# Adding a Crosstab to a Dashboard

Last Modified on 11/24/2023 2:22 pm EST

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.

A Crosstab table shows data aggregated across two dimensions in a matrix style to show the correlation between different variables and the values in the cross-section of the dimensions. Crosstab Charts are used when we want to show the relationship between two Categorical values.

**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 Table to a Dashboard
- Adding a Heatmap to a Dashboard
- Adding a Map to a Dashboard
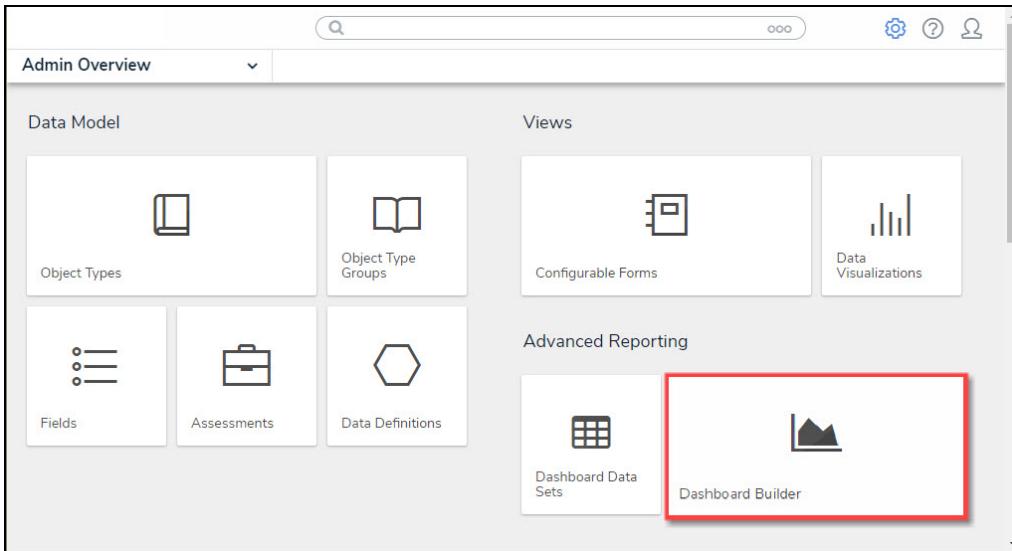- Adding a Box and Whiskers Chart to a Dashboard

# Navigation

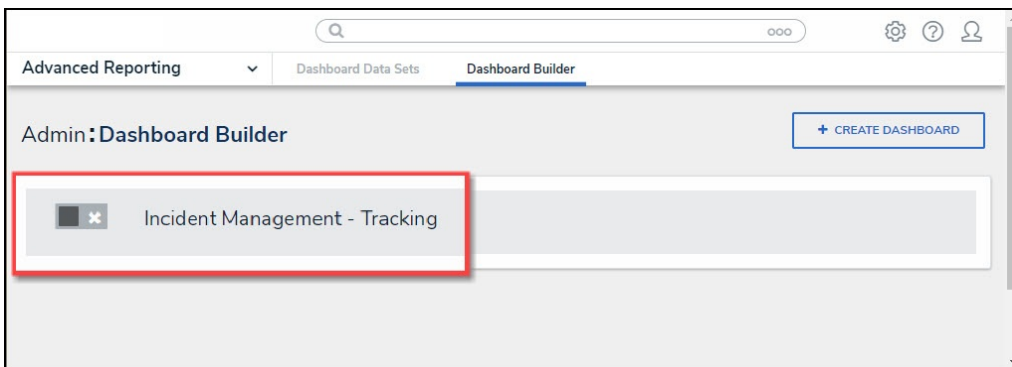1. From the **Home** screen, click on the **System** icon.
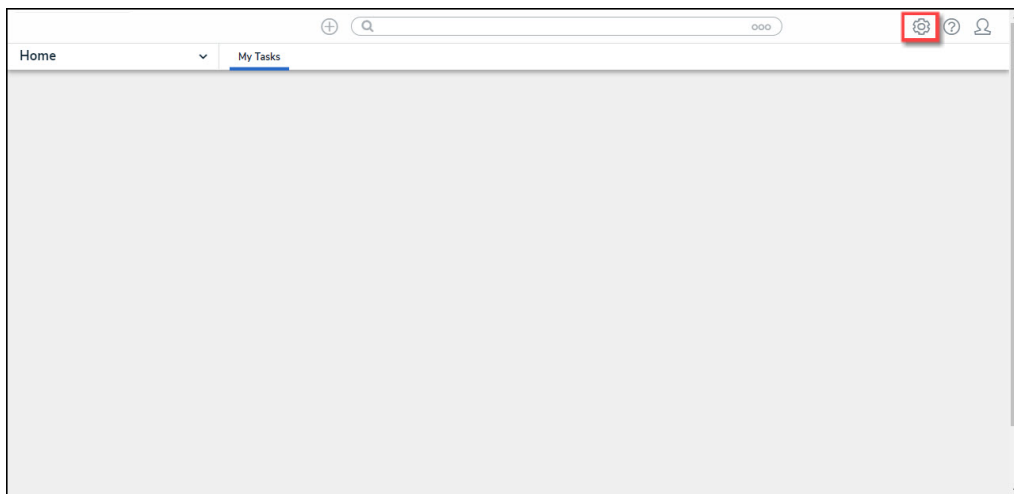


