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# Designer User's Guide

Dashboard management

7/26/2024

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- Administrator

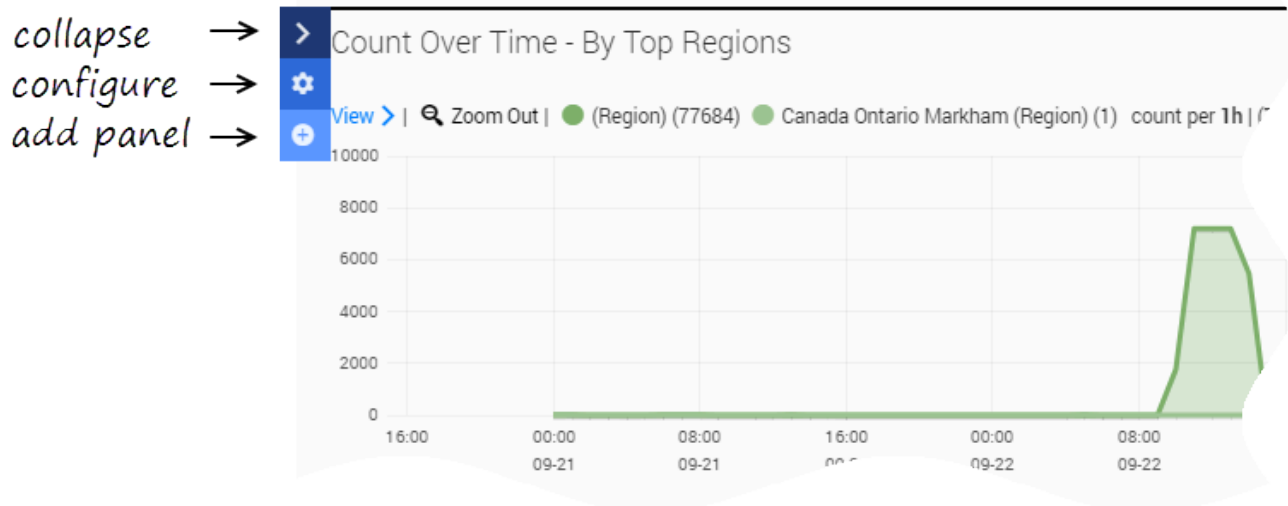
Learn how to manage the Designer Analytics dashboards.

### Related documentation:

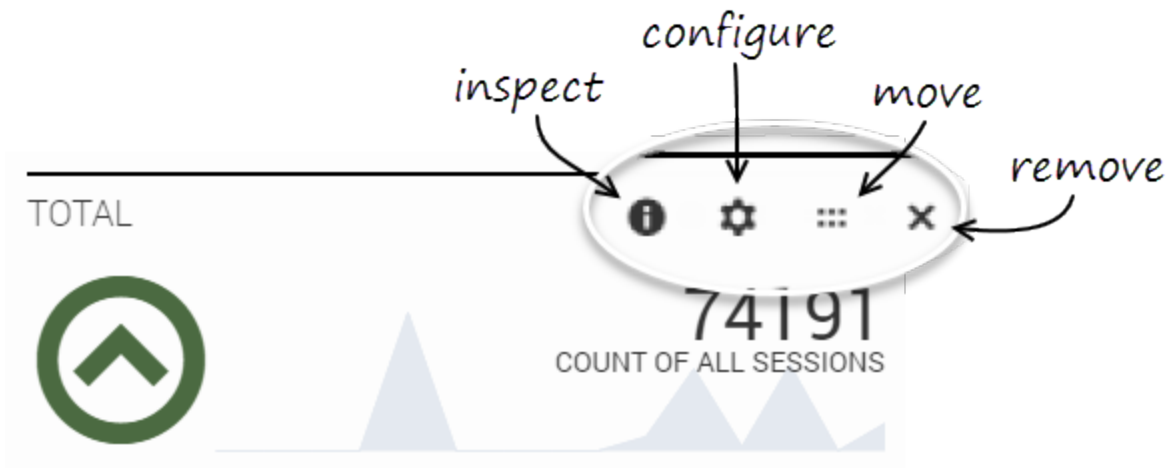
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## Rows and Panels

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.



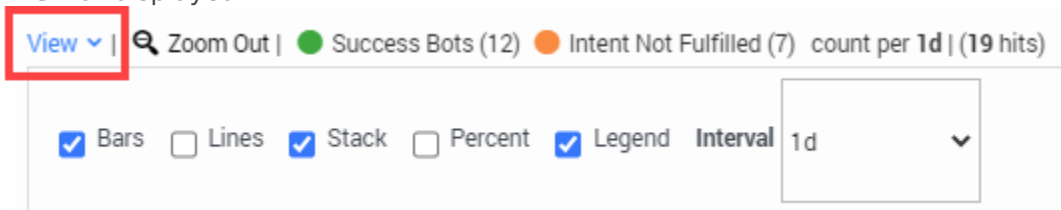
Each of the panels has options to **configure**, **move**, or **remove** the panel. Some panels also have an **inspect** icon that lets you view the query for the report being displayed.



