

Formatting a Chart

Last Modified on 06/26/2024 3:40 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

The Format function on the Chart screen allows users to add formatting to a Chart in two different ways: Small Multiples or Conditional Formatting.



Warning:

All changes or edits made to a Chart are globally applied across all instances of that Chart. [Create a duplicate Chart](#) to apply changes or edits that will not affect the original Chart.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to use the Dashboard Builder.

Related Information/Setup

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

- [Adding Styles to a Chart](#)

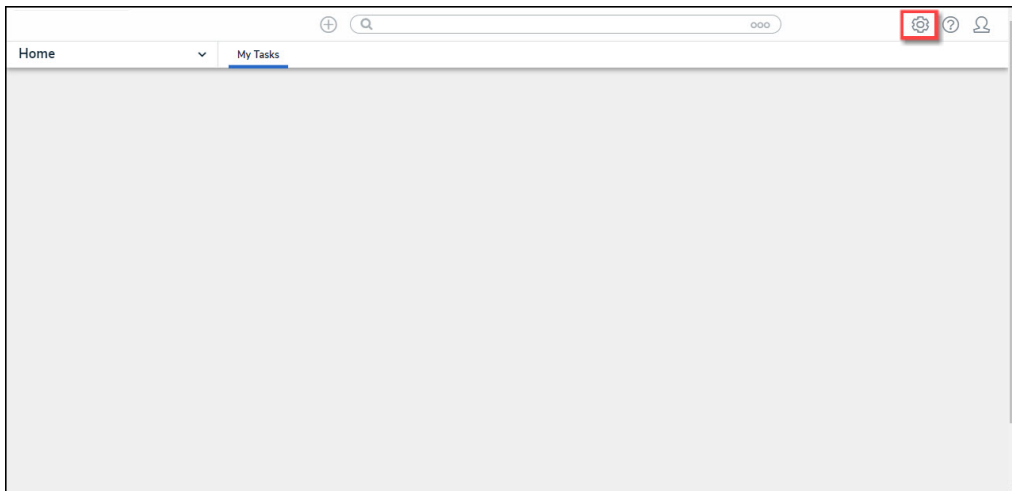
Please see the corresponding articles below for Information on Adding a Chart Type not covered by these instructions.

