Adding a Combo Chart to a Dashboard

Last Modified on 09/15/2023 1:48 pm 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.

Combo Charts allow users to layer multiple XY Charts (Bar Charts, Line Charts, and Symbol Charts) in a single Chart. Combo Charts consist of one shared dimension or **Category** and multiple measures or **Values** and are used to compare different metrics grouped by the same category.

> **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](#)

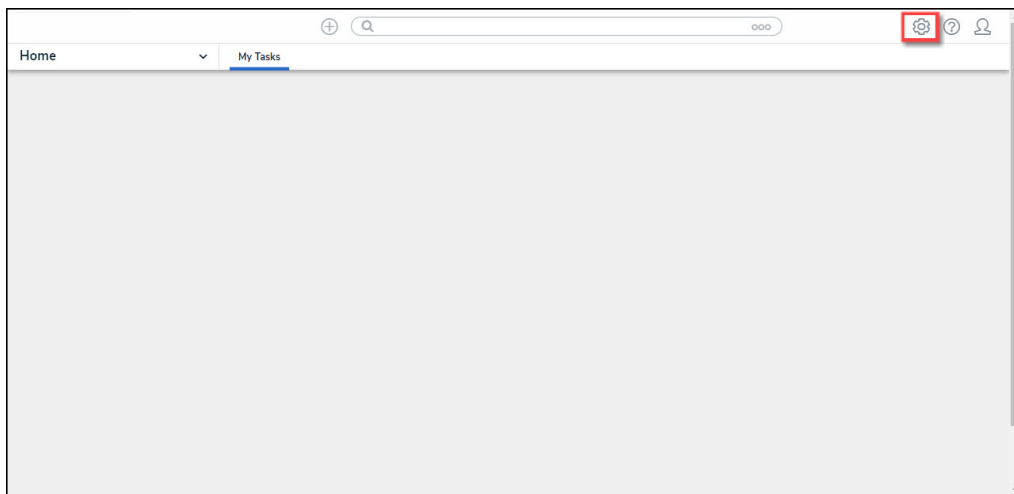To add styles to your Chart, please follow the link below:

- 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 Multi-Series 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
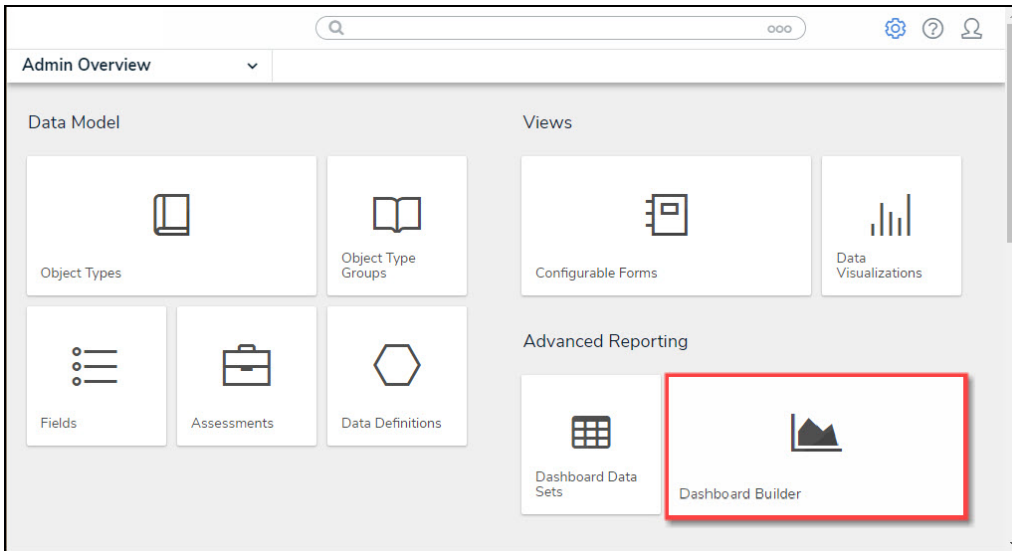- Adding a Box and Whiskers Chart to a Dashboard

