Alchemer Dashboard - Getting Started FAQs

New to Alchemer Dashboard? You're in the right place. These FAQs cover the most common getting-started questions, from access to understanding core features, so you can get up and running fast.

Note: use the navigation panel "In this Article" on the right hand side of the page to jump to the right category.

Getting Started with Dashboard

Q: What is Alchemer Dashboard?

Alchemer Dashboard is a data visualization and analysis tool that transforms survey and Alchemer Digital feedback into interactive dashboards, charts, and insights. Dashboard enables teams to visualize data from multiple surveys, track key performance indicators, and share findings across your organization, all without requiring advanced technical skills.

Q: What types of projects work best with Dashboard?

Dashboard supports both one-off projects and ongoing studies. One-time projects benefit from flexible visualization and reporting capabilities, while ongoing programs can leverage real-time updates, trend tracking, and automated alerts to monitor performance metrics over time.

Q: How does Dashboard compare to standard Alchemer reporting?

Standard survey reporting is designed to analyze individual survey results. Dashboard allows you to connect multiple surveys as datasets and identify trends and insights across your feedback data. Dashboard provides real-time visualizations that update automatically as new responses arrive, multi-survey comparison capabilities, and AI-powered analysis tools (with Advanced Dashboard).

Q: What is an interaction?

In Alchemer Digital, an *interaction* is a feedback touchpoint you run in your app: a Digital Survey, Prompt, Love Dialog, or Rating Dialog. In Dashboard, Digital interactions are a data source you can visualize, just like surveys.

Pricing & Account Access

Q: Is Dashboard included with my account?

Dashboard is included with Business Platform (Enterprise) accounts. If you're on an individual or small team plan, Dashboard is not currently available, but you can contact Sales to explore

upgrade options.

Q: Are the AI features included or an add-on?

Advanced Dashboard features (including Spark, AI Highlights, and Predictive Analytics) are available as an optional add-on for Business Platform accounts. Contact your Customer Success Manager to learn more or request a demo.

Q: What's the difference between Business Platform accounts and other plans?

Business Platform (Enterprise) accounts include:

- Dashboard and advanced visualization capabilities
- Unlimited surveys and questions
- Higher response limits
- Advanced integrations and API access
- Team-based permissions and governance
- Dedicated Customer Success Manager

For detailed plan comparisons, visit: https://www.alchemer.com/plans-pricing/compare-licenses/

Q: Is there a limit to how many dashboards I can create?

No, there is no limit on the number of dashboards you can create. You can build as many dashboards as needed for different teams, audiences, or use cases.

Q: Can I use Dashboard as a replacement for Standard Reporting?

You'll retain access to Standard Reporting alongside Dashboard. Whether to use Dashboard or Standard Reporting depends on your needs:

- Use Dashboard for: Multi-survey analysis, real-time monitoring, interactive exploration, trend tracking over time, stakeholder-facing visualizations
- Use Standard Reporting for: Single survey reports, detailed response-level analysis, report exports in Word/Excel/PowerPoint

Many customers use both tools depending on the specific reporting requirement.

Data Sources

Q: How do I add surveys to Dashboard?

Before visualizing survey data, you must add it as a data source in Dashboard. Navigate to the Data tab, select your survey from the Data Source selector, and Alchemer will automatically structure the response data for optimal visualization. We recommend waiting until your survey design is complete and you've collected real responses before adding a data source.

If you're working with Alchemer Digital, you add a Digital Survey or Prompt as a source the same way. Love Dialog and Rating Dialog data is already available and doesn't need to be added.

Go to the Quick Start Guide

Q: I'm an Alchemer Digital customer, why is some of my data already in Dashboard while other data has to be created?

It depends on the interaction type. **Love Dialog and Rating Dialog** data is pre-built: a single Love Dialog model and a single Rating Dialog model are created automatically for you, each containing data for all the Digital apps you can access, so you can chart them or use Spark right away. For **Digital Surveys and Prompts**, you create a dataset from the source yourself (Data > Sources > select the source > New Dataset).