*System Icon*

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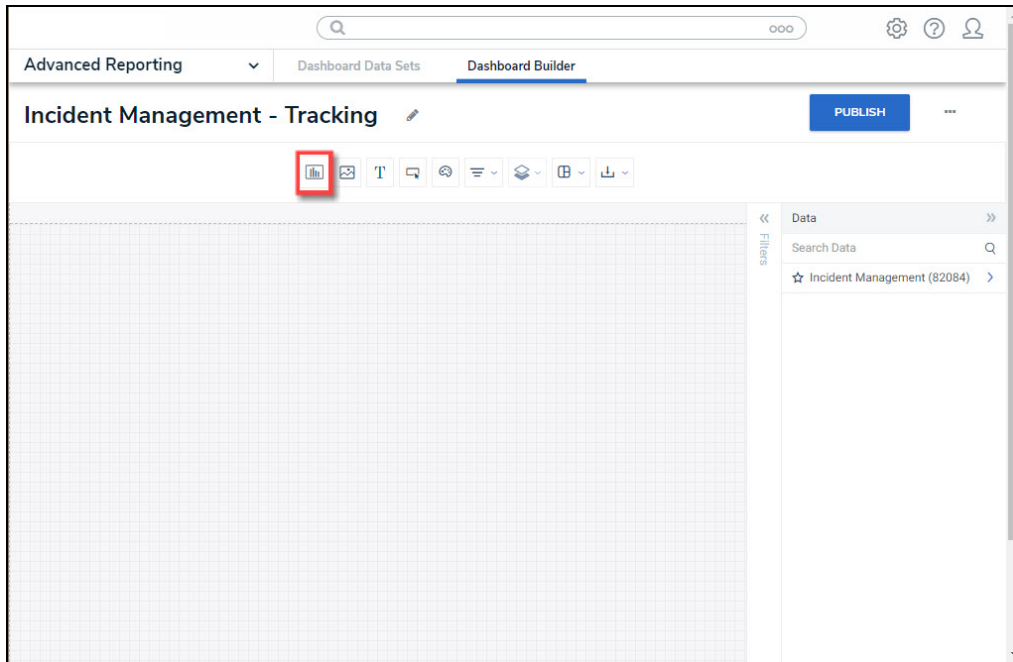
*Dashboard Data Sets Tile*

