

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Unpublished Dashboards will also be automatically removed from the Dashboard section on the Edit Activity screen.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

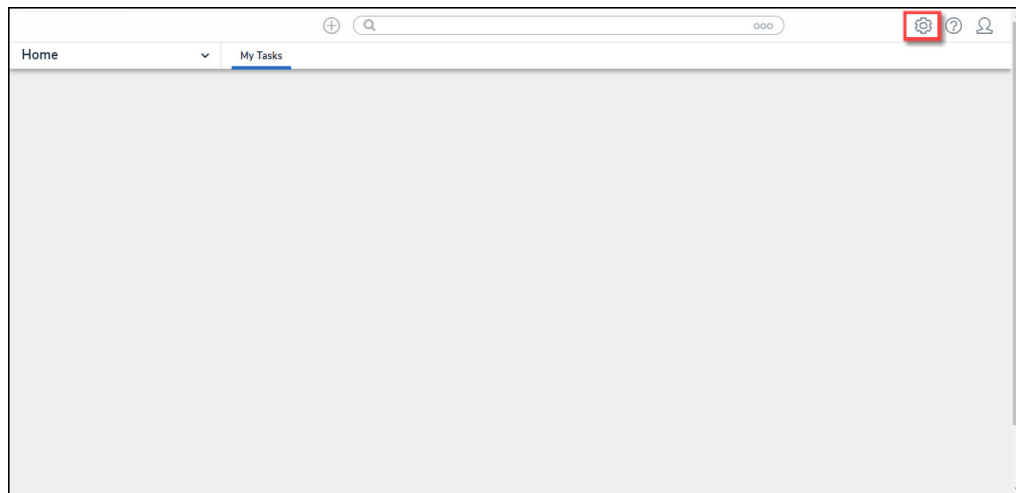
- [Publishing/Unpublishing a Dashboard Data Set](#)

Please follow the link below to publish a Dashboard.

- [Publishing a Dashboard](#)

