

Dashboard Quick Start Guide

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Overview

Before using the Dashboards feature to create charts and Dashboards, it is recommended that users carefully read through the following information. The information presented below is laid out in order, as some elements of the Dashboard feature must first be created before you can create charts and Dashboards using the Dashboard Builder.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to use the Dashboard and Data Set Builders.

Dashboard Data Sets



Note:

Resolver recommends using one data set per Dashboard, ensuring filters apply to all charts within a Dashboard.

1. [Creating a Dashboard Data Set](#)

- The first step in creating a Dashboard is setting up a Dashboard Data Set. Dashboard Data Sets allow users to build a Dashboard Data Path using the object types they would like to include on their Dashboards.

2. [Define the Data to be Displayed in a Dashboard](#)

- After configuring a Dashboard Data Path and creating a Data Set, the user must define the data available for use within Dashboard Charts. For further information, please see the articles under the [Advance Dashboard Data Set Functions](#) section.

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

- After the Dashboard Data Set is created, you must publish the Dashboard Data Set to create Dashboards through the Dashboard Builder.



Warning:

Resolver recommends not unpublishing or deleting a Data Set. Doing so will remove the data from the corresponding charts (forcing the user to recreate the charts) and cause

a system error.

Dashboard Builder

4. [Creating a New Dashboard](#)

- After the Dashboard Data Set is published, users must create a Dashboard using the Dashboard Builder feature.

5. [Adding a Chart to a Dashboard](#)

- Using the Dashboard Builder, users can add multiple charts to the Dashboard. For more information, please see the [Chart Elements](#) and [Chart Functions](#) sections.

6. [Publishing a Dashboard](#)

- The Dashboard must be published before it can be embedded to an Activity view.

Dashboard Visibility

7. [Embedding a Dashboard in an Activity](#)

- Add a Dashboard to an activity view for users to access the Dashboard data.



Note:

Users can edit a published dashboard without unpublishing it. Unpublished dashboards are removed from the activity.

Dashboard Data Set Functions

Users can add additional data elements (e.g., assessments, fields, formulas, properties, data transformations, geolocations, and roles) to a Dashboard Data Set during its creation or after, allowing you to create more complex dashboards.

- [Adding Assessment Type Data to a Data Set](#)
- [Adding Fields to the Dashboard Data Set](#)
- [Adding Formulas to the Dashboard Data Set](#)
- [Adding Properties to the Dashboard Data Set](#)
- [Adding Geolocation Data to a Data Set](#)
- [Adding a Data Transformation to a Dashboard Data Set](#)
- [Adding Role Data to a Data Set](#)

Chart Elements

- [Adding a Multi-Series Chart to a Dashboard](#)
- [Adding a Combo Chart to a Dashboard](#)
- [Adding a Table/Group Table to a Dashboard](#)
- [Adding an Expandable Table to a Dashboard](#)
- [Adding a Crosstab to a Dashboard](#)
- [Adding a Heatmap to a Dashboard](#)
- [Adding a Box and Whiskers Chart to a Dashboard](#)
- [Adding a Map Chart to a Dashboard](#)

Chart Functions

- [Editing/Formatting a Category or Value](#)
- [Adding Tooltips to a Chart](#)
- [Adding Styles to a Chart](#)
- [Sorting a Chart](#)
- [Applying Layers to a Chart](#)
- [Formatting a Chart](#)
- [Adding a Chart Filter](#)
- [Adding a Comparison to a Chart](#)
- [Adding a Trend Chart to a Table](#)
- [Adding an Aggregated Formula to a Group Table](#)
- [Adding a Table Calculation](#)
- [Sorting a Group Table Using Multi-Column Sort](#)
- [Creating a Duplicate Chart](#)
- [Deleting a Chart from a Dashboard](#)

Advanced Dashboard Builder Functions

- [Setting Dashboard Page Actions \(Drill Downs\)](#)
- [Downloading a Chart](#)