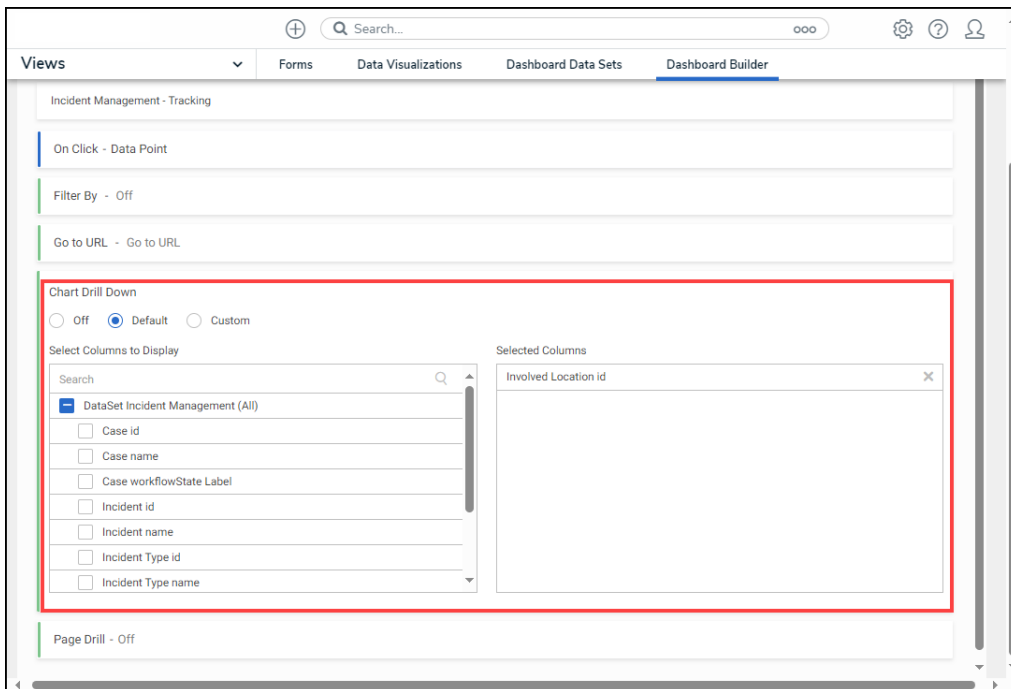


Go to URL Options

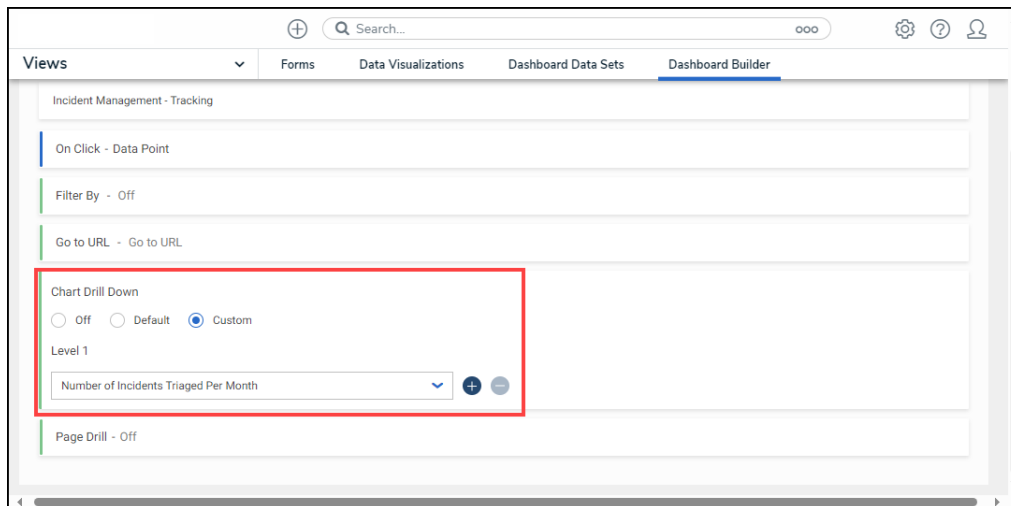
6. The **Go to URL** will appear on the **Dashboard Builder** and **Dashboard Widget** screens when a user clicks a Data Point on a Chart (Data Point) or clicks outside the Chart (Panel).



7. Select a **Chart Drill Down** option from the dropdown list by selecting the corresponding radio button:
- **Off:** The **Off** option disables the **Chart Drill Down** option.
 - **Default:** The **Default** option allows a user to create Chart Drill Downs using the data columns from the selected Chart.
 - **Select Columns to Display:** Click the Checkbox next to a column to add it to the Chart as a drill down.
 - **Selected Columns:** Click the X icon next to the column to remove the column from the Chart or deselect the Checkbox on the **Select Columns to Display** field to remove the column from the Chart.
 - **Custom:** The **Custom** option allows users to create a Chart Drill Down using the data from the Charts that appear on the Canvas on the **Dashboard Builder** screen. Users can add multiple drill-down levels based on the number of Charts on the **Dashboard Builder** screen. Click the **Plus** icon to add a Chart as a drill-down, and click the **Minus** icon to remove the Chart.

