

# Adding a Table/Group Table 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.

Tables display data in rows of consecutive columns in a spreadsheet-like format. This form of visualization provides an easy way to view data and perform various analytical functions.



**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

Please follow the link below to create a new Dashboard Data Set.

- [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](#)

Please follow the link below to add styles to your Chart.

- [Adding Styles to a Chart](#)

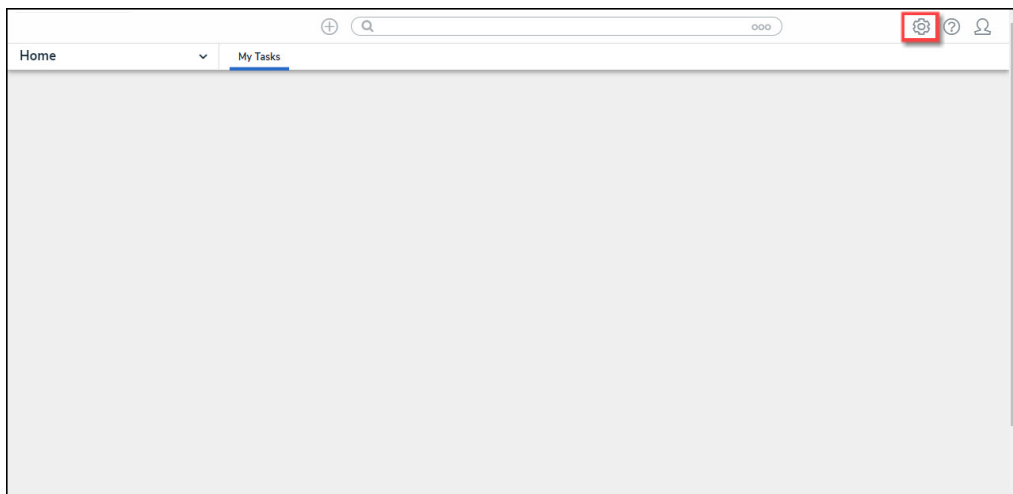
Please see the corresponding articles below for Information on Adding a Chart Type not covered by these instructions.

- [Adding a Chart to a Dashboard](#)
- [Adding a Multi-Series Chart to a Dashboard](#)
- [Adding a Combo Chart 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](#)

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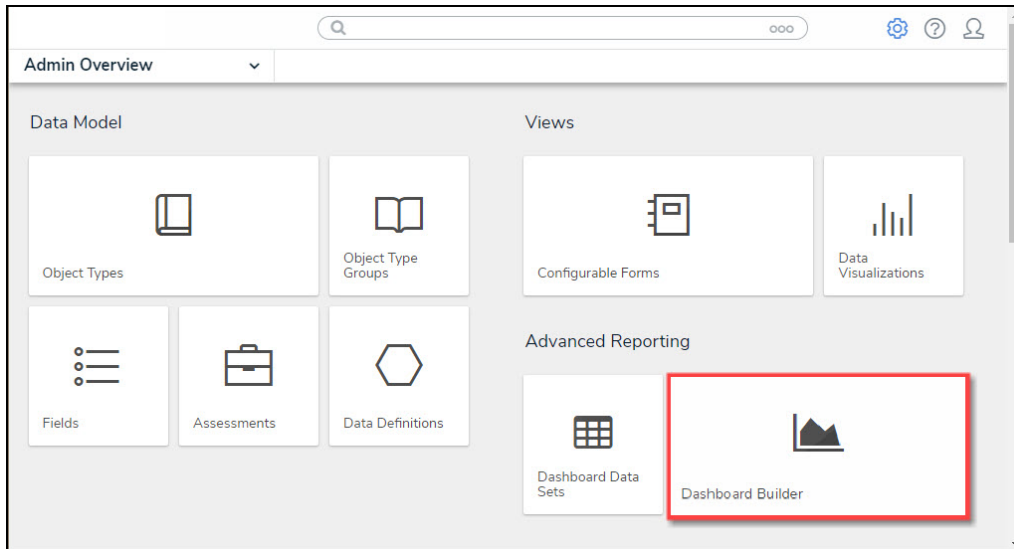
## Navigation

