broadvoice

Analytics: Configuring Dashboards

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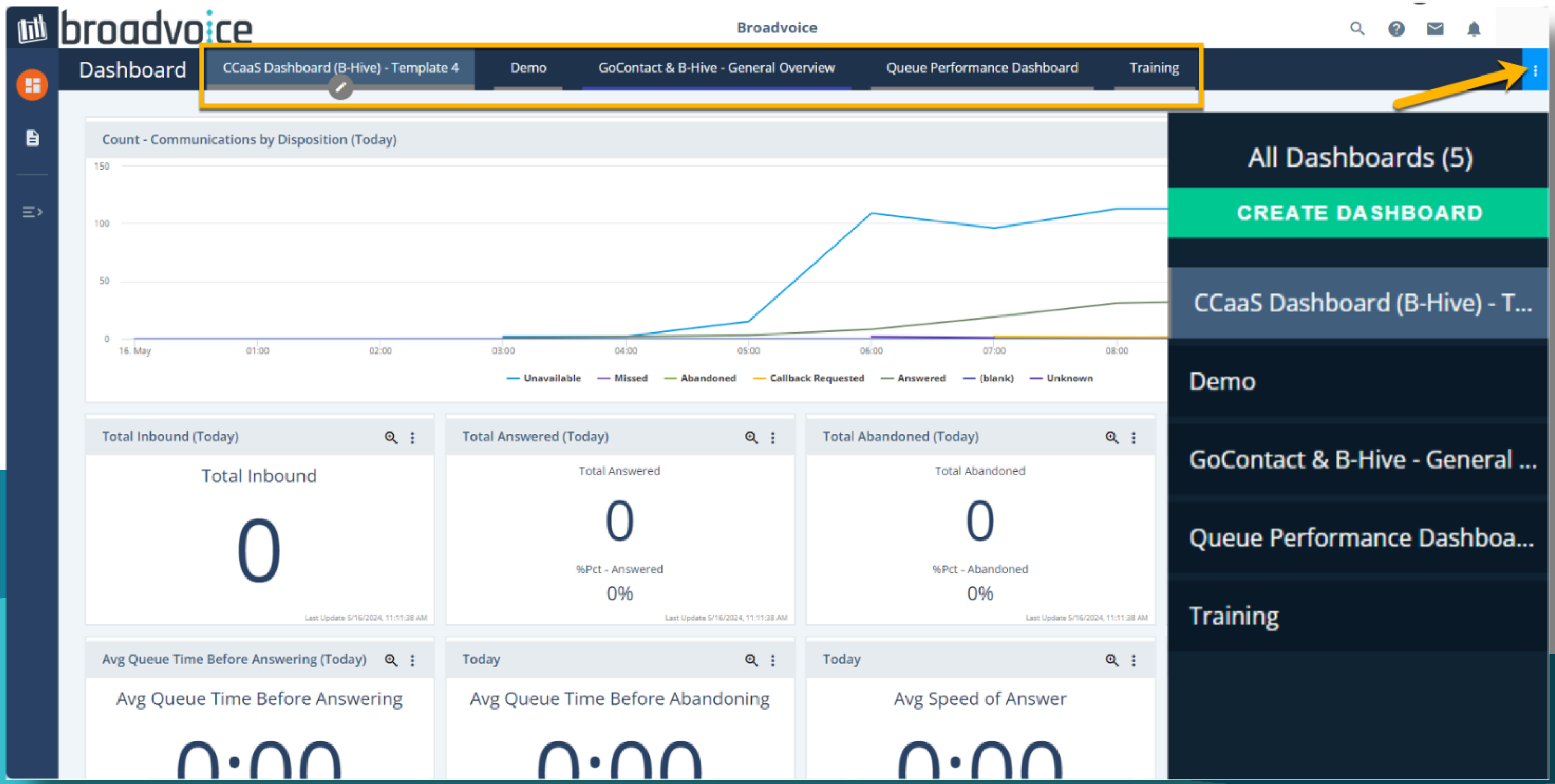
Introduction

Dashboards display various types of visual data regarding your operation all in one place. In this guide, you will learn how to configure your dashboards to display real-time charts and scheduling dashboards that will give you valuable insights into how your operation is performing.

Modifying Dashboard Tabs

Dashboard tabs are added to the Dashboard bar in the order they are created. This means the first dashboard you create or are given access to will occupy the first space and become your default Dashboard. You can change the order of the dashboard tabs by following the steps below:

- Step 1: Click on the dots to the far right of the Dashboard tab bar.
- Step 2: In the popup, drag and drop the dashboard tabs into the order you want them on your tab menu.