Navigation

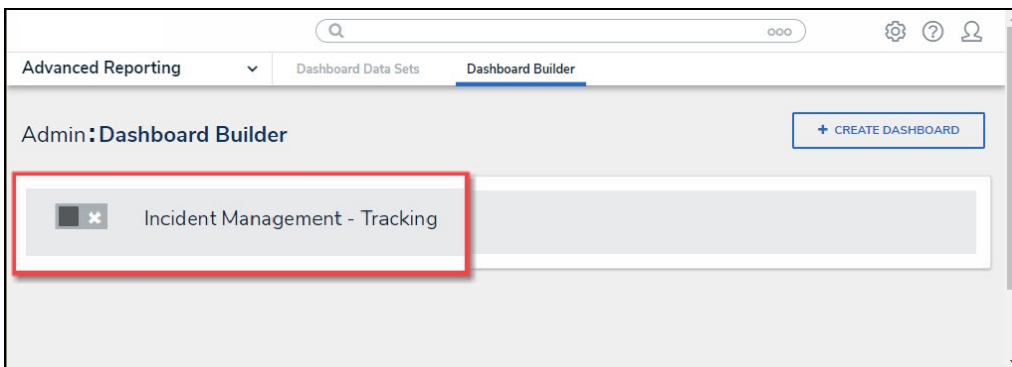1. From the **Home** screen, click on the **System** icon.

System Icon

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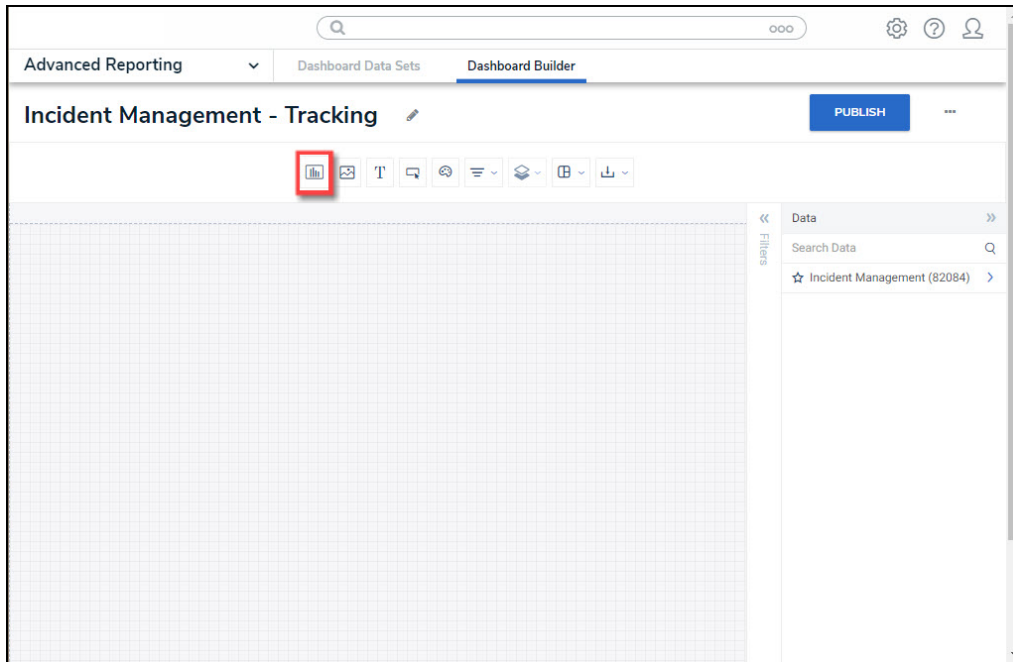
Dashboard Data Sets Tile

