

Adding Fields to the Dashboard Data Set

Last Modified on 09/12/2025 10:56 am EDT

Overview

Fields added to the Dashboard Data Set will only appear as options in the Dashboard Builder when the Dashboard Data Set has been published.



Note:

A Dashboard Data Set can have a maximum of 100 fields.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission or Data Management advanced permissions to add fields to a Dashboard Data Set.

Related Information/Setup

To create a new Dashboard Data Set, please follow the link below:

- [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](#)

After adding fields to the Dashboard Data Set, you can unlink specific Fields for the Dashboard Data Set. Please follow the link below for more information on Unlinking Fields on a Dashboard Data Set.

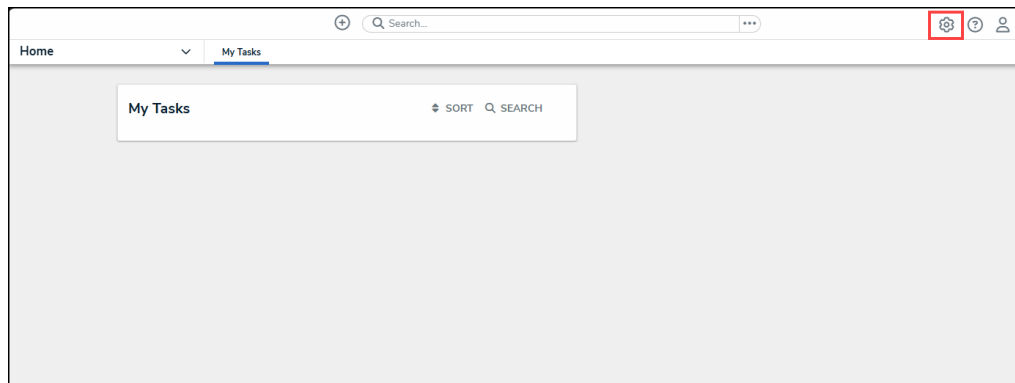
- [Unlinking Fields, Formula, and Properties on a Dashboard Data Set](#)

For more information on how to delete a Dashboard Data Set, please follow the link below.

- [Deleting a Data Dashboard Set](#)