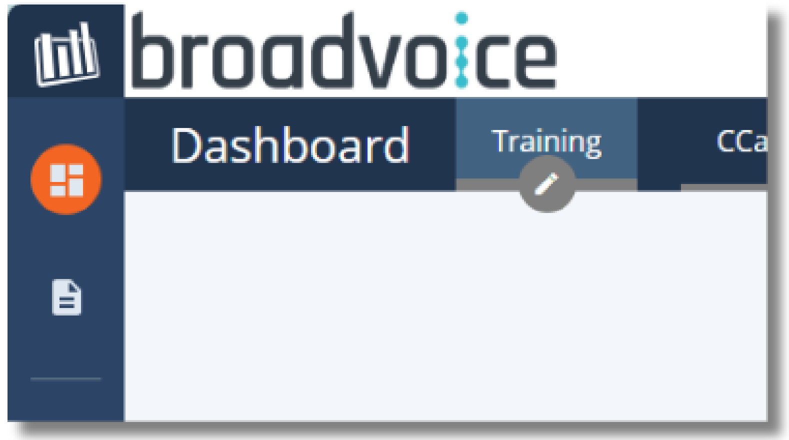
Modifying Dashboard Tabs

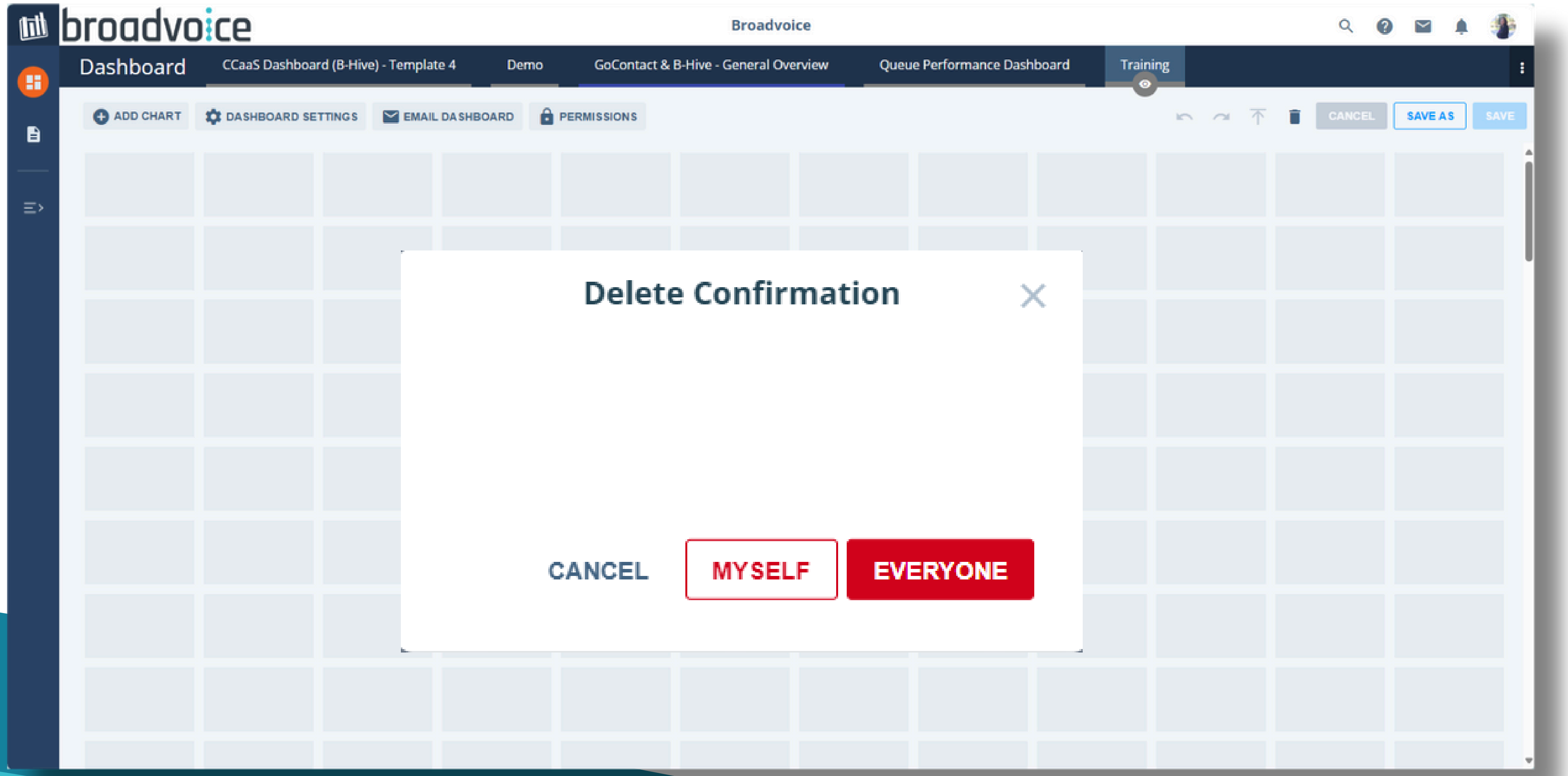
Broadvoice Analytics gives you the flexibility to permanently a Dashboard that is no longer relevant to your organization from the platform.   To delete a Dashboard Tab:

Step 1: Click on the tab you want to delete (verify this is the tab you'd like to delete) and press the Edit (pencil) button.

Step 2: To the right side of the page, press the Trash/Delete Button.

Step 3: In the popup, select who you'd like the dashboard tab removed for - yourself or all users.



