Getting Started with SparkViz

SparkViz builds dashboards for you. Describe the dashboard you want in plain English, and SparkViz creates a complete, multi-chart dashboard organized into tabs and sections. Then refine it by asking for changes instead of editing chart by chart.

> SparkViz requires the Advanced Dashboard add-on and access to edit dashboards. Without Advanced Dashboard, you won't see the SparkViz tab. To learn more about access, see Alchemer Dashboard Permissions Overview.

SparkViz Demo

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Open SparkViz

1. Open a new or existing dashboard in edit mode.
2. In the toolbar at the top of the page, select **SparkViz**. The toolbar also includes **Add** and **Styling**, and **Cancel** and **Save** sit at the top right.

On an empty dashboard, SparkViz shows **Turn ideas into Dashboards** with a prompt box and a few example prompts to get you started. After your first prompt, SparkViz moves to a panel on the right side of the page, where you can keep the conversation going. Use the collapse icon (>>) to hide the panel.

Build a dashboard from a prompt

1. Describe the dashboard you want in the prompt box. Say who it's for and what they need to track. For ideas, see **Example prompts** below.
2. If more than one data source matches your request, SparkViz lists them and asks which one to use. Choose the one you want.
3. Review the plan. SparkViz proposes a numbered list of the charts it will build. Confirm the plan, or ask for changes.

4. SparkViz builds the charts, groups them into tabs and sections, and applies styling. While it works, the dashboard shows **Working on your request**, and the panel shows each step.

5. Review the dashboard, then select **Save** to keep it.

A full dashboard can take several minutes to build. Each time SparkViz changes the dashboard, the panel shows a **Dashboard updated** card with a version number, so you can keep track of what changed.

Refine your dashboard

Keep the conversation going in the SparkViz panel to make changes. For example, ask SparkViz to:

- Add a chart.
- Remove a tab.
- Rename a chart.
- Change a chart type.

If a chart type doesn't suit the data in a field, SparkViz uses a table instead.

Use the thumbs up and thumbs down icons under SparkViz replies to rate them.

Undo a change

To undo something SparkViz did, ask it to revert the change. For example, "Revert your last change" or "Put back the tab you removed."

Save or discard your changes

> **Important:** SparkViz doesn't save your changes automatically. Select **Save** at the top right to keep your dashboard, or select **Cancel** to discard the changes.

Example prompts

Strong prompts name the audience, the goal, and the data you care about. Try these as a starting point:

- "As a customer experience lead, I want a dashboard that tracks survey responses over time, breaks down responses by survey, and shows our top surveys."
- "As a business analyst, I want to see how response volume varies by region, with a map and a breakdown by country."
- "As a finance head, I want a one-page summary of key response metrics with trends for the

last 12 months."
- "Add a tab that compares satisfaction scores by month."

FAQ

Who can use SparkViz?
Users with the Advanced Dashboard add-on and access to edit dashboards.

Does SparkViz save my dashboard automatically?
No. Select **Save** at the top right to keep your changes, or **Cancel** to discard them.

Can I undo what SparkViz did?
Yes. Ask SparkViz to revert the change. You can also select **Cancel** to discard all unsaved changes.

Can I still add charts myself?
Yes. Use **Add** in the edit toolbar, or pin charts to the dashboard as you always have.

How is SparkViz different from Spark?
Spark answers questions about your data with charts and written summaries. SparkViz builds and edits whole dashboards. To learn more about Spark, see Using the Spark Chat Space and Getting Started with Spark.

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