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Designer User's Guide

Dashboard management

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- Administrator

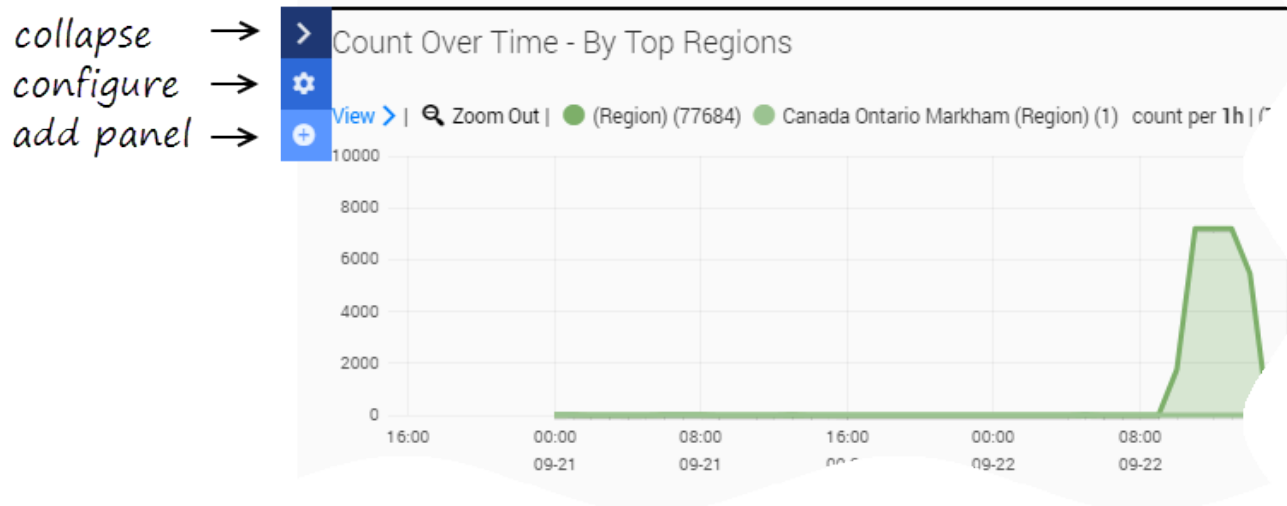
Learn how to manage the Designer Analytics dashboards.

Related documentation:

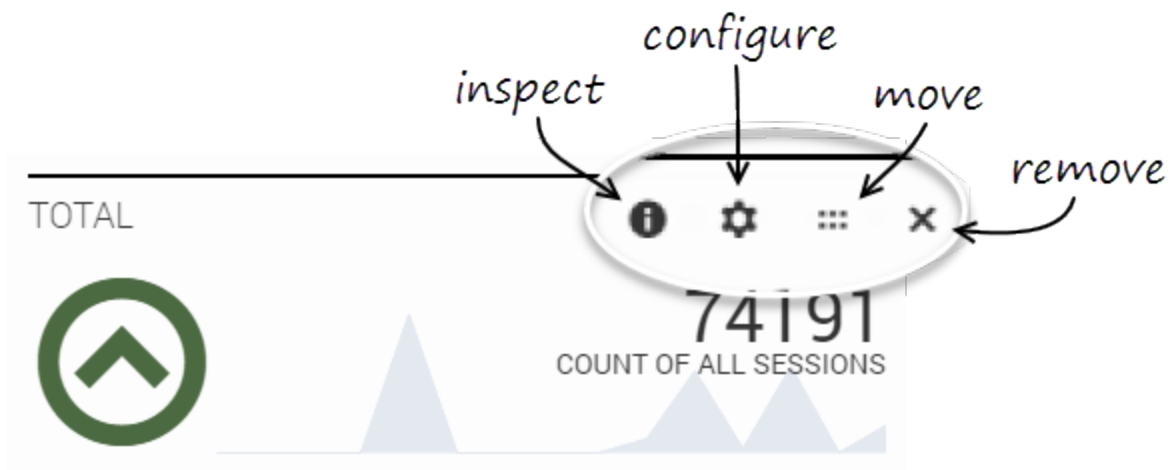
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Rows and Panels

On the left side of each row is a sliding menu that remains hidden (or collapsed) when not in use. The menu slides out when you hover over it and has options to **collapse**, **configure**, or **add panels** to the row.