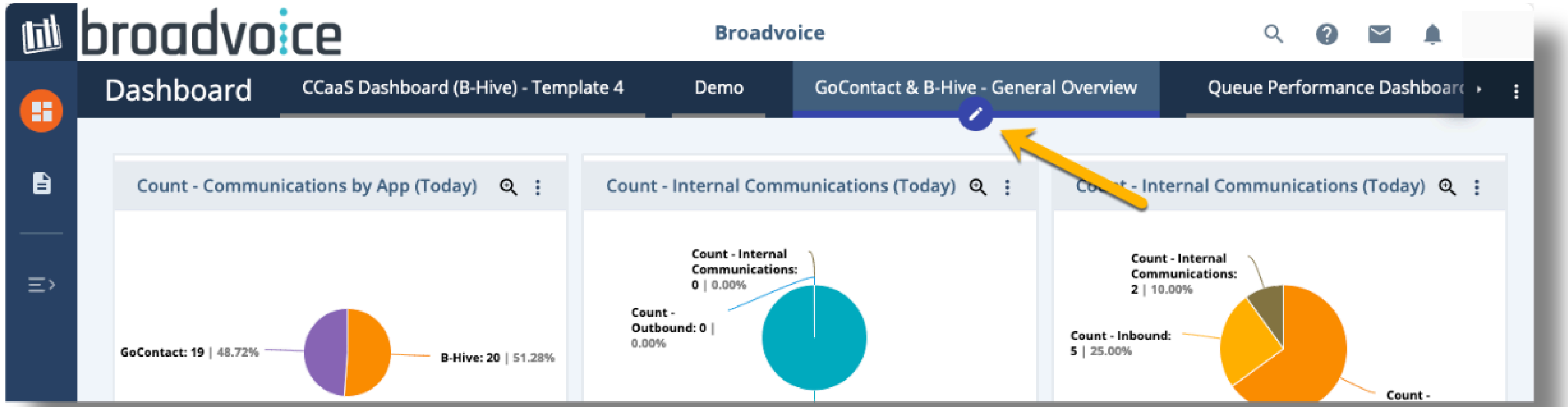


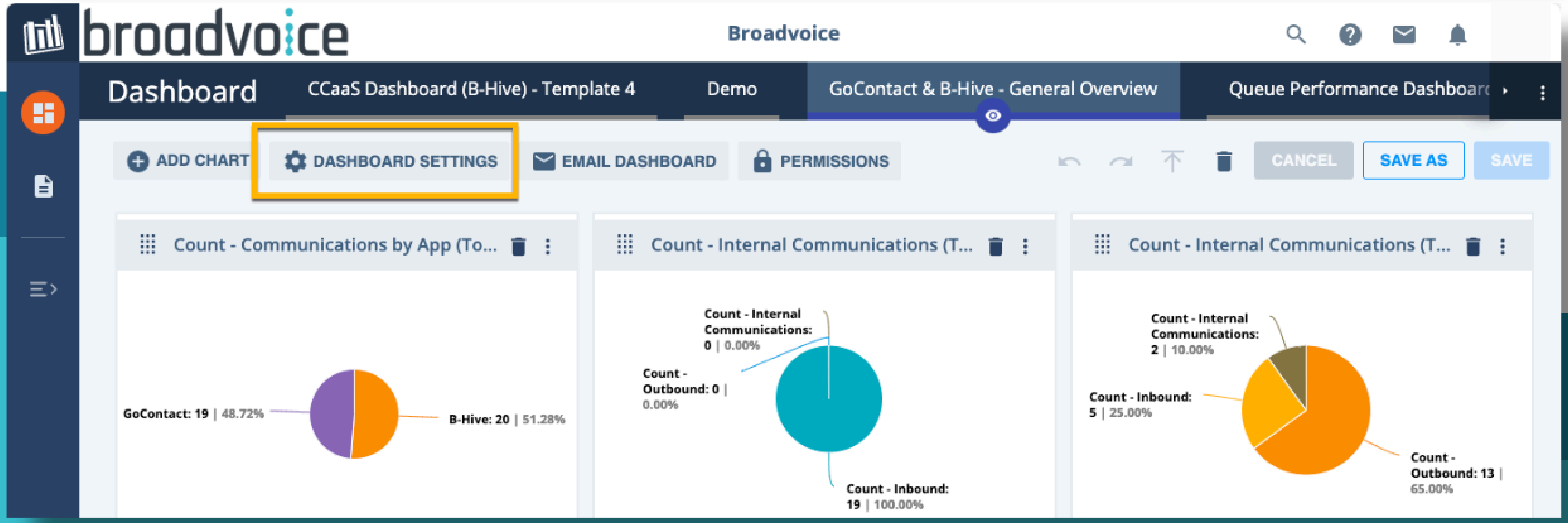
Replacing Dashboard Filters

If you update the name of a group or a queue or change the groups and queues populating your dashboard, you will need to edit your Dashboard filters.

To do that :

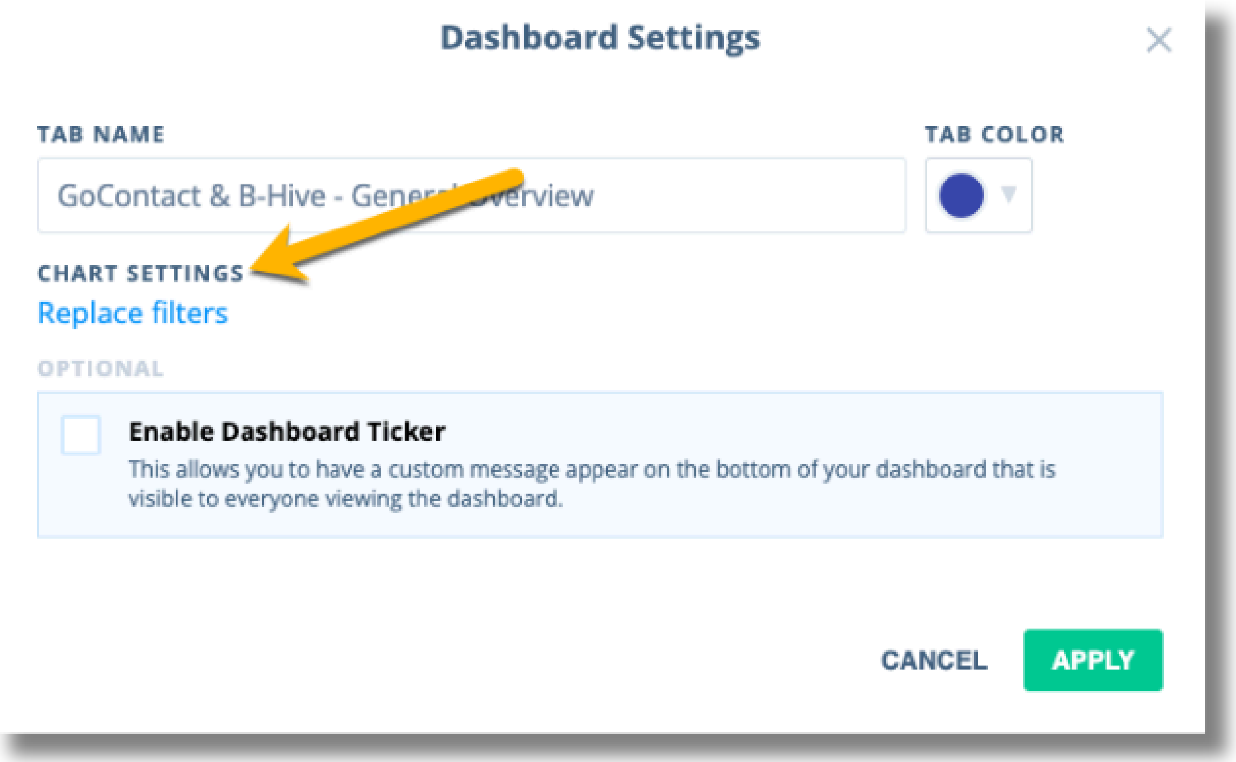
1. Navigate to the dashboard you'd like to make changes to.
2. Click the pencil icon to "Edit".
3. Click "Dashboard Settings.