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

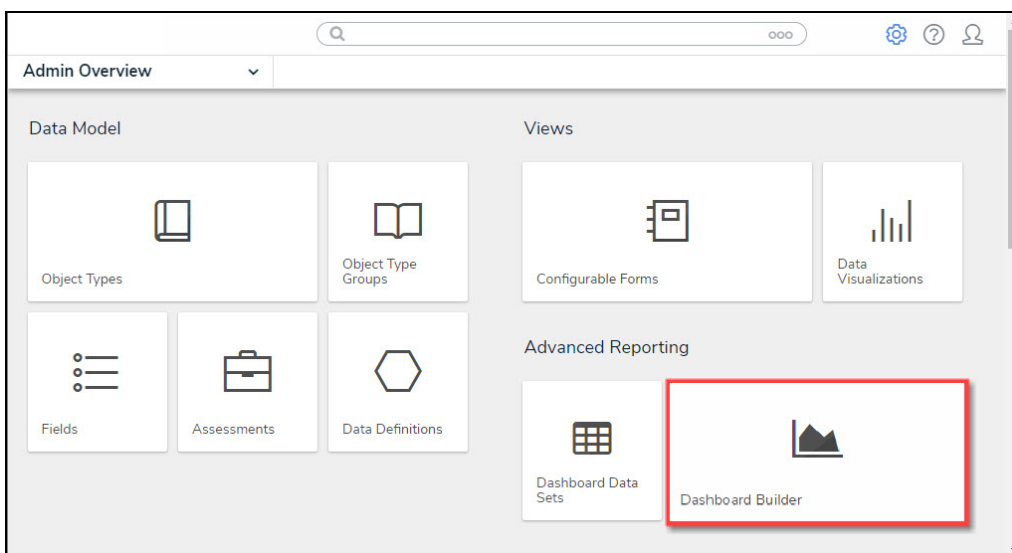
Navigation

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



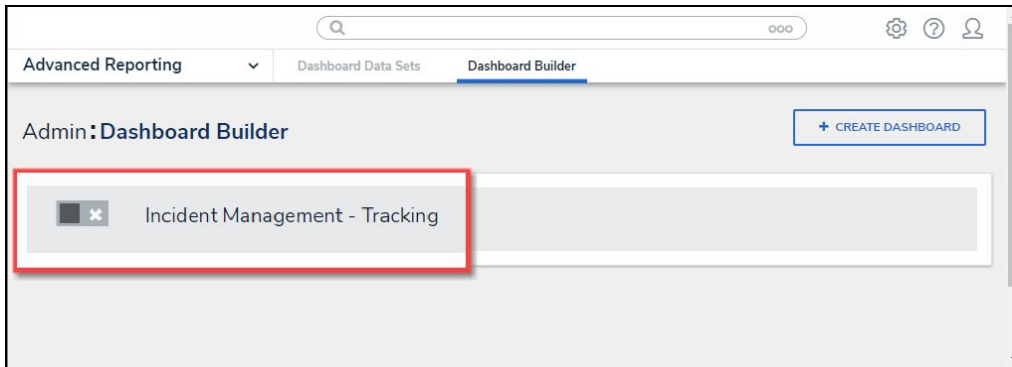
System Icon

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



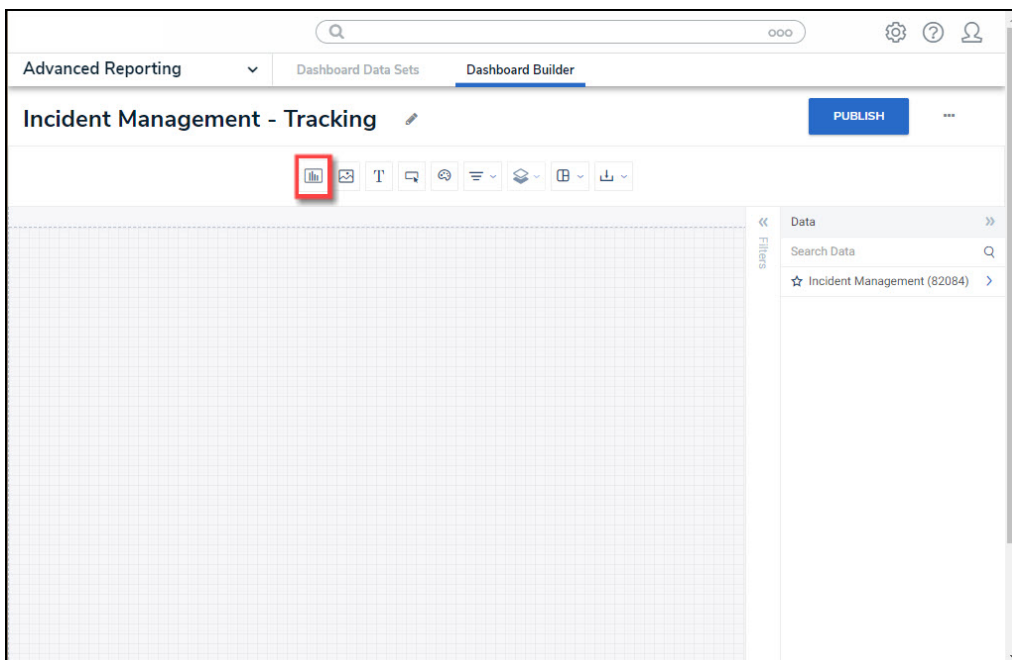
Dashboard Data Sets Tile

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



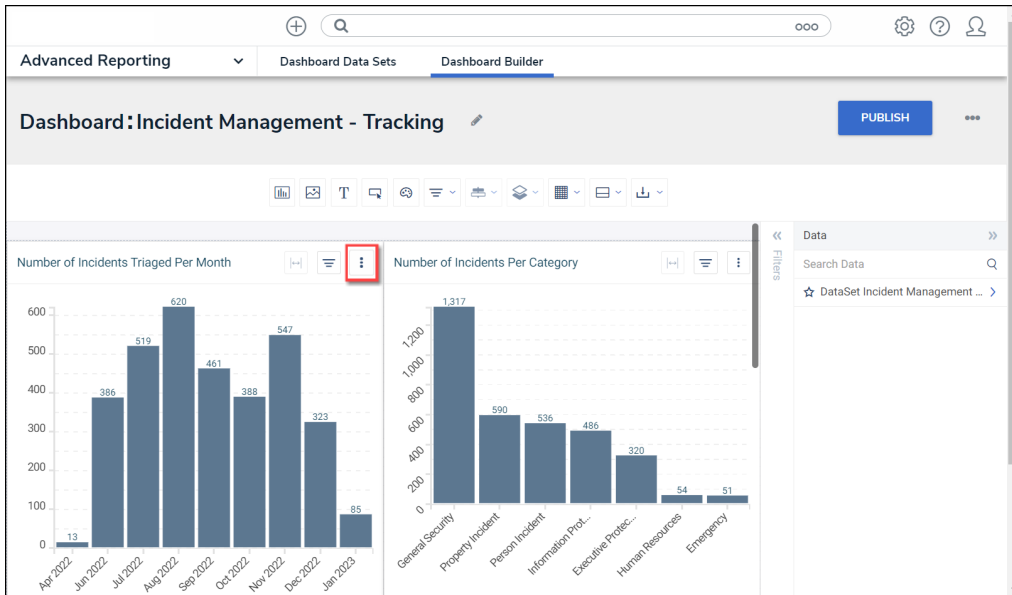
Dashboard Name

4. From the **Dashboard** screen, to access the **Chart** screen, click on the **Add Chart** button.



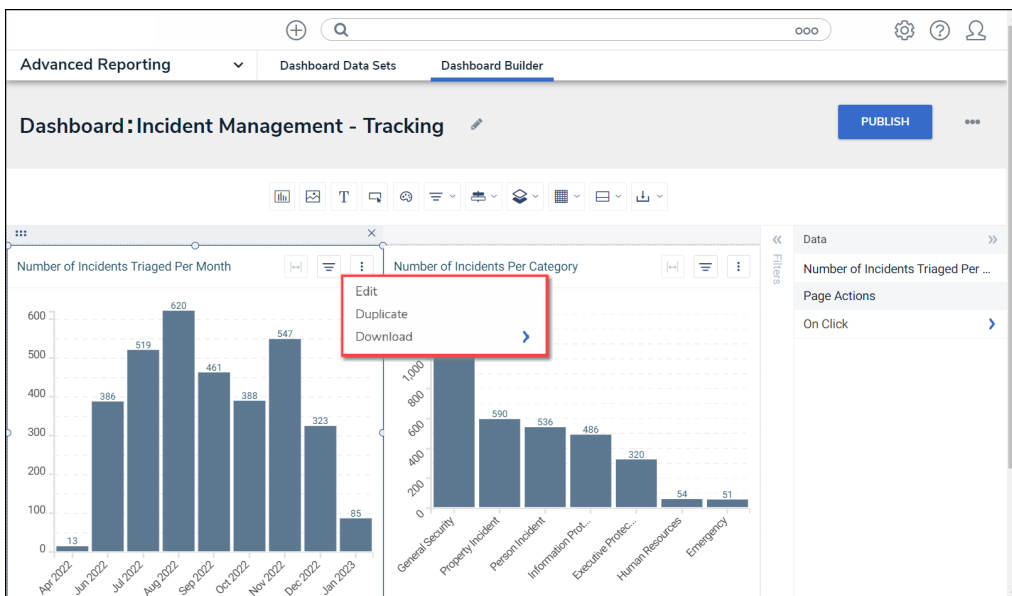
Add Chart Button

5. Or click the **More Options** icon on an existing **Chart View**.



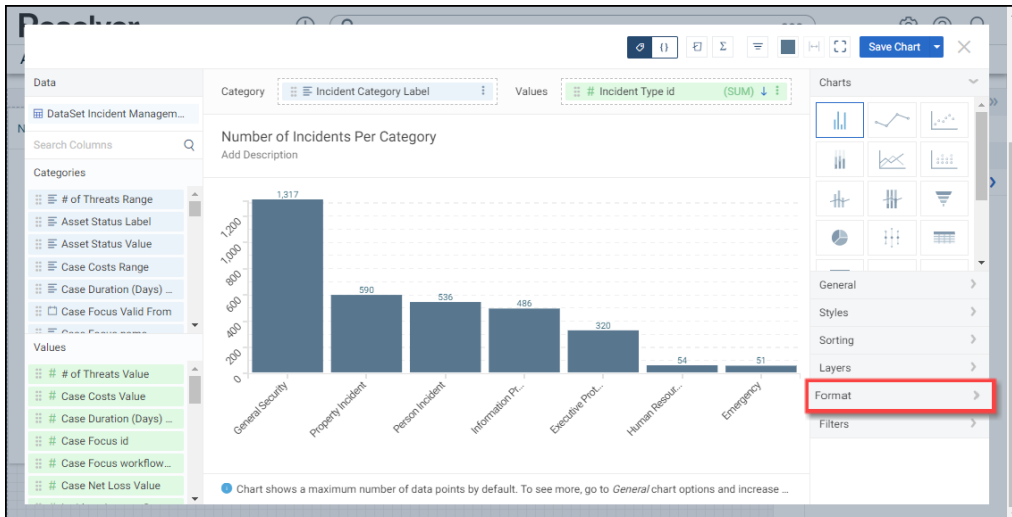
More Options Icon

6. Click the **Edit** option from the **More Options** dropdown menu.



