

Adding a Multi-Series Chart to a Dashboard

Last Modified on 05/14/2024 11:05 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.

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

The following instructions apply to Multi-Series Bar, Multi-Series Line and Multi-Series Symbol Chart Types.

Multi-series Charts present a single value in more than one Category. Users must add a single **Category**, **Value** and **Series** field to create something similar to a Pivot Chart. A Multi-series Chart consists of two dimensions and a measure.



Warning:

All changes or edits made to a Chart are globally applied across all instances of the Chart unless you duplicate the Chart and apply changes or edits to the duplicated 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 follow the link below:

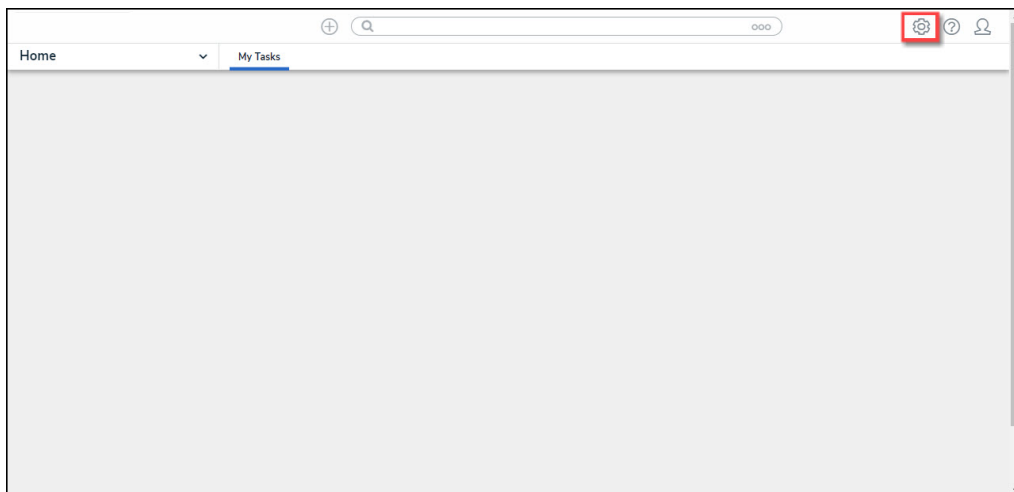
- [Adding Styles to a Chart](#)

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

- [Adding a 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 Map to a Dashboard](#)
- [Adding a Box and Whiskers Chart to a Dashboard](#)