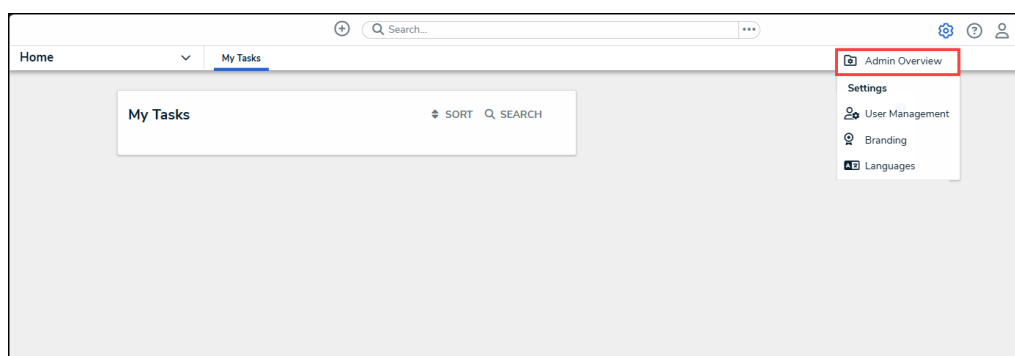
Navigation

1. From the **Home** screen, click the **Administration** icon.



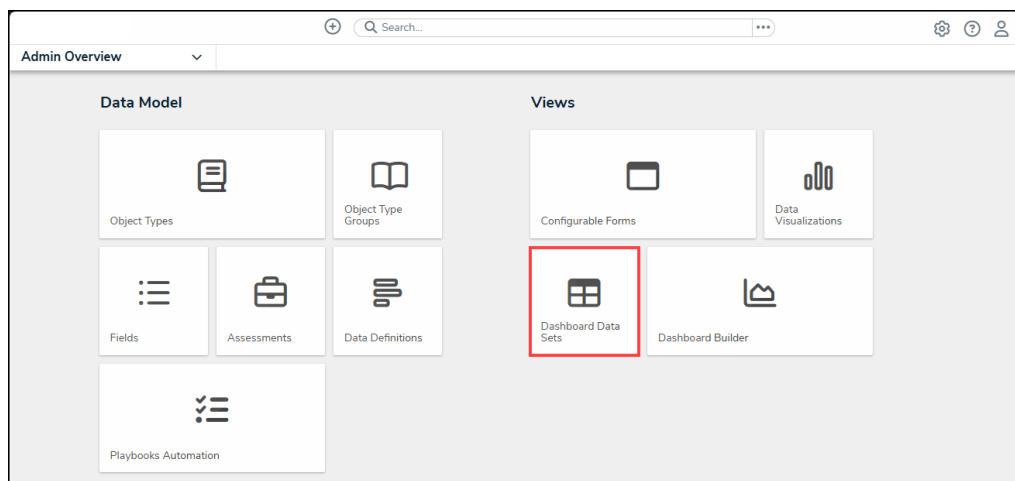
Administration Icon

- From the **Administrator Settings** menu, click the **Admin Overview** link.



Administrator Settings Menu

- From the **Admin Overview** screen, click on the **Dashboard Data Sets** tile under the **Views** section.



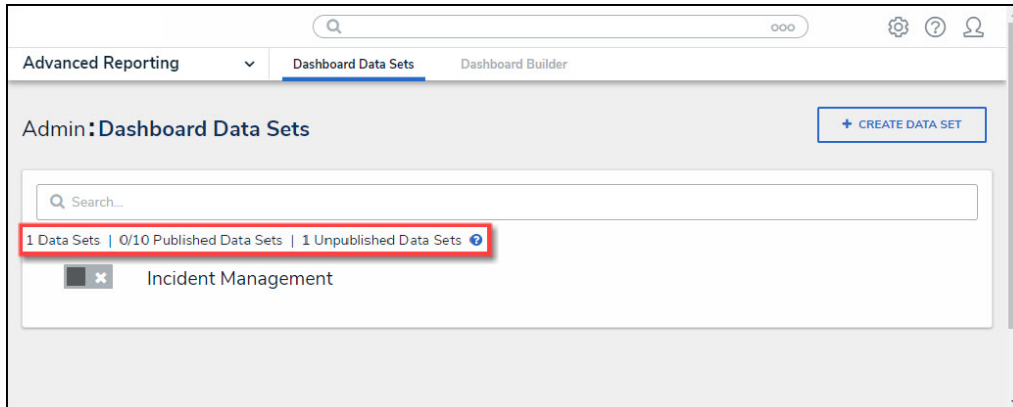
Dashboard Data Sets Tile

- The **Dashboard Data Sets** screen lists the following information below the **Search** field:

- **Number of Data Sets (Data Sets):** The total number of Dashboard Data Sets.
- **Published Data Sets:** The total number of published Dashboard Data Sets that can

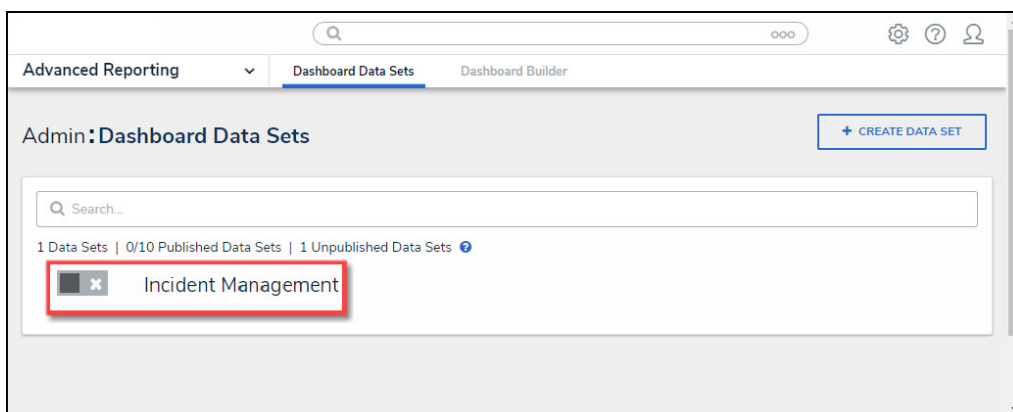
be used within the Dashboard Builder. Published Dashboard Data Sets will be out of 10. You can only have 10 Published Dashboard Data Sets within the system.

- **Unpublished Data Sets:** The total number of unpublished Dashboard Data Sets. Unpublished Dashboard Data Sets cannot be used within the Dashboard Builder.



