

# Adding a Crosstab to a Dashboard

Last Modified on 11/24/2023 2:22 pm EST

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**

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.

A Crosstab table shows data aggregated across two dimensions in a matrix style to show the correlation between different variables and the values in the cross-section of the dimensions. Crosstab Charts are used when we want to show the relationship between two Categorical values.

*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 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 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 Table 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 on the **System** icon.

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| Home ~ | My Tasks    |     | -      |
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System Icon

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



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|  |             |                       | Dashboard Data<br>Sets Dashbo | oard Builder           |

Dashboard Data Sets Tile

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

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Dashboard Name

### Adding a Crosstab Chart to a Dashboard

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



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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.

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|                          |              | Drop column as "category"  |         |              |           |        |
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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.

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| The medicate obstantial  | # 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.

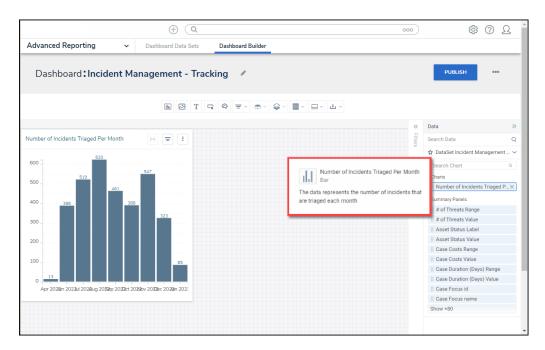


Chart Description

5. Select the **Crosstab** tile from the **Charts** panel.



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| Categories                 | The data represents the number of incidents that are triaged each month |          | 100    | 28  | a.     |
| 🗄 🗐 # of Threats Range 🔺   |   | N.       | 1962-2 |     | 1      |
| 🗄 🚍 Asset Status Label     |   |          | - AND  | -   |        |
| 🗄 🚍 Asset Status Value     |   | -        |        |     |        |
| 🗄 🗮 Case Costs Range       |   |          |        |     | -      |
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| # # of Threats Value       |   | Format   |        |     | >      |
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| # Case Focus workflow      |   |          |        |     |        |
| 🗄 # Case Net Loss Value    | Drop column as "category"   |          |        |     |        |
| # Incident Average Dur     |   |          |        |     |        |
| 13                         |   |          |        |     |        |

Crosstab Tile

- 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: 🗀
- Drag and drop a Category or Value from the Data Panel onto the Rows section on the left side of the Chart or within the Row field.



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| ;;;<br> | Categories                             |   |             |          | 249                |     |
| N       | ······································ | Number of Incidents Triaged Per Month                                   |             | 1000 Aug |                    |     |
|         | II = Overall Case Value                | The data represents the number of incidents that are triaged each month |             | 1405     | -                  |     |
|         | C Primary Incident Type V              |   |             | _        |                    |     |
|         | III ■ Primary Incident Type            |   |             |          |                    | -   |
|         | 🗄 🗏 Primary Incident Type              | Drop column as "column"   | General     |          |                    | >   |
|         | 🗄 🐺 Priority Label                     |   | Ch. 1       |          |                    |     |
|         | 🗄 🚍 Priority Value                     |   | Styles      |          |                    | ·   |
| 5       | 🗄 🗋 Reported Date/Time 🚽 💂             |   | Header      |          |                    | ~   |
|         | Values                                 |   | Font Co     | lor      |                    |     |
|         | # Location Risk Value                  | Drop  | BG Cold     | or.      |                    |     |
|         | 🗄 # Location id                        | Drop  |             |          |                    |     |
|         | # Location workflowSta                 | as "row" Crosstab Chart   | Format      |          |                    |     |
|         | 🗄 # Net Loss Value                     |   | <b>-</b> 1K | 123 \$ 9 | 6 X <sup>y</sup> ( | 3   |
|         | 🗄 # Overall Case Costs V               |   |             |          |                    | _   |
|         | 🗄 # Overall Case Impact                |   | Format      |          |                    | >   |
| 5_      | II # Overall Case Value_V              |   | Filters     |          |                    | >   |
|         |  |   |             |          |                    | -   |

Drag and Drop a Row

9. The **Row** data will populate the **Chart**. Data will populate the Chart after adding a Category or Value that has data to the Chart.