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

Dashboard Name

Adding a Combo Chart to a Dashboard

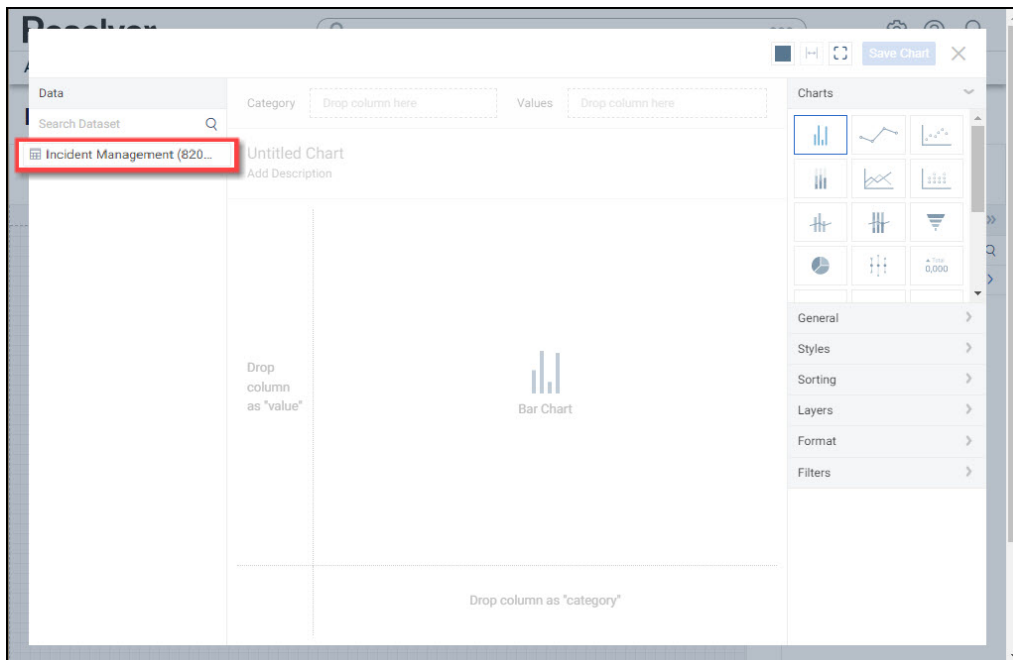1. From the ***Canvas Layout*** screen, click the **Add Chart** button.

Add a Chart Button

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

> (i) **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
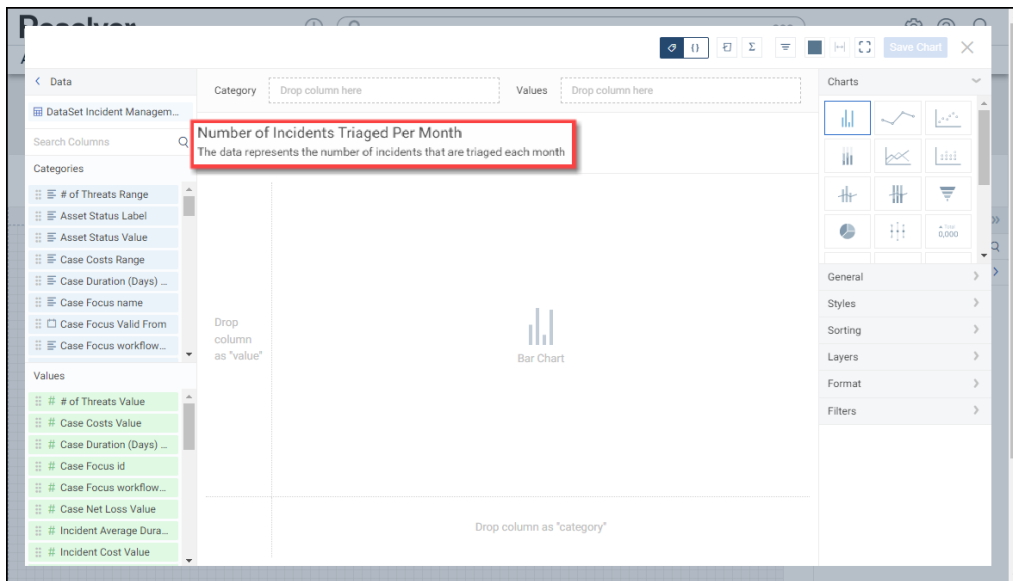
characters will show in the **Chart Header**.