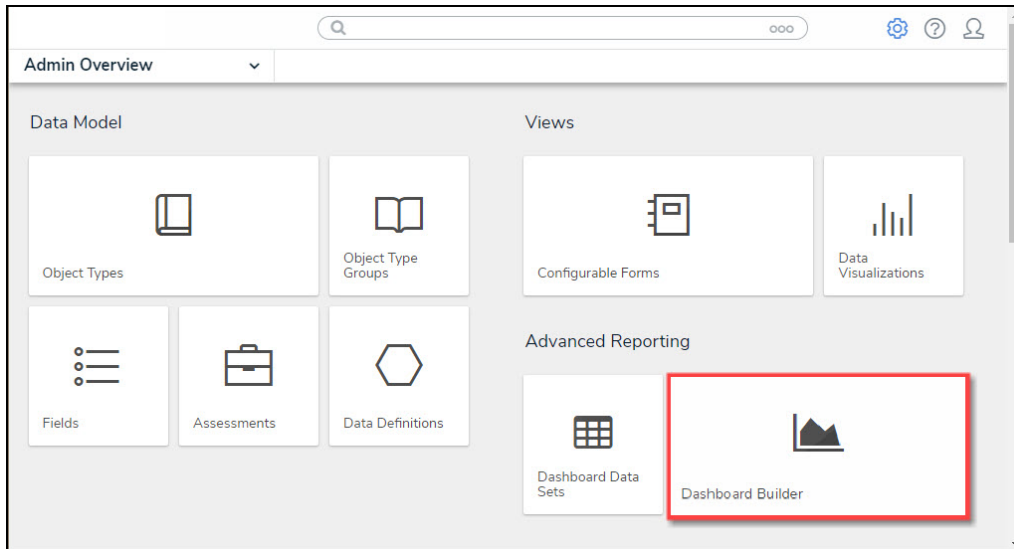
Navigation

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



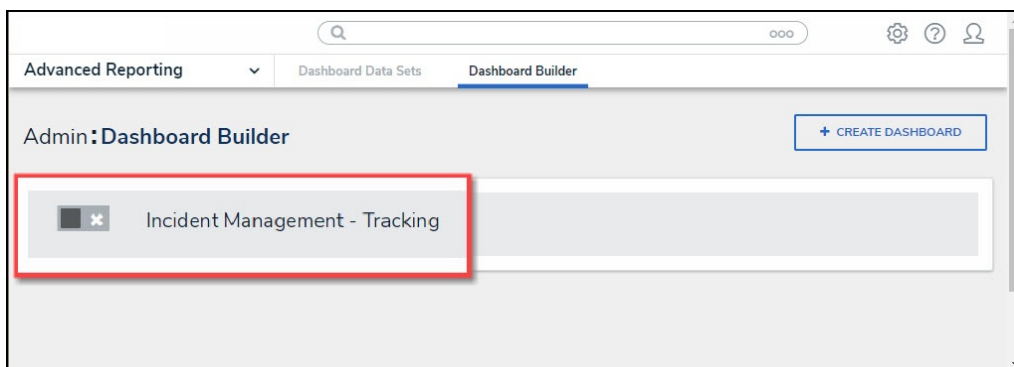
System Icon

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**.

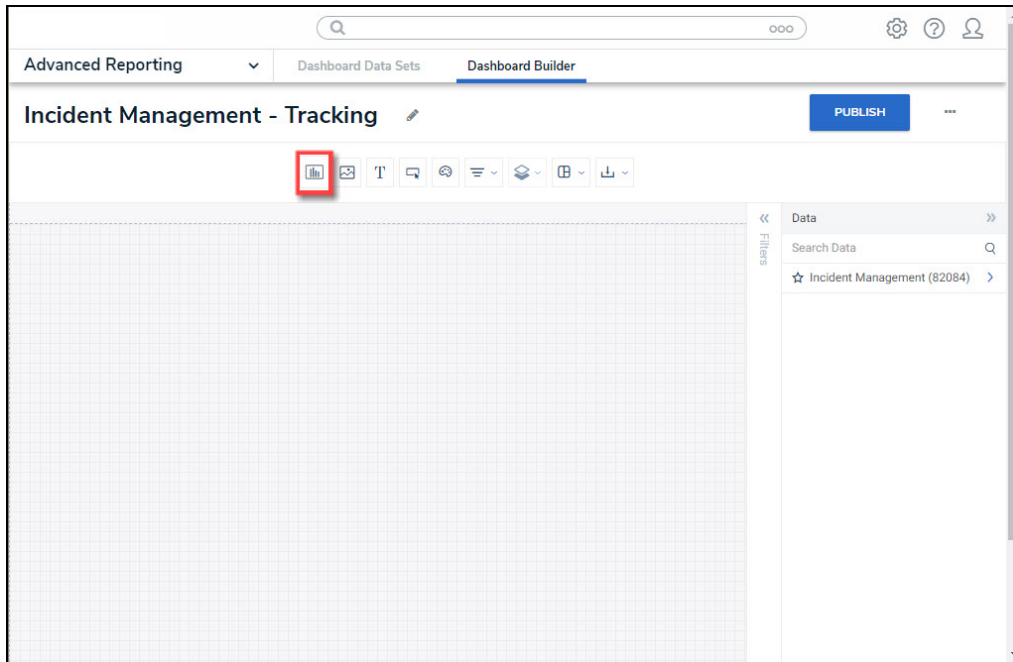


Dashboard Name

Adding a Multi-Series Chart to a Dashboard

For illustration purposes, we are going to use the Multi-Series Bar Chart Type in the instructions below. However, you can apply these instructions to Multi-Series Line and Symbol Chart Types.