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



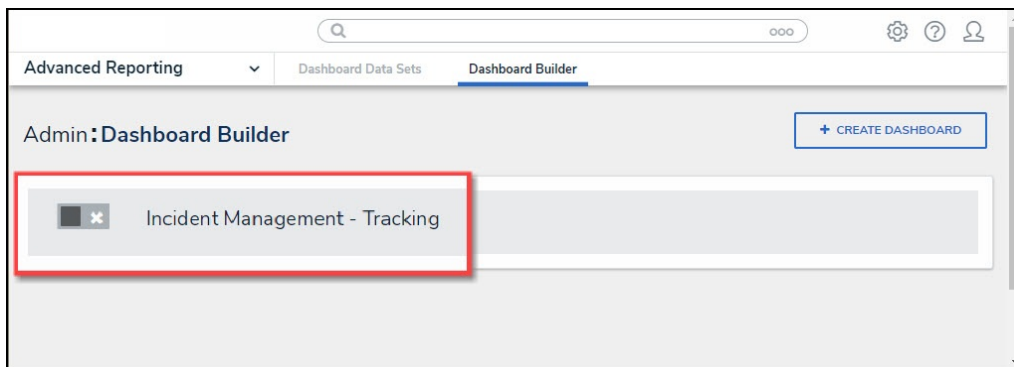
*System Icon*

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



*Dashboard Data Sets Tile*

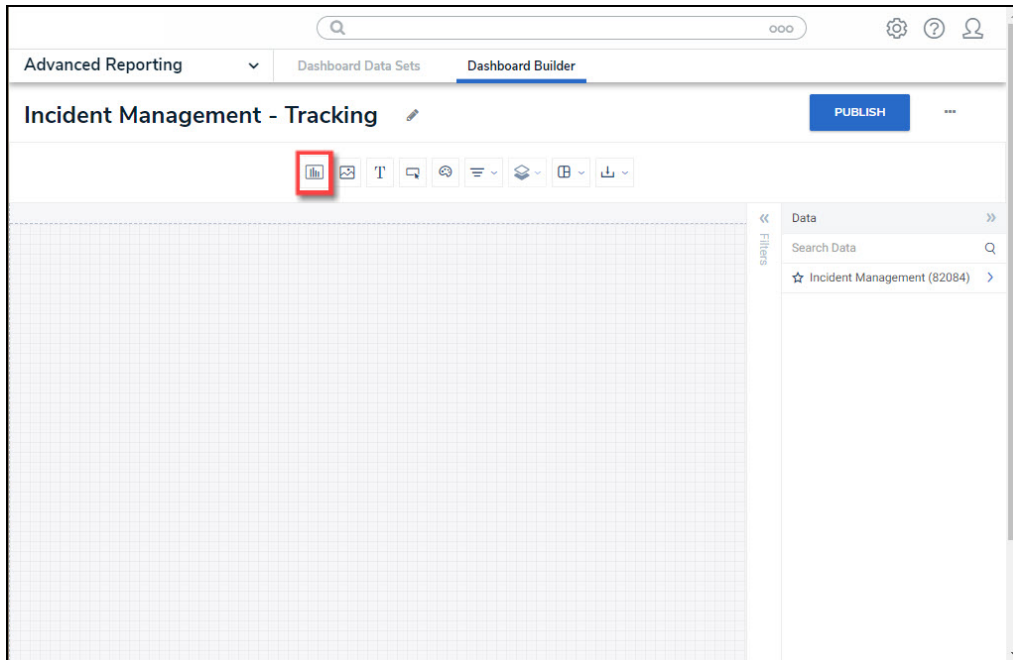
3. From the **Dashboard Builder** screen, click on a **Dashboard Name**.