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**.
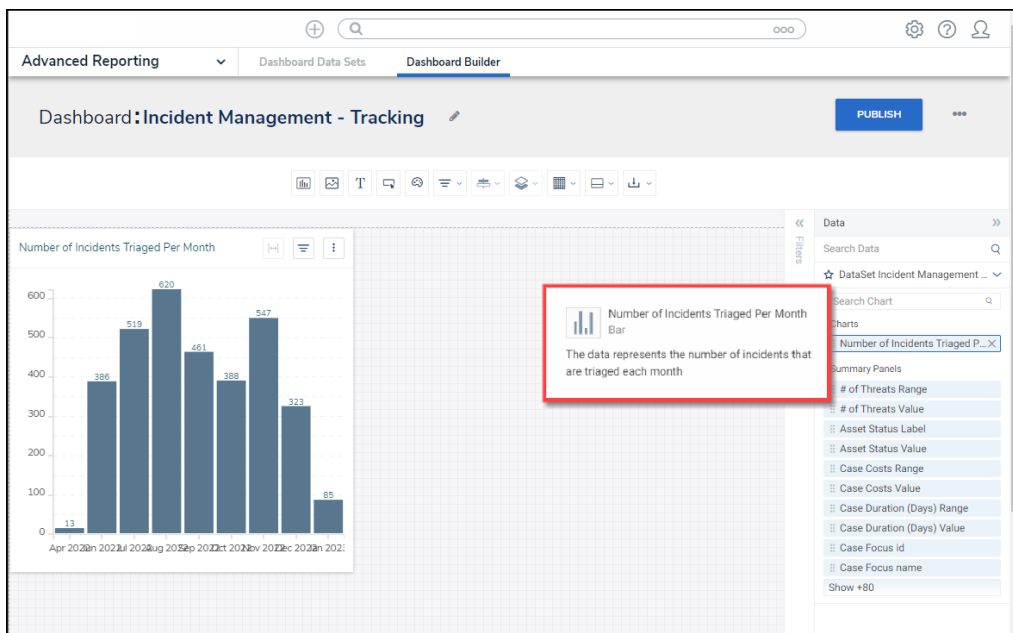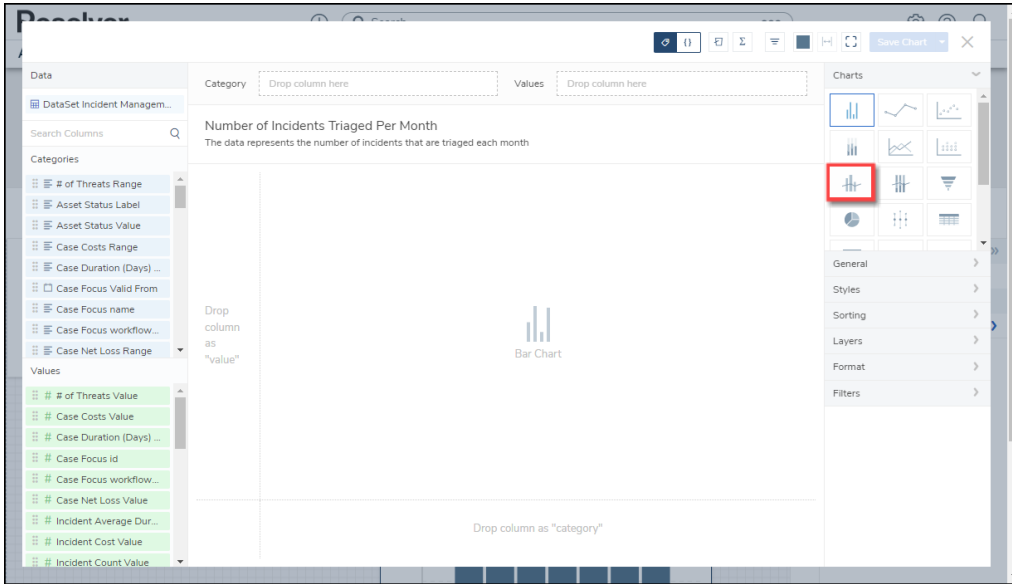