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

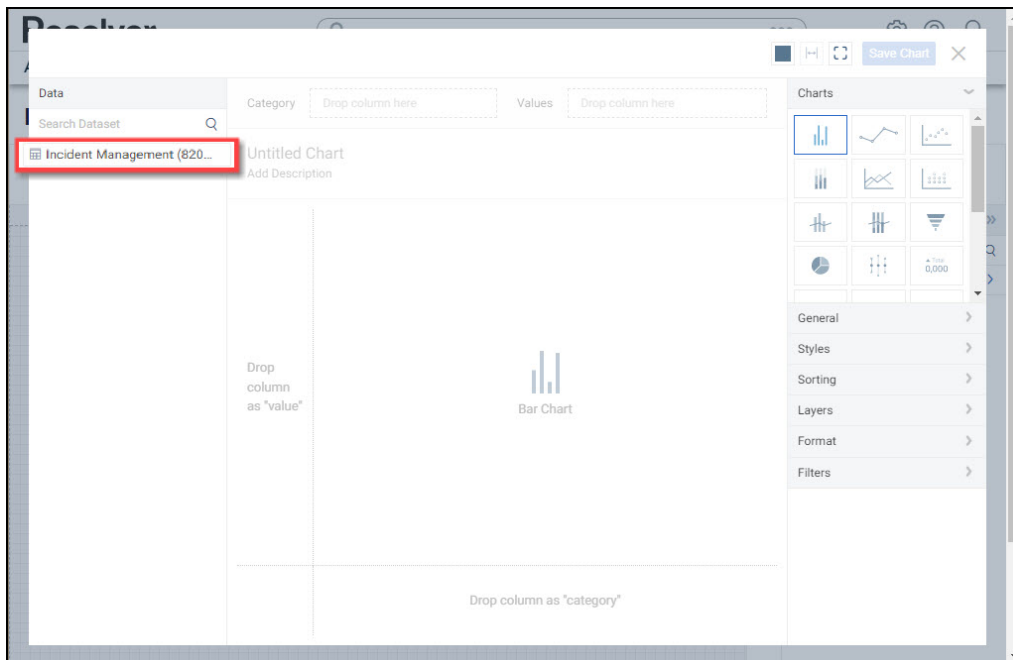


Add a Chart Button

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**.

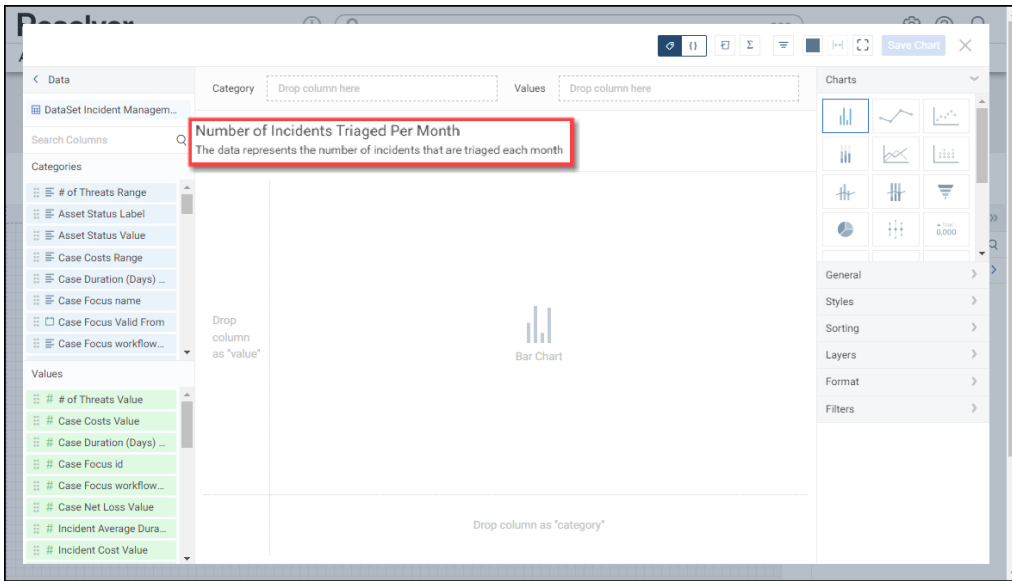


Chart Header and Description

4. 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 pop up when hovering your cursor over a **Chart Name**.

