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Outbound (CX Contact) CX Contact Help

[Configure a Dashboard](#)

Contents


- [1 Specify a default dashboard](#)
- [2 Configure a dashboard](#)
- [3 General](#)
- [4 Labels](#)
- [5 Rows](#)
- [6 Time Settings](#)
- [7 Fields formatting](#)
- [8 Related Topics](#)

Learn how to configure a Dashboard.

Related documentation:

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Specify a default dashboard

You can customize a dashboard and set it as the default one for a partition. To specify a dashboard as the default dashboard, click the **Load** icon  on the upper-right corner of the analytics page, and then click the **Make default** icon.

Configure a dashboard

The **Configure Dashboard** window contains 5 tabs that enable you to determine how the specific Analytics dashboard should be viewed and what information should and should not be included.


Configuration of the **Configure Dashboard** window is specific to each dashboard. For example, if you open the **Configure Dashboard** window in the **User Actions** dashboard, select **Editable** in the **General** tab and click **Save**, **Editable** will only be selected for the Users Action dashboard.

For details about each tab in the **Configure Dashboard** window, refer to one or more of the following sections:

- General
- Labels
- Rows
- Time Settings
- Fields formatting

Important

When configuring the Configure Dashboard window, you must click **Save** to ensure that your changes are not lost.

To open the **Configure Dashboard** window, select the **Analytics** menu and click the **Configure Dashboard** icon  in the top right corner of the **Analytics** screen.

[Link to video](#)

General

In the Configure Dashboard > General tab (see image below) you can change one or more of the following options:

Parameter	Description
Title	The dashboard title.
Style	Reserved for future use.
Editable	Enables you to lock the specific dashboard so that it cannot be changed in the future.
Hints ?	Reserved for future use.


The screenshot shows the 'General' configuration tab for a dashboard. The 'Title' field is set to 'Pre-Loading'. The 'Style' is set to 'dark'. Both the 'Editable' and 'Hints ?' checkboxes are checked. The interface includes a 'Cancel' button and a 'Save' button at the bottom.

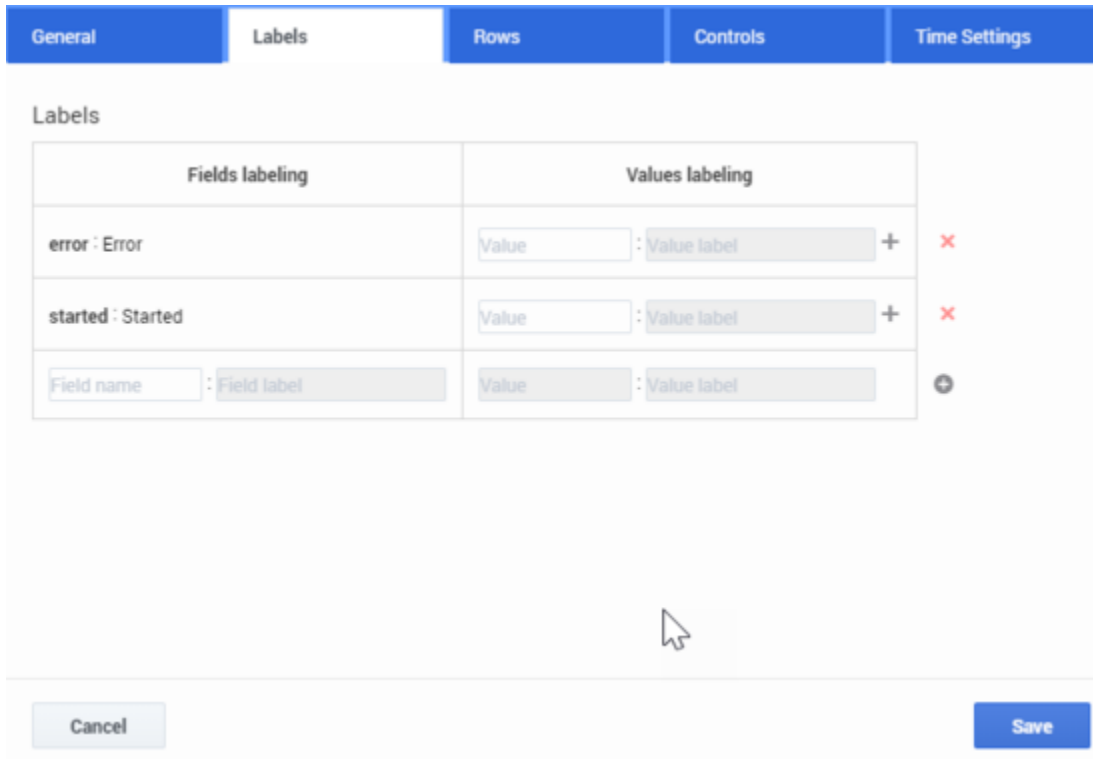
Labels

In the Configure Dashboard > Labels tab (see image below) you can change the default name of each field (that is, the Label name) to a name with a meaning that you can easily understand.