Edit Option

7. From the **Chart** screen, click the **Format** panel from the **Configuration** panel.



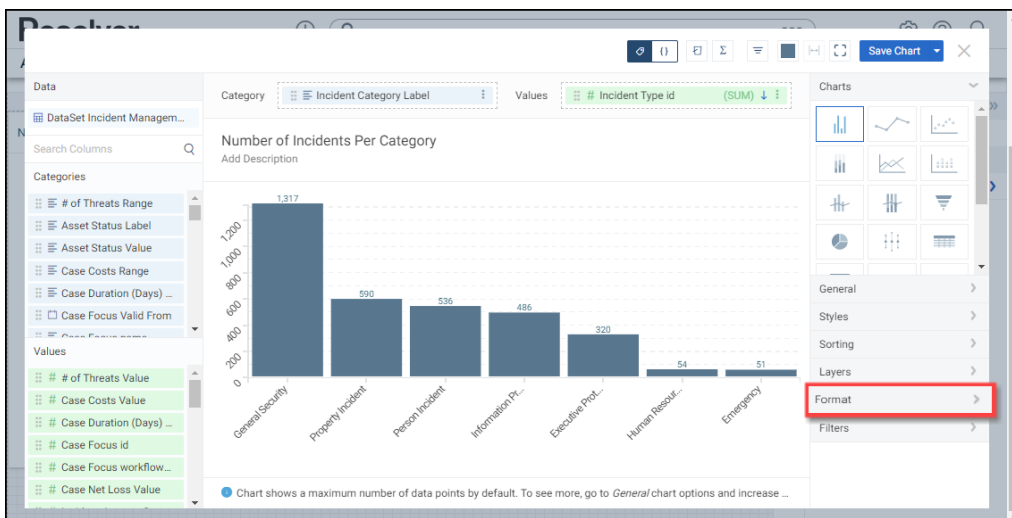
Format Panel

Adding Small Multiples to a Chart

Small Multiples allows a user to create multiple charts using the same data set, scale, and axes to pull out different data groups creating data comparisons between the different Charts. Small Multiples add a new data Column to the Chart used to create the data groups. An example would be sales per month by country, where the country value would be the added Column to a Chart already using sales per month as the Category and Value.

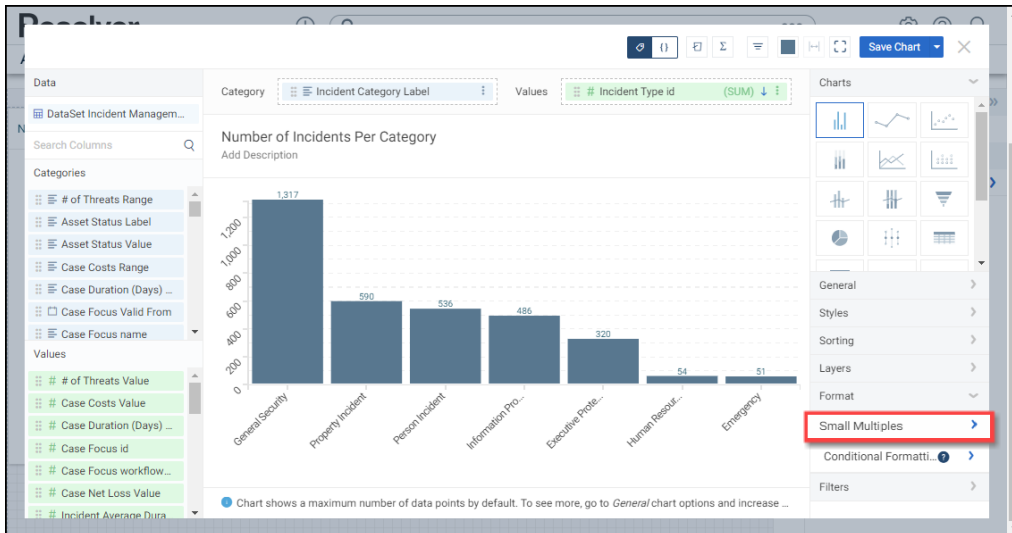
The Small Multiples feature can be applied to Bar, Line, Symbol, Min/Max, Multi-Series Bar, Multi-Series Line, Multi-Series Symbol, and Combo Charts.