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



*Dashboard Name*

# Adding a Crosstab Chart to a Dashboard

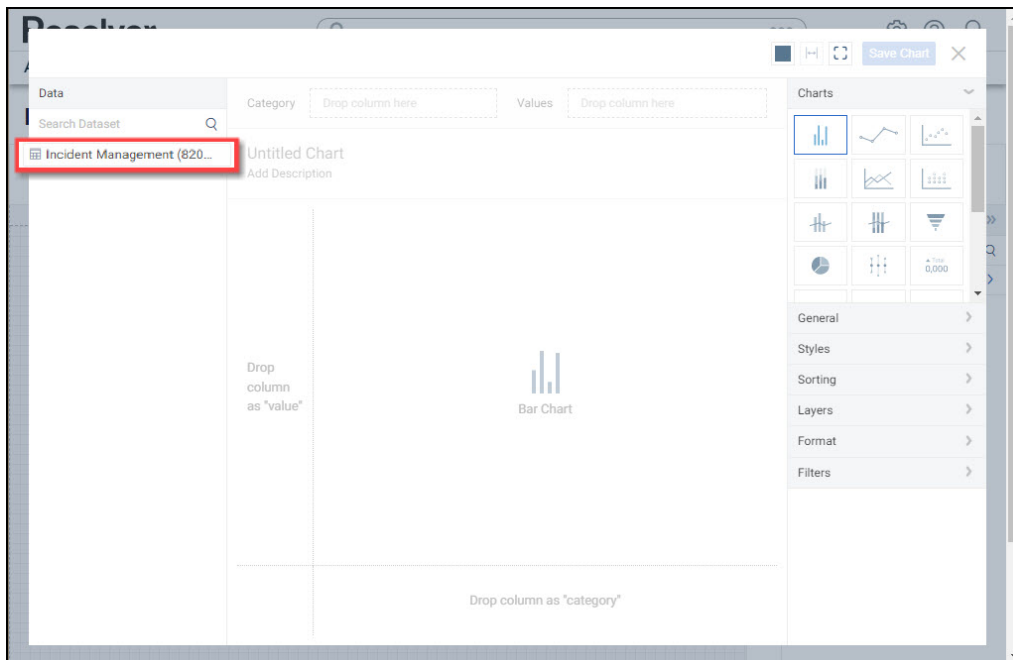1. From the **Canvas Layout** screen, click the **Add Chart** button.

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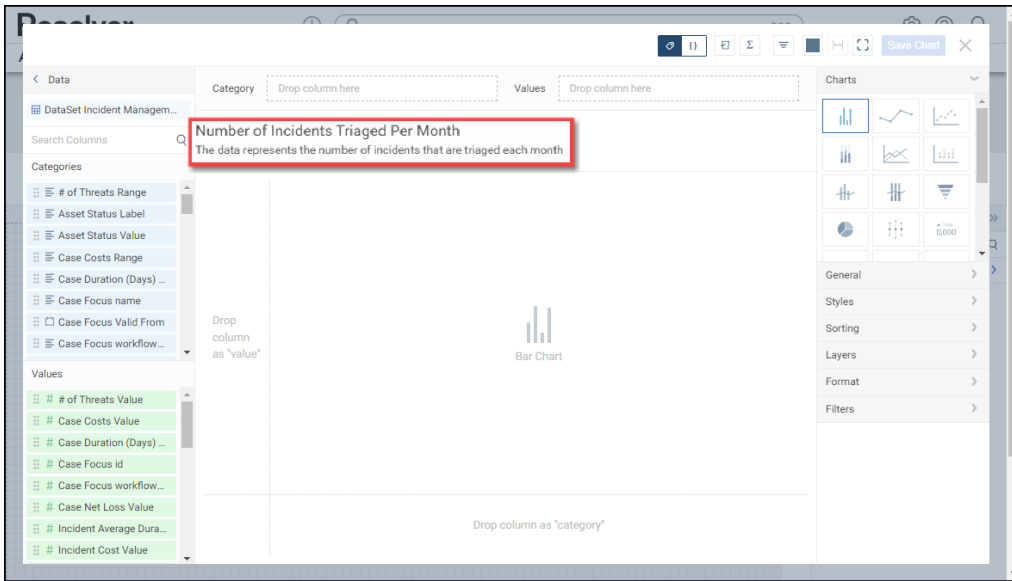
characters will show in the **Chart Header**.