*Dashboard Name*

## Adding a Table to a Dashboard

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



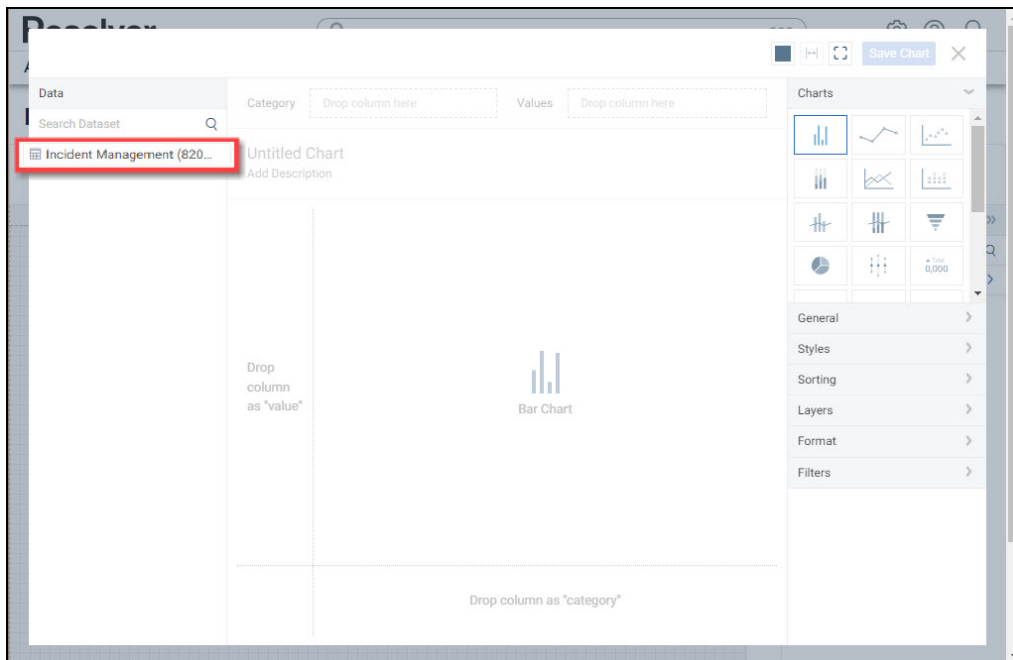
*Add a Chart Button*

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



**Note:**

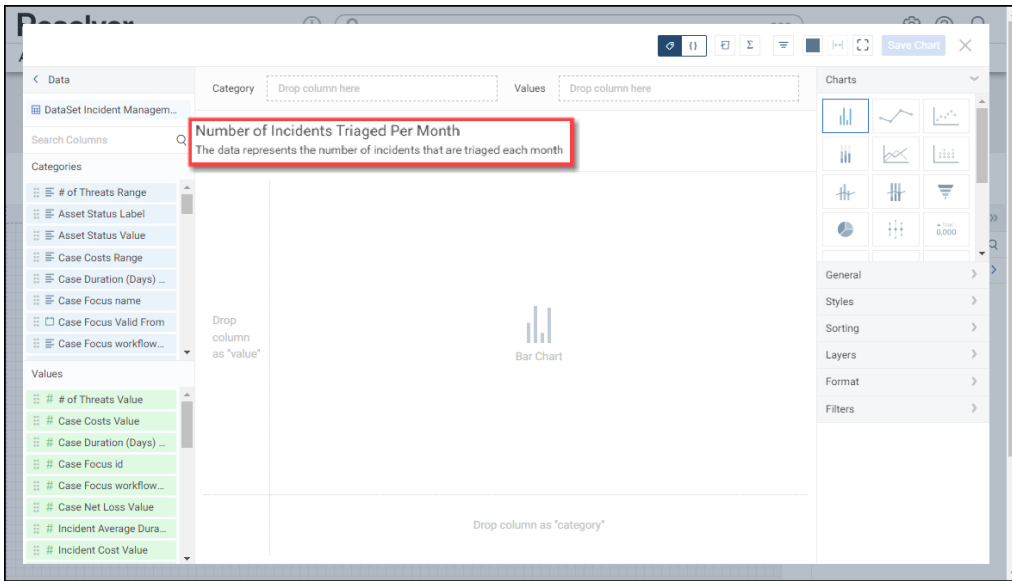
*Only published Dashboard Data Sets will appear on the Data Panel.*



*Dashboard Data Set*

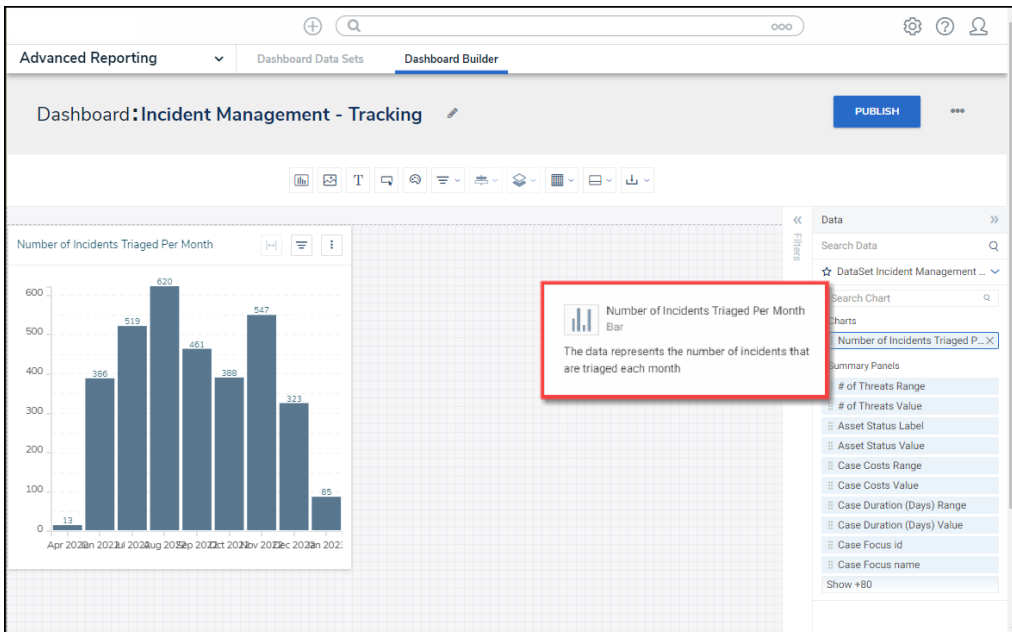
3. Click in the **Chart Header (Untitled Chart)** field and enter a **Chart Name**. The first 36