1. Click the **Format** panel.



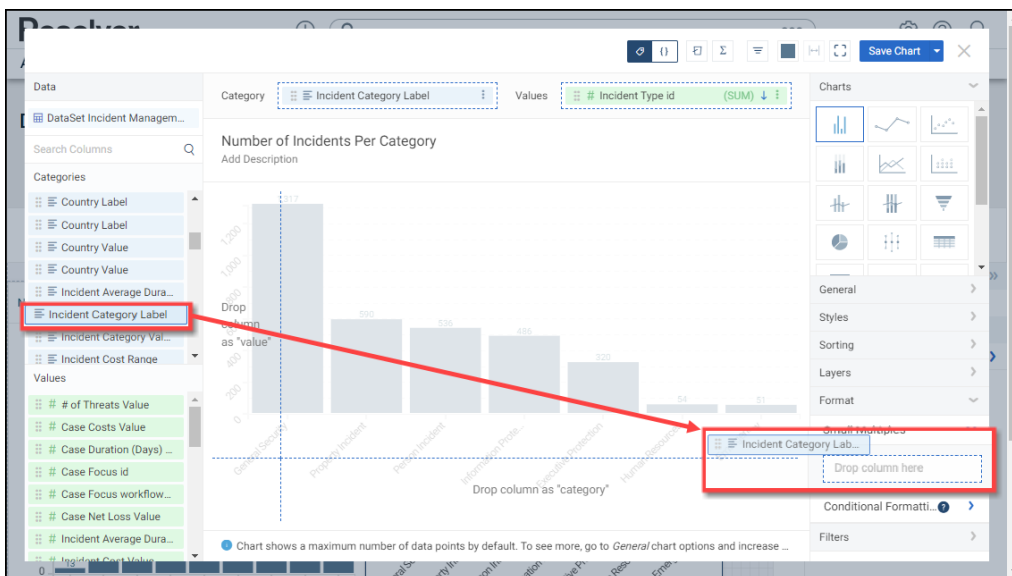
Format Panel

2. Click the **Small Multiples** panel.



Small Multiples Panel

3. Drag and drop a **Category** from the **Categories** panel to the **Drop Column Here** field under the **Small Multiples** panel.



Drag and Drop Category

4. The **Chart** screen will refresh, applying the data value information from the **Small Multiples Column** to the Chart dividing the Chart into multiple Charts based on the number of values in the Small Multiples Column.

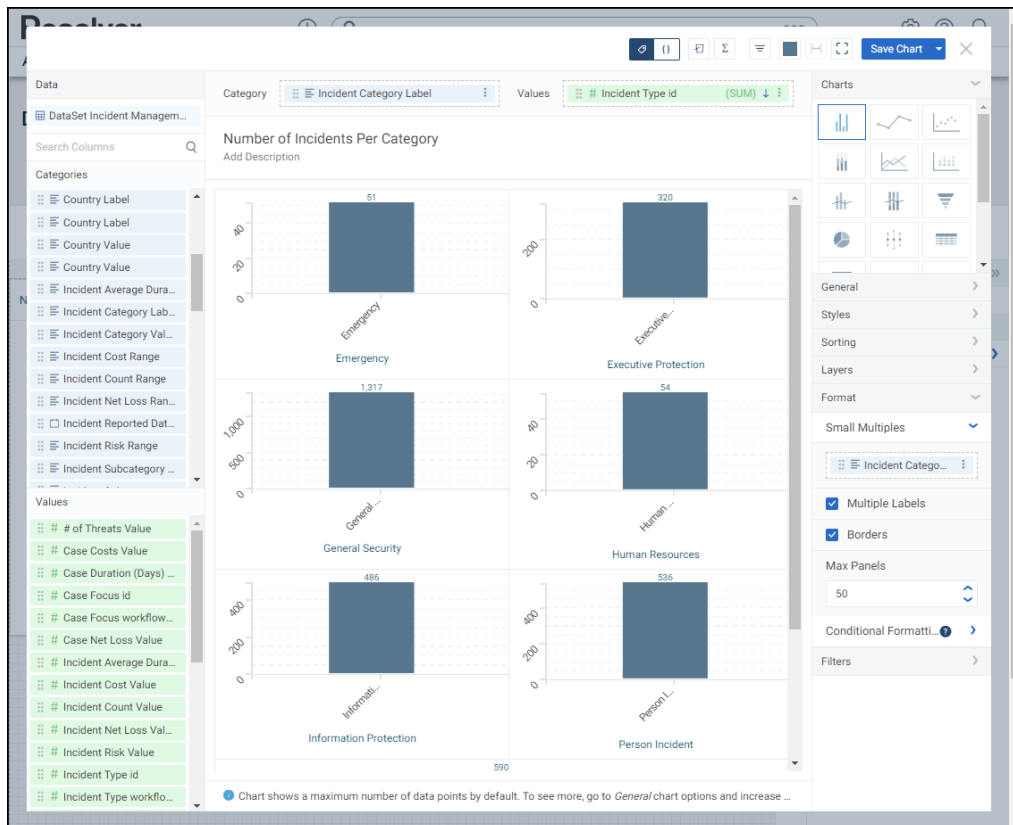
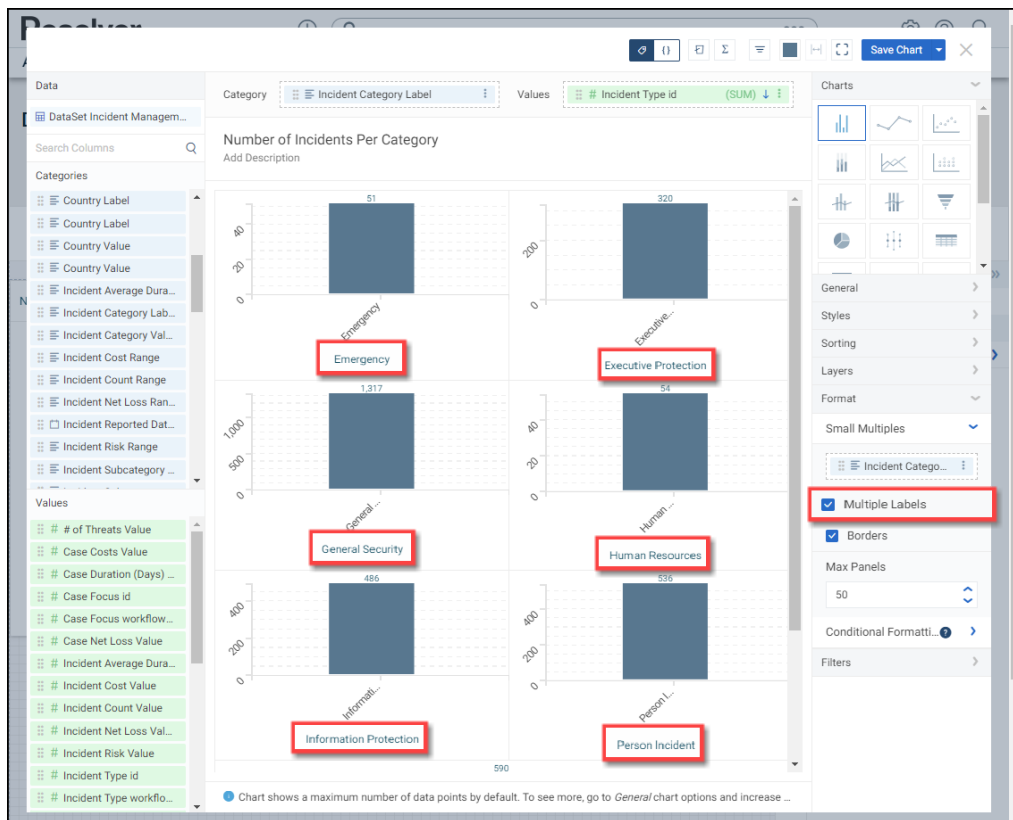