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|    | Search Columns  | Q | Values           | Drop column here  | Ĩ  |          | 111        |                  |         |
|    | Categories  |   | l                |   |    |          |            | 249              | »       |
| N  | II = Overall Case Value   | * |                  | ncidents Triaged Per Month                                  |    |          | 1007       |                  |         |
| 1  | II D Primary Incident Type  |   | The data repres  | ents the number of incidents that are triaged each month    |    |          |            |                  |         |
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|    | 🗄 🗐 Primary Incident Type   |   |                  | Grand Total*  |    | General  |            |                  | , Ť     |
|    | 🗄 🚍 Priority Label  |   | Mar 2023         | 1   | 11 |          |            |                  | <u></u> |
|    | ∷ ≣ Priority Value  |   | Grand Total*     | 1   | 11 | Styles   |            |                  | ~       |
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|    | # Location id   |   |                  |   |    | Format   |            |                  |         |
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|    | # Net Loss Value  |   |                  |   |    | - 1K     | 123 \$ 9   | e X <sub>A</sub> | 9       |
|    | # Overall Case Costs V<br># # Overall Case Impact   |   | * Grand Totals a | nd Subtotals are based on the aggregate of the data values. |    | Format   |            |                  | >       |
|    | # Overall Case Impact   |   |                  | umn could be added to this chart.                           |    | Filters  |            |                  | ÷       |
| í. | The second | - | Values colu      | anni coura de addeu to this chart.                          |    | ritters  | _          |                  | <u></u> |



- 10. **(Optional)** Add multiple Categories or Values to the **Rows** field to add multiple rows to the Table.
- 11. Drag and drop a **Category** or **Value** from the **Data Panel** onto the **Columns** area on the left of the Chart or within the **Columns** field.



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| ;;;<br> | Categories                 |   |         | 100        | 26                 |     |
| N       | 🗄 🗏 Country Value 🔺        | Nymber of Incidents Triaged Per Month                                       |         | Malbur     |                    |     |
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|         | Incident Average Dur       |   | HINH I  |            |                    | >   |
|         | Incident Category Label    |   |         | _          |                    | -   |
|         | ⋮                          | Drop column as "column"   | General |            |                    | >   |
|         | 🗄 🐺 Incident Cost Range    | - Mar 2023 111  | Styles  |            |                    | ~   |
|         | 🗄 🐺 Incident Count Range   | Grand Total* 111  |         |            |                    |     |
| 5       | 🗄 🚍 Incident Net Loss Ra 🔻 |   | Header  |            |                    | ~   |
|         | Values                     |   | Font Co | lor        |                    |     |
|         | 🗄 # Location Risk Value 🔺  | Drop  | BG Cold |            |                    |     |
|         | # Location id              | column<br>as "row"  | 00.000  | /          |                    |     |
|         | # Location workflowSta     | as row  | Format  |            |                    |     |
|         | # Net Loss Value           |   | - 1K    | 123 \$     | % x <sup>y</sup> @ | 3   |
|         | 🗄 # Overall Case Costs V   |   |         |            |                    | -   |
|         | 🗄 # Overall Case Impact    | * Grand Totals and Subtotals are based on the aggregate of the data values. | Format  |            |                    | >   |
| 5       | # Overall Case Value_ V    | A Values column could be added to this chart.                               | Filters |            |                    | >   |
|         |                            |   |         |            |                    |     |

Columns Field

- 11. **(Optional)** Add multiple Categories or Values to the **Columns** field to add multiple Columns to the Table.
- 12. Drag and drop a **Category** or **Value** from the **Data Panel** onto the **Value** area on the left of the Chart or within the **Values** field.

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|   | Data  | Rows  | 🗄 🗇 Pr (Month, Year) 👔 🚦  | c   | Charts   |            |        | ~      |
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|   | Search Columns Q                                | Values  | Drop column here  |     |          | 111        |        |        |
|   | Categories                                      |   |   |     |          |            | 2.65   |        |
| N | II Incident Subcategory                         | Number of   | Incidents Triaged Per Month   |     |          | 1957       |        |        |
|   | Incident Type Valid Fr     E Incident Type name | The data repre  | esents the number of incidents that are triaged each month  |     |          | - And      |        |        |
|   | II I Incident Type workflo                      | 1   |   |     |          |            |        | >      |
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|   | Values  |   |   |     | Font Col | or         |        | 1      |
|   | # Incident/Cost Value                           | mn  | Drop column as "value"  |     | BG Colo  | r          |        |        |
|   | 🗄 # Incident Count Value                        | 'ow"  |   | 1   | Format   |            |        |        |
|   | # Incident Net Loss Val                         |   |   |     |          | 123 \$ 1   |        |        |
|   | 🗄 # 🗤 dent Risk Value                           |   |   |     | - 1K     | 123 Ş      | е X, G | 신 []   |
|   | # Incident Type id                              | and Total   | d Subtotals are based on the apprepate of the data values.  | F   | format   |            |        | >      |
|   | # Incident Type workflo                         | A Values of A V | olumn could be added to this chart.   | F   | ilters   |            |        | ,      |
|   | 🗄 # Investigation Time (H 🖕                     |   |   |     |          | _          |        |        |