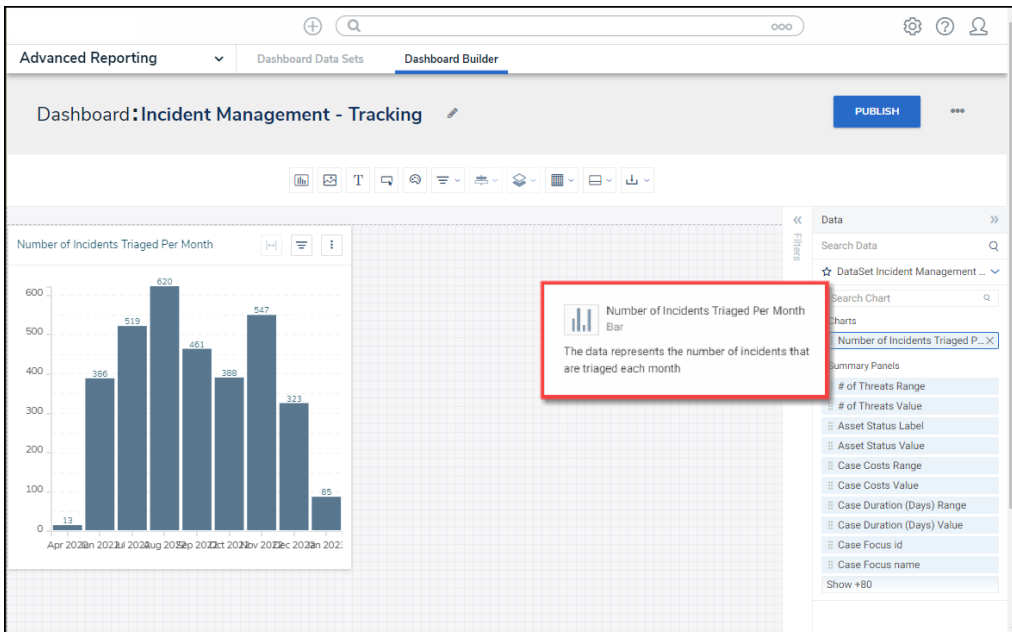
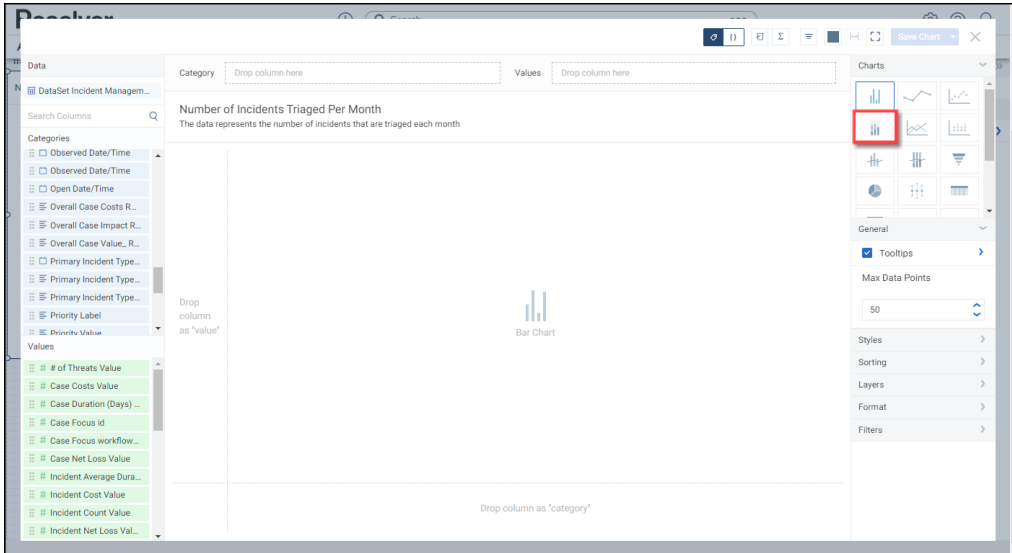


