Adding a Heatmap to a Dashboard

Last Modified on 01/29/2025 4:43 pm EST

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.

Heatmaps are forms of visualization that represent data in colors, mapping ranges of values to ranges of colors. With careful selection of the color spectrum used in a heatmap, higher data values may appear hot and lower values appear cold.

> ⛔ **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 or Data Management advanced permissions to add a Heatmap to a Dashboard.

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 Crosstab to a Dashboard](#)

- [Adding a Map to a Dashboard](#)

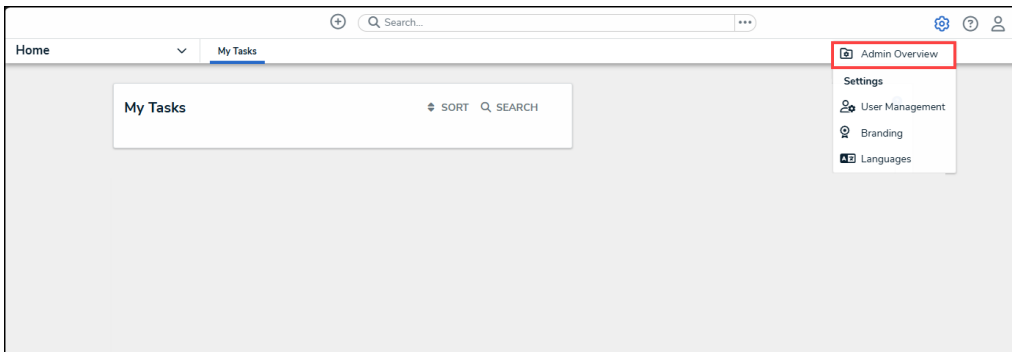- [Adding a Box and Whiskers Chart to a Dashboard](#)

Navigation
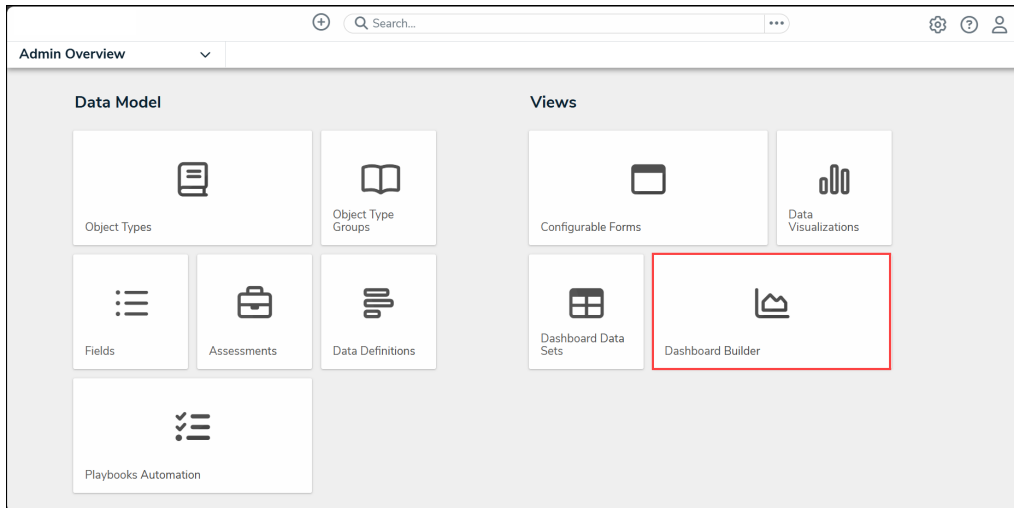
1. From the ***Home*** screen, click the **Administration** icon.
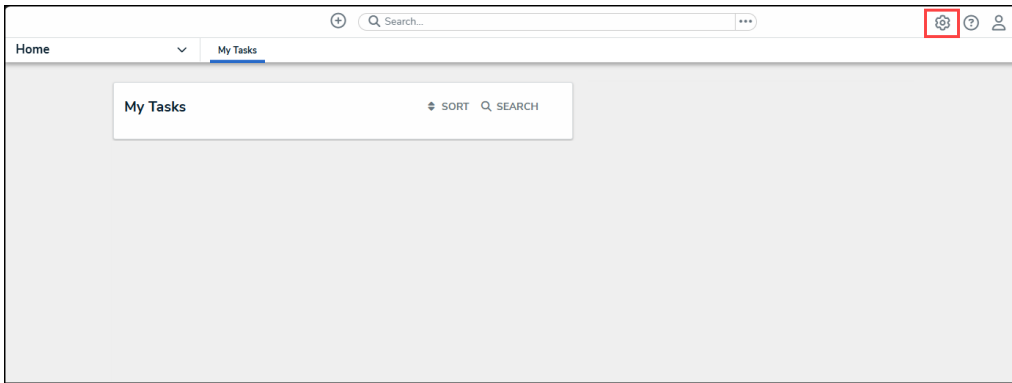
Administration Icon

