

Embedding a Dashboard in an Activity

Last Modified on 09/27/2023 11:43 am 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

Administrators can embed a Dashboard in an Activity, incorporating the Dashboard into the system.



Warning:

You must have at least one Published Dashboard before adding a Dashboard to an Application.



Note:

Unpublished Dashboards will also be automatically removed from the Dashboard section on the Edit Activity screen.

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.

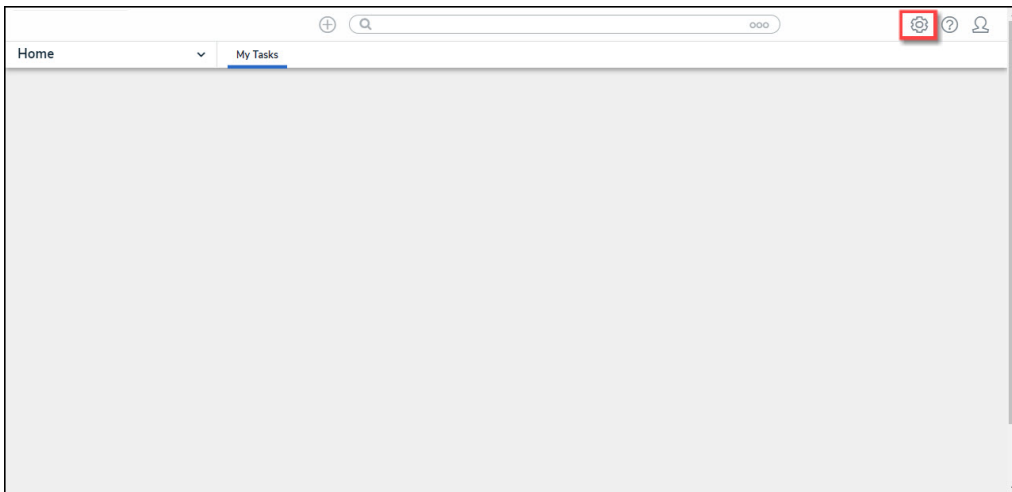
- [Publishing/Unpublishing a Dashboard Data Set](#)

Please follow the link below to publish a Dashboard.

- [Publishing a Dashboard](#)

