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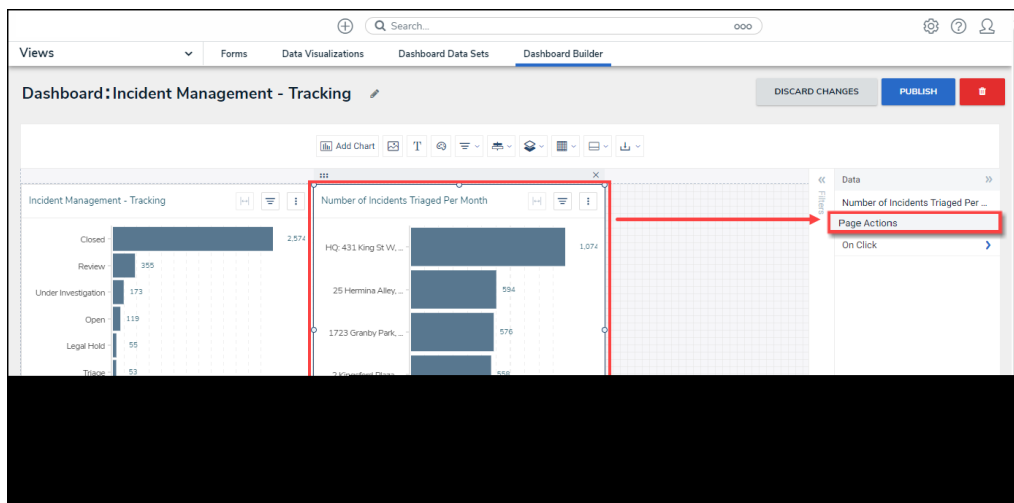
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Administrator Settings Menu

3. From the **Admin Overview** screen, click on the **Dashboard Builder** tile under the **Views** section.

Dashboard Builder Tile

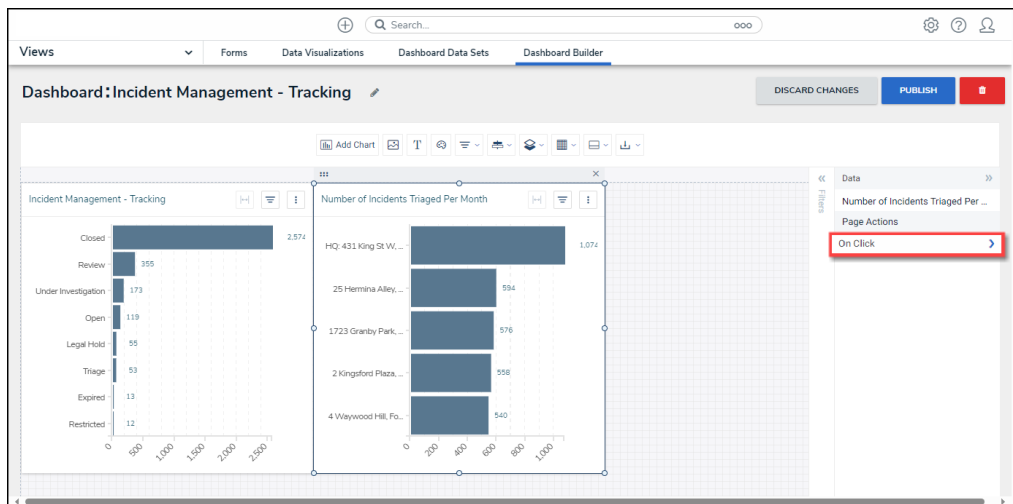
4. From the **Dashboard Builder** screen, clicking on a **Chart** will activate the **Page Action** option under the **Data Panel**.



Page Action

Setting Dashboard Page Actions (Drill Downs)

- From the **Data** section, click the **On Click** link to expand **Page Action** options.



On Click Link

- From the **Page Actions** screen, select an **On Click** option from the dropdown list by selecting the corresponding radio button:
 - **Data Point:** The **Data Point** option creates a Page Action trigger when a Data Point is selected from a Chart.
 - **Panel:** The **Panel** option creates a Page Action trigger when the user clicks outside the Chart.