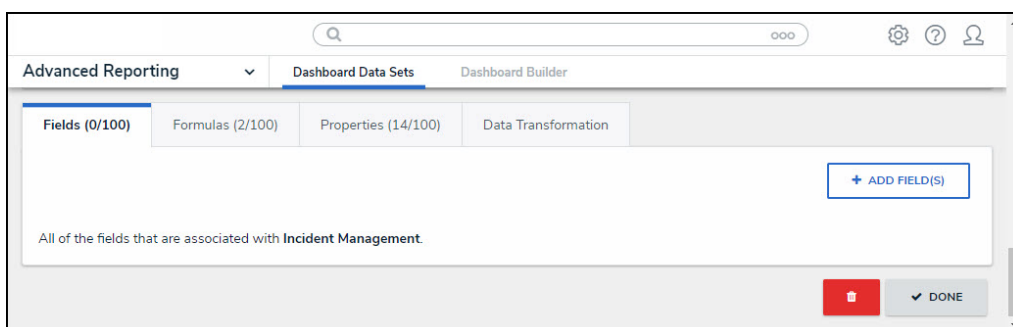
Total Dashboard Data Set Fields

5. Click the **Dashboard Date Set Name** to select a **Dashboard Data Set** from the list.



Dashboard Data Set

6. From the **Edit Data Set** screen, scroll to the **Fields** tab.



Fields Tab

Adding Fields to the Dashboard Data Set

1. Click the **+ Add Fields** button on the **Fields** tab.

The screenshot shows the 'Admin: Edit Data Set' interface for 'Incident Management'. The 'Publish' section at the top has a 'PUBLISH' button. The 'Incident Management' section includes a 'Name' field (Incident Management), a 'Description' field (Summarize critical insights for the security program), and an 'Anchor' dropdown (Incident). The 'Select Data Paths' section shows a tree structure of nodes: Incident (selected), Involved Location(s), Involved Location (selected), Primary Incident Type, Incident Type (selected), and Related Cases (Reference), Case (selected). At the bottom, the 'Fields (0/100)' tab is active, and the '+ ADD FIELD(S)' button is highlighted with a red box.

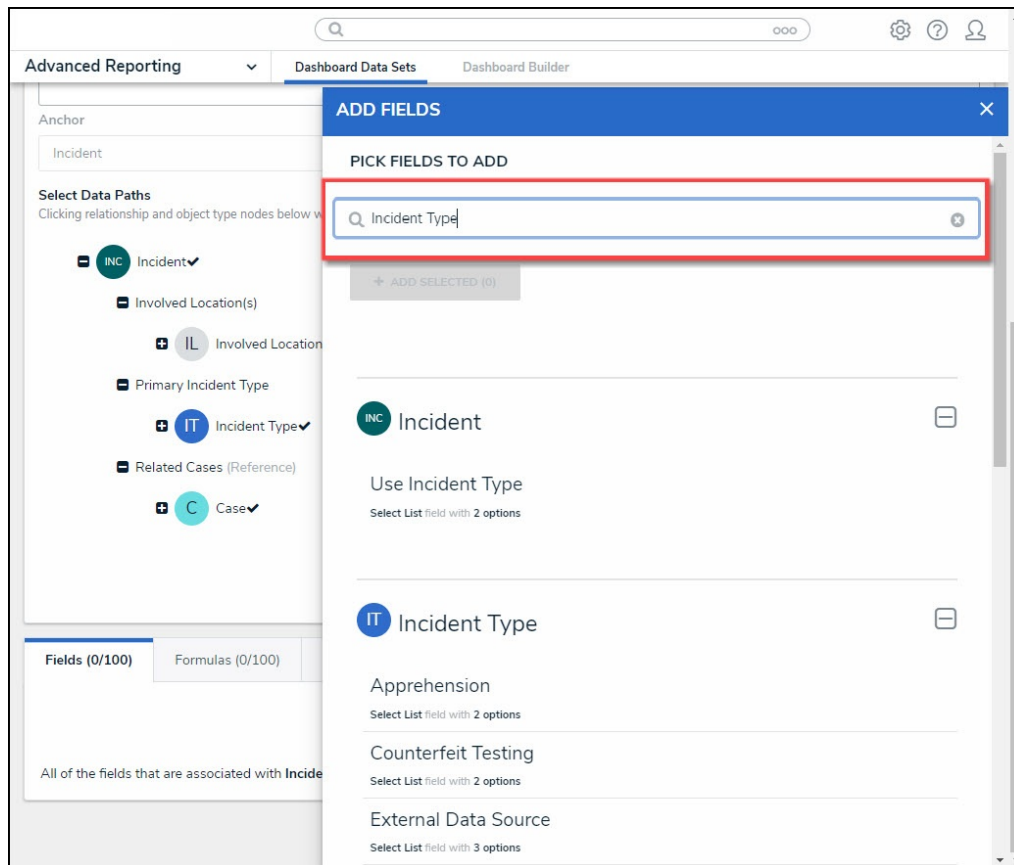
+ Add Fields Button

2. From the **Add Fields** pop-up, enter an **Object Type** or **Field Name** in the **Search** field to narrow the **Fields** list down.