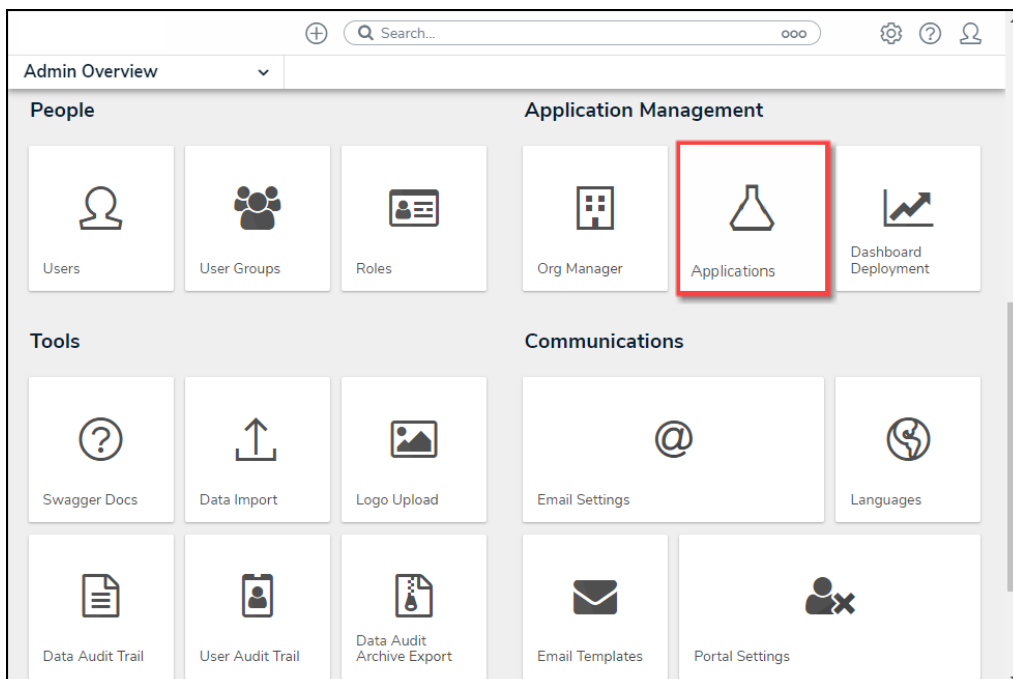
Navigation

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



System Icon

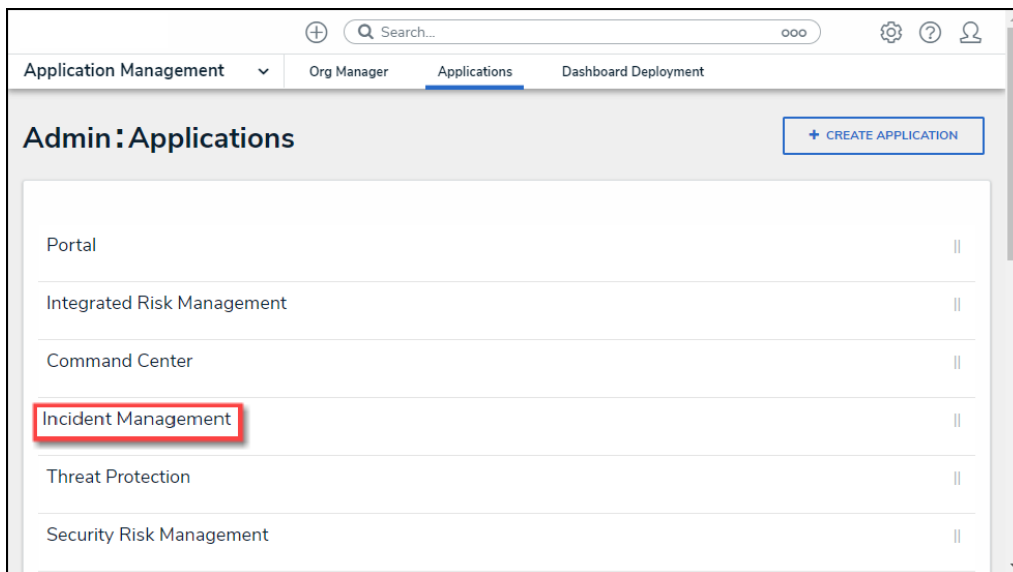
2. From the **Admin Overview** screen, click on the **Applications** tile under the **Application Management** section.



Applications Tile

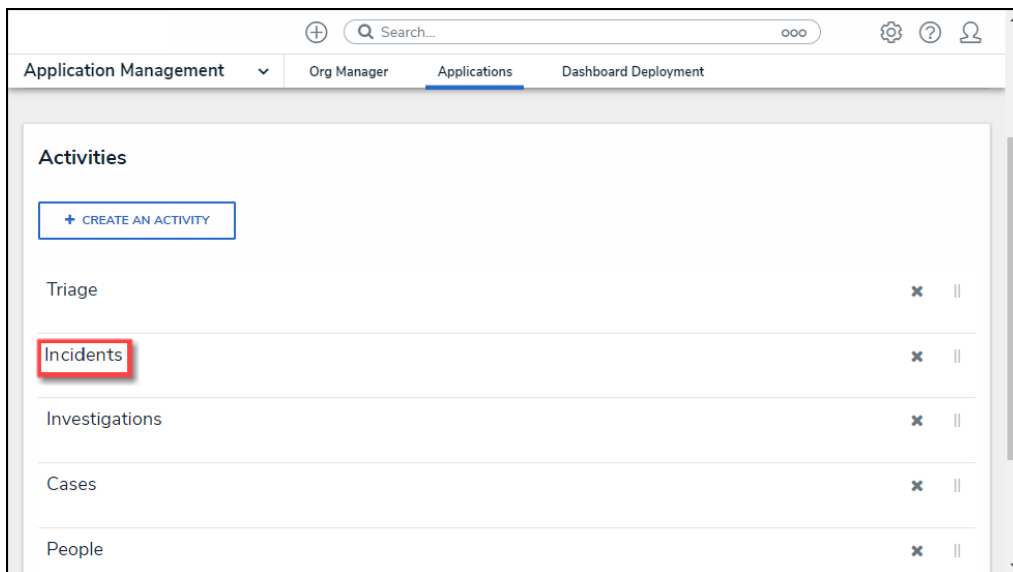
3. From the **Admin Applications** screen, scroll to the Application and click the **Application**

Name you want to embed a Dashboard.