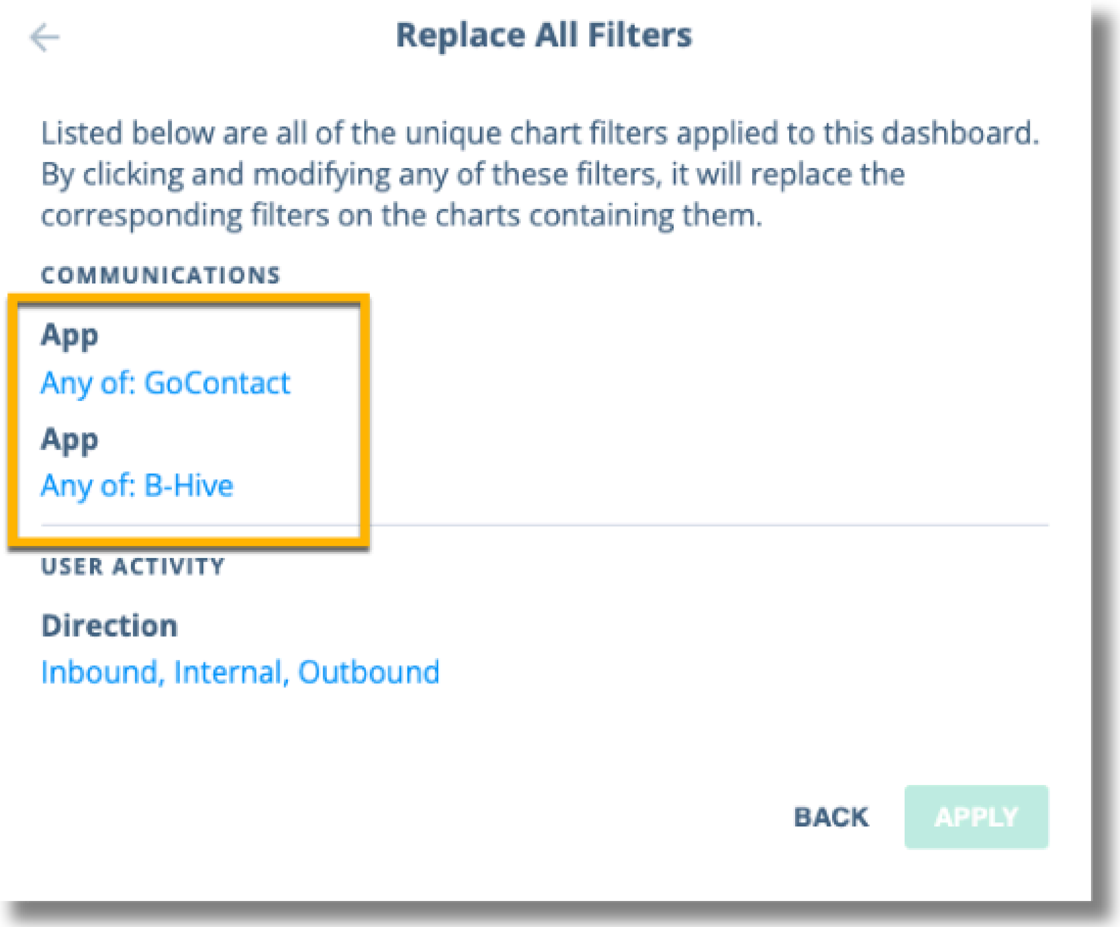




Replacing Dashboard Filters

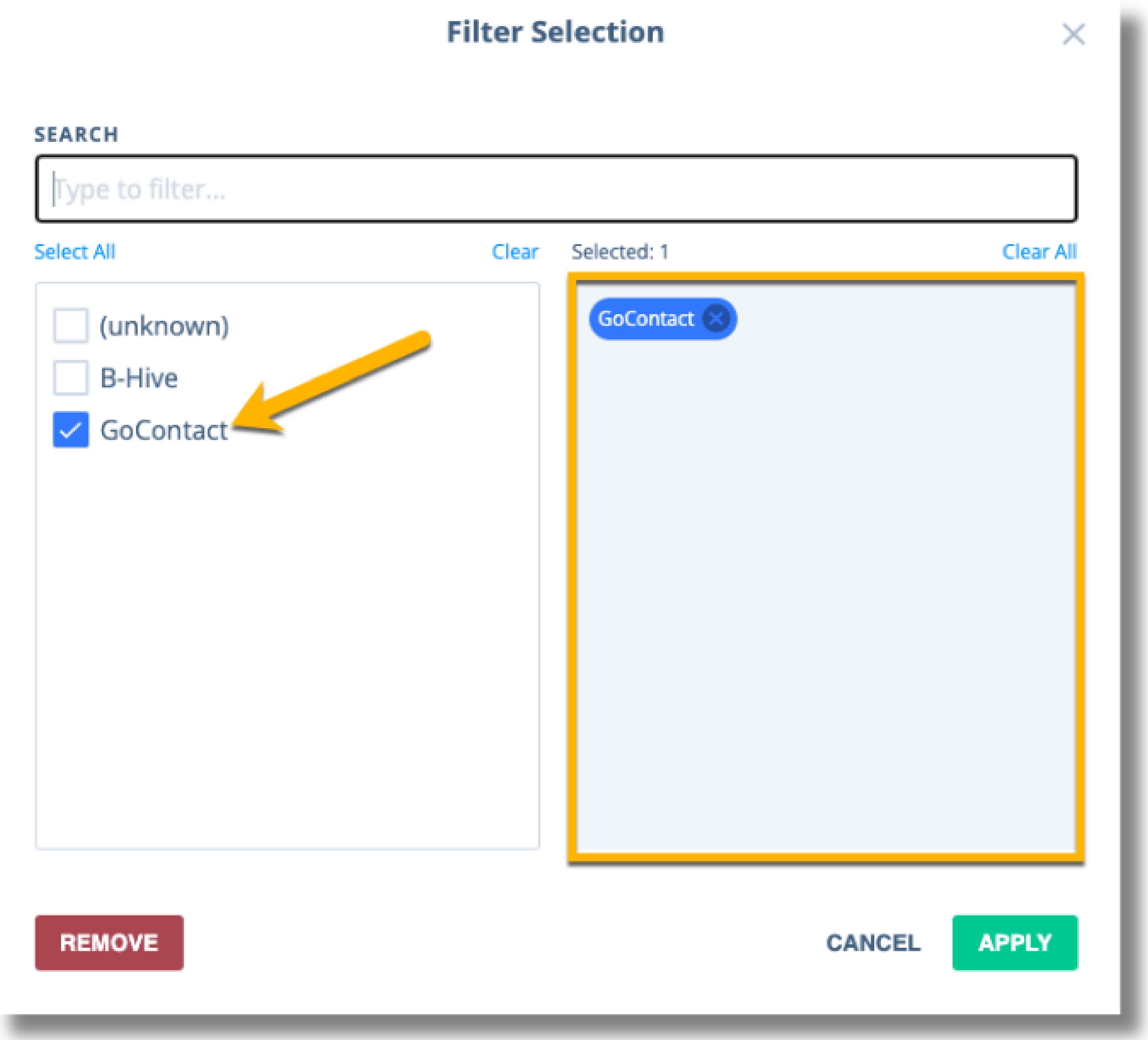
4. Click "Replace filters".
5. Click the filter in blue that you'd like to change.