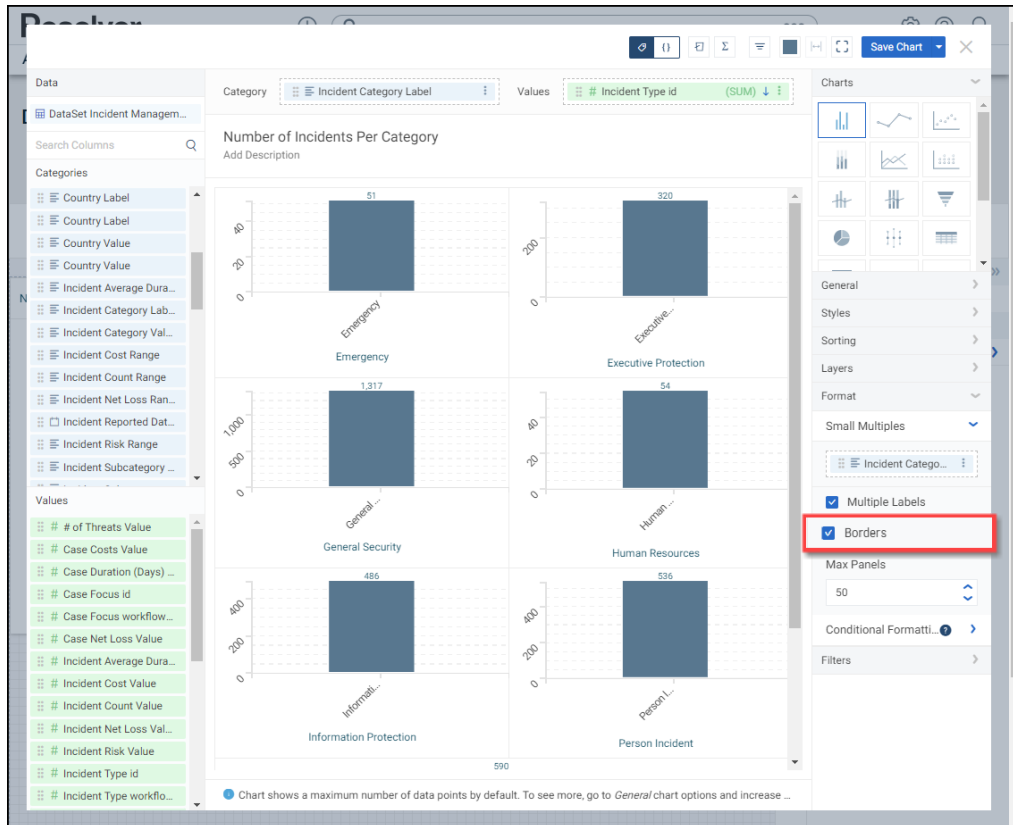
Chart Canvas

5. Click the **Multiple Labels** checkbox to enable or disable the **Small Multiples Column Value** labels on the Chart. By default, the **Multiple Labels** checkbox is enabled.



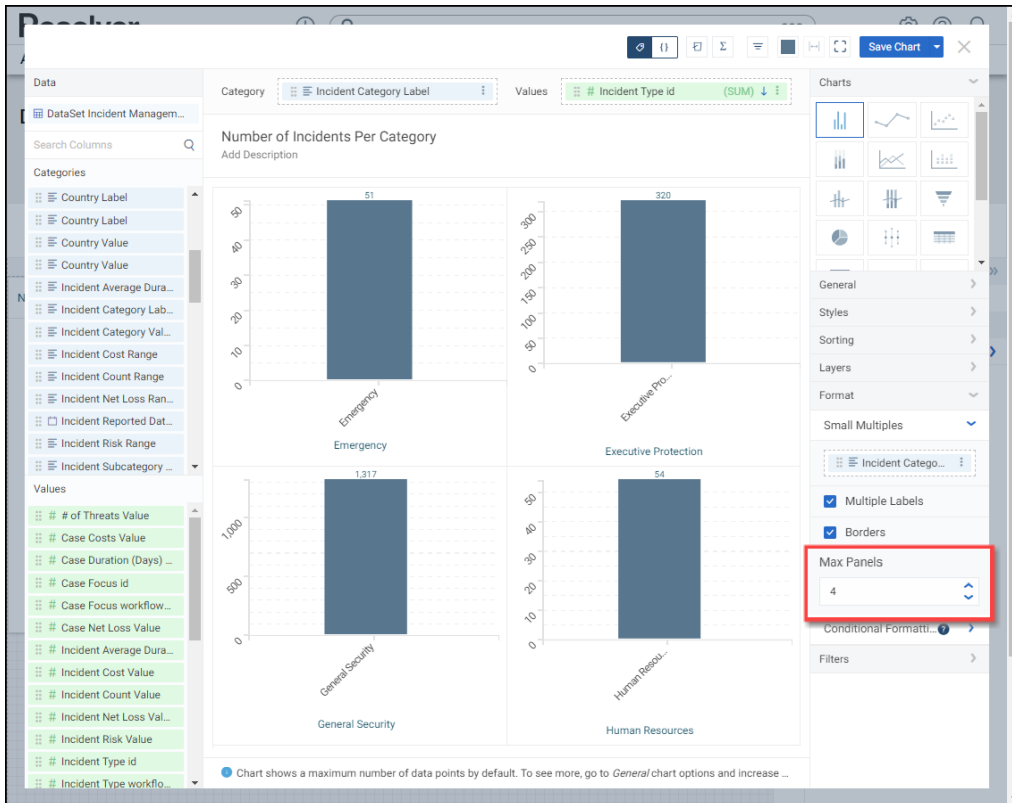
Multiple Labels Checkbox

- Click the **Borders** checkbox to enable or disable borders between the Charts. By default, the **Borders** checkbox is enabled.