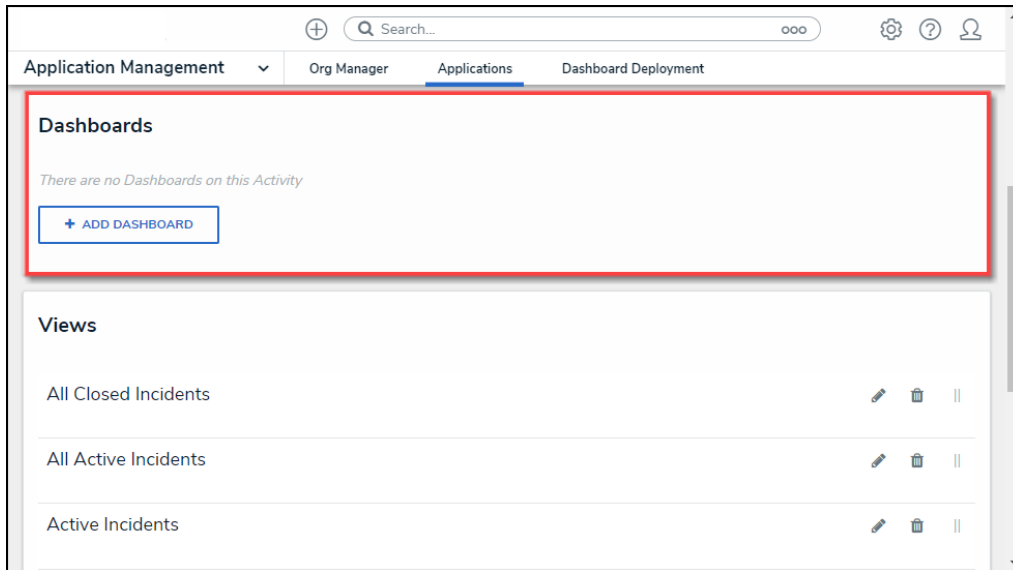
Select an Application

- From the **Admin Edit Applications** screen, scroll to the Activity and click the **Activity Name** you want to embed a Dashboard from the **Activities** section.



Select an Activity

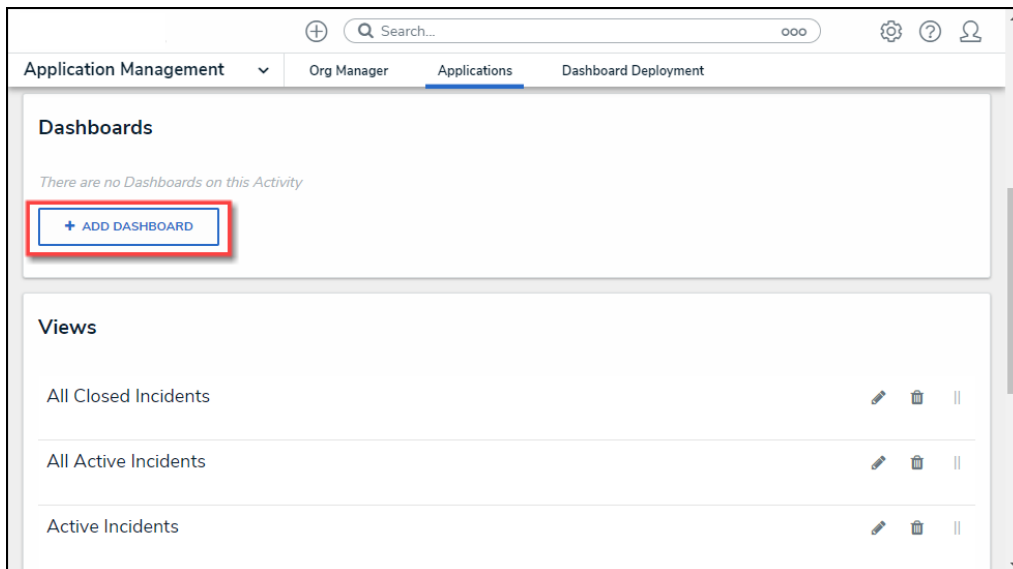
- From the **Edit Activity** screen, scroll to the **Dashboard** section.