Chart Description

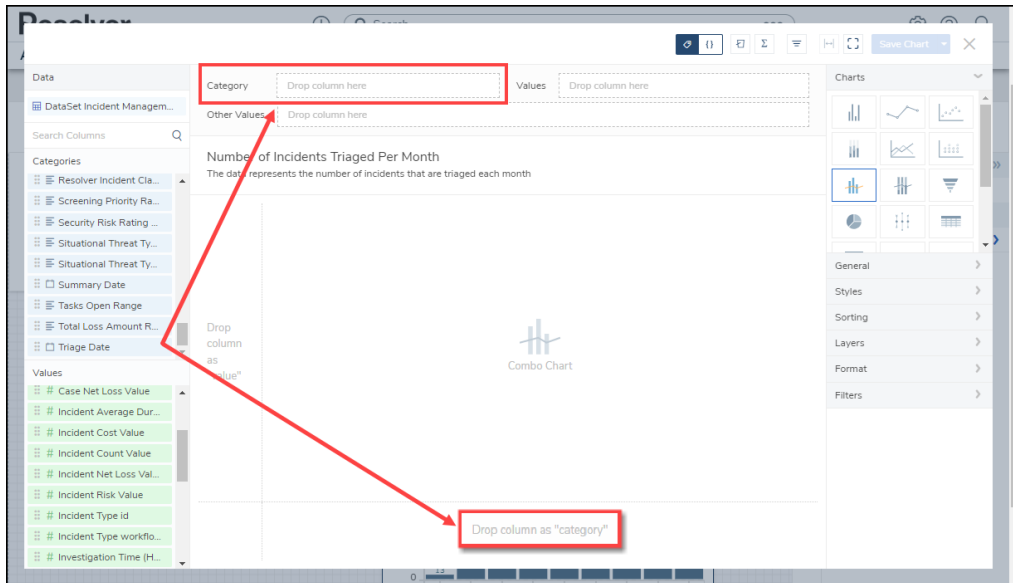5. Select the **Combo** Chart tile from the **Charts** panel.

Combo 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:
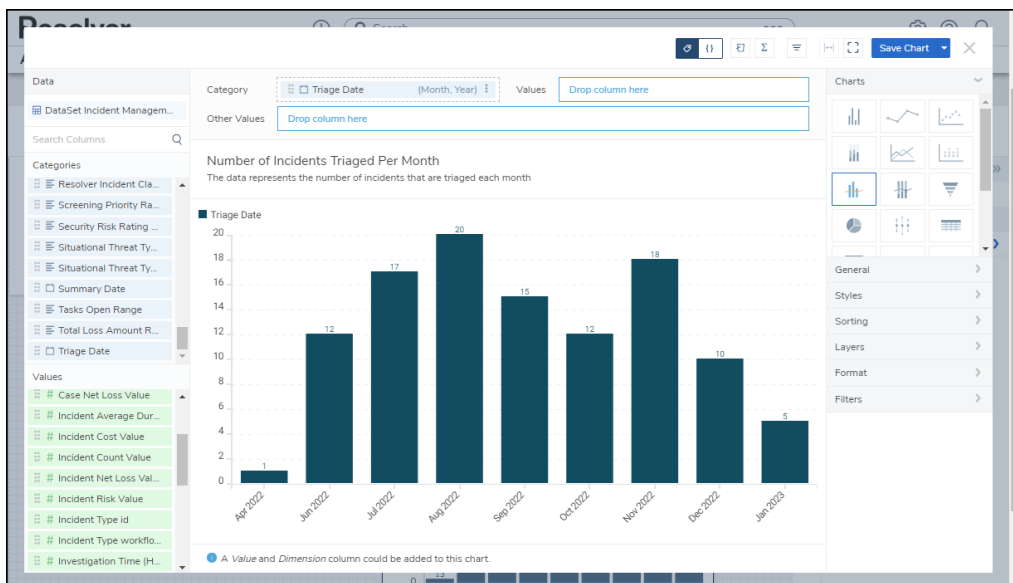
- **Text:**