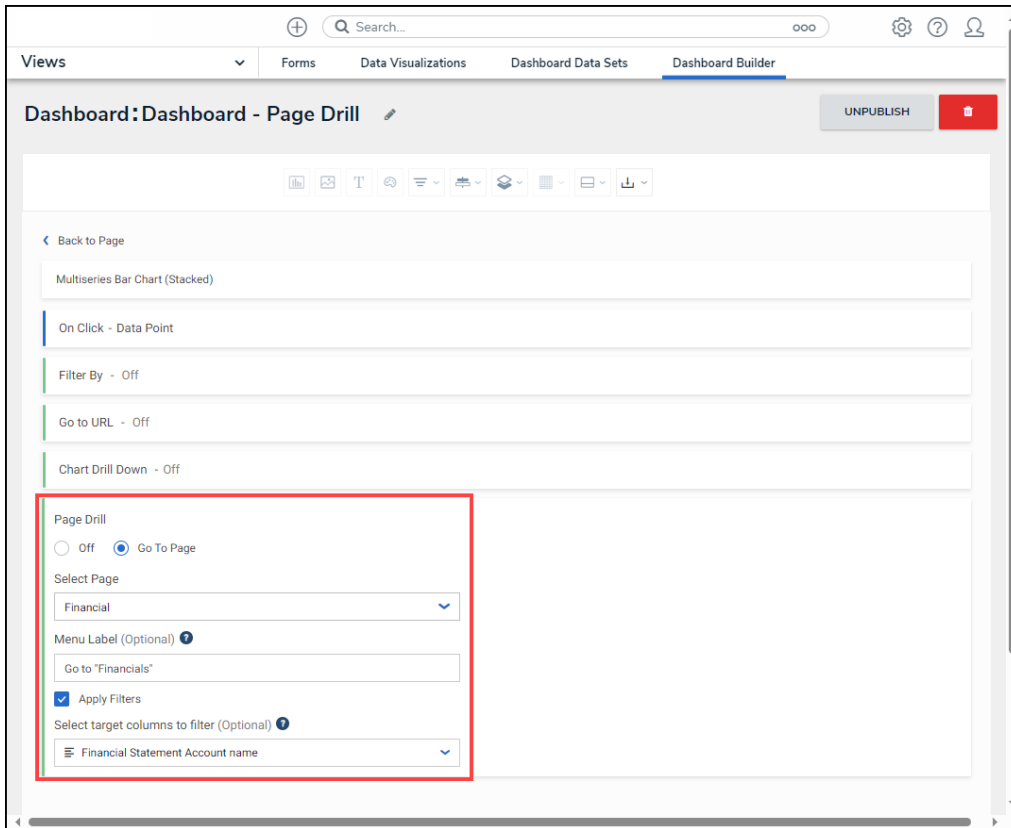


Default Chart Drill Down



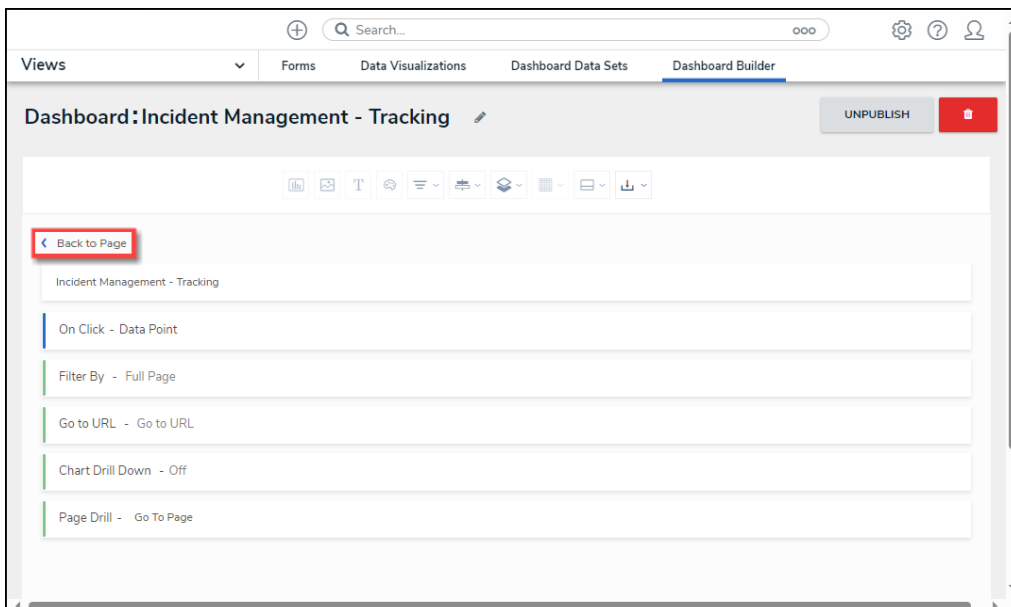
Custom Chart Drill Down

8. Select a **Page Drill** option from the dropdown list by selecting the corresponding radio button:
- **Off:** The **Off** option disables the **Page Drill** option.
 - **Go to Page:** The **Go to Page** option enables the Go to Page redirect that opens a new Dashboard when clicking a Data Point or outside of the Chart panel.
 - **Select Page:** Select a Dashboard (page) redirect from the dropdown menu.
 - **Menu Label:** Enter a custom Page Drill Title that will appear when clicking a Data Point or outside of the Chart panel.
 - **Apply Filters:** The Apply Filters checkbox will filter the Chart(s) on the Dashboard selected from the **Select Page** dropdown menu based on the column(s) selected from the **Select target columns to filter** dropdown menu. The **Select target columns to filter** dropdown menu will be greyed out when the **Apply Filters** checkbox is not selected.
 - **Select target columns to filter:** Select the column(s) that will filter the connected Dashboard. The **Apply Filters** checkbox must be selected to access the **Select target columns to filter** dropdown menu.



Page Drill Options

9. After completing the Page Action configuration, click the **< Back to Page** link to save your changes and return to the **Dashboard Builder** screen.



< Back to Page Link

10. From the **Dashboard Builder** screen, click the **Publish** button for the Page Actions to take effect.