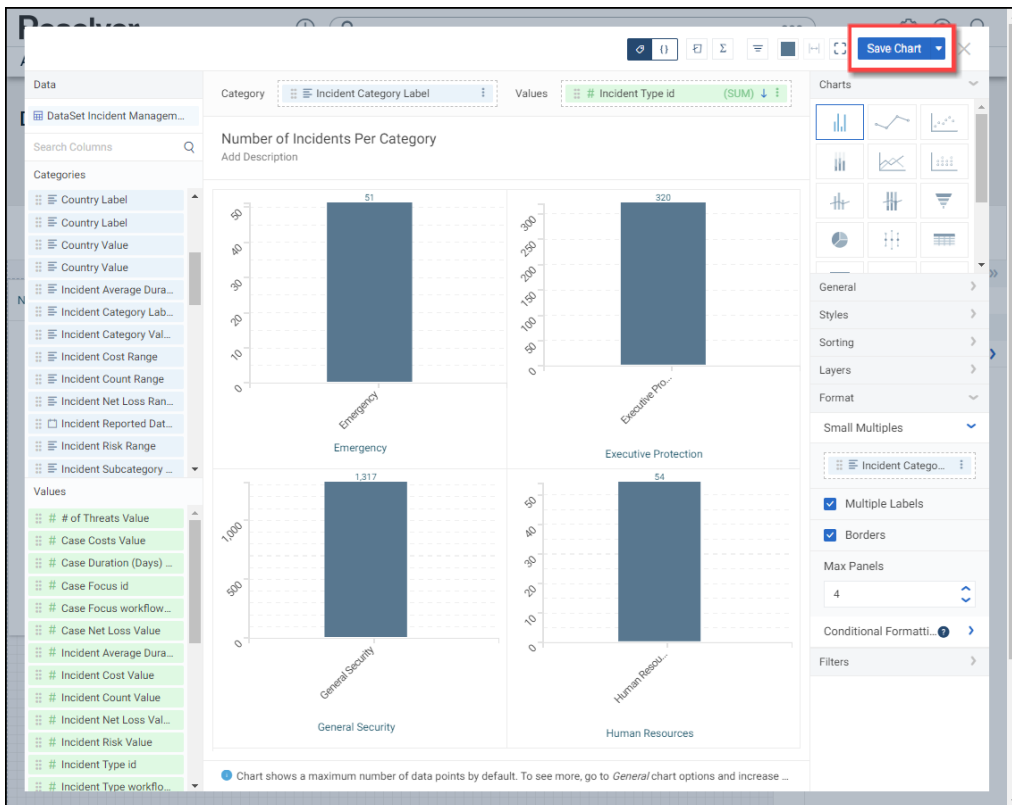
Borders Checkbox

- Click the **Max Panels** field and enter the number of panels you want to display on the Chart, or use the increase and decrease arrows to adjust the Max Panels value. The **Max Panels** field controls the number of Charts that appear on the Chart Canvas. By default, the **Max Panels** field is set to 50.



Max Panels Field

8. Click the **Save Chart** button to save changes to the Chart.



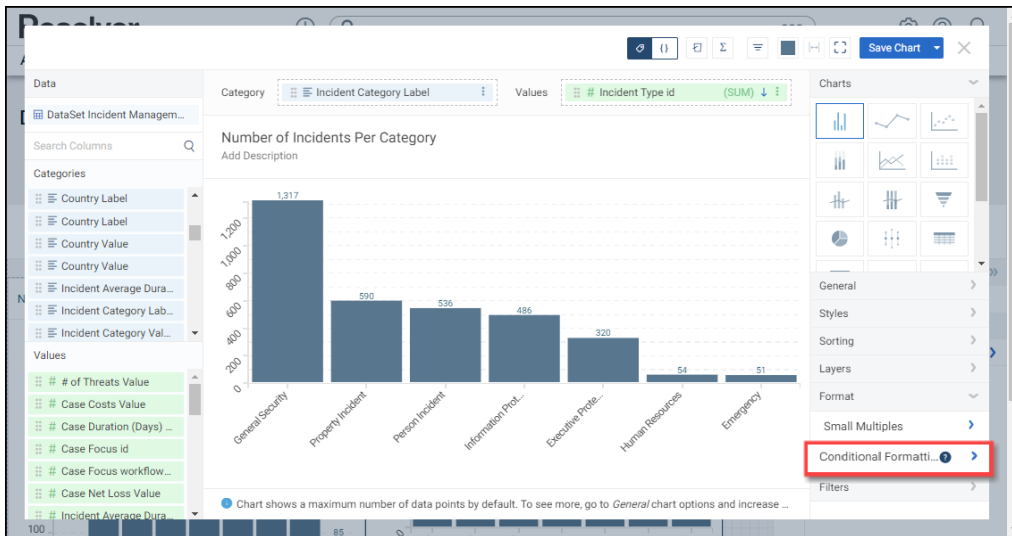
Save Chart Button

Adding Conditional Formatting to a Chart

The Conditional Formatting feature allows users to apply a style to the chart when the data meets certain criteria defined in a condition.