*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**.
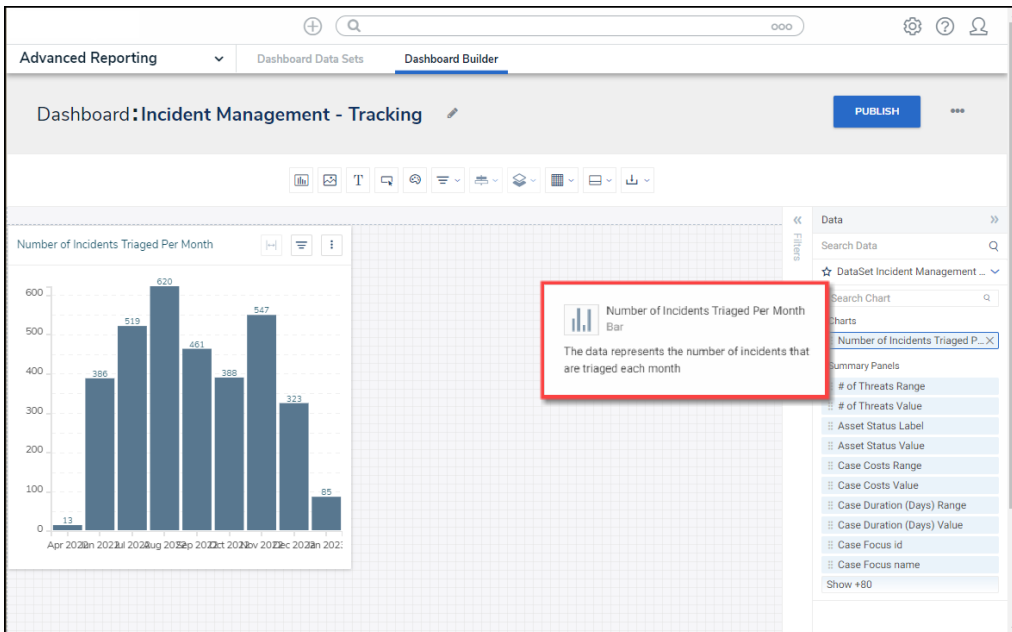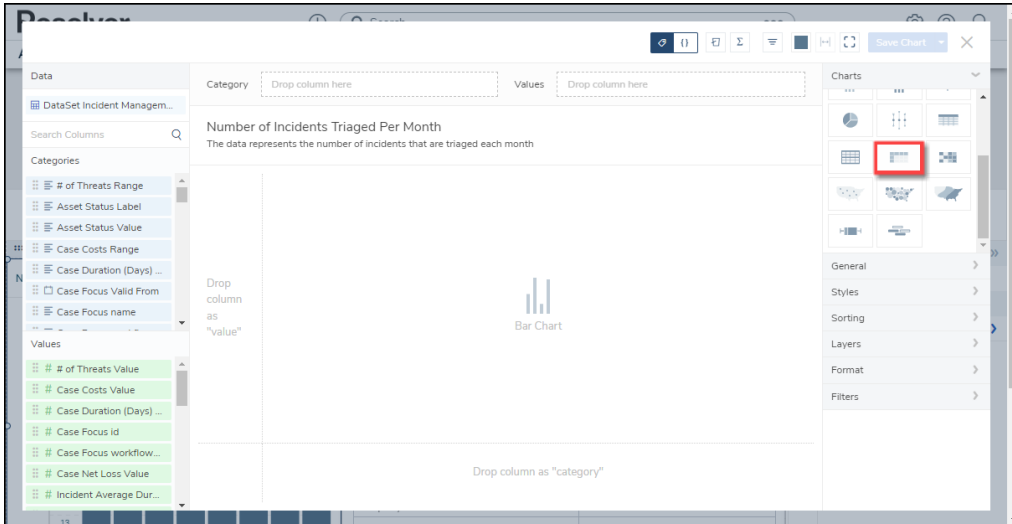