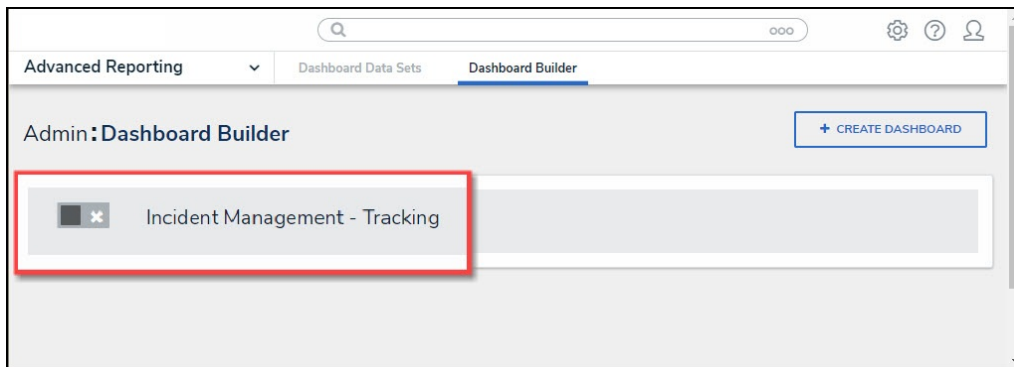2. From the **Administrator Settings** menu, click the **Admin Overview** link.

Administrator Settings Menu

3. From the ***Admin Overview*** screen, click on the **Dashboard Builder** tile under the **Views** section.
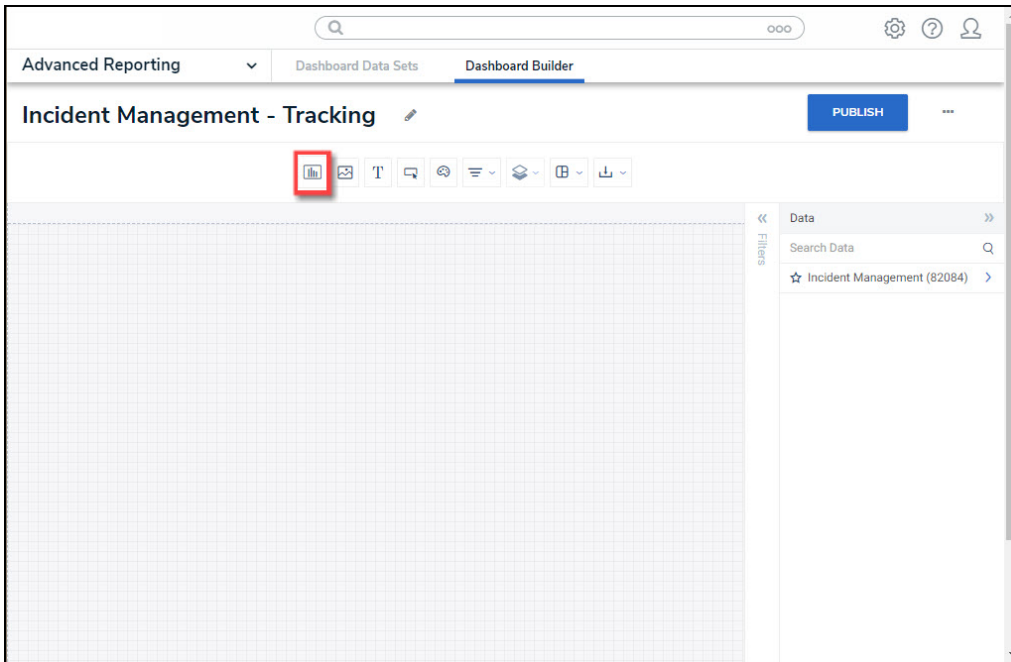
Dashboard Builder Tile