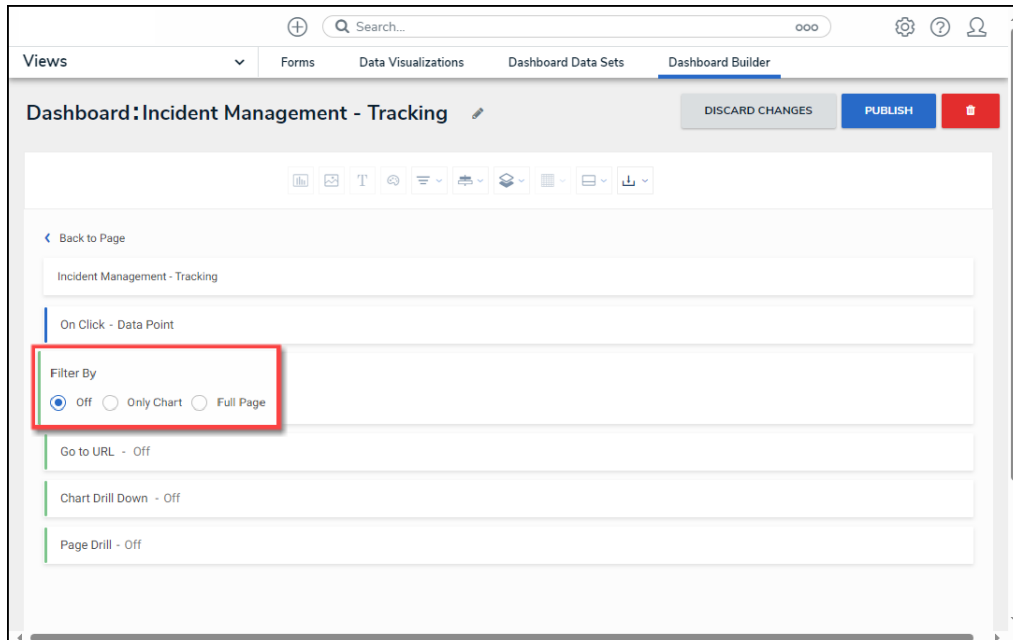
The screenshot shows the 'Page Actions' configuration screen for the 'Incident Management - Tracking' dashboard. The 'On Click' option is selected, and the 'Data Point' radio button is highlighted with a red box. Below the radio buttons, there are several toggle switches for 'Filter By', 'Go to URL', 'Chart Drill Down', and 'Page Drill', all currently set to 'Off'.

On Click Options

- Select a **Filter By** option from the dropdown list by selecting the corresponding radio

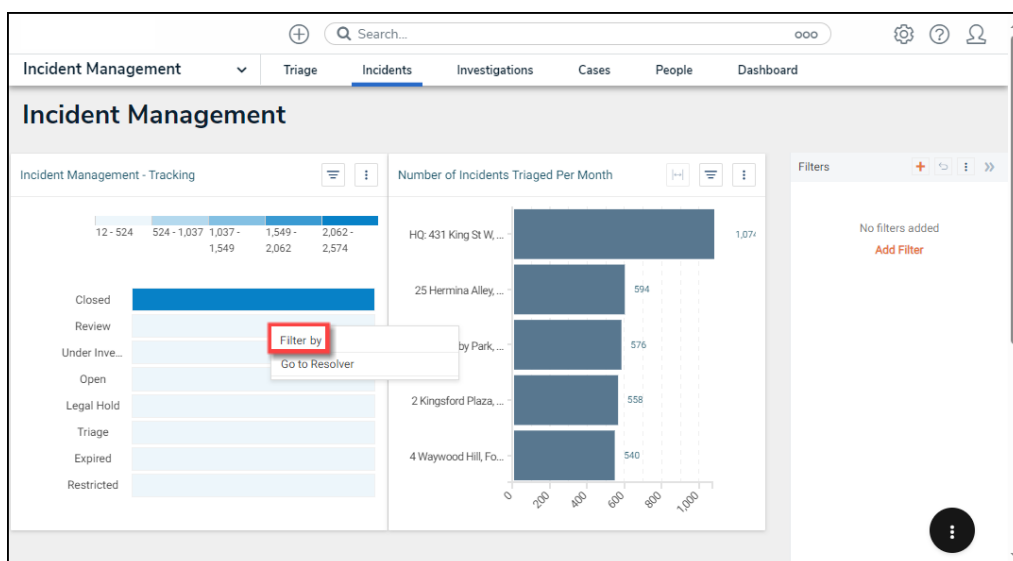
button:

- **Off:** The **Off** option disables the **Filter By** option.
- **Only Chart:** The **Only Chart** option only applies the filter to the selected Chart.
- **Full Page:** The **Full Page** option applies the filter to all charts on the **Canvas** section on the **Dashboard Builder** screen, using the same Data Set.



Filter By Options

- The **Filter By Option** will appear on the **Dashboard Builder** and **Dashboard Widget** screens when a user clicks a Data Point on a Chart (Data Point) or clicks outside the Chart (Panel).