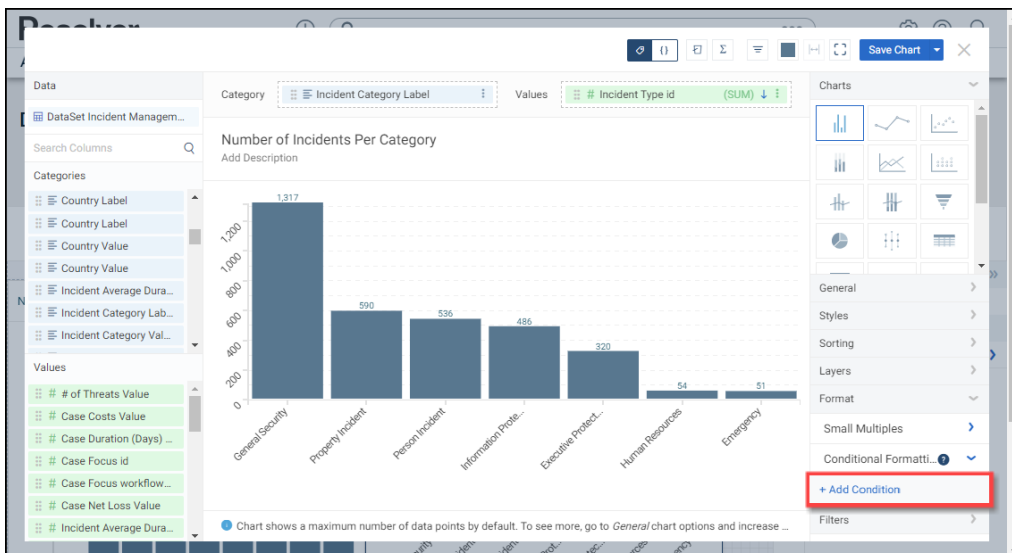
The Conditional Formatting feature can be applied to Bar, Line, Symbol, Table, Expandable Table, Crosstab, Multi-Series Bar, Multi-Series Line, Multi-Series Symbol, Combo, Dot Map, Bubble Map, Funnel, and Pie Charts.

1. Click the **Conditional Formatting** panel.



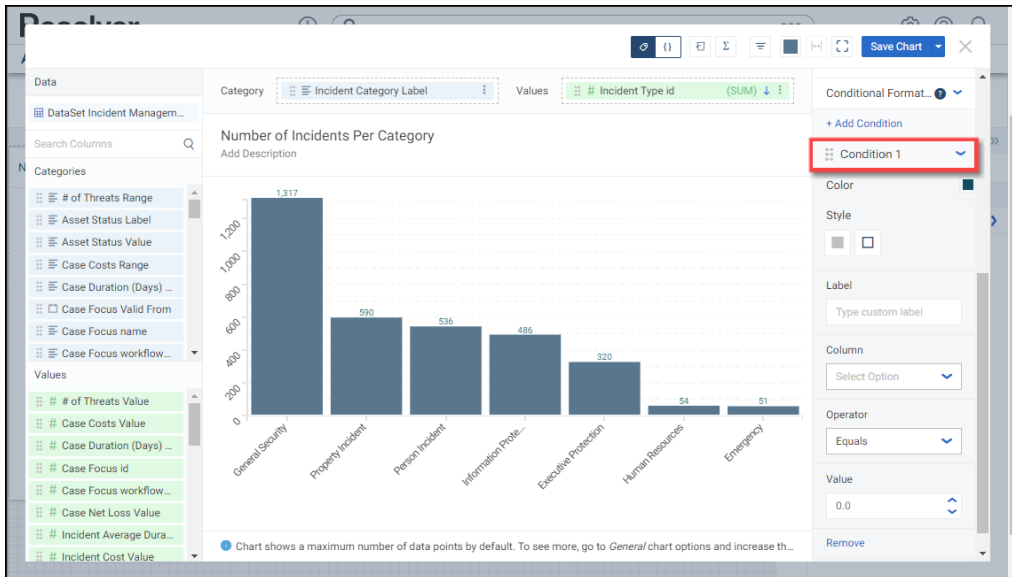
Conditional Formatting Panel

2. Click the **+Add Conditional** link.



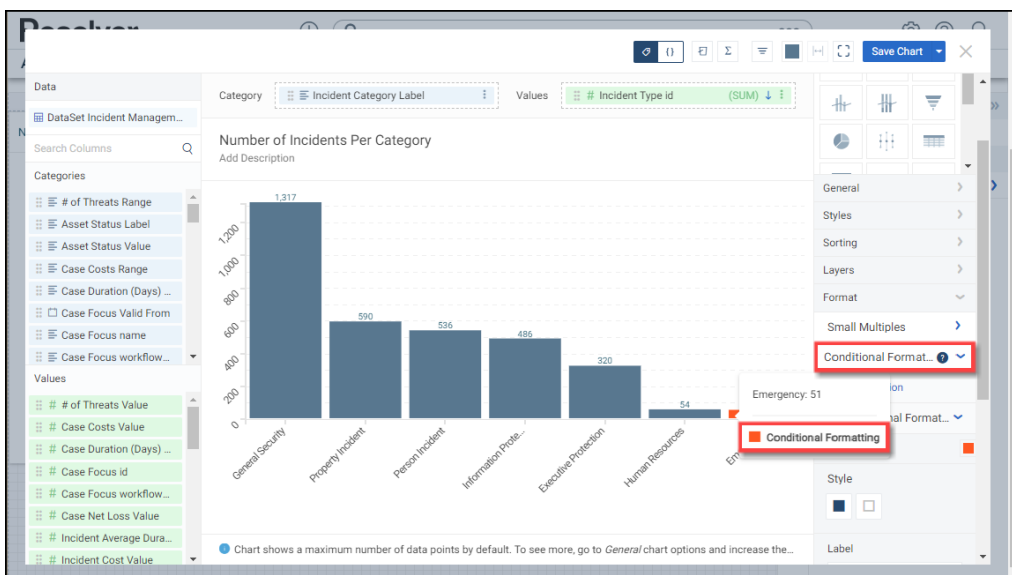
+Add Conditional Link

3. A new **Condition** panel will appear under the **Conditional Formatting** panel called **Condition 1**. Click the **Condition 1** panel to open the condition options:



Condition 1 Panel

- **Color:** The **Color** option allow users to select a color from the color palette to represent the Condition on the Chart when the criteria is met.
- **Style:** The **Style** option allows users to select the style the Condition uses when applied to the Chart (filled or outlined).
- **Label:** Select the **Label** field and enter a Conditional label. The **Label** option allows users to add a custom label for the Condition. The Label will replace the default Condition 1 label used on the panel and appear on a **Tooltip** when hovering over a Condition on the Chart.

