

Adding an Expandable Table 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.

Expandable Tables group banded reports. Each row presents a distinct value from the grouping field with special formatting highlighting the value. The number of detail records associated with the grouped value is displayed in parentheses adjacent to the grouped values. Expandable tables are useful for organizing datasets with many rows, as multiple detail rows are collapsed by default.



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 an Expandable Table 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

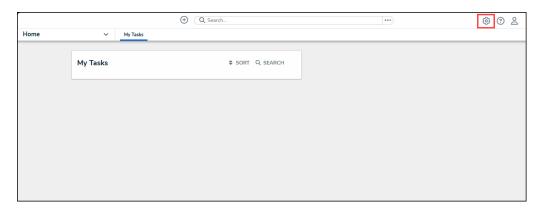


Please see the corresponding articles below for Information on Adding a Chart Type not covered by these instructions.

- Adding a Chart to a Dashboard
- Adding a Multi-Series Chart to a Dashboard
- Adding a Combo Chart to a Dashboard
- Adding a 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 **Administration** icon.



Administration Icon

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

		(Q Search	•••	\$ (?) \$
Home	✓ My Tasks		ſ	Admin Overview
				Settings
	My Tasks	\$ SORT Q SEARCH		💁 User Management
			9	2 Branding
			1	az Languages

Administrator Settings Menu

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



			€ Q Search		•	••	Ę) () 0
Admin 0	Overview	~		 					
	Data Model			Views					
	Object Types		Object Type Groups	Configurable Forms		Data Visualizations			
	Fields	Assessments	Data Definitions	Dashboard Data Sets	Dashboard Builder	<u> </u>			
	Playbooks Automatic	Dn							

Dashboard Builder Tile

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

	Q		000	\$ \$ \$ \$
Advanced Reporting ~	Dashboard Data Sets	Dashboard Builder		
Admin : Dashboard Builder			+ CRE	ATE DASHBOARD
📕 🗴 Incident Manage	ment - Tracking			
		_		

Dashboard Name

Adding an Expandable Table to a Dashboard

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



	(Q		0	···	ß
Advanced Reporting	✓ Dashboard Data Sets	Dashboard Builder			
Incident Manageme	nt - Tracking 🛛 🖉			PUBLISH	
	🖿 🖂 T 🗔 @) ≡·\$~B~L~			
				Data	»
			Filters	Search Data	Q
			0	☆ Incident Management (820	84) >

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.

Pasaluar				~	0	\cap
,			H ()	Save C	hart X	
Data	Category	egory Drop column here Values Drop column here titled Chart Description				
Search Dataset Q	Dataset Category Drop column here Values Drop column here Values Untitled Chart Add Description H H H ♥ Offereral Styles Sorting Sorting Sorting Sorting Format Filters	ıl.l	\checkmark	4 ⁴ 4 ⁴ 4	1	
⊞ Incident Management (820						
			#	#	Ŧ	»»
			0		0,000	Q >
			General			>
	Drop	11	Styles			>
	column	Ibl	Sorting			>
	as "value"	Bar Chart	Layers			2
			Format			2
			Filters			>
		Drop column as "category"				

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**.

Peeelver				6		\cap
		σ () Ε Σ Ξ		Save 0	hart 💙	×
< Data	Category	Drop column here Values Drop column here	Charts			~
DataSet Incident Managem.			- dd	\sim	100	1
Search Columns				C Save Churl > rts II	1	
Category Drop column here Charts Charts						
${}_{ }\equiv$ # of Threats Range			++-	#	$\overline{\nabla}$	
≣ ≣ Asset Status Label					A 700	
≣ E Asset Status Value		column		111	0,000	
🗄 🐺 Case Costs Range						*
$\exists \equiv$ Case Duration (Days)			General			>
🗄 🗮 Case Focus name			Styles			>
🗄 🖾 Case Focus Valid From			Sorting			>
${\ensuremath{:\!\!\!:}}:\!$			-			>
Values	tet Incident Managem Category Category oblumms es of Threats Range es Cats Range es Cats Range es Cats Range es Cats Range es Couts Nalue es Couts Nalue					>
# # of Threats Value						
# Case Costs Value			Filters			7
🗄 # Case Duration (Days)						
# Case Focus workflow						
# Case Net Loss Value						
# Incident Average Dura		Drop column as "category"				
# # Incident Cost Value						

Chart Header and Description

 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.