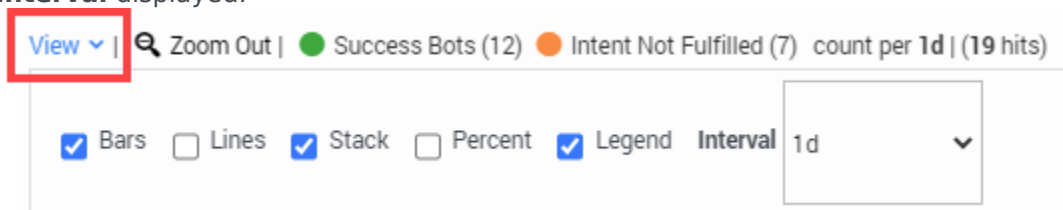
Each of the panels has options to **configure**, **move**, or **remove** the panel. Some panels also have an **inspect** icon that lets you view the query for the report being displayed.



Tip

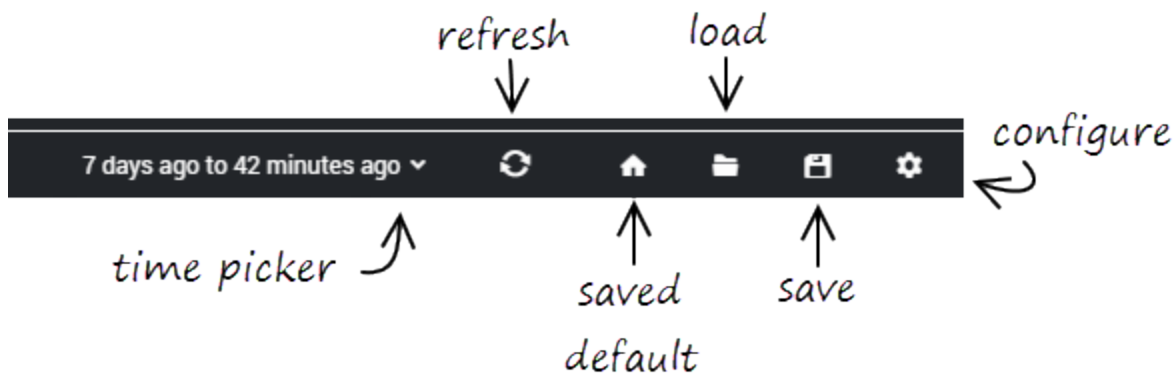
Sometimes, after closing an **inspect** panel, it might look like the dashboard page has gone blank, especially if there was a lot of information to scroll through. If this happens, simply scroll back up to the top of the dashboard page. (This issue can be avoided by using **Esc** to dismiss an **inspect** panel instead of closing it.)

Some panels have a **View** menu that you can expand to select a visualization option or change the **Interval** displayed:



Dashboard controls

At the top of the screen are control icons for performing common tasks.



Time picker

Lets you select the time period for which you want to display data.

Refresh

Refreshes the dashboard with the most current data for the selected time period.

Home (saved default)

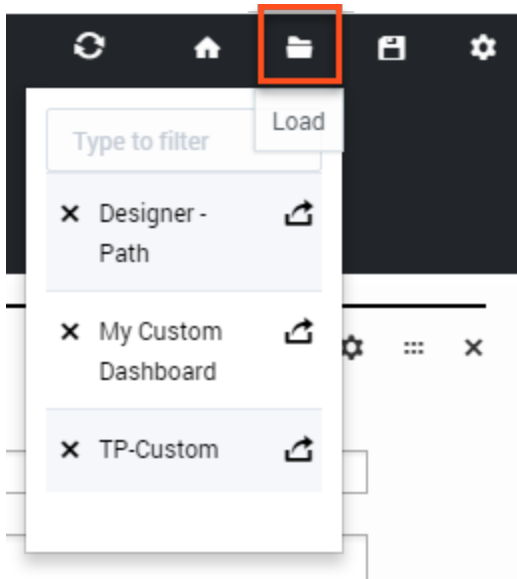
Returns to the dashboard that is currently saved as the default (or "home") dashboard.