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



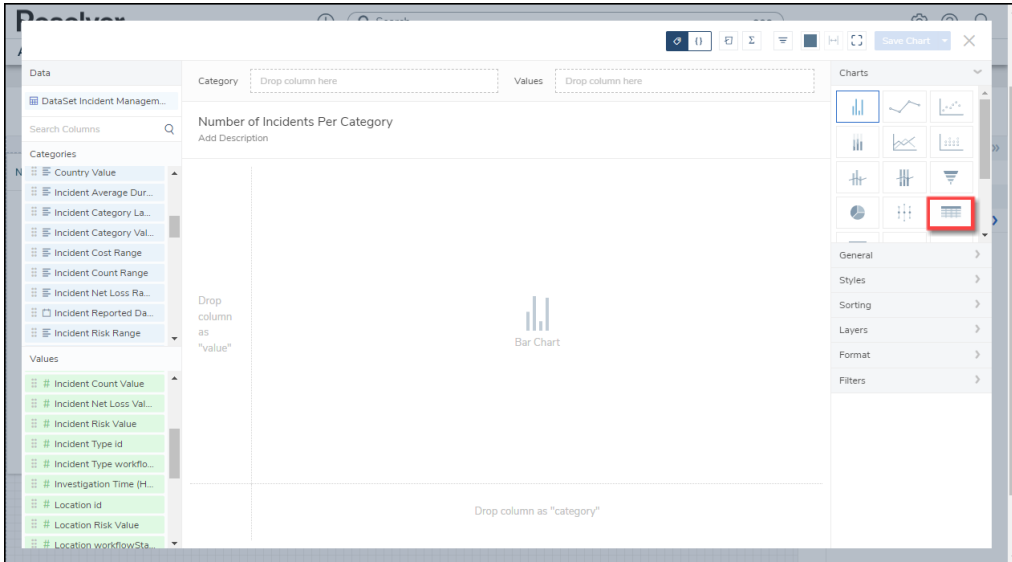
*Chart Header and Description*

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 **Table** Chart tile from the **Charts** panel.





*Table Chart*

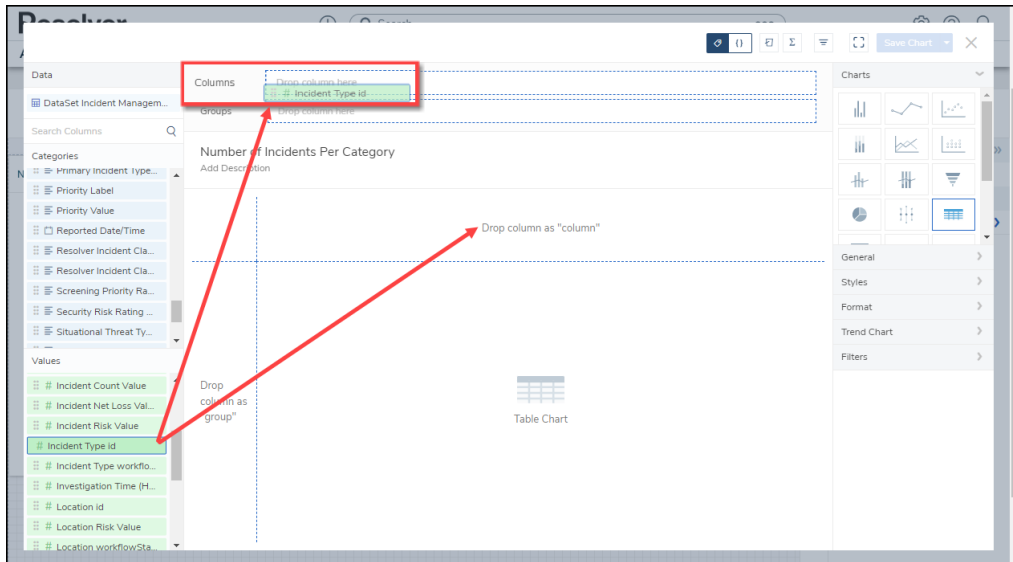
6. Dashboard Data Set **Categories** and **Values** will appear under the **Dashboard Data Set Name** on the **Data Panel**.