Change a field name

1. Type the field name in the **Field Name** text box. A list of fields with the letters you typed appears.
2. Select the field whose name you want to change.

3. In the Field label text box type the new name for the selected field and click the **Add new field** icon .
4. Click **Save**.



The screenshot shows the 'Labels' tab of a configuration interface. At the top, there are five tabs: 'General', 'Labels' (selected), 'Rows', 'Controls', and 'Time Settings'. Below the tabs, the 'Labels' section contains a table with two columns: 'Fields labeling' and 'Values labeling'. The table has three rows. The first row shows 'error : Error' in the 'Fields labeling' column and 'Value : Value label' in the 'Values labeling' column, with a red 'x' icon to the right. The second row shows 'started : Started' in the 'Fields labeling' column and 'Value : Value label' in the 'Values labeling' column, also with a red 'x' icon. The third row shows 'Field name : Field label' in the 'Fields labeling' column and 'Value : Value label' in the 'Values labeling' column, with a plus icon to the right. Below the table, there are 'Cancel' and 'Save' buttons.

Fields labeling	Values labeling
error : Error	Value : Value label +
started : Started	Value : Value label +
Field name : Field label	Value : Value label +




Rows

In the Configure Dashboard > Rows tab (see image below) you can add and/or remove dashboard rows. The dashboard row enables you to control the specific dashboard layout with height and row order configuration options.

Add / Remove a Dashboard Row

1. Type the name of the new dashboard row and enter a row height.
2. Click **Create Row**.
3. Click **Save**.

Important

To delete a dashboard row click the Delete row icon  next to the name of the row. To change the location of each row in the dashboard, click the up or down arrow  

associated with the row you want to move.

The screenshot displays the 'Rows' configuration tab. At the top, there are five tabs: 'General', 'Labels', 'Rows' (selected), 'Controls', and 'Time Settings'. Below the tabs, the 'Rows' section contains a list of rows. The first row has a title 'General' and a downward arrow icon. The second row has a title 'Details Record' and an upward arrow icon. Below the list, there is an 'Add Row' section with two input fields: 'Title' (containing 'New row') and 'Height' (containing '150px'). At the bottom of the form, there are three buttons: 'Create Row', 'Cancel', and 'Save'.

Time Settings

In the Configure Dashboard > Time Settings tab (see image below) you can change one or more of the following options:

Parameter	Description
General time field	The primary field that contains the time stamp.
Display time format	The time format you wish to see displayed. For example, YYYY/DD/MM, or hhmmss, and so on.
Other time fields	Select optional time fields to be displayed in the format selected in Display time format.

The screenshot shows the 'Time Settings' configuration window. It includes tabs for General, Labels, Rows, Time Settings, and Formats. The 'General time field' section contains a dropdown menu set to '@timestamp' and a text input for 'Display time format' with the value 'YYYY-MM-DD HH:mm:ss'. The 'Time zone' section features a dropdown menu set to 'America/New_York -04:00' and a checked checkbox for 'Show full TZ list'. The 'Other time fields' section has an empty text box and a '+' button. Below this is a table with two columns: 'Time Field' and 'Format ?'. The table lists three fields: 'started', 'created', and 'finished', each with a format of 'YYYY-MM-DD' and a small 'x' button to its right. At the bottom of the window are 'Cancel' and 'Save' buttons.

Fields formatting

In the Configure Dashboard > Fields formatting tab (see image below) you can add and/or remove time and duration rows. Each row enables you to control the time and duration format that appears in the user interface.

Change a field format

1. Type the field name in the **Field** text box. A list of fields with the letters you typed appears.
2. Select the field whose format you want to change.
3. In the **Initial format** select the format you want to change.
4. In the **Output format** select the new format.
5. In the **Round** text box enter the number of decimal points that can appear for the selected Output format.
6. Click **Save**.

General	Labels	Rows	Time Settings	Formats
Fields formatting				
Field	Initial format	Output format	Round ?	
duration	Milliseconds	Seconds	2	✖
Field			2	⊕
<div>Cancel</div> <div>Save</div>				

Related Topics

- [Configure a Dashboard Row](#)
- [Create an Analytics Dashboard Panel](#)