Q: Do I need to create a dataset for Love Dialog or Rating Dialog data?

No. Each user has one Love Dialog model and one Rating Dialog model, built and maintained for you and spanning every Digital app you have access to. There's no source to add or dataset to create, they're ready to use.

Q: What data is available to use in Dashboard?

In order for data to appear in Dashboard, the following criteria must be met:

- A survey or Digital interaction must have received a response within the last 3 years.
- Only 3 years of response data will be available for those surveys or interactions.
- The 3 year term is a daily rolling window

Q: Can I upload my own data from Excel or other sources?

Dashboard is currently designed specifically for Alchemer survey data and does not support direct uploads from Excel or external data sources. However, if you import data into your survey through an Alchemer integration, all of that integrated data will be available for visualization in Dashboard.

Q: Can I use Alchemer Pulse classifications in Dashboard?

Pulse integration with Dashboard is not yet available but is on the product roadmap for 2026. This will enable you to bring text analytics classifications from Pulse directly into Dashboard visualizations.

Q: What happens if I edit my survey after creating a data source?

Many survey modifications flow smoothly into Dashboard without requiring action. However, we recommend refreshing your data source, for a survey, Digital Survey, or Prompt, if you:

- Add a new page or question
- Add question labels to an existing survey
- Make structural changes to the survey

Refreshing the data source will not break existing charts or dashboards. Navigate to the Data tab and click the refresh button next to your data source.

Q: How often does my dashboard data refresh?

Data sources update automatically as new survey responses come in. Currently, there is approximately a 2-hour delay between response submission and data appearing in Dashboard. Alchemer is working to reduce this refresh time in future updates.

Q: How quickly does my Digital data appear in Dashboard?

For Digital interactions, data is typically available in Dashboard within about an hour of being collected or updated in Alchemer Digital.

Q: Will I be notified when I need to refresh a data source?

Dashboard does not automatically alert you when a data source needs refreshing. However, you can easily refresh data sources at regular intervals by clicking the refresh button in the Data tab whenever you make significant survey modifications.

Q: Can I use data from multiple surveys in one dashboard?

Yes. You can visualize data from multiple surveys on a single dashboard, placing charts side-by-side for easy comparison. And, you can combine data from multiple surveys within a single chart or visualization.

Question Labels

Q: What are question labels?

Question Labels are reusable tags you apply to questions across surveys to standardize your data. They help maintain consistency when the same question appears in multiple surveys, making it easier to compare results and build cross-survey visualizations.

Question Labels include a centralized library with commonly used labels and type-ahead search functionality to prevent duplication.

Go to the Question Labels Help Article

Q: Do survey respondents see question labels?

No, question labels are visible only on the backend during survey building and data analysis. Survey respondents never see question labels, they only see the actual question text.

Q: Can I add question labels to a live survey?

Yes, you can add or edit question labels on live surveys at any time. After adding labels to an existing survey, you'll need to refresh the data source in Dashboard for the labels to appear in your visualizations.

Q: Are question labels available for Digital surveys?

Yes. Digital Surveys support question labels, so you can apply the same clear, consistent naming to your Digital data that you use for surveys.

Q: Are question labels the same as SPSS variable names?

No, question labels are separate from SPSS variable names. Question labels are an enhancement of the question alias functionality and serve a different purpose, standardizing questions across surveys for easier analysis and comparison.

Q: Can I use question labels in Standard Reporting and exports?

Yes. Question labels work across Alchemer products, including Standard Reporting, Dashboard, and data exports to tools like SPSS. This helps standardize your data and streamline reporting workflows throughout your organization.

Go to the Question Labels Help Article

Q: Where do I manage question labels in Dashboard?

Open the Data menu in Dashboard and select Question Labels. The page shows your Question Label Library grouped by category; permitted users can search, use + Label to add a label, and edit or delete labels. Some labels are system managed and cannot be edited or deleted. See Manage Question Labels in Dashboard.

Q: Who can manage question labels in Dashboard?

In Dashboard, any user with a Creator license can manage question labels. Dashboard does not use Survey's role-based permissions. (In Survey, managing labels requires the "Create and modify question library elements" role permission.) Users without a Creator license do not see the Question Label page.