Replacing Dashboard Filters

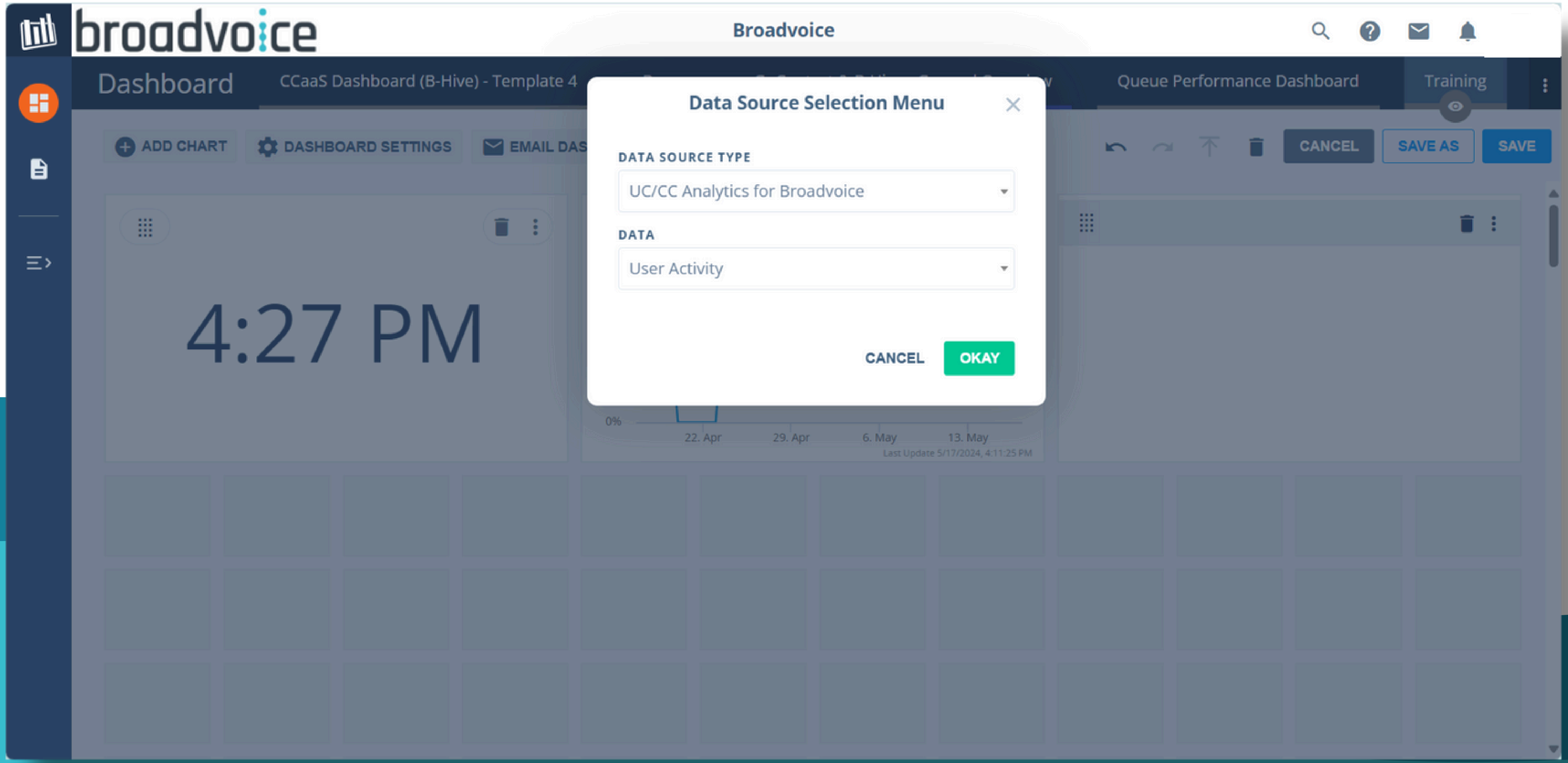
6. Click the box on the left next to the filter you want to remove from your Dashboard.
7. Click on the filters on the right to add new filters to your Dashboard.
8. Click Apply once you have made the changes.
9. Repeat steps 1-8 for all filters you would like to modify.



Creating Real-Time Charts

The building blocks of charts are Data sources and instances. Customizing these will control what information will flow into your chart.
To create a Real-Time chart, you must first ensure that the Real-Time module is on your account. Then, follow the steps below to create a chart on your Dashboard.

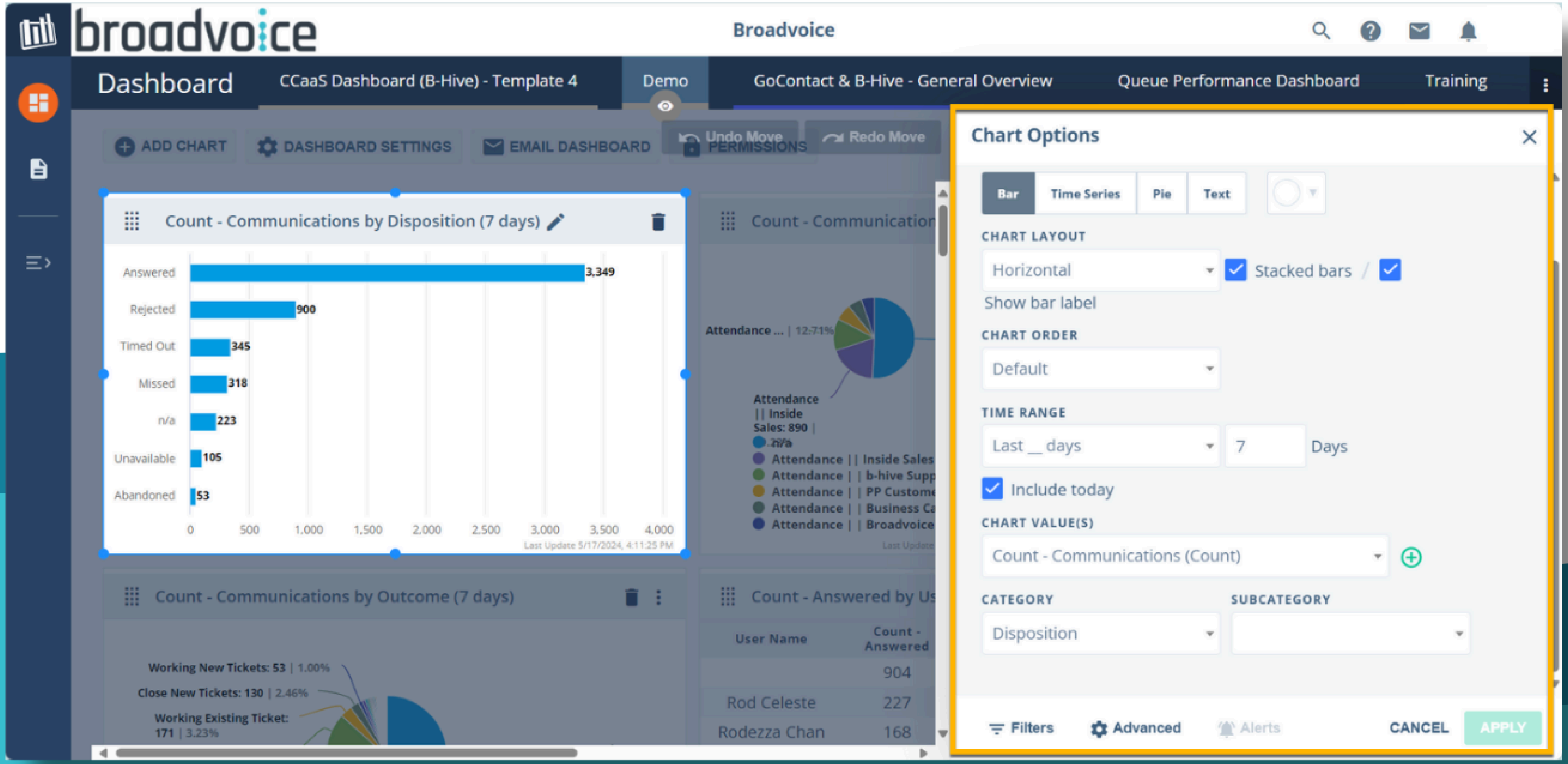
- Click Add Chart.
- Select a Data Source Type from the Dropdown menu.
- Click Okay.