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

Dashboard Name

Adding a Heatmap to a Dashboard

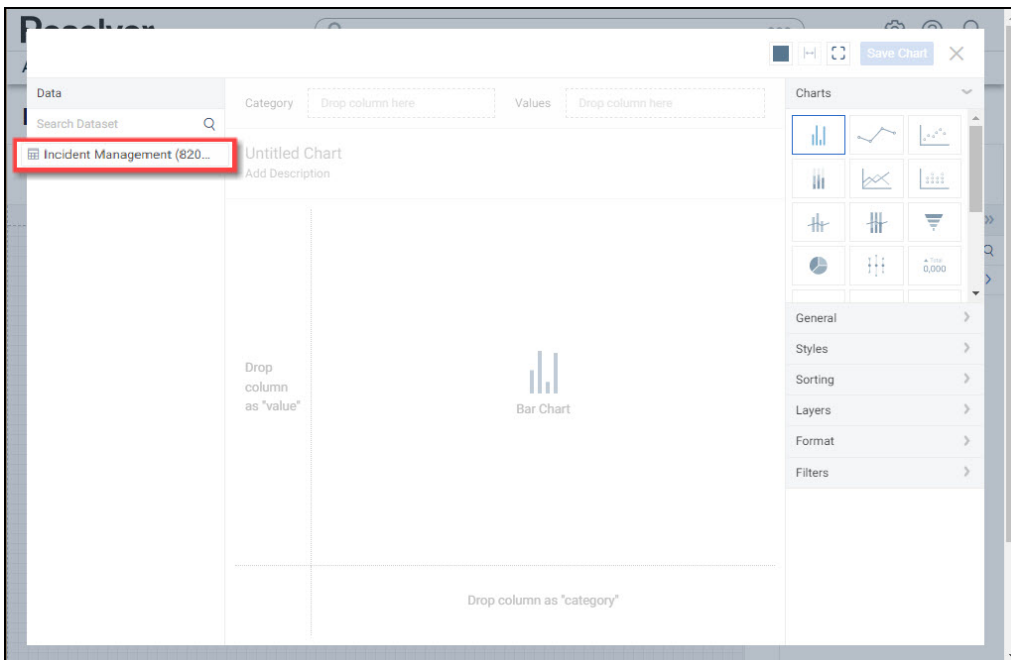1. From the **Canvas Layout** screen, click the **Add Chart** button.