Q: Do labels I manage in Dashboard sync to Survey and Digital?

Yes. A label you add or edit in Dashboard is available in Survey and Digital, and in the Dashboard chart builder. Changes to question labels appear right away in the editor across all products.

Building Charts & Visualizations

Q: How do I create charts in Dashboard?

Dashboard offers multiple ways to create charts:

1. Manual Chart Builder: Use the search bar to select attributes, measures, and filters from your data sources. Click "Go" to generate the visualization.
2. AI-Powered (Spark): If you have Advanced Dashboard, use natural language queries to ask questions about your data, and Spark will automatically generate appropriate charts.

Charts can be saved individually or pinned to dashboards for easy access.

Go to the Building Charts Help Article

Q: What types of charts and visualizations are available?

Dashboard supports a wide range of chart types, including:

- Column charts (standard and stacked)
- Line charts
- Bar charts (horizontal and vertical)
- Pie charts
- KPI charts and metrics
- Pivot tables
- Geo charts (area, bubble, heatmap)
- Sankey charts
- Treemap charts
- Heatmaps

The appropriate chart type depends on your question type and analytical goals. Dashboard automatically suggests relevant visualizations based on your data.

Learn more about chart types

Q: Can Dashboard create cross-tabs or pivot tables?

Yes, Dashboard supports pivot table charts, which allow you to create cross-tabulations and multi-dimensional data views. Pivot tables are one of the many chart types available in the visualization builder.

Read more about pivot table charts

Q: Can I combine related questions in a single chart?

Yes, you can combine related questions within a single chart. Dashboard's chart builder allows you to add multiple measures and attributes to create comprehensive visualizations.

Go to the Building Charts Help Article

Q: How do I visualize checkbox grid or multi-select questions?

Our help documentation provides specific guidance for visualizing different question types, including checkbox grids and multi-select questions. These question types can be displayed in various formats depending on your analytical needs.

Go to the Building Charts Help Article

Customizing Visualizations

Q: Can I customize chart colors?

Yes, chart and visualization colors are fully customizable. You can change colors for individual charts through the chart configuration menu. Access customization options by clicking the edit chart icon and selecting the Color dropdown menu.

Visit the Change Chart Colors Help Article

Q: Are there color-blind friendly views?

Color-blind friendly themes are not currently available. However, charts and visualizations support a wide range of WCAG accessibility requirements to ensure your dashboards are accessible to all users.

Q: Can I use design templates for consistent branding?

Dashboard does not currently support design templates. However, chart designs are highly customizable, allowing you to manually adjust colors, fonts, and formatting to match your brand guidelines across multiple dashboards.

Q: Can I customize data labels and percentages?

Yes, data labels are highly customizable. Specific customization options vary by chart type. You can adjust decimal places, number formatting, label positioning, and more through the chart configuration settings.

Visit the Editing Charts Help Article

Q: Can I add explanatory text to dashboards?

Yes, you can add Notes Tiles to any dashboard. Notes Tiles allow you to include:

- Dashboard overviews and instructions
- Company branding through images
- Definitions of terms and metrics
- Context for specific visualizations
- Headers and section dividers

Learn more about Notes Tiles

Formulas & Custom Calculations

Q: Can I create custom calculations in Dashboard?

Yes, Dashboard supports formulas for creating custom calculations and metrics. You can use formulas to:

- Calculate length of interview (LOI) by subtracting start time from submission time
- Apply weighting based on demographics
- Create custom benchmarks or targets
- Calculate rates and percentages
- Build complex nested formulas

Learn more about Formulas

Q: Can I add manual benchmarks to charts?

Yes. If you have manually calculated a benchmark value (such as an average across multiple surveys), you can add it to a chart using a formula. This allows you to visualize performance against custom targets or industry standards.

Q: How do I apply weighting to my dashboard data?

Weighting can be applied using formulas in Dashboard. Create a formula that applies your weighting logic based on demographic or other variables, then use that weighted measure in your charts.