Filter By Option

- Select a **Go to URL** option from the dropdown list by selecting the corresponding radio

button:

- **Off:** The **Off** option disables the **Go to URL** option.
- **Go to URL:** The **Go to URL** option allows users to set an external URL link to appear within the **Canvas** section on the **Dashboard Builder** screen.
 - **Title:** The **Title** option allows users to enter a custom title for the URL. The Title will appear on the **Dashboard Builder** screen within the **Menu** options.
 - **URL:** Enter a valid external URL.
 - **Open In:** Select an open option from the **Open In** dropdown menu:
 - **Self:** Opens the external URL on the current screen.
 - **New Tab:** Opens a new browser tab to display the external URL.
 - **New Window:** Opens a new browser window to display the external URL.

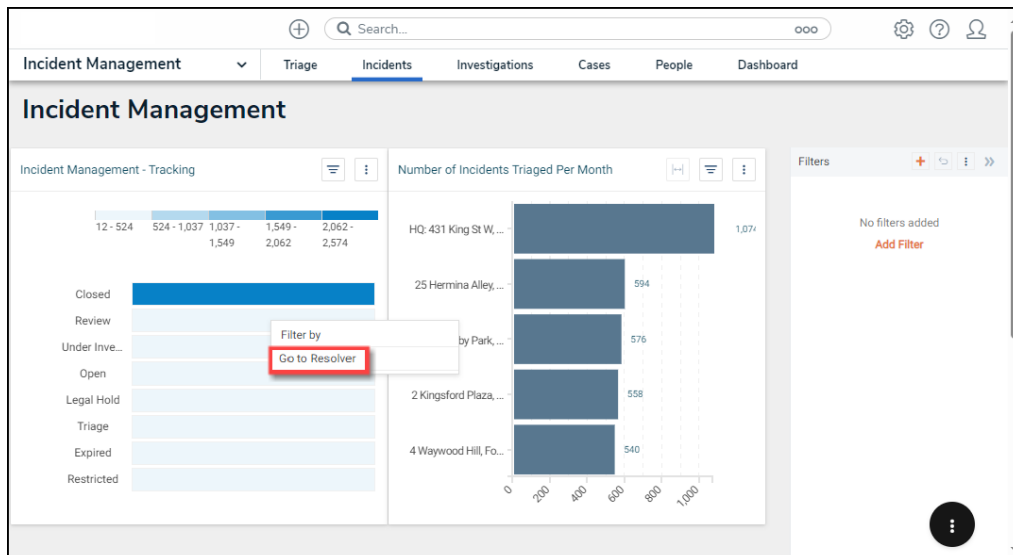
The screenshot shows the 'Dashboard Builder' interface. A red box highlights the 'Go to URL' section, which includes the following fields:

- Go to URL:** Radio buttons for 'Off' and 'Go to URL' (selected).
- Title (Optional):** Text input field containing 'Resolver'.
- URL:** Text input field containing 'https://www.resolver.com/'.
- Open In:** Dropdown menu with 'New Window' selected.

The background shows a dashboard layout with sections like 'Incident Management - Tracking', 'On Click - Data Point', 'Filter By - Off', 'Chart Drill Down - Default', and 'Page Drill - Off'.

Go to URL Options

6. The **Go to URL** will appear on the **Dashboard Builder** and **Dashboard Widget** screens when a user clicks a Data Point on a Chart (Data Point) or clicks outside the Chart (Panel).



Go to URL

7. Select a **Chart Drill Down** option from the dropdown list by selecting the corresponding radio button:

- **Off:** The **Off** option disables the **Chart Drill Down** option.
- **Default:** The **Default** option allows a user to create Chart Drill Downs using the data columns from the selected Chart.
 - **Select Columns to Display:** Click the Checkbox next to a column to add it to the Chart as a drill down.
 - **Selected Columns:** Click the X icon next to the column to remove the column from the Chart or deselect the Checkbox on the **Select Columns to Display** field to remove the column from the Chart.
- **Custom:** The **Custom** option allows users to create a Chart Drill Down using the data from the Charts that appear on the Canvas on the **Dashboard Builder** screen. Users can add multiple drill-down levels based on the number of Charts on the **Dashboard Builder** screen. Click the **Plus** icon to add a Chart as a drill-down, and click the **Minus** icon to remove the Chart.

The screenshot shows the 'Dashboard Builder' tab in the Resolver interface. Under the 'Views' section, the 'Incident Management - Tracking' view is active. The 'Chart Drill Down' configuration is highlighted with a red box. It shows three radio buttons: 'Off', 'Default' (selected), and 'Custom'. Below the radio buttons is a 'Select Columns to Display' list with a search bar. The list contains several columns, including 'Case id', 'Case name', 'Case workflowState Label', 'Incident id', 'Incident name', 'Incident Type id', and 'Incident Type name'. To the right of this list is a 'Selected Columns' box which currently contains 'Involved Location id'. Other settings like 'Filter By' (Off) and 'Go to URL' (Go to URL) are visible above the chart drill down section.