- **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.
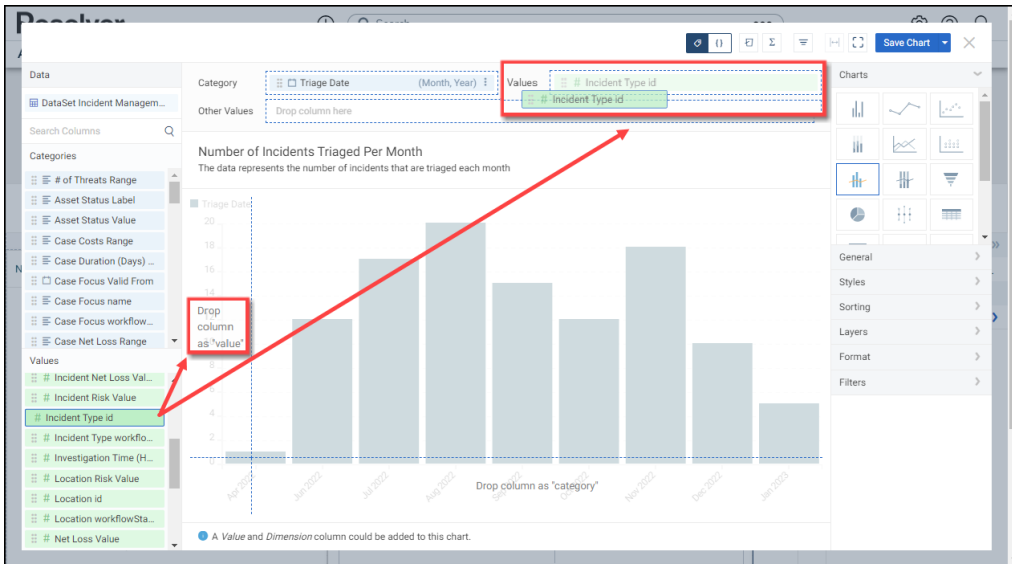
Drag and Drop a Category

9. The **Category** data will populate the **Chart**. Data will populate the Chart after adding a Category or Value that has data to the Chart.
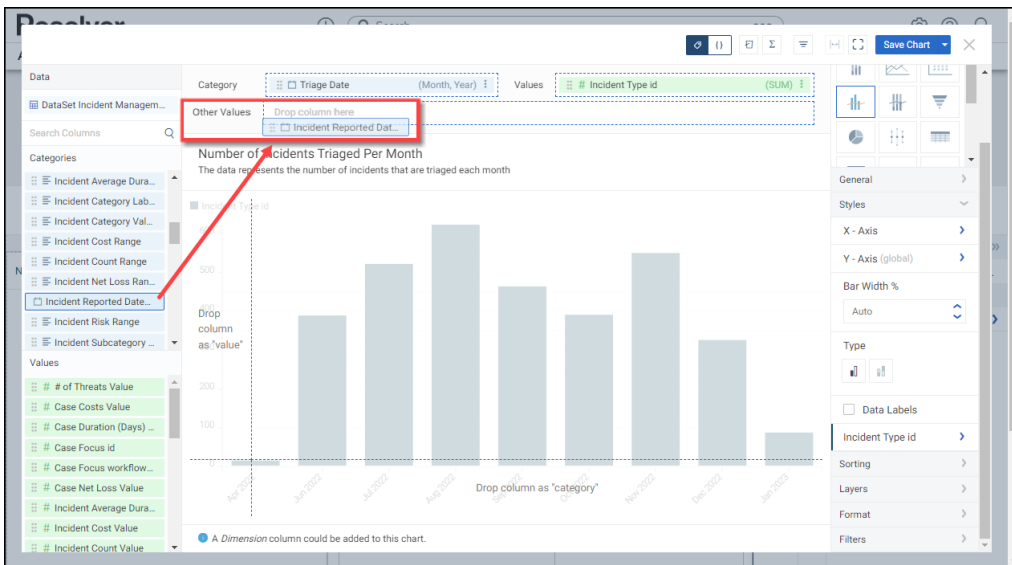

