

Embedding a Dashboard in an Activity

Last Modified on 01/29/2025 4:51 pm EST

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Unpublished Dashboards will also be automatically removed from the Dashboard section on the Edit Activity screen.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

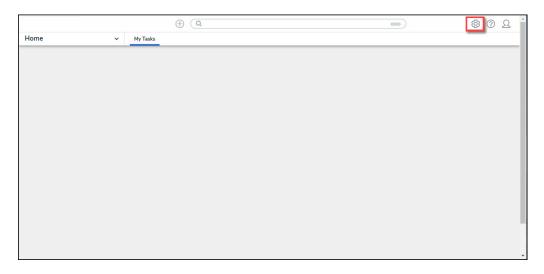
Please follow the link below to publish a Dashboard.

• Publishing a Dashboard

Navigation

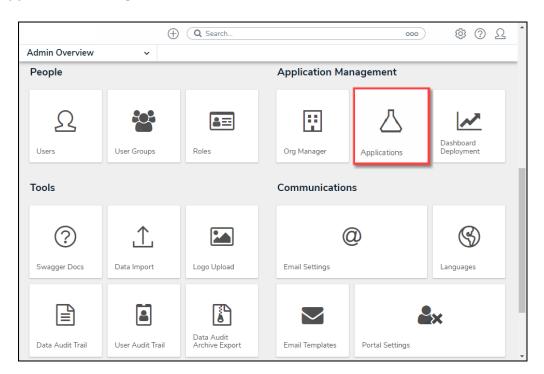


1. From the *Home* screen, click on the **System** icon.



System Icon

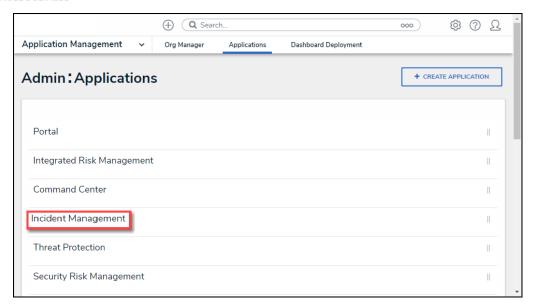
From the *Admin Overview* screen, click on the **Applications** tile under the *Application Management* section.



Applications Tile

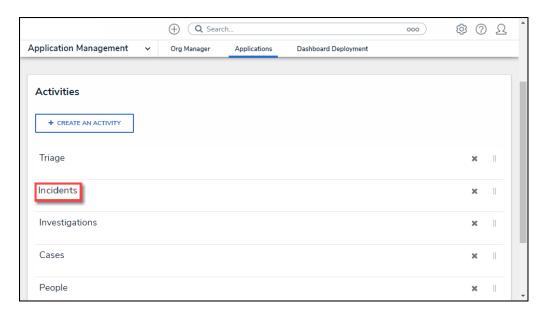
From the *Admin Applications* screen, scroll to the Application and click the **Application** Name you want to embed a Dashboard.





Select an Application

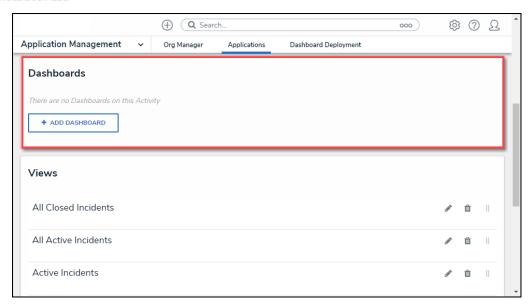
From the *Admin Edit Applications* screen, scroll to the Activity and click the **Activity** Name you want to embed a Dashboard from the *Activities* section.