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

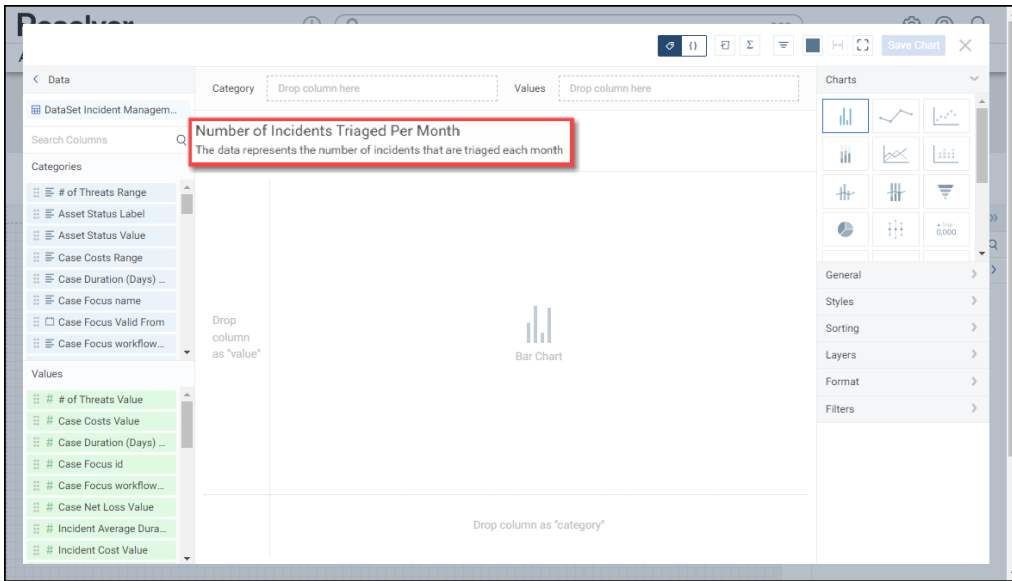characters will show in the **Chart Header**.

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**.
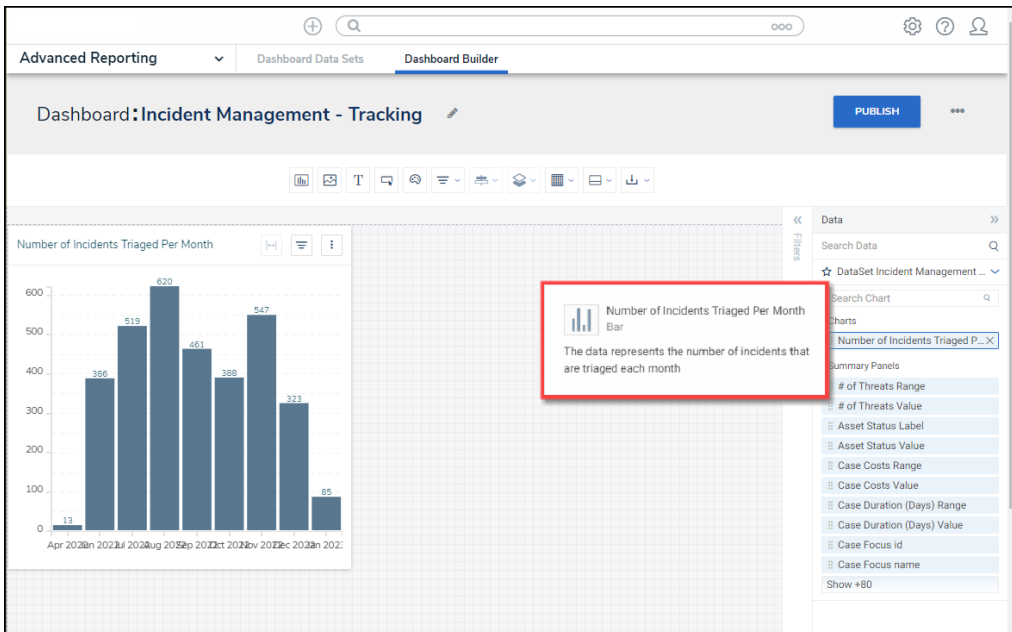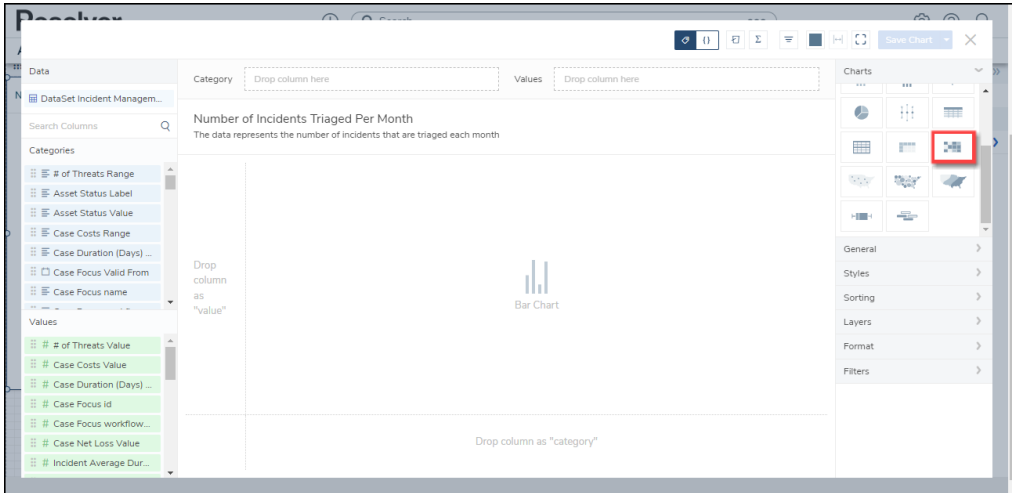