Creating Real-Time Charts

In the pop-up that opens, depending on the data source and data set you have chosen, you will be able to customize how that data is displayed. You can:

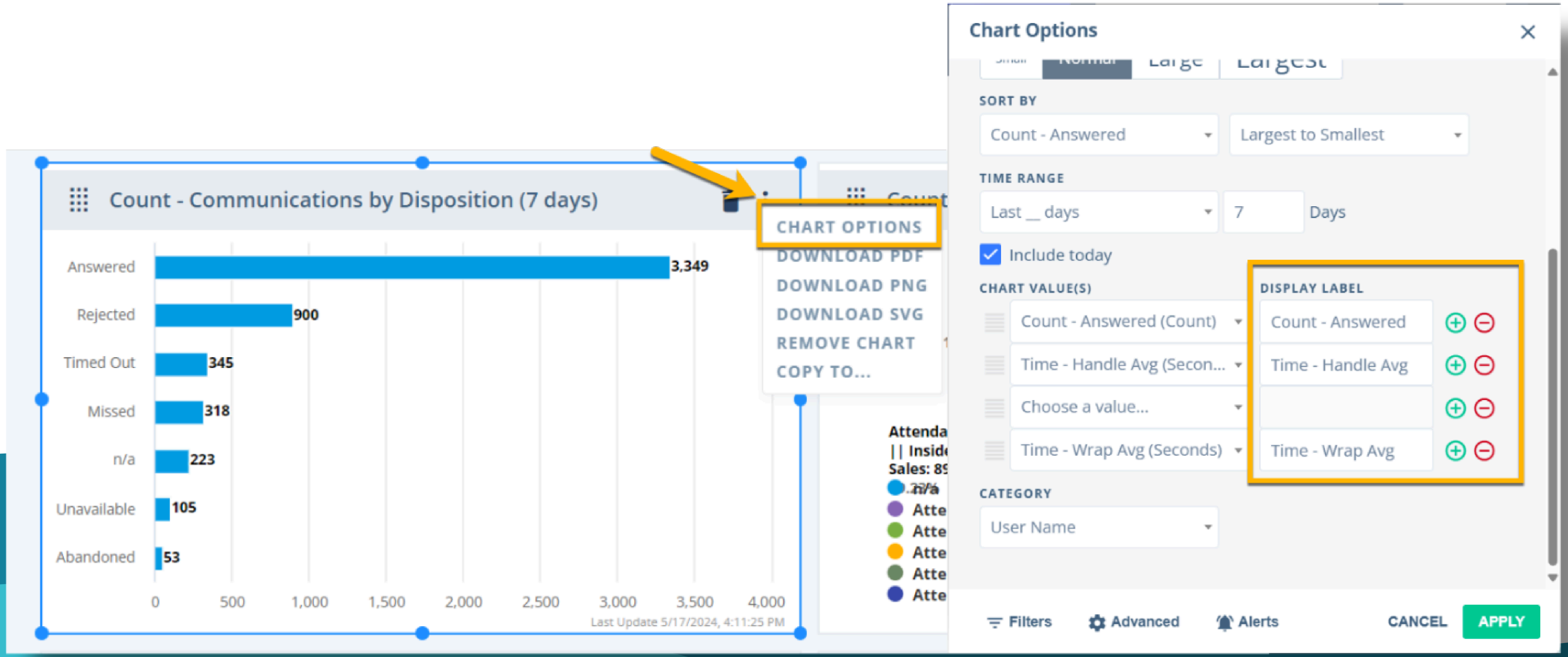
- Choose the chart type
- Select a customized chart color
- Select a chart layout
- Choose the chart order
- Chart Values
- Select the Categories and Sub Categories if applicable
- Click Apply



Renaming Chart Values

When building or editing charts, you may want to rename your chart values. From the Dashboard page. Follow the steps below to rename a chart value

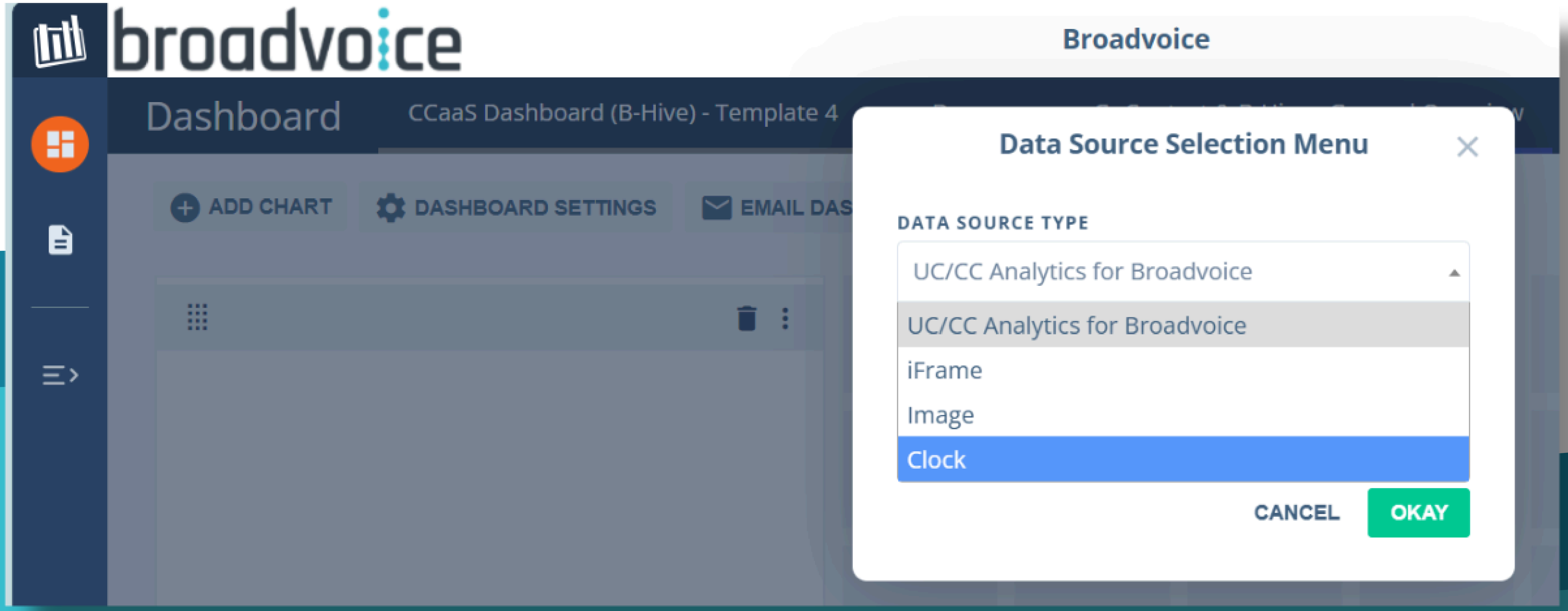
- Click on the 3 dots menu in the top right of the chart you wish to modify.
- Choose chart options in the drop-down
- In the pop-up, type the desired chart value name in the display label field.
- Click apply.