Dashboard Section

Embedding a Dashboard in an Activity

1. Click the **+Add Dashboard** button.



+Add Dashboard Button

2. Fill out the fields that appear:

The screenshot shows the Resolver application management interface. At the top, there is a search bar and navigation tabs for 'Application Management', 'Org Manager', 'Applications', and 'Dashboard Deployment'. The 'Applications' tab is selected. Below the navigation, the 'Dashboards' section is displayed with the message 'There are no Dashboards on this Activity'. A form is shown with three fields: '* Name' (a text input field with a character count of 40), 'Description' (a text input field), and 'Dashboard' (a dropdown menu). The form is outlined with a red border. At the bottom right of the form, there are 'CANCEL' and 'CREATE' buttons.

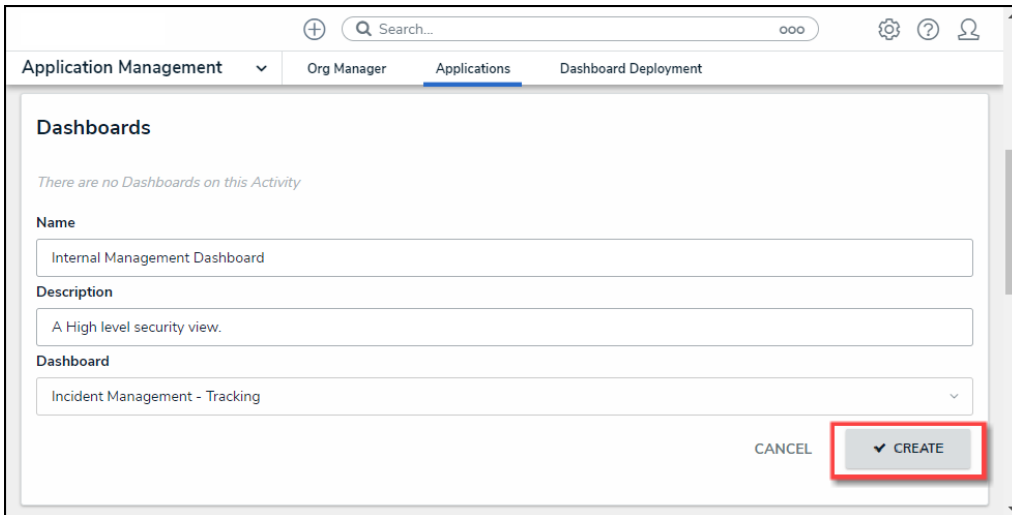
Dashboard Fields

- **Name:** Enter a name to represent the Dashboard within the system. The **Dashboard Name** will appear on the **Edit Activity** screen under the **Dashboard** section.
- **Description:** Enter a brief description outlining the Dashboard.
- **Dashboard:** Select a published Dashboard from the **Dashboard** dropdown menu.

The screenshot shows the Resolver application management interface with the 'Dashboards' form filled out. The 'Name' field contains 'Internal Management Dashboard', the 'Description' field contains 'A High level security view.', and the 'Dashboard' dropdown menu is set to 'Incident Management - Tracking'. The form is outlined with a red border. At the bottom right of the form, there are 'CANCEL' and 'CREATE' buttons.