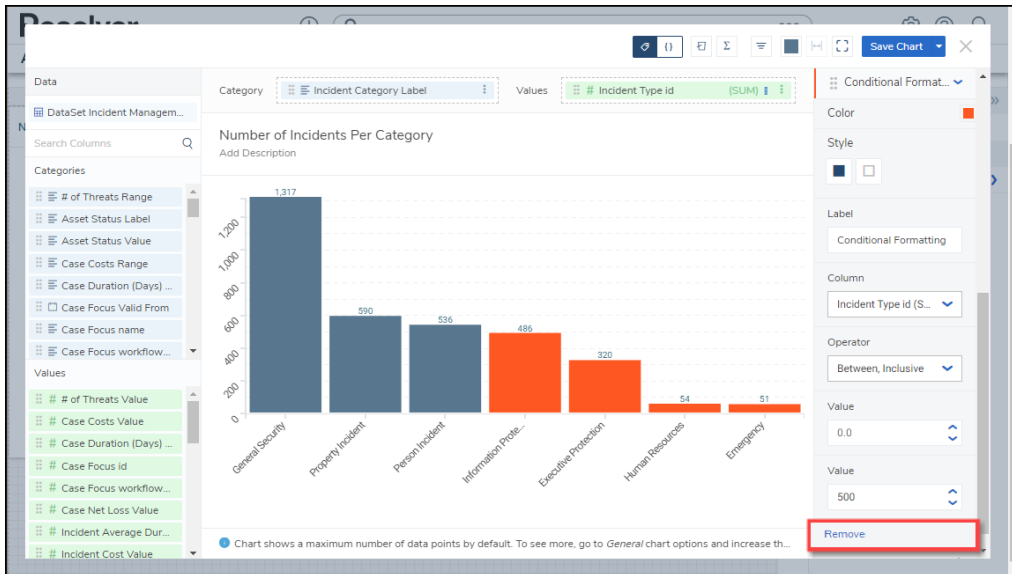


Label

- **Column:** Select a **Column** from the **Column** dropdown. The Conditional Formatting is applied to the Column selected.

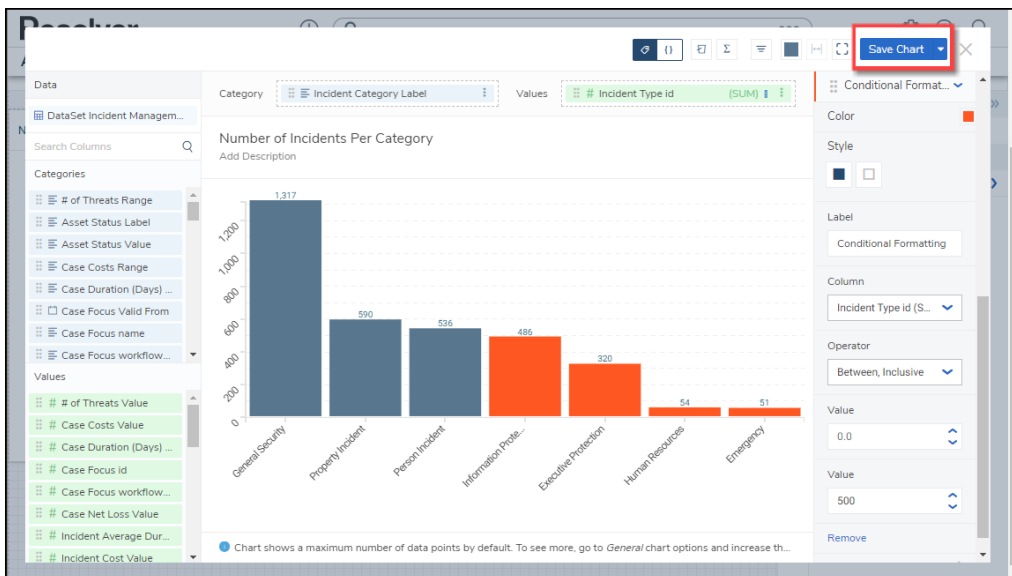
- **Operator:** Select an **Operator** from the **Operator** dropdown. The Operator is applied to the value to create the Condition that must be met for the formatting to appear on the Chart.
 - **Equals:** If a value(s) on the Chart equals the Value in the **Value** field, the Condition is met.
 - **Does Not Equal:** If a value(s) on the Chart does not equal the Value in the **Value** field the Condition is met.
 - **Less Than:** If a value(s) on the Chart is less than the Value in the **Value** field, the Condition is met.
 - **Greater Than:** If a value(s) on the Chart is greater than the Value in the **Value** field, the Condition is met.
 - **Less Than or Equal to:** If a value(s) on the Chart is less than or equal to the Value in the **Value** field, the Condition is met.
 - **Greater Than or Equal to:** If a value(s) on the Chart is greater than or equal to the Value in the **Value** field, the Condition is met.
 - **Between, Inclusive:** If a value(s) on the Chart is within the value range, including the edge values, the Condition is met (e.g., 0 - 500, will include the edge values 0 and 500). An extra **Value** field is added when using Between, Inclusive, which allows users to create a value range by entering a numerical value in each **Value** field. The first **Value** field is the min value in the range.
 - **Between, Exclusive:** If a value(s) on the Chart is within the value range, excluding the edge values, the Condition is met (e.g., 0 - 500, will exclude the edge values 0 and 500). An extra **Value** field is added when using Between, Exclusive, which allows users to create a value range by entering a numerical value in each **Value** field. The first **Value** field is the min value in the range.
 - **Is Null:** If a value(s) on the Chart equals null (0), the Condition is met. The **Value** field is removed and is not used when **Is Null** is selected.
 - **Is Not Null:** If a value(s) on the Chart does not equal null (0), the Condition is met. The **Value** field is removed and is not used when **Is Not Null** is selected.
- **Value:** Enter the value(s) the Condition must meet for the Formatting to apply to the Chart.
- **Apply to:** Select an **Apply to** option from the dropdown menu. The **Apply to** option will appear for certain Charts (e.g., Tables). The Apply to option allows users to select the area of the Chart that the Conditional Formatting will apply (e.g., Entire Row or specific column).

4. Click the **Remove** link to delete the Conditional Formatting from the Chart.



Remove Link

5. Click the **Save Chart** button to save changes to the Chart.



Save Chart Button