*Chart Description*

5. Select the **Crosstab** tile from the **Charts** panel.

*Crosstab Tile*

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:
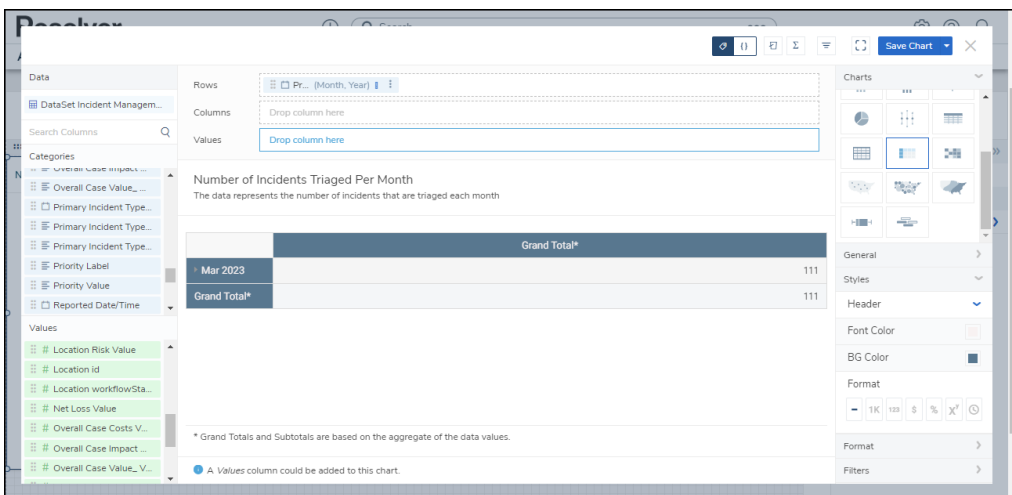
- **Text:** ≣
- **Numeric:** #
- **Date:** ☐

8. Drag and drop a **Category** or **Value** from the **Data Panel** onto the **Rows** section on the left side of the Chart or within the **Row** field.
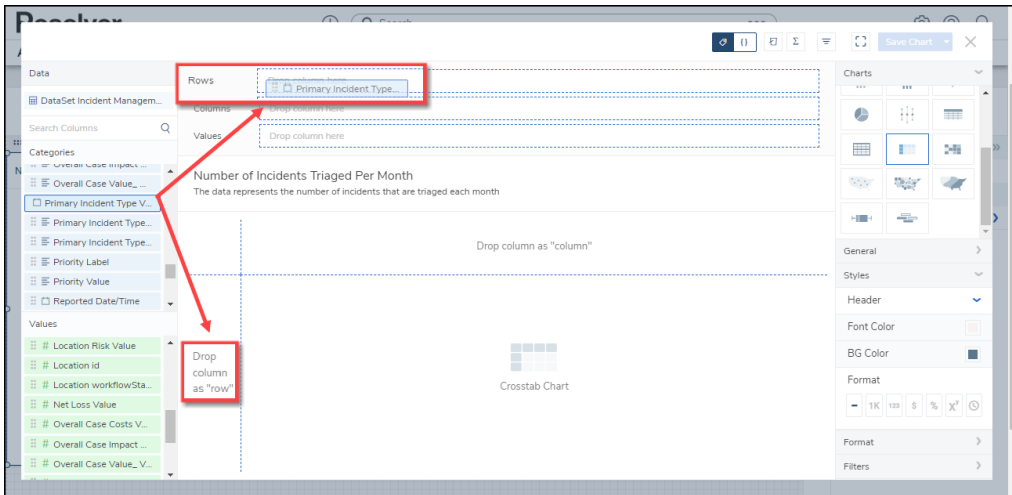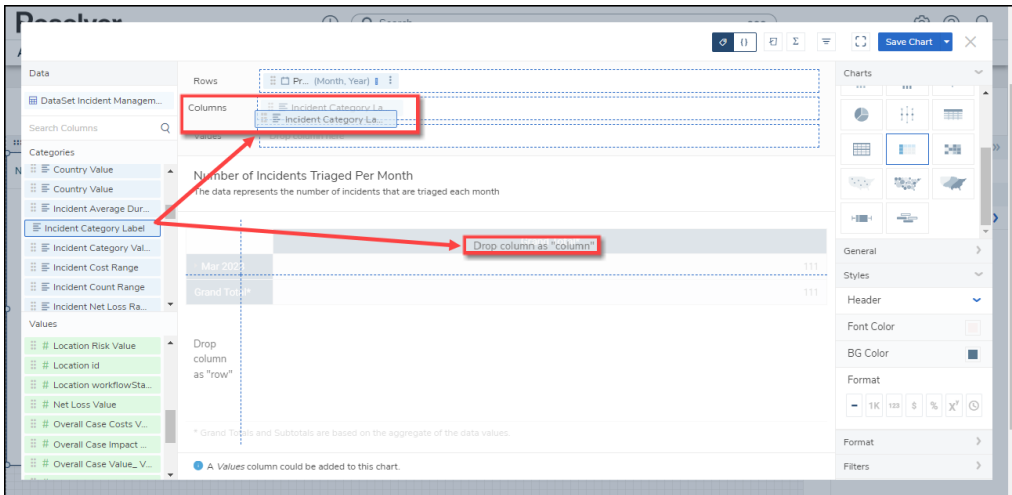
*Drag and Drop a Row*