Tip

This **Home** button is not the same as the **Home** button on the main toolbar (for the built-in dashboard types). That button will always return you to the built-in Summary dashboard, while this one will return you to the dashboard you've assigned to it.

Load

Lets you select and open any dashboards that you have saved.



Save

Saves the current dashboard. You will be prompted to give the dashboard a new name. (This option might not be available for all users or deployments.)

Configure

Customize certain properties and settings for the current dashboard.

Navigation, Query, and Filtering tabs

Toggling these tabs lets you show or hide their options.

Navigation tab

Shows or hides the dashboard icons.

Query tab

Toggling the **Query** tab lets you manually enter a query statement to search for specific terms, criteria, or conditions. (Currently, custom queries only work on the Session Detail Records dashboard. You can use filters and drill-down options to achieve the same result on other dashboards.)

For example, you might enter the following query:

```
applicationName:"Test 2" AND finalDisposition:"System Error" AND ANI=5551234321
```

This query would search the **Test 2** application for sessions where the final disposition was **System Error** and the **ANI** (the caller's phone number) was **5551234321**.

Query statements are not automatically applied to all panels on the dashboard. To use a query statement on a panel, go to the panel's **Configure** settings and select it from the **Queries** tab.

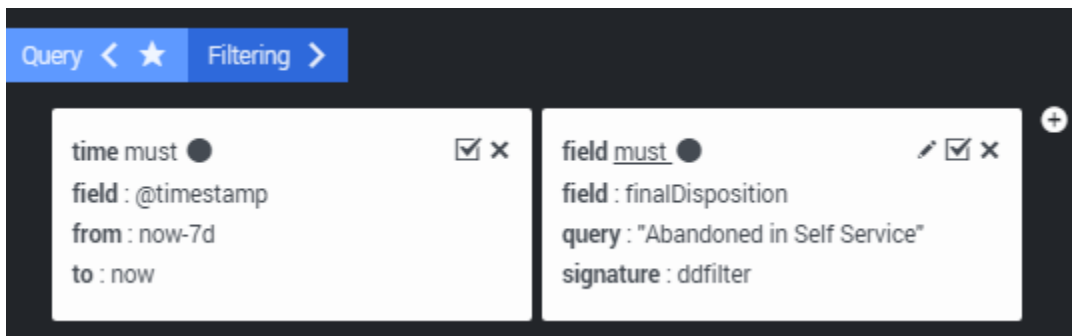
Filtering tab

Toggling the **Filtering** tab lets you see any filters that are currently applied to the dashboards.

Important

In most cases, any filters that you define are applied across *all* of the system dashboards, not just the dashboard you are currently viewing.

Whenever you select a value from the Filter panel, or click a specific time range or section of a pie or bar chart, a filter is automatically created. In this example, we can see that an **Abandoned in Self Service** filter was applied:



With the filters visible, you can easily modify, remove, or turn a filter on or off (the solid dot indicates the filter is currently *on*).

You can also make a filter *inclusive* or *exclusive* by clicking the field and choosing one of the options:

A screenshot of a configuration dialog box with a dark header bar containing a close button (X) and a plus sign (+). The dialog has several sections: a 'field' section with a radio button and a dropdown menu showing 'must' (highlighted in blue), with options 'must' (highlighted), 'mustNot', and 'either' visible; a 'field :' section with a text input containing 'finalD'; a 'signature :' section with a text input containing 'ddfilter'; and a 'query :' section with a text input containing '"Abandoned in Self Service"'. At the bottom are 'Save' and 'Apply' buttons.

field ☒ must

field : must
mustNot
either

finalD

signature :
ddfilter

query :
"Abandoned in Self Service"

Save Apply