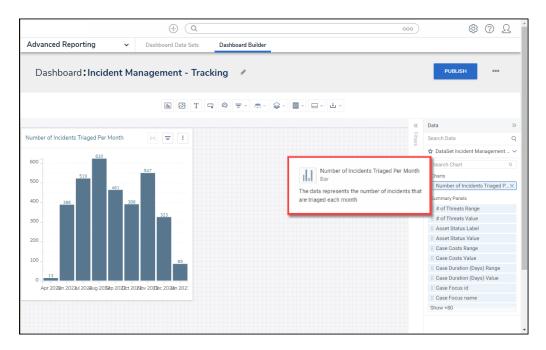


Chart Description

5. Select the **Expandable Table** Chart tile from the **Charts** panel.



Decelver		\bigcirc	(n c			~		C
				0 E E =	нС		t - X	<
Data		Category Drop column here	Values Drop column here		Charts			~
🖩 DataSet Incident Managem					#	#	$\overline{\nabla}$	
Search Columns	Q	rgory Drop column here Values Drop column here mmber of Incidents Per Category a Description		6	+++	-	1	
Categories	Number of Incidents Per Category Add Description Drop column as "value" Bar Chart							
🗄 🖾 Primary Incident Type	٠					100	249	
∃ ≣ Primary Incident Type					_			
🗄 🗏 Primary Incident Type						1000	-	
🗄 🐺 Priority Label								
🗄 🚍 Priority Value	column as							
🗄 🖾 Reported Date/Time		column		d.l				
🗄 📱 Resolver Incident Cla			Hill III					
	*		Bar Chart		Sorting			
Values					Layers			
# Incident Type Id	^				Format	1		
# Incident Type workflo					Filters			;
🗄 # Investigation Time (H								
# Location Risk Value								
# Location id								
🗄 # Location workflowSta								
🗄 # Net Loss Value								
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1					1			ar.

Expandable Table Chart

- 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.).
- 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.

Decelver				6	
			0		: • X
Data	Columns	E E Incident Category Label	Charts		~
DataSet Incident Managem	E Inc	Ident Category La.	#	#	₹
Search Columns C			6	H	-
Categories	Add Descrip	f Incidents Per Category			
🗄 🗮 Incident Average Dur	-			100	249
■ Incident Category Label		Drop column as "column"		1955	1
II Incident Category Val		Drop column as "column"			
Incident Cost Range Fincident Count Range			General		>
II I Incident Net Loss Ra			Styles		>
🗄 🗋 Incident Reported Da	•		Format		>
Values			Filters		>
🗄 # Incident Type id	Drop				
🗄 # Incident Type workflo	column as				
🗄 # Investigation Time (H	"section"	Expandable Table Chart			
# Location Risk Value					
# Location id					
3 # Location workflowSta					
🗄 # Net Loss Value					
13		Drop	1		

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.

		2 [3] δ	▼ C	Save Char	×	0
Data	Columns	I E Incident Category Label	Charts		_	~
DataSet Incident Managem	Sections	Drop column here	1 #	#	Ŧ	*
Search Columns Q	L					
Categories		ncidents Per Category	•	1 <u>11</u>		
Incident Average Dur	Add Description			100	0.65	
E Incident Category La	≡ Incident Cat	tenny ahel			-	
E Incident Category Val	Person Incident			1000		1
🗄 🐺 Incident Cost Range	Information Prote	ection	General			
🗄 🐺 Incident Count Range	Property Incident	t .				<u>_</u>
🗄 🐺 Incident Net Loss Ra	Property Incident	t .	Styles			>
🗄 🗋 Incident Reported Da 🖕	Person Incident		Format			>
/alues	Property Incident	t	Filters			>
# Incident Type id	Property Incident	d .				
# Incident Type workflo	Human Resource	85				
# Investigation Time (H	General Security	1				
# Location Risk Value	General Security	1				
# Location id	Property Incident	t				
# Location workflowSta						