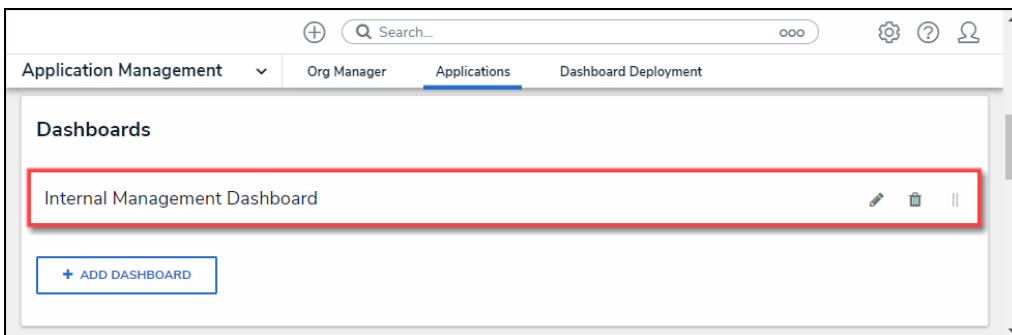
Completed Dashboard Fields

3. Click the **Create** button to add the Dashboard to the Activity.



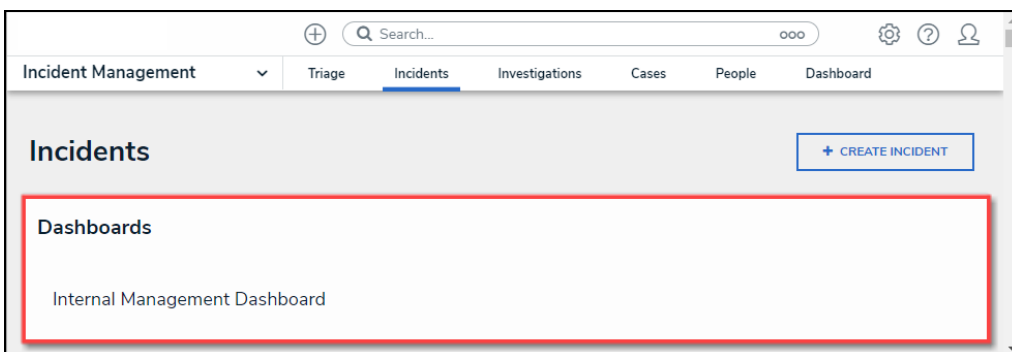
Create Button

- The **Dashboards** section on the **Edit Activity** screen will now display the newly added Dashboard.



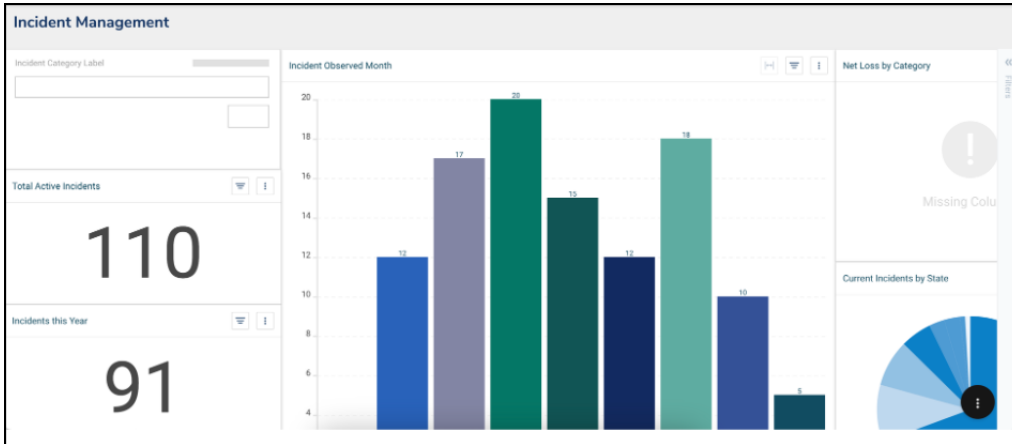
Dashboard Section

- Navigate to the Activity within the system. A new **Dashboards** section will appear, listing the Dashboard.



Dashboard Section

- Click the **Dashboard Name** to view the Dashboard.



Dashboard