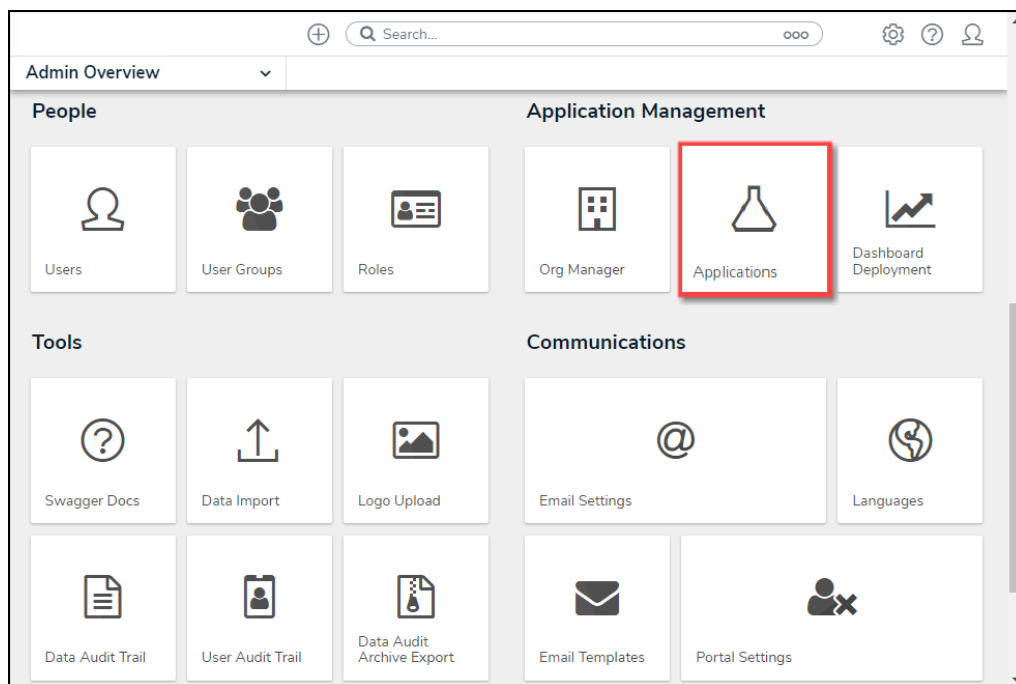
Navigation

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



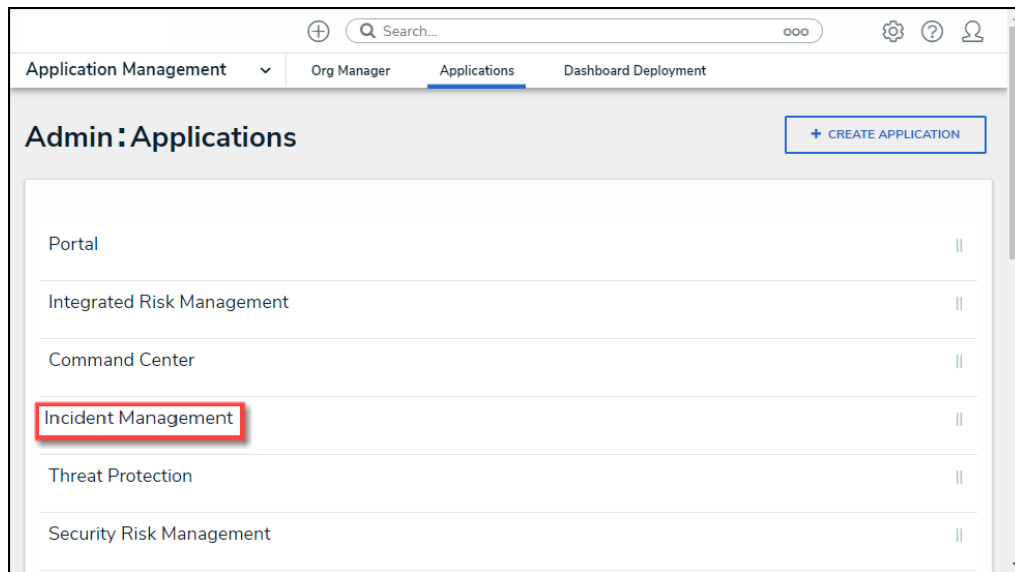
System Icon

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



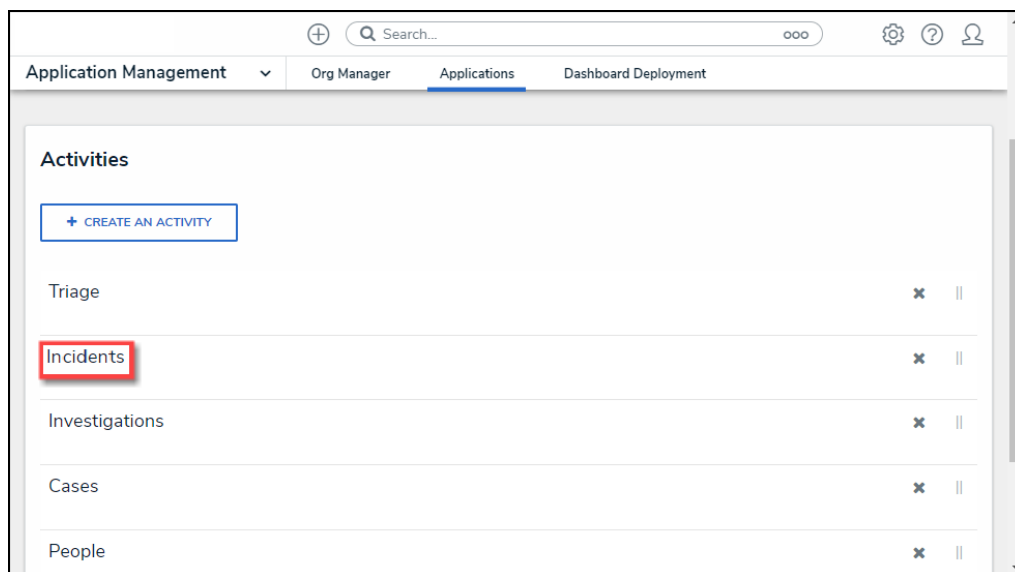
Applications Tile

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



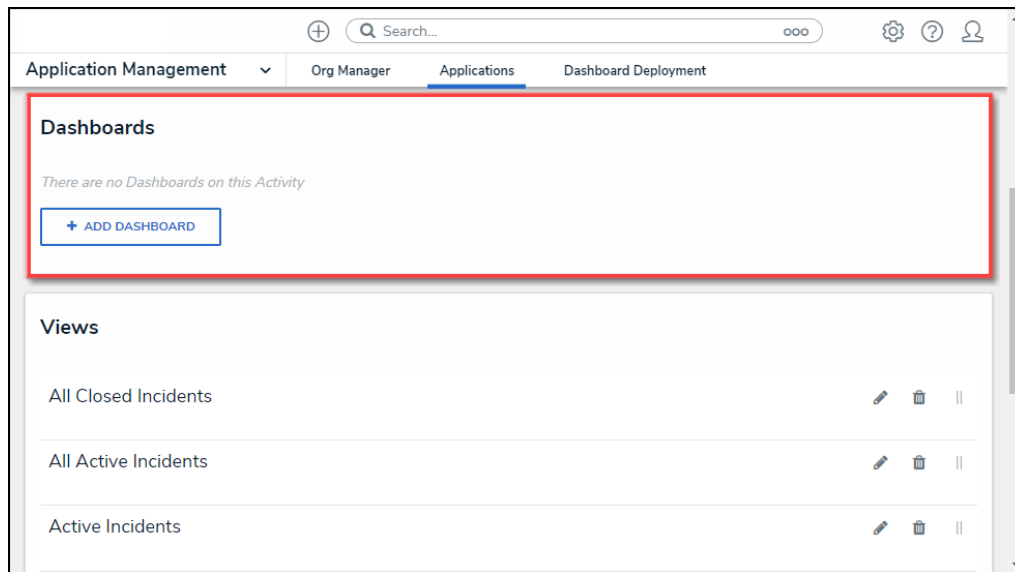
Select an Application

- 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

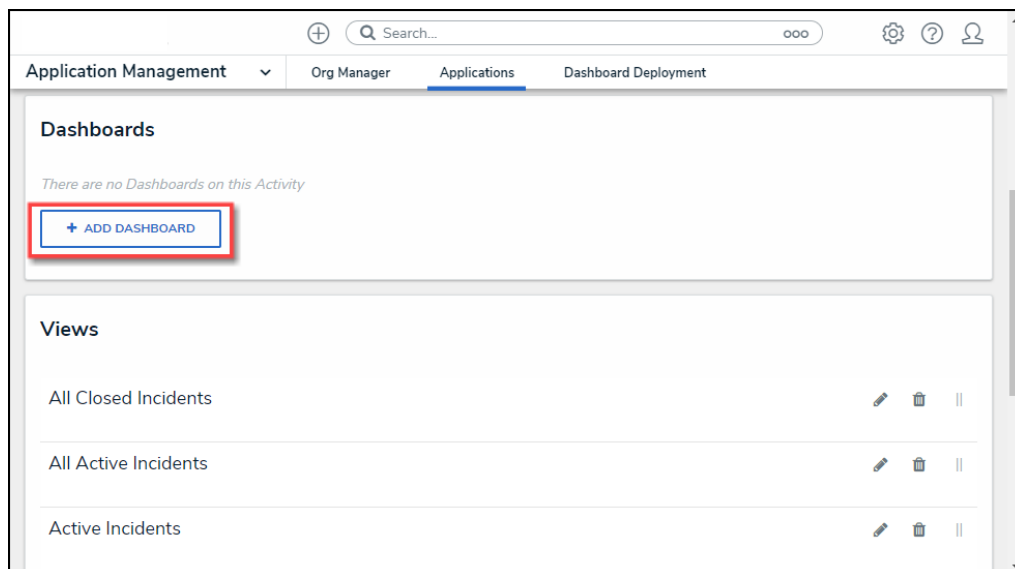
- From the **Edit Activity** screen, scroll to the **Dashboard** section.



Dashboard Section

Embedding a Dashboard in an Activity

1. Click the **+Add Dashboard** button.



+Add Dashboard Button

2. Fill out the fields that appear:

Application Management ▾ Org Manager Applications Dashboard Deployment

Dashboards

There are no Dashboards on this Activity

* Name

Description

Dashboard

CANCEL CREATE

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.

Application Management ▾ Org Manager Applications Dashboard Deployment

Dashboards

There are no Dashboards on this Activity

Name

Description

Dashboard

CANCEL CREATE

Completed Dashboard Fields

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