Renaming Chart Values

When you're building or editing your dashboard, you may want to display additional information alongside historical or live data. This could be an image or a photo from a recent team activity event, a clock, or an event embed other websites, media, or documents in your Dashboard. Below, we'll walk through the steps of configuring the dashboard to add these elements as a chart. From your Dashboard:

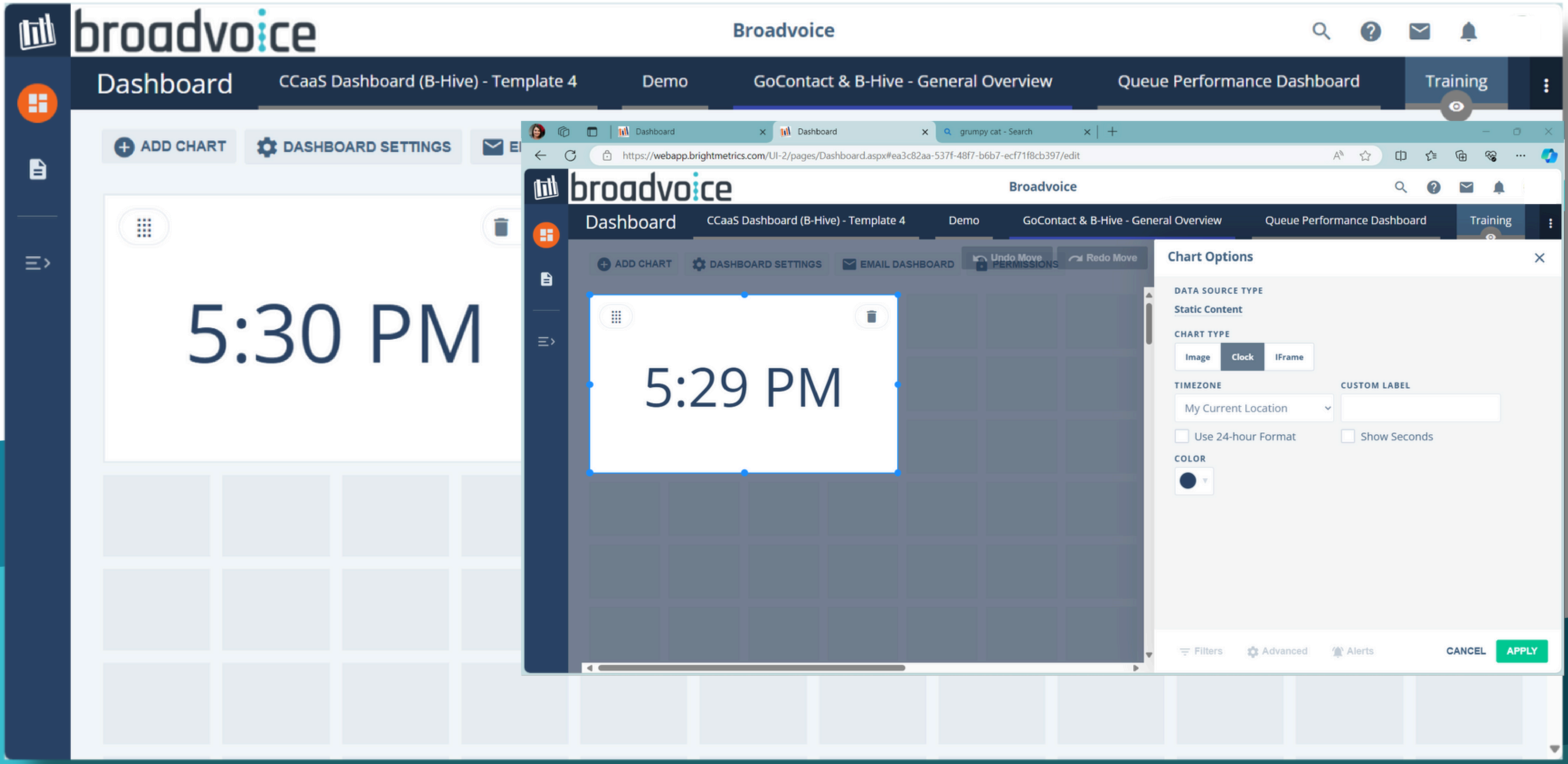
- Click Add Chart.
- Select your Data Source Type from the DropDown. Available options will vary depending on your organization's customization.
  - IFrame-lets, you add an HTML tag to your dashboard to display websites and media documents on your dashboard.
  - The image lets you add photos or text to your Dashboard
  - Clock adds a clock to your dashboard
- Click OKAY.
- Click apply.



Renaming Chart Values

In the Chart Options pop-up, you can configure the values and add images or URLs depending on your chosen Data Source.

- Adjust the size and shape of your chart using the blue dots surrounding the chart.
- Upload your photo, configure your clock, or add an Iframe URL
- Click Apply.
- Click Save at the top of the Dashboard to lock in your changes.