Chart Description

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

Heatmap 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:
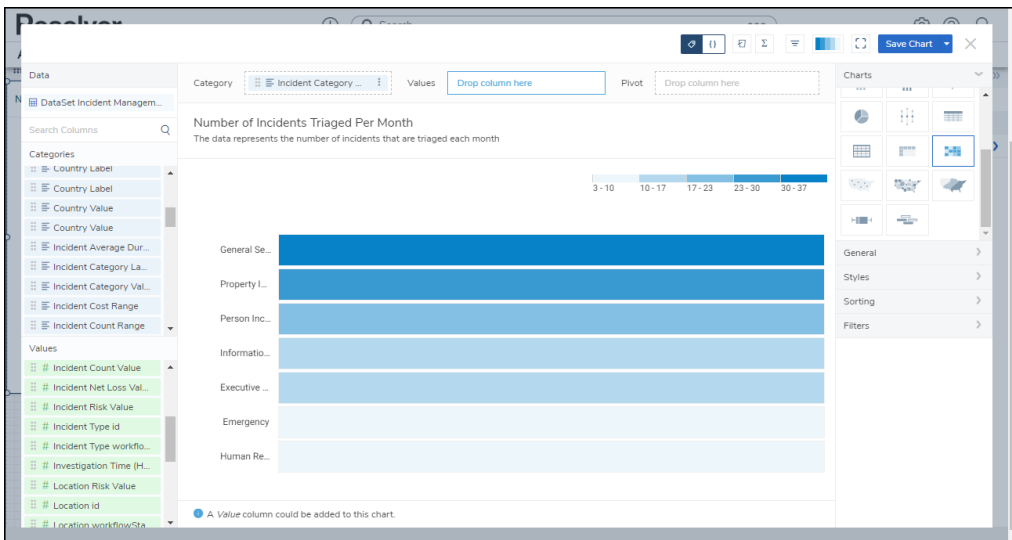
- **Text:**   ≡
- **Numeric:** #
- **Date:**   □