Select an Activity

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

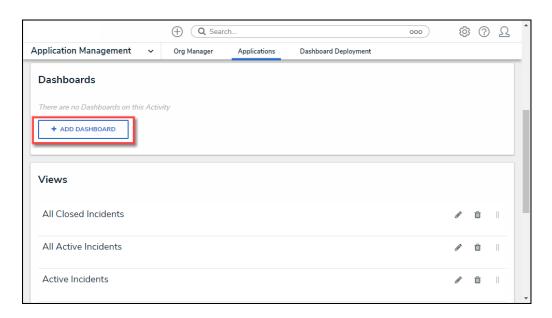




Dashboard Section

Embedding a Dashboard in an Activity

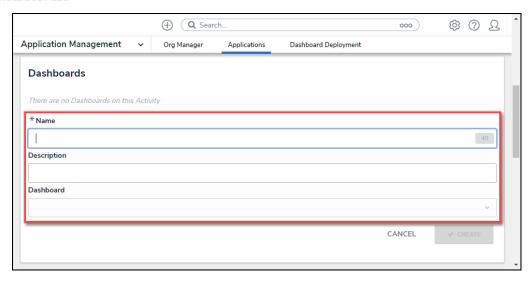
1. Click the +Add Dashboard button.



+Add Dashboard Button

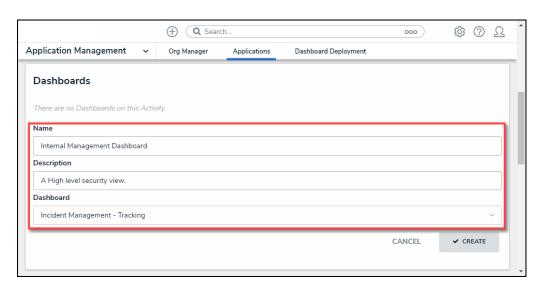
2. Fill out the fields that appear:





Dashboard Fields

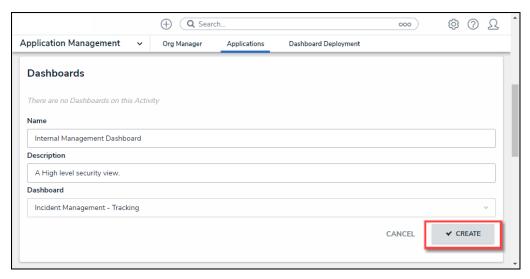
- Name: Enter a name to represent the Dashboard within the system. The Dashboard
 Name will appear on the Edit Activity screen under the Dashboard section.
- **Description:** Enter a brief description outlining the Dashboard.
- Dashboard: Select a published Dashboard from the Dashboard dropdown menu.



Completed Dashboard Fields

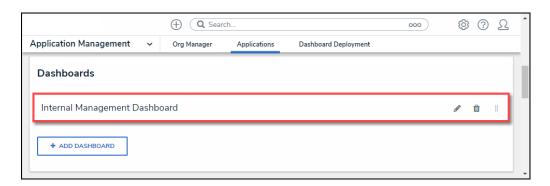
3. Click the **Create** button to add the Dashboard to the Activity.





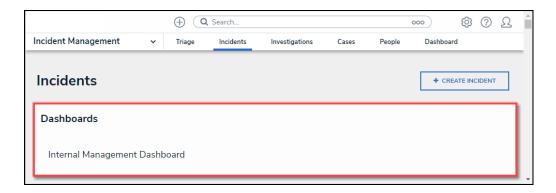
Create Button

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



Dashboard Section

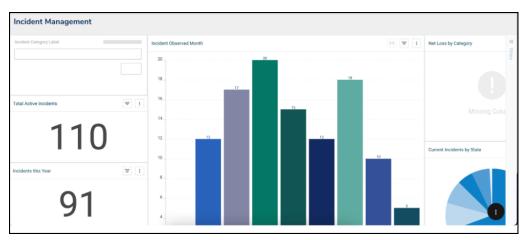
5. Navigate to the Activity within the system. A new *Dashboards* section will appear, listing the Dashboard.



Dashboard Section

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





Dashboard