Learn more about Formulas

Sharing & Permissions

Q: Who can view my dashboards?

You can customize sharing permissions when creating or editing a dashboard, choosing to:

- Keep dashboards private (visible only to you)
- Share with specific users with View or Edit permissions
- Share with entire teams or user groups

Q: Can I share dashboards with people who don't have Alchemer accounts?

Currently, viewing dynamic, interactive dashboards requires an Alchemer login. Users without accounts can only view static PDF exports of dashboards.

Alchemer is exploring the ability to share interactive dashboards via public links with individuals who may not have Alchemer licenses. This feature requires more complex controls to limit what data is publicly accessible. Contact your Customer Success Manager to discuss license options or share your interest in this capability.

Q: Can I embed interactive dashboards on my website?

Dashboard does not currently support embedding interactive dashboards on external websites. Viewing dynamic dashboards requires users to log into the Alchemer application. This is being investigated as a future enhancement.

For public-facing reporting, consider using static PDF exports or exploring Alchemer's standard report sharing features, which do support public links and website embedding.

Q: Does viewing a dashboard require a license seat?

Viewing a dynamic dashboard requires an Alchemer login with appropriate permissions. All users on Business Platform accounts can view dashboards that have been shared with them, regardless of their specific license type. The ability to create and edit dashboards is restricted to users with Full Access or Professional licenses. Collaborator and Stakeholder licenses are able to view and interact with dashboards.

Q: How do I share a static PDF version?

To share a dashboard as a PDF:

1. Open the dashboard
2. Click the More menu (three dots)
3. Select "Download PDF"
4. Choose your format and layout options
5. Download and distribute the PDF file
6. PDF exports do not require recipients to have Alchemer logins and can be shared via email, file sharing services, or other distribution methods.

Q: Can I download individual charts?

Yes, individual charts and visualizations can be downloaded directly in multiple formats:

- PNG: High-quality image format
- CSV: Raw data in comma-separated values
- XLSX: Excel spreadsheet format
- SVG: Scalable vector graphics (available for certain chart types)

Access download options by clicking the More menu on any chart.

Visit the Download a Dashboard Help Article

AI Features (Advanced Dashboard)

AI features require an upgrade to Advanced Dashboard, which is available for Business Platform/enterprise accounts. Contact your Customer Success Manager for details on upgrading.

Q: What AI features are available in Dashboard?

Advanced Dashboard includes AI-powered capabilities:

- Spark: Natural language search that allows you to ask questions in plain English and receive automatically generated charts and insights
- SparkViz: Builds a complete dashboard from a prompt in the dashboard editor, then refines it as you ask for changes
- AI Highlights: Machine learning algorithms that automatically identify patterns, trends, anomalies, and correlations in your data

Q: What is Spark and how does it work?

Spark is an AI-powered conversational search tool that uses Large Language Models (LLMs) to understand natural language queries. Instead of manually building charts, you can ask questions like "What's the average satisfaction score by region?" and Spark will automatically generate the appropriate visualization.

Spark shows transparency in its reasoning, you can see how it parsed your question, what data it used, and what filters it applied. This allows you to validate the results and ensure accuracy.

Q: What types of data work best with Spark?

Spark is optimized for quantitative data analysis. While it has some ability to understand text fields, it is not designed for robust open text analytics. For comprehensive text analysis, Alchemer recommends using Alchemer Pulse, which offers purpose-built natural language processing and sentiment analysis capabilities.

Learn more about Spark

Q: Where do I find Spark?

With Advanced Dashboard, select **Spark** in the top navigation, just to the left of **Overview**, to open the Spark chat space. You can also ask quick questions from the Spark prompt bar at the top of the **Overview** page. Learn more in Using the Spark Chat Space.

Q: Are my Spark conversations saved?

Yes. Your chats appear in the **Chats** list in the Spark chat space, with the most recent activity at the top. Select a chat to pick up where you left off. Chats from the earlier Spark pop-up aren't carried over.

Q: What is SparkViz?