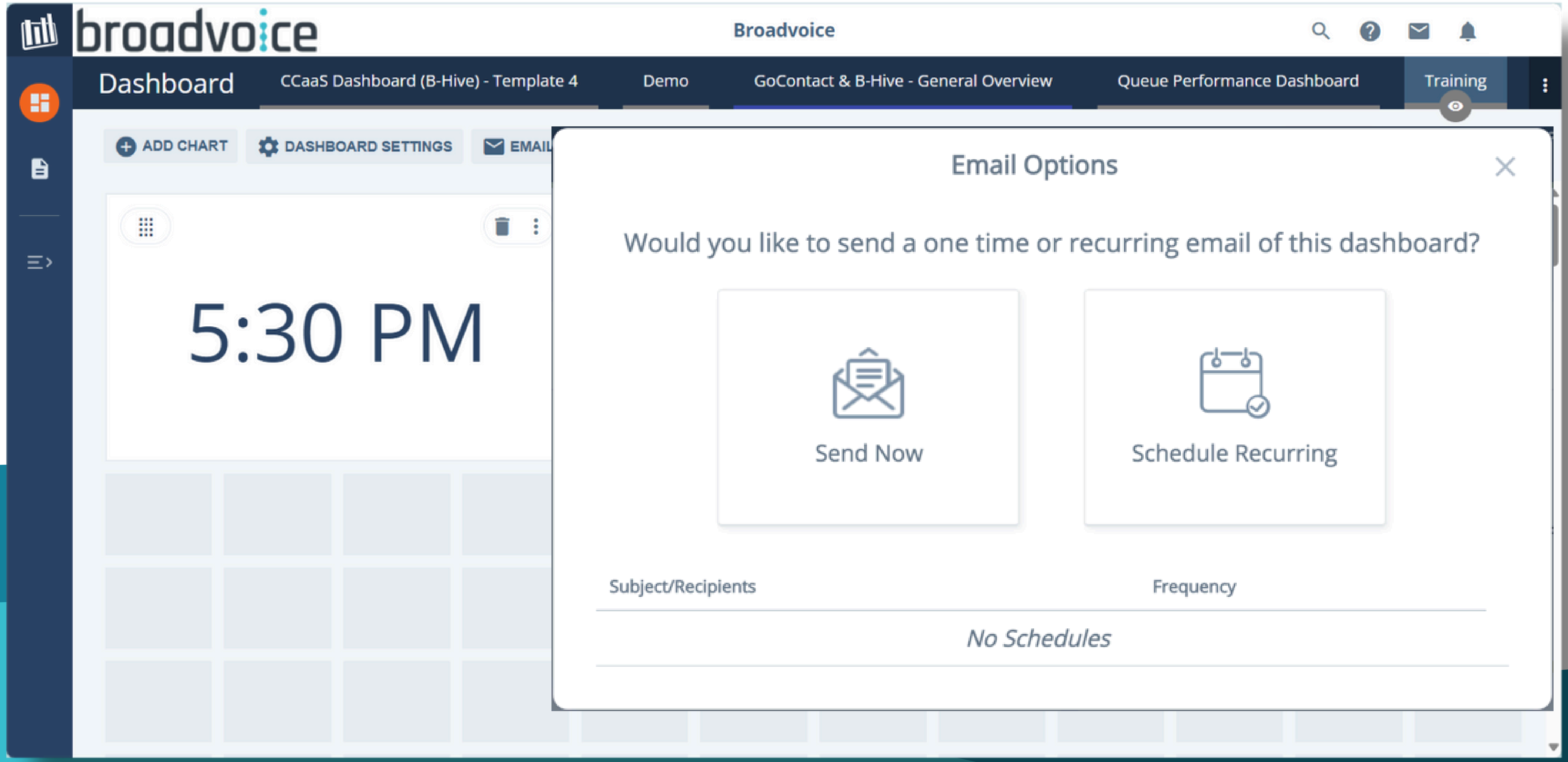


Scheduling Dashboards

To set up a schedule for receiving a copy of your dashboard tab or set it up to send to someone, follow the steps below to schedule this workflow

Please note that real-time dashboards are not able to be set up for scheduled emailing

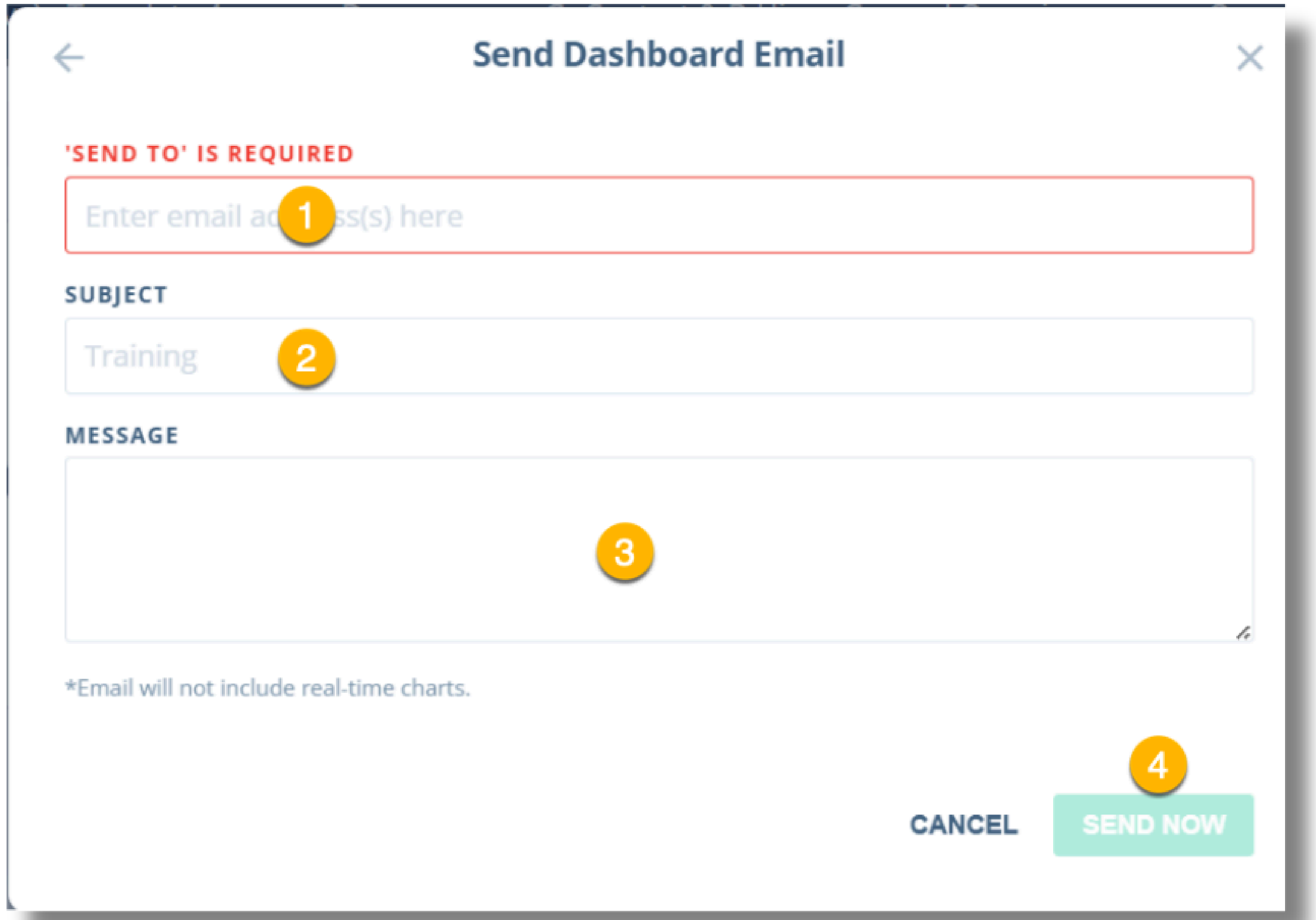
1. Click the pencil or eye on the dashboard tab you wish to schedule
2. Select Email Dashboard
3. In the pop-up, click “Send Now” or “Schedule Recurring”



Scheduling Dashboards

If you choose "Send Now," you will need to configure the following settings in the pop-up:

1. Select who the email of the dashboard tab will go to. You may enter as many email addresses as you wish; just ensure they are separated by a comma and space. Additionally, you can also enter an FTP or HTTP URL for the file to be delivered directly to that location.
2. Give the report a custom subject. If you do not, it will default to the Dashboard Name + Date + Time.
3. Give your report a message for the recipient, then choose any format and orientation options as desired.
4. Select Send Now.



Scheduling Dashboards

If you choose “Schedule Recurring,” you will need to configure the following settings in the pop-up:

1. Select who the email of the dashboard tab will go to. You may enter as many email addresses as you wish. Just ensure they are separated by a comma and space. Additionally, you can also enter an FTP or HTTP URL for the file to be delivered directly to that location.
2. Give the report a custom subject. If you do not, it will default to the Dashboard Name + Date + Time.
3. Give your report a message for the recipient, then choose any format and orientation options as desired.
4. Set up your schedule for when they should receive the emailed dashboard.
5. Click Save.