Values Field

13. Columns and Rows can be reordered by Dragging and Dropping the Categories or Values in the Rows, Columns, and Value fieldsk, creating a different order.



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|---|----------------------------|----|-------------------|------------|------------------------|------------------------|-----------------------------|-----------------------|---------------------|-------------|-------------|-----------|--------------------|--------|
|   | Data                       |    | Rows              | 🗄 🗋 Pr     | (Month, Year) 🛯 🚦      |                        |                             |                       |                     |             | Charts      |           |                    | ~      |
|   | 🖩 DataSet Incident Managem |    | Columns           | 🗄 🗐 Inci   | dent Catego 🚦 🗄        |                        |                             |                       |                     |             |             |           |                    | 1      |
| Search Columns  |                            | Q  | Values            | # Inci     | dent Typ (SUM) 🚦       | 🗄 🗂 Triage Dat         | e (CNT) i                   |                       |                     |             |             | 111       |                    |        |
|   | Categories                 | ٦, | vulues            |            | acite typ (boint) *    | . El mage ba           |                             |                       |                     |             |             | 100       | 0.99               | ł      |
|   | 🗄 🚍 Priority Label         | *  | Number of In      | cidents    | Triaged Per Mo         | nth                    |                             |                       |                     |             |             | 10557     |                    | 1      |
|   | ∷ ≣ Priority Value         |    | The data represe  | nts the nu | mber of incidents that | it are triaged each m  | onth                        |                       |                     |             |             |           |                    | 4      |
|   | 🗄 🖾 Reported Date/Time     |    |                   |            |                        |                        |                             |                       |                     |             |             |           |                    |        |
|   | 🗄 🐺 Resolver Incident Cla  |    |                   |            | Emerg                  | ency                   | Executive F                 | Protection            | General             | Security    |             |           |                    |        |
| ≣ ≣ Resolver Incident Cla   |                            |    |                   |            |                        |                        |                             |                       |                     |             | General     |           |                    | >      |
|   | ∷ ≣ Screening Priority Ra  | ÷  |                   |            | Incident Type<br>id    | Triage Date            | Incident Type<br>id         | Triage Date           | Incident Type<br>id | Triage Date | Styles      |           |                    | $\sim$ |
|   | E Security Risk Rating     | -  | - Mar 2023 Tota   | ı          | 51                     | 3.00                   | 320                         | 10                    | 1,317               | 37          | Header      |           |                    | ~      |
|   | Values                     |    | - W10 2023        | Total      | 51                     | 3.00                   | 320                         | 10                    | 1,317               | 37          | Font Co     | lor       |                    |        |
|   | # Location Risk Value      | *  | 03/10/20          | 123        | 51                     | 3.00                   | 320                         | 10                    | 1,317               | 37          | BG Cold     | or        | ſ                  |        |
| l   | # Location id              |    |                   | 023        |                        |                        |                             |                       |                     |             |             |           |                    | -      |
| l   | # Location workflowSta     |    | Grand Total*      |            | 51                     | 3.00                   | 320                         | 10                    | 1,317               | 37          | Format      |           |                    |        |
| # Net Loss Value           # Overall Case Costs V           # Overall Case Impact |                            | 1  | 4                 |            |                        | _                      |                             |                       |                     |             | <b>-</b> 1K | 123 \$    | % χ <sup>γ</sup> ( | 3      |
|   |                            |    | * Grand Totals an | d Subtota  | ils are based on the a | oprepate of the data   | values                      |                       |                     |             |             |           |                    |        |
|   |                            |    | 2.2.3 10(0) 01    |            |                        | 55-55-12 51 GTC GGC    |                             |                       |                     |             | Format      |           |                    | >      |
|   | # Overall Case Value_ V    |    |                   |            |                        | ate buy default. To an | e more, go to <i>Genera</i> | ( shart antions and i |                     |             | Filters     |           |                    |        |

Moving Column/Row Order

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