Category Data

10. 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.
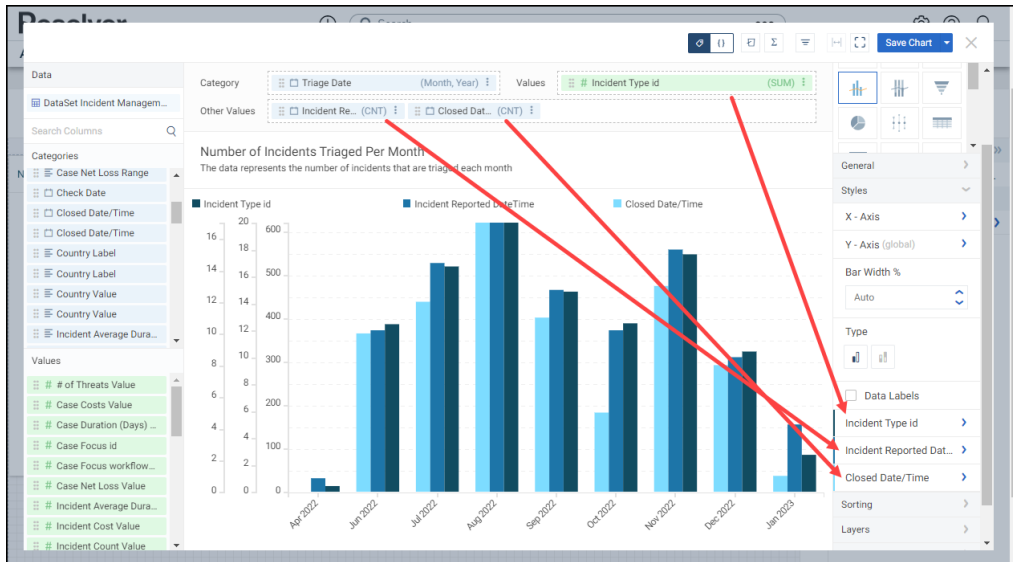
Drag and Drop a Value

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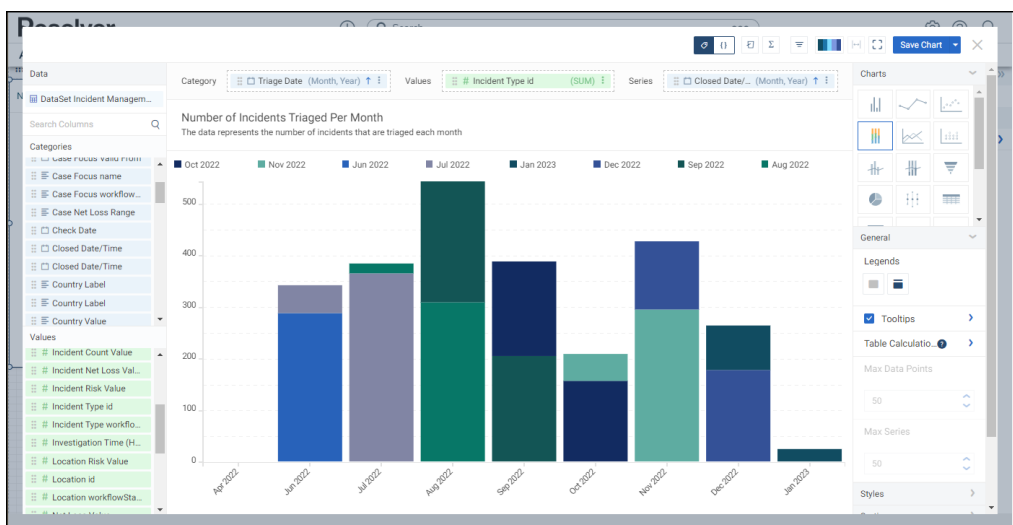

Series Field

12. **(Optional)** Add multiple Categories or Values to the **Other Values** field to add further dimensions to the Chart.

13. When multiple Categories or Values are added to the **Other Values** field or **Values** field, each value will appear under the Styles panel, allowing users to apply styles to each value individually.

Other Value Styles

14. **(Optional)** Please see the Adding Styles to a Chart article to add styles to your Chart.

15. The Categories and Values will create the Combo Chart in the Dashboard Canvas.

Combo Chart

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