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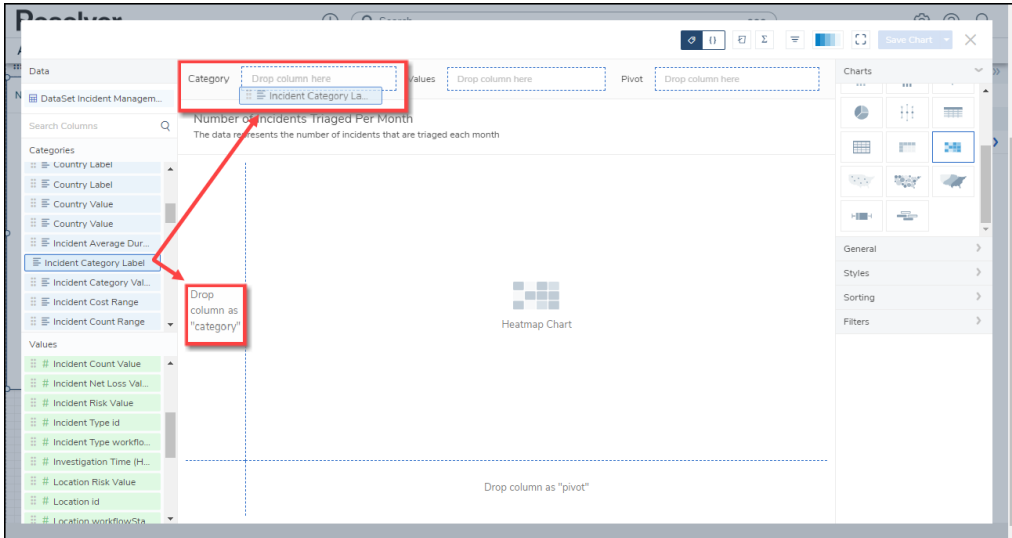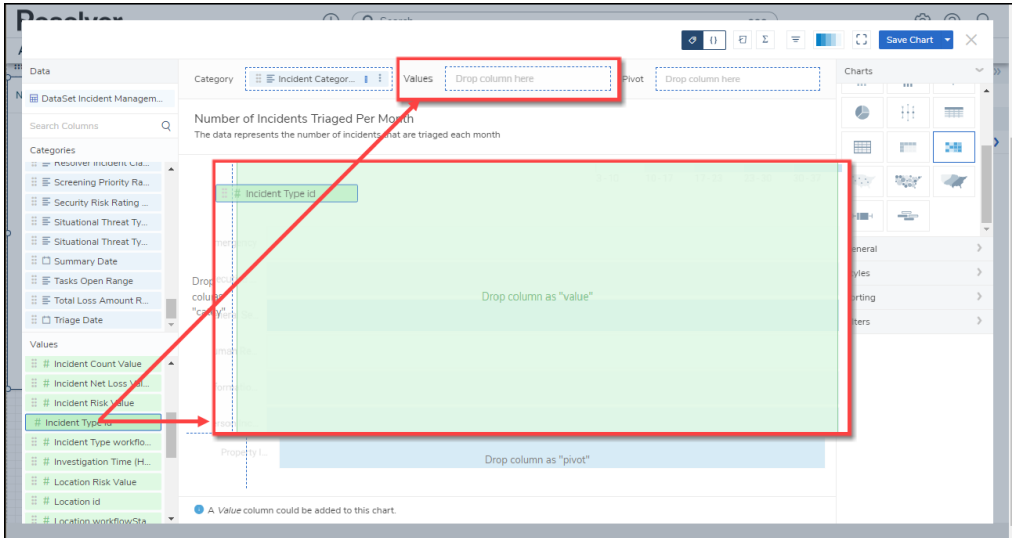
Drag and Drop a Category

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. **(Optional)** Add multiple Categories or Values to the **Category** field to add multiple dimensions.

11. **(Optional)** Drag and drop a **Category** or **Value** from the **Data Panel** onto the **Values** area on the left of the Chart or within the **Values** field. Data entered in the **Values** field is used as the Heatmap measure and is aggregated as needed.