- **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:

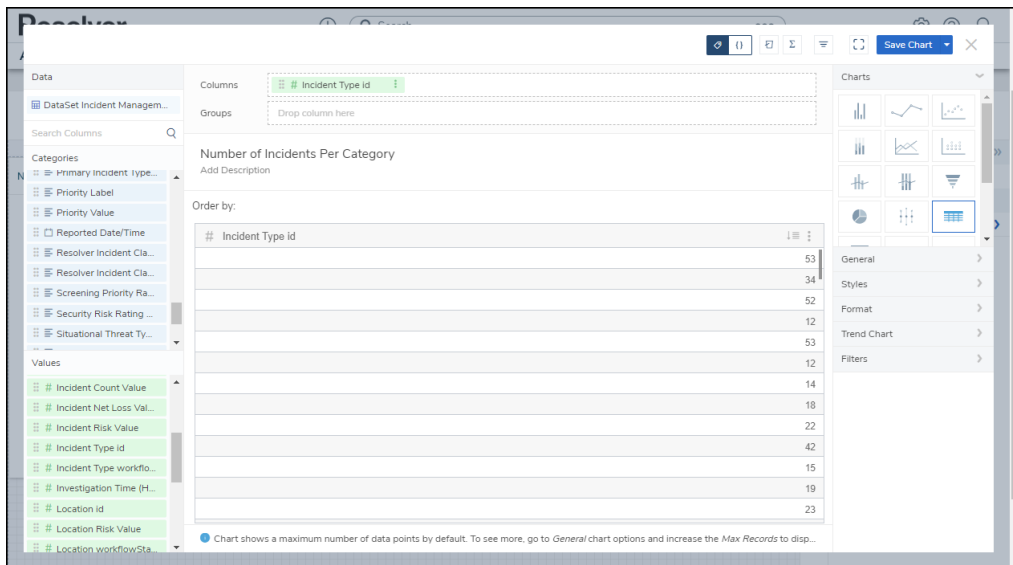
- **Text:** 
- **Numeric:** 
- **Date:** 

8. Drag and drop a **Category** or **Value** from the **Data Panel** onto the **Column** section at the top of the Chart or within the **Column** field.



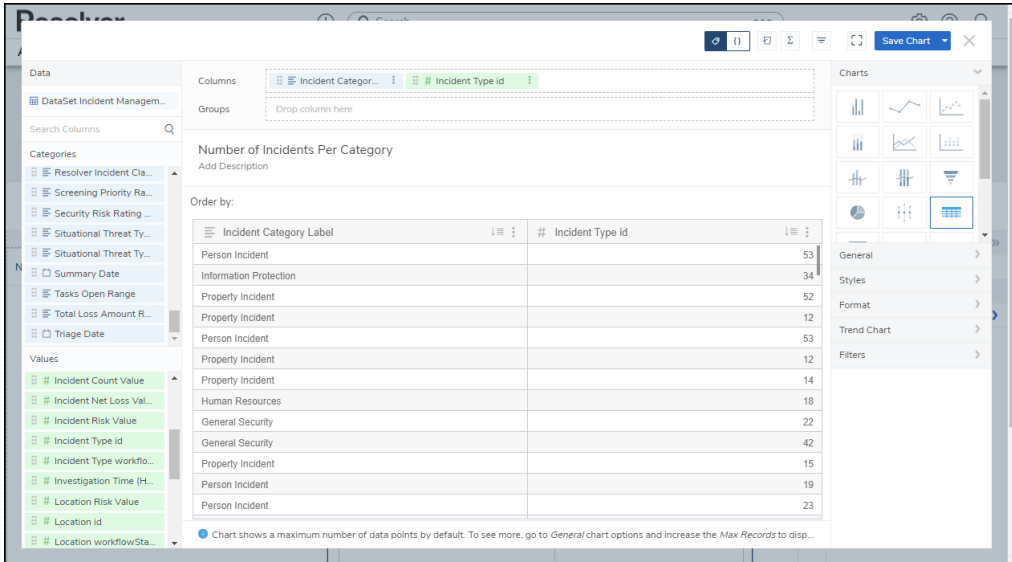
*Drag and Drop a Column*

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



*Data Table*

- Add multiple Categories or Values to the **Column** field to add multiple Columns to the Table.