### Tip

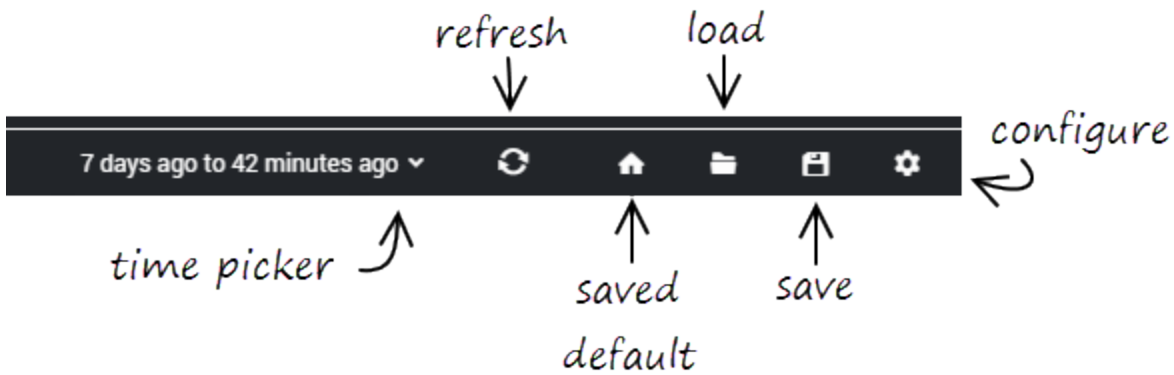
Sometimes, after closing an **inspect** panel, it might look like the dashboard page has gone blank, especially if there was a lot of information to scroll through. If this happens, simply scroll back up to the top of the dashboard page. (This issue can be avoided by using **Esc** to dismiss an **inspect**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

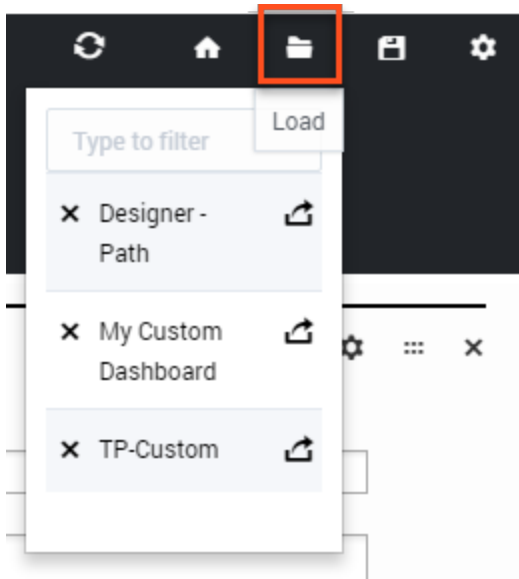
Returns to the dashboard that is currently saved as the default (or "home") dashboard.

#### 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
```

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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.

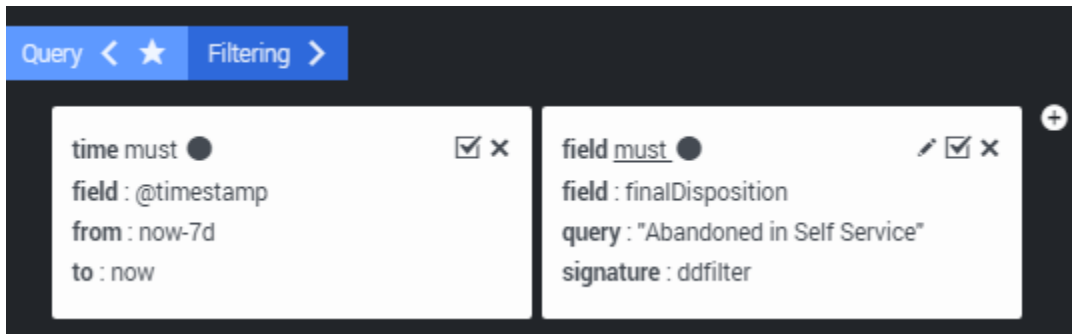
## Filtering tab

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:

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A configuration dialog box with a dark border and a close button (X) in the top right corner. The dialog contains the following elements:

- A label "field" followed by a radio button and a dropdown menu showing "must".
- A label "field:" followed by a text input field containing "finalD". A dropdown menu is open below this field, listing "must" (highlighted in blue), "mustNot", and "either".
- A label "signature:" followed by a text input field containing "ddfilter".
- A label "query:" followed by a text input field containing "Abandoned in Self Service".
- Two buttons at the bottom: "Save" (disabled) and "Apply" (active).