Note:

Fields are organized by Object Type.



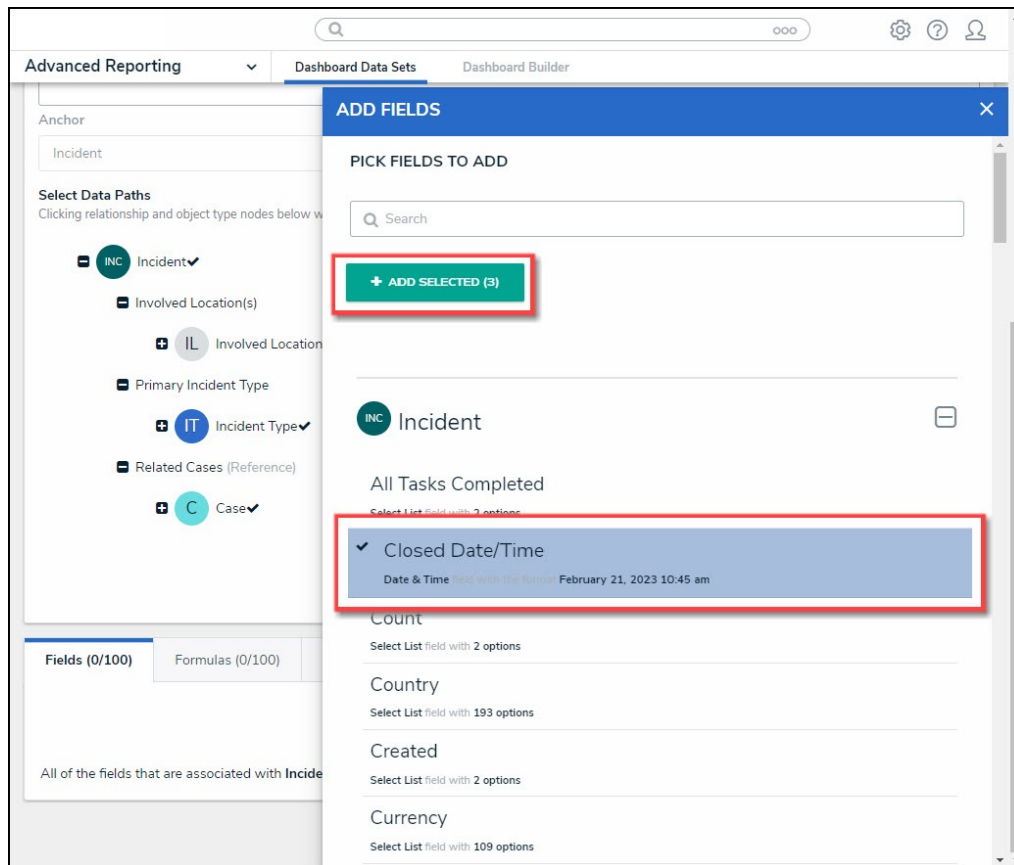
Search Field

3. Select the **Fields** you want to include in the Dashboard Data Set by clicking on a **Field**. As you add fields to the Dashboard Data Set, the **+ Add Selected** button at the top of the **Add Fields** pop-up will track the number of fields you have selected.
4. When you have selected all the desired **Fields**, click the **+ Add Selected** button to add the fields to the Dashboard Data Set. Fields added to the Data Set will no longer appear on the pop-up screen as a selectable field.



Note:

Single Select, Numeric, and Date/Time fields are the only fields available to add to a Data Set.



+ Add Selected Button

5. Selected **Fields** are listed under the **Fields** tab.

Advanced Reporting

Dashboard Data SetsDashboard Builder

Fields (3/100)

Formulas (0/100)

Properties (12/100)

Data Transformation

+ ADD FIELD(S)

All of the fields that are associated with Incident Management.

INC

Incident

Closed Date/Time

Date & Time field with the format February 21, 2023 11:06 am

IL

Involved Location

Primary Location

Select List field with 2 options

C

Case

Check Date

Date & Time field with the format February 21, 2023

DONE

Fields Tab