The screenshot shows the 'Dashboards' section of the 'Applications' tab. It contains a form with the following fields:

- Name:** Internal Management Dashboard
- Description:** A High level security view.
- Dashboard:** Incident Management - Tracking

At the bottom right, there are two buttons: 'CANCEL' and '✓ CREATE'. The 'CREATE' button is highlighted with a red rectangular box.

Create Button

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

The screenshot shows the 'Dashboards' section of the 'Applications' tab. It displays a list of dashboards with the following entry:

- Internal Management Dashboard** (with edit, delete, and expand icons)

Below the list is a button labeled '+ ADD DASHBOARD'.

Dashboard Section

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

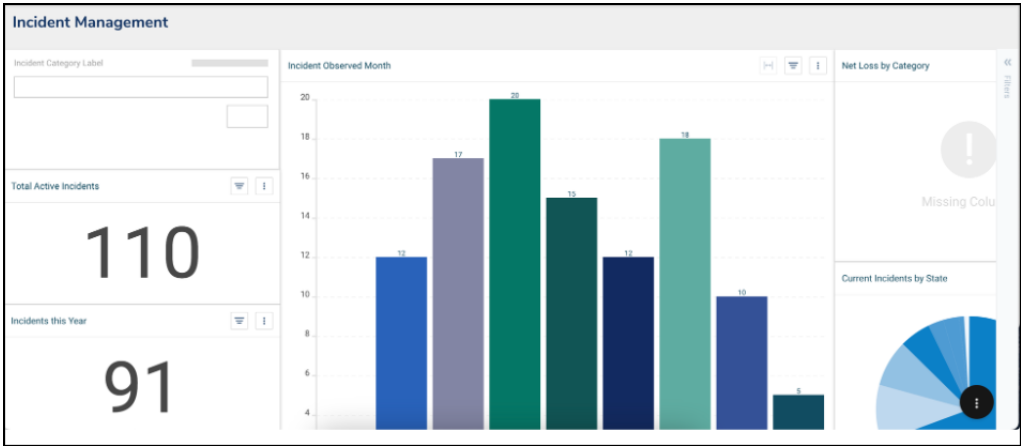
The screenshot shows the 'Incidents' section of the 'Incident Management' tab. It features a 'Dashboards' section with the following entry:

- Internal Management Dashboard**

A '+ CREATE INCIDENT' button is visible in the top right corner of the 'Incidents' section.

Dashboard Section

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



Dashboard