Chart Description

5. Select the **Multi-series Bar** Chart tile from the **Charts** panel.






Multi-series Bar Chart

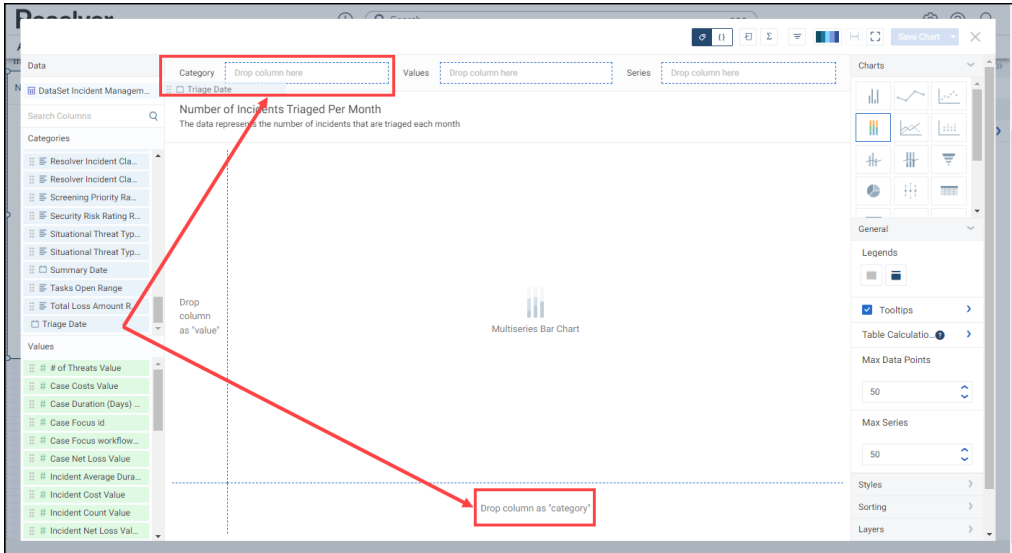
6. Dashboard Data Set **Categories** and **Values** will appear under the **Dashboard Data Set Name** on the **Data Panel**.

- **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.).

7. **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:

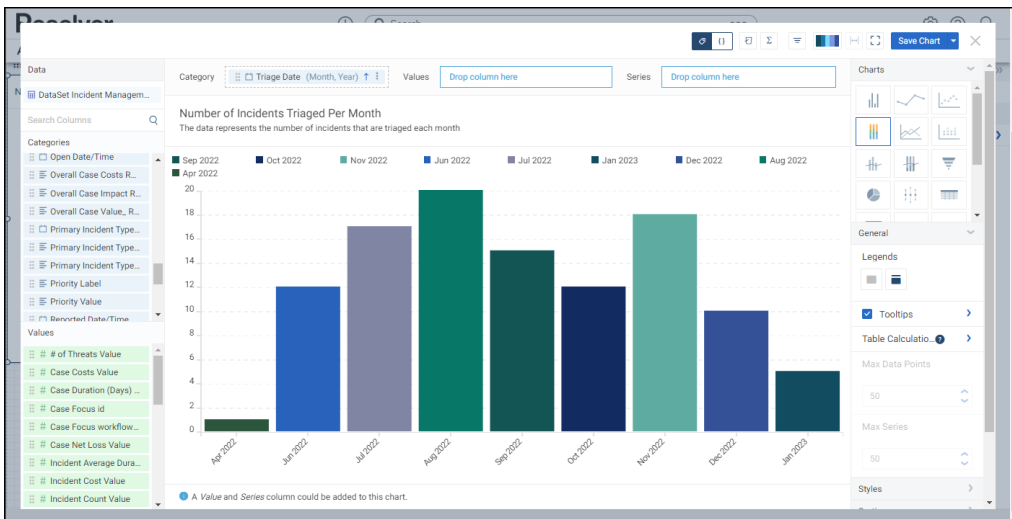
- **Text:** 
- **Numeric:** 
- **Date:** 

8. 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.