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



*Data Crosstab*

10. **(Optional)** Add multiple Categories or Values to the **Rows** field to add multiple rows to the Table.

11. Drag and drop a **Category** or **Value** from the **Data Panel** onto the **Columns** area on the left of the Chart or within the **Columns** field.

*Columns Field*

11. **(Optional)** Add multiple Categories or Values to the **Columns** field to add multiple Columns to the Table.

12. Drag and drop a **Category** or **Value** from the **Data Panel** onto the **Value** area on the left of the Chart or within the **Values** field.
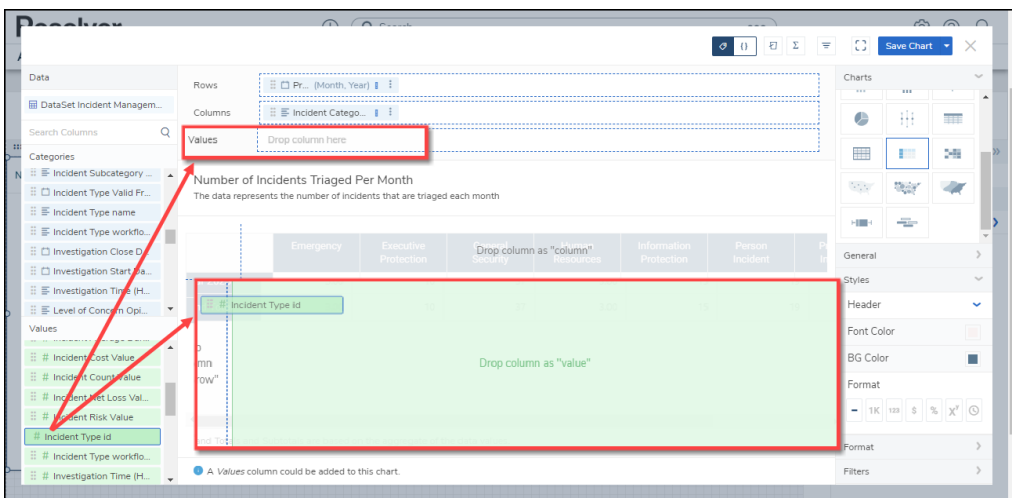


*Values Field*

13. Columns and Rows can be reordered by Dragging and Dropping the Categories or Values in the Rows, Columns, and Value fieldsk, creating a different order.

*Moving Column/Row Order*

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