Quick Start Guide

Quick start guide:
Get started with Dashboard

Alchemer Dashboard helps you visualize, track, and share your feedback data across your team. Whether you're building a standard dashboard or using Spark to create advanced, AI-assisted visualizations, this guide will help you get up and running—fast.

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The video above covers getting started from Alchemer **Survey** data. The video below covers getting started from Alchemer **Digital** data.

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Access the Dashboard area

Finding the Dashboard icon in the main navigation may not be obvious at first. Here's how to locate it:

1. In the left-hand main navigation, find the grid button, then the **Alchemer Dashboard** section.
2. Click **Dashboard** to open the dashboard workspace.

Step 1: Prepare your data

To create a chart, you first need data to work with. How you get there depends on the type of feedback data you're using.

Option A — Create a dataset from a source (Alchemer Survey survey, Digital Survey, or Digital Prompt)

For Alchemer Survey surveys, Digital Surveys, and Digital Prompts, you build a dataset from a source:

1. From the top navigation, click **Data** > **Sources**.
2. Select the checkbox for the source(s) you want to include — an Alchemer Survey survey, a Digital Survey, or a Digital Prompt.
3. Click **New Dataset** at the bottom of the page.
4. The **Dataset** column shows **Creating...**. When it finishes, a confirmation appears and the dataset is ready. You can also open the **Datasets** tab and click **Refresh** to see it.

Note: You can select more than one **Alchemer Survey survey** to combine them into a multi-survey dataset. Selecting multiple sources isn't yet supported for Digital sources.

Option B — Use a ready-made model (Love Dialog or Rating Dialog)

Love Dialog and Rating Dialog data is pre-built for you. A single Love Dialog model and a single Rating Dialog model are created automatically, each containing data for all the Digital apps you can access. You don't need to create a dataset — these models are ready to chart or use with Spark right away. Go to **Create** > **Chart** or **Overview** > **Spark** and select the Love Dialog or Rating Dialog dataset to begin.

> **Tip:** A **source** is your raw feedback data, such as a survey or prompt. A **dataset** is a refined view based on the questions and filters you define from that source. (Love Dialog and Rating Dialog models come ready to use, so there's no source step.)

Step 2: Create your first chart

Once your dataset is ready:

1. Go to the **Charts** tab.
2. Click **New Chart**.
3. Select your dataset and choose the question labels you want to visualize. All available data from your dataset will display in the left-side column.
4. Choose your chart type from the library (bar, line, scatter, pivot, etc.). The chart type will default as a table. Once you have your table set up, then you can change the chart type by selecting the chart type you want.
5. Customize the chart with filters, colors, and descriptions.

Step 3: Pin to your Dashboard

After customizing your chart:

1. Click **Pin** in the chart toolbar.
2. Select the dashboard you'd like to pin it to.
    - If you haven't created a dashboard yet, you'll be prompted to create one.

Use Spark for AI-powered dashboards

Want answers fast? Ask Spark a question about your data in plain language, and it creates a chart for you.

> This feature is only available to customers who have upgraded to use Advanced Dashboard. If you are interested in upgrading, reach out to your sales rep.

To use Spark:

1. Ensure you've created a dataset.
2. Navigate to the **Overview** tab.
3. Select a dataset from the dropdown.
4. In the Spark input box, ask a business question in natural language (e.g., "Show me a bar chart of NPS scores by month").
5. Spark will create a chart for you instantly.
6. Pin and customize the chart as needed.

Spark also has its own place in the top navigation, where you can chat with it and come back to saved conversations. To learn more, see Using the Spark Chat Space.

> **Good to know:** You can change the chart type after using Spark, just like with manually created charts.

Build a whole dashboard with SparkViz

To build a complete dashboard from a prompt, open a dashboard in edit mode and select **SparkViz**. Describe what you want, review the plan, and SparkViz creates the charts, tabs, and sections for you. Your changes are kept only when you select **Save**. To learn more, see Getting Started with SparkViz.

Next steps

Once you've pinned a few charts to your dashboard:

- Building in Dashboard

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