SparkViz builds a complete dashboard from a prompt. Open a dashboard in edit mode, select **SparkViz**, and describe what you want. Then refine the dashboard by asking for changes. Your changes are kept only when you select **Save**. Learn more in Getting Started with SparkViz.

Q: What are AI Highlights?

AI Highlights uses machine learning to automatically analyze your data and surface insights you might have missed. It identifies:

- Trends: Patterns that emerge over time
- Correlations: Relationships between different variables
- Anomalies: Unusual values or outliers in your data
- Change drivers: Factors that explain increases or decreases in metrics

AI Highlights learns from your interactions, improving recommendations based on which insights you find valuable.

Learn more about AI Highlights

Q: What types of data are featured on predictive dashboards?

Predictive dashboards work best with data tracked over time, such as CSAT scores, NPS, or other key performance indicators (KPIs). The predictive analytics engine uses historical patterns to

forecast future trends, helping teams anticipate changes before they occur.

Data Security & Privacy

Q: How does Dashboard handle data security?

Alchemer Dashboard implements multiple layers of security:

- Encryption: 256-bit encryption for data at rest and TLS encryption for data in transit
- Access Controls: Role-based permissions and data governance
- Compliance: EU-US Data Privacy Framework certified
- Secure Infrastructure: Hosted on AWS Tier 1 data centers with firewall protection
- Confidentiality: Customer data is confidential and accessed by staff only when necessary for support

Read Alchemer's Security Whitepaper

Q: Is my data used to train AI models?

No. Customer data will not be used to train or be visible in any publicly available LLMs. Your data will not be visible to other Alchemer customers, and Alchemer does not use your feedback data for any external AI model training purposes.

Dashboard employs a "human-in-the-loop" approach where you can review and provide feedback on AI-generated queries, and the system enforces configured access controls to prevent unauthorized data access.

Learn more about Dashboard's AI

Q: How can I verify that AI results are accurate?

Spark and AI Highlights provide transparency into their reasoning. You can:

- Review how AI parsed your questions
- See what data sources and filters were applied
- Drill down into the underlying data
- Validate results against your own knowledge of the data

Q: Where is my dashboard data stored?

Dashboard data is stored in Alchemer's data warehouse with enterprise-grade security. Queries are performed live without moving data outside this secure environment.

Advanced Features & Integrations

Q: Is this a substitute for Power BI?

Alchemer offers a separate Power BI integration that allows you to push survey data into Microsoft Power BI for analysis. However, for most survey reporting use cases, Dashboard provides many of the same features as Power BI, interactive visualizations, real-time data, and

flexible analysis, without requiring a separate business intelligence tool.

The choice between Dashboard and Power BI depends on your specific needs and existing technology stack. Contact your Customer Success Manager to discuss which approach works best for your organization.

Power BI Integration Help Documentation

Q: Can Dashboard show response rates?

Dashboard can display the number of responses received. However, the total number of survey invitations sent is not automatically available in Dashboard at this time. You can calculate response rates manually or use formulas to create custom rate calculations if you have both metrics available.

Q: How does Dashboard handle time series data from multiple surveys?

Support for true time series analysis across multiple surveys is currently in development. In the meantime, you can visualize data from multiple surveys side-by-side on the same dashboard to compare trends manually. Once multi-survey data visualization within a single chart is released, time series analysis across surveys will become more seamless.

Troubleshooting & Support

Q: Why don't I see my recent survey changes in Dashboard?

If you've made changes to a live survey, such as adding questions, pages, or question labels, you need to refresh the data source for those changes to appear in Dashboard. Navigate to the Data tab, find your survey data source, and click the refresh button. This will not break any existing charts or dashboards.

Q: I can't see Dashboard in my navigation. What should I do?

If Dashboard doesn't appear in your Alchemer navigation, you may not have access based on your account type. Dashboard is available for Business Platform (Enterprise) accounts. Contact your Customer Success Manager to verify your account includes Dashboard or to explore upgrade options.

Q: Where can I get more help?

Head to the comprehensive Dashboard help documentation site

You can also:

- Contact Alchemer Support through your account
- Reach out to your Customer Success Manager

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