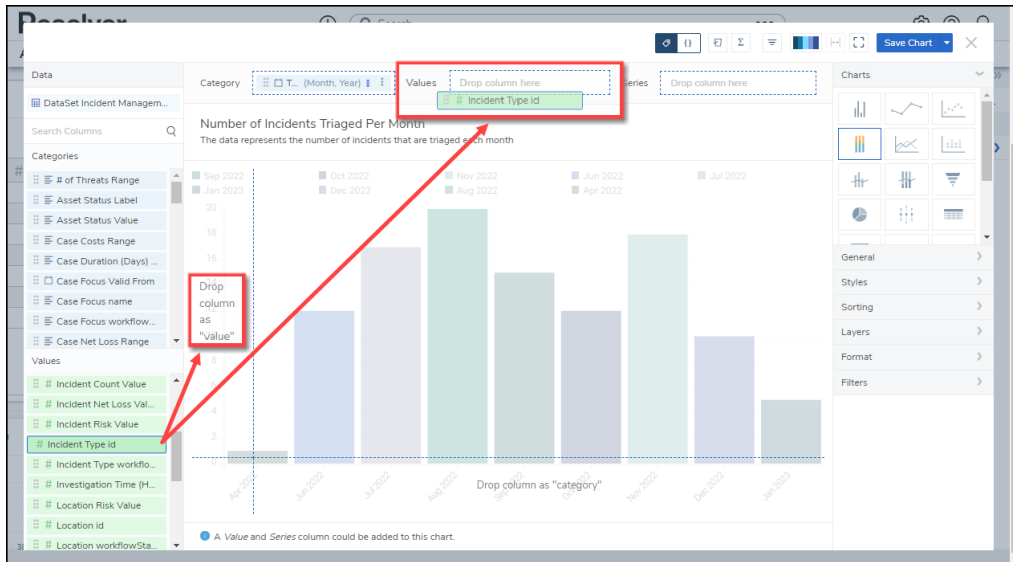
Drag and Drop a Category

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



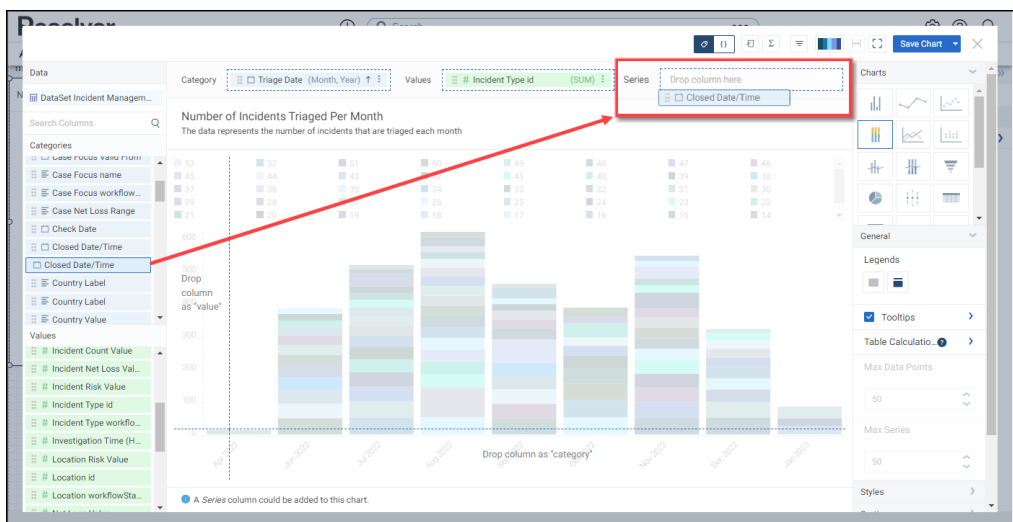
Chart

- 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.



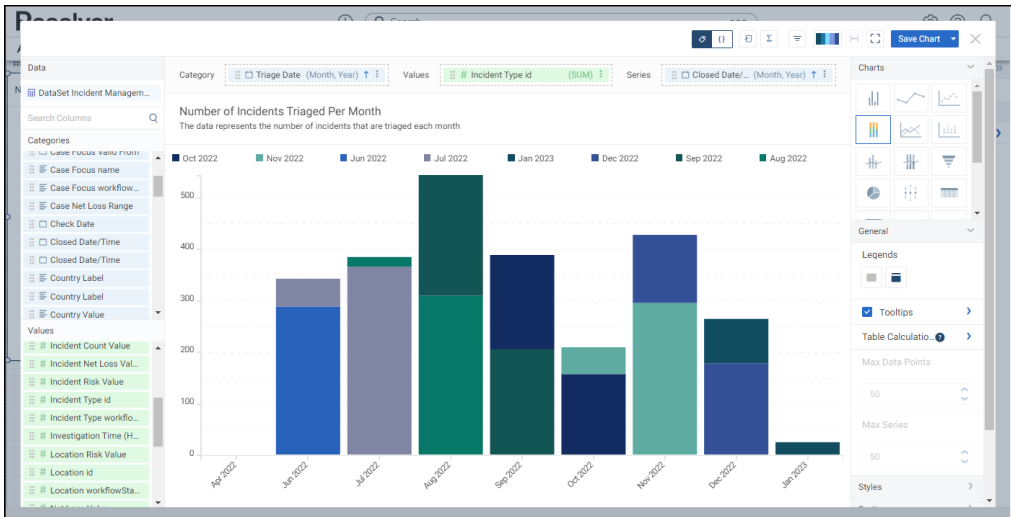
Drag and Drop a Value

11. Drag and drop a second Category from the **Data Panel** onto the **Series** field at the top.



Series Field

12. The bar size represents the value of each Category, and each value in the Series is represented by a color that can be distinguished by adding a legend to the chart.



Multi-series Bar Chart

13. Click the **Save Chart** button to save your changes.