Default Chart Drill Down

This screenshot shows the same 'Dashboard Builder' interface, but with the 'Custom' radio button selected for 'Chart Drill Down'. The 'Level 1' dropdown menu is now visible and set to 'Number of Incidents Triaged Per Month'. The 'Select Columns to Display' list is no longer visible in this view. The 'Involved Location id' column remains in the 'Selected Columns' box. The 'Filter By' and 'Go to URL' settings are also visible.

Custom Chart Drill Down

8. Select a **Page Drill** option from the dropdown list by selecting the corresponding radio button:
 - **Off:** The **Off** option disables the **Page Drill** option.
 - **Go to Page:** The **Go to Page** option enables the Go to Page redirect that opens a new Dashboard when clicking a Data Point or outside of the Chart panel.
 - **Select Page:** Select a Dashboard (page) redirect from the dropdown menu.
 - **Menu Label:** Enter a custom Page Drill Title that will appear when clicking a Data Point or outside of the Chart panel.
 - **Apply Filters:** The Apply Filters checkbox will filter the Chart(s) on the Dashboard selected from the **Select Page** dropdown menu based on the

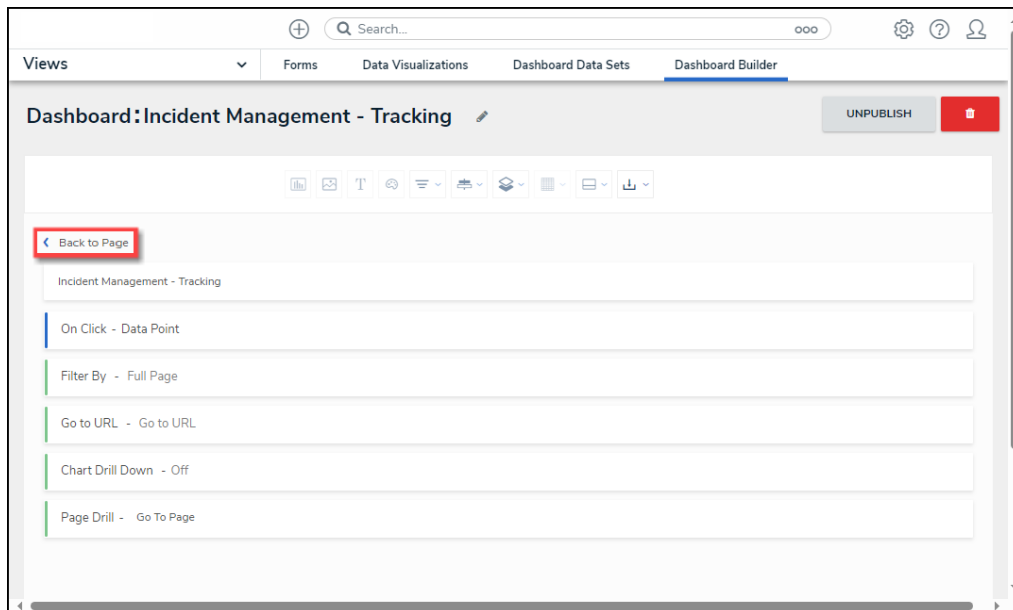
column(s) selected from the **Select target** columns to filter dropdown menu. The **Select target columns to filter** dropdown menu will be greyed out when the **Apply Filters** checkbox is not selected.

- **Select target columns to filter:** Select the column(s) that will filter the connected Dashboard. The **Apply Filters** checkbox must be selected to access the **Select target columns to filter** dropdown menu.

The screenshot shows the Resolver Dashboard Builder interface. The top navigation bar includes a search bar, settings, help, and user icons. The main menu has tabs for Views, Forms, Data Visualizations, Dashboard Data Sets, and Dashboard Builder. The current view is 'Dashboard: Dashboard - Page Drill'. The configuration panel on the left includes a 'Back to Page' link, a 'Multiseries Bar Chart (Stacked)' visualization, and several interactive options: 'On Click - Data Point', 'Filter By - Off', 'Go to URL - Off', and 'Chart Drill Down - Off'. The 'Page Drill' section is highlighted with a red box and contains the following settings: 'Page Drill' with radio buttons for 'Off' and 'Go To Page' (selected); 'Select Page' with a dropdown menu showing 'Financial'; 'Menu Label (Optional)' with a text input field containing 'Go to "Financials"'; 'Apply Filters' with a checked checkbox; and 'Select target columns to filter (Optional)' with a dropdown menu showing 'Financial Statement Account name'.

Page Drill Options

9. After completing the Page Action configuration, click the < **Back to Page** link to save your changes and return to the **Dashboard Builder** screen.



< Back to Page Link

10. From the **Dashboard Builder** screen, click the **Publish** button for the Page Actions to take effect.