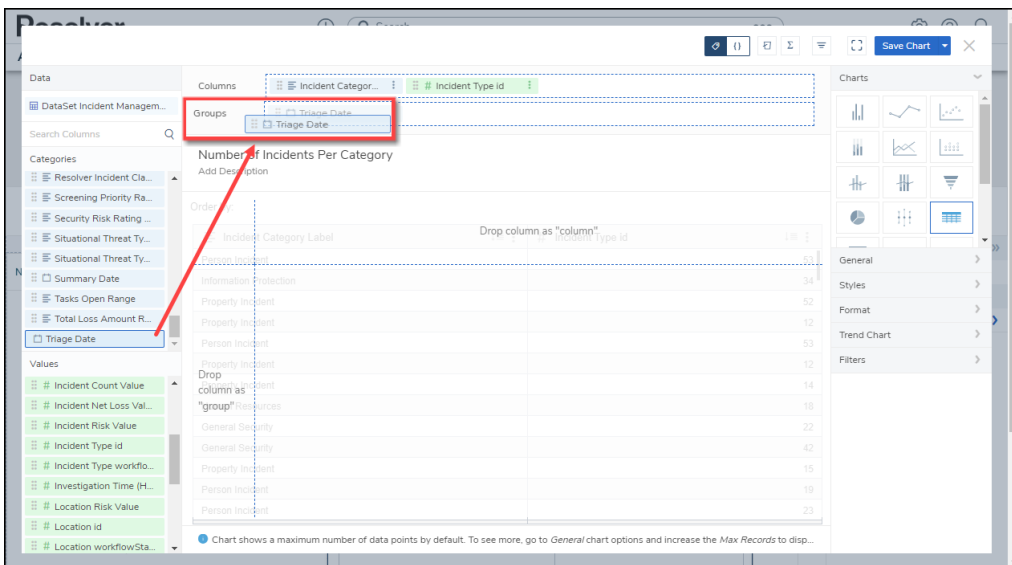


*Multiple Columns*

## Grouped Table

An Administrator can create a Grouped Table by adding a Category or Value to the Group Field. A Grouped Table treats the Categories and Values in the Group field as a group, aggregating the Categories or Values in the Column fields within the Groups.

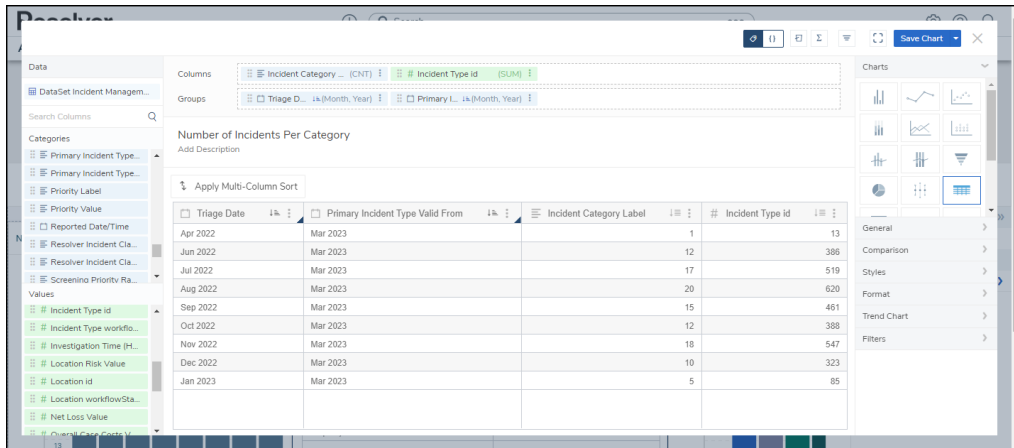
1. Drag and drop a **Category** or **Value** from the **Data Panel** into the **Group** section at the Side of the Chart or within the **Group** field at the top.



*Drag and Drop a Groups*

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





*Multiple Groups*

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