Data Expandable Table

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

)aaalwar				6	0	\cap
		Z (3 () ©	₹ C	Save Char	t 🝷 >	<
Data	Columns 🗄 🗐 Incident Category Label 🕴 🗄 🗇 Primary Incident T	уре V 1	Charts			~
🖩 DataSet Incident Managem	Sections Drop column here		#	#	Ŧ	1
Search Columns	1					1.
Categories	Number of Incidents Per Category	•	H			
II	Add Description			100	249	
🗄 🖩 Overall Case Impact	≡ Incident Category Label	Primary Incident Type Valid From	555	150.00		1
III III Case Value	Person Incident	03/10/2023		1000	-	
🗄 🖾 Primary Incident Type	Information Protection	03/10/2023	General			
🗄 🗏 Primary Incident Type	Property Incident	03/10/2023				<i>.</i>
🗄 📰 Primary Incident Type	Property Incident	03/10/2023	Styles			>
🗄 🐺 Priority Label	Person Incident	03/10/2023	Format			>
Values	Property Incident	03/10/2023	Filters			>
# Incident Type Id	Property Incident	03/10/2023				
# Incident Type workflo	Human Resources	03/10/2023				
🗄 # Investigation Time (H	General Security	03/10/2023				
# Location Risk Value	General Security	03/10/2023				
# Location id	Property Incident	03/10/2023				
# Location workflowSta						
# Net Loss Value	A Category column could be added to this chart.					

Multiple Columns

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



Data	Columns II E Incident Category Label	ii 🗇 Primary Incident Type V	Charts		~
DataSet Incident Managem	Sections		 #	#	Ŧ
Search Columns Q	# Incident Type id		 6	H	-
Categories	Number on Incidents Per Category Add Description			-11-	
II I Overall Case Costs R				100	265
🗄 🖩 Overall Case Impact	E Icidem Category Label		555	165y	
II	Person Incident	Drop column as "column"		444	
🗄 🖾 Primary Incident Type	nformation Protection		General		2
🗄 🗏 Primary Incident Type	Property Incident				
🗄 🖩 Primary Incident Type	Property Incident		Styles		,
II II Priority Label	Person Incident		Format		>
Values	Droperty in tent		Filters)
# Incident Risk Value	columniasi dent				
# Incident Type id	Section"				
# # Incident Type workflo	General Security				
# Investigation Time (H	General Security				
# Location Risk Value	Property Incident				
# Location id					

Section Field

- 12. Add multiple Categories or Values to the **Section** field to add multiple Columns to the Table.
- 13. Adding Sections creates expandable dropdown lists within the Table.

)aaalwar					~		\cap
		Z B 0 0	$\overline{\pi}$	С	Save Char	t • ×	
Data	Columns	III 🗄 Incident Category Label III 🗇 Primary Incident Type V II		Charts	~		~
DataSet Incident Managem	Sections	🗄 # Incident Type Id I 🗉 🗄 🗇 Triage Date I 🗉 🗄			-		^
Search Columns Q				- 11			
Categories	Number of Add Descripti	f Incidents Per Category		#-	#	$\overline{\nabla}$	I
🗄 🖾 Primary Incident Type 📩	Add Descripti	NI I		6	H		
🗄 🗏 Primary Incident Type	1 Apply M	ulti-Column Sort			111		
🗄 🚍 Primary Incident Type	 AbbiA M 	ard-Coldmin Sort			100	249	
🗄 🐺 Priority Label		≡ Incident Category Label ↓ ■ 🖄 Primary Incident Type Valid From	$\downarrow =$				*
II	Incid	ent Type id :		General			>
🗄 🗋 Reported Date/Time	12	(4 Records)		Styles			>
🗄 🐺 Resolver Incident Cla		Triage Date :		Format			5
Values		12/10/2022		Filters			
		12/10/2022 Trage Date: 010/37/023					<u></u>
# Incident Type workflo	>	Triage Date : 01/03/2023					
# Investigation Time (H							
# Location Risk Value		Triage Date : 01/04/2023					
# Location id							
# Location workflowSta		ent Type Id :					
🗄 # Net Loss Value	Chart show	vs a maximum number of data points by default. To see more, go to General chart options and increase the Max Groups to display.					
							÷

Multiple Sections

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