Values Field

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

13. Drag and drop a **Category** or **Value** from the **Data Panel** onto the Pivot area on the left of the Chart or within the **Pivot** field. The **Pivot** field summarizes the Category or Value data.
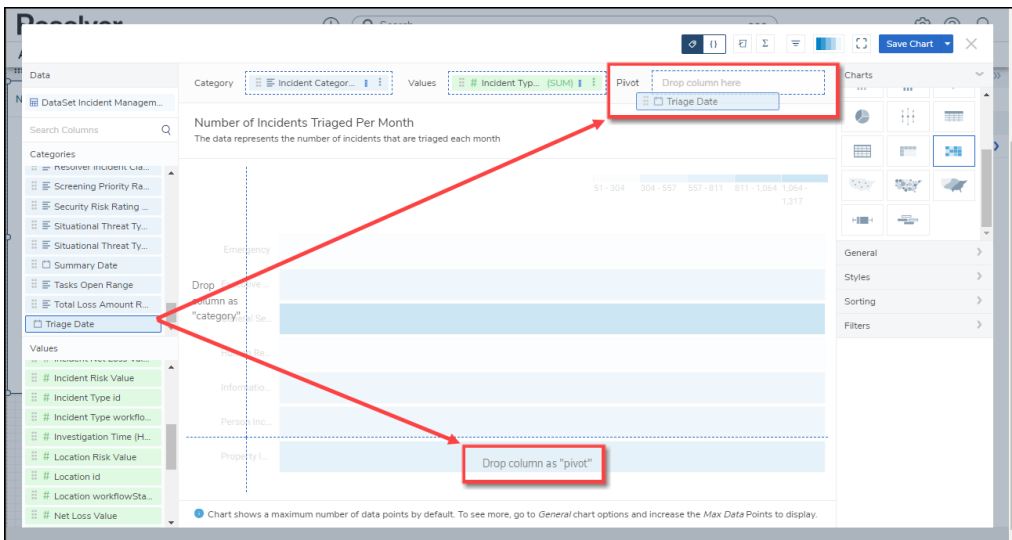
Pivot Field

14. The Categories, Values, and Pivot data will create the Heatmap in the Dashboard Canvas.
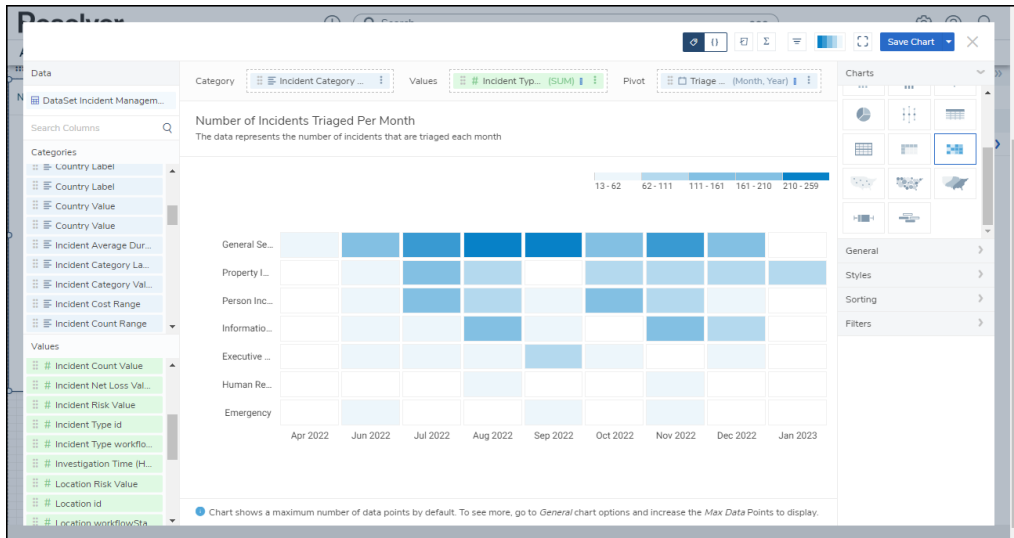
Moving Column/Row Order

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