Dashboard Navigation Overview

Alchemer Dashboard features a main navigation bar along the top that provides access to the most important functions. The available options depend on your products and license, so may vary by user.

> For more information on Alchemer Dashboard permissions and license types, refer to this document.

All users have access to:

- Overview
- Dashboards
- Charts
- Alerts

With the Advanced Dashboard add-on, you also see **Spark** as the first item in the navigation, to the left of **Overview**. It opens the Spark chat space. Without the add-on, Spark doesn't appear in the navigation.

Overview

Let's first discuss the Overview page.

Search Bar

The search bar appears for everyone. If you have Standard Dashboard, you can use it to find your existing dashboards and charts. If you have Advanced Dashboard, you'll see the Spark search bar, which enables the AI-powered search assistant capabilities.

KPI Watchlist

Below the search bar, you see a KPI watchlist, where you can show important key performance indicators that you want to keep an eye on.

Favorites

Add any chart or dashboard to the Favorites section for quick access.

Trending

The Trending section shows which charts and dashboards are currently popular in your organization.

Library

The Library shows all dashboards and charts that you've created or are shared with you.

Create Button

> You must have a Creator license type to be able to create to Charts and Dashboards.

Use the Create button to get started with creating a new chart, dashboard, or dataset.

Adding a Chart

The chart builder lets you search and visualize your feedback data using filters and keywords. As you type, Alchemer automatically offers suggested search terms. If the suggested term matches what you intended to type, you can simply select it from the list.

Once you've entered all your search terms, click Go to run the search. The results are visualized as a chart, map, or table.

The search can then be saved and shared with others. This saved search is referred to as a Chart.

Learn more about Charts.

Adding a Dashboard

A dashboard is a live, interactive view that groups a set of related visualizations together.

Learn more about building a Dashboard.

Adding a Dataset

Before you can start visualizing feedback, it needs to be added as a dataset in Dashboard.

The dataset selector shows you a list of your surveys and other sources. When you add a dataset, Alchemer will automatically review the structure and set up the response data in the best way for visualization.

For this reason, we recommend waiting to add a dataset until your survey design is complete and you've started collecting real responses.

Learn more about managing sources.

Dashboards Tab

Once you've created a chart, you can add, or "pin", it to a new or existing dashboard.

Learn more about building a Dashboard.

Dashboards you've created or have been shared with you can be accessed from the Overview and Dashboards pages.

You can export a static PDF of your dashboard, or share a live dashboard with others in your organization.

> While the ability to create new dashboards and charts is restricted by license, all users are able to view, filter, drill-down, and present dashboards and charts that have been shared with them.

Charts Tab

Any charts you create or that have been shared with you will be listed on the Overview page and the Charts page. Clicking into any chart will run the search query using the most up to date data available. Learn more about Charts.

Alerts Tab

Keep your team members and stakeholders in touch with the latest data trends using alerts and schedules.

Alerts can be set to automatically detect anomalies, trigger based on a threshold, or sent on a schedule.

Use dashboard schedules to send an exported, point-in-time view of an entire dashboard to your stakeholders on a regular basis.

Learn more about scheduling.

Data Tab

Only users with the Creator or Admin license type can view and manage data. The Data area has two tabs—**Sources** and **Datasets**—where you create and manage the data that powers your charts.

Sources

The Sources tab lists the surveys and Digital interactions (Digital Surveys and Prompts) that you can turn into datasets. For each source you can see its Document Type, Status, Interaction Count, and whether a dataset has been created from it yet. To build a dataset, select one or more sources and click **New Dataset**. The dataset is then generated on demand.

Datasets

The Datasets tab lists the datasets you've created from your sources. For each dataset you can see its Source Type, Source, number of Rows, when it was last updated, and the most recent response date. Use **Create Chart** to start visualizing a dataset, and use **Refresh** to pull in the latest data from the source.

Some models are pre-generated for you and are ready to use right away. The **Account Summary**, **All Surveys**, **Love Dialog**, and **Rating Dialog** models are created automatically and do **not** appear on the Sources or Datasets pages. The Sources and Datasets pages are only for sources that you turn into datasets on demand.

Spark

Spark is an AI-powered search assistant that translates natural language questions into powerful, precise queries. You can access Spark from a few places.

1. From the Overview page, use the search bar to ask questions about your data using natural language and get an AI-generated visualization. You may also see suggestions for existing visualizations that answer your question.

2. From a dashboard, access Spark from any chart to refine the visualization using natural language.

3. From the top navigation, select **Spark** to open the Spark chat space, a full-page place to ask questions and pick up saved conversations. To learn more, see Using the Spark Chat Space.

To build a whole dashboard from a prompt, use SparkViz in the dashboard editor. Describe the dashboard you want, and SparkViz creates the charts, tabs, and sections for you. To learn more, see Getting Started with SparkViz.

> Not seeing the results you're expecting from Spark? Use the intuitive coaching mechanism to provide feedback to the AI about what results and chart type you're expecting to see for the question you asked. Your coaching will help Spark better interpret similar questions next time.

AI Highlights Tab

AI Highlights brings your data to life, automatically identifying patterns, trends, and anomalies you might have missed. Learn more about AI Highlights.

You can start an AI Highlights analysis from a chart, dashboard, or model. Analysis options differ by the type of data you're reviewing.

On the AI Highlights page, you can find all the analysis reports that you generated or that have been shared with you.

Alchemer Pulse

Alchemer Pulse helps you identify and explore themes in your open-text responses and text-based data. Customers with Pulse can access the tool from the Pulse tab. Learn more about Alchemer Pulse.

Related Articles