Contents

Data Workbench Dashboard User Guide

Business Opportunities...............................................................4
Features..........................................................................................4
Glossary..........................................................................................4

Getting Started..................................................................................6
Dashboard User Interface...............................................................6

Visualizations...................................................................................9
Visualization Types...........................................................................10
  Column Charts.................................................................................11
  Bar Charts.......................................................................................12
  Line Charts.....................................................................................12
  Tables..............................................................................................13
  Metric Legends.................................................................................14
  Pie Chart..........................................................................................14
  Scatter Plot.....................................................................................15
  Rich text.........................................................................................16
Creating Visualizations...................................................................16
Configuring Visualizations...............................................................17
Manipulating Visualizations............................................................23
  Locking and Unlocking Visualizations.................................................23
  Collapsing and Expanding Visualizations............................................24
  Exporting Visualizations.................................................................24
  Configuring Visualizations.............................................................24
  Removing Visualizations.................................................................24
  Sizing Visualizations......................................................................24
  Moving Visualizations....................................................................25

Dashboards......................................................................................27

Data Workbench Dashboard User Guide

Last updated 2/9/2017
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opening and Viewing Dashboards</td>
<td>27</td>
</tr>
<tr>
<td>Quick-Access Menu</td>
<td>27</td>
</tr>
<tr>
<td>Dashboard Browser</td>
<td>28</td>
</tr>
<tr>
<td>Dashboard Hyperlink</td>
<td>32</td>
</tr>
<tr>
<td>Query-To Parameter</td>
<td>33</td>
</tr>
<tr>
<td>Creating a Dashboard</td>
<td>34</td>
</tr>
<tr>
<td>Saving a Dashboard</td>
<td>35</td>
</tr>
<tr>
<td>Editing or Updating a Dashboard</td>
<td>36</td>
</tr>
<tr>
<td>Making a Copy of a Dashboard</td>
<td>37</td>
</tr>
<tr>
<td>Other Dashboard Functions</td>
<td>37</td>
</tr>
<tr>
<td>Dashboard Sharing and Access Controls</td>
<td>38</td>
</tr>
<tr>
<td>Making Selections within the Dashboard</td>
<td>39</td>
</tr>
<tr>
<td>Locked Selections</td>
<td>40</td>
</tr>
<tr>
<td>Applying Selections</td>
<td>41</td>
</tr>
<tr>
<td>Removing Selections</td>
<td>42</td>
</tr>
<tr>
<td>Determining What's Selected</td>
<td>43</td>
</tr>
<tr>
<td>Cross-Profile Selections</td>
<td>44</td>
</tr>
<tr>
<td>Exporting Data</td>
<td>46</td>
</tr>
<tr>
<td>Dashboard Access Controls</td>
<td>49</td>
</tr>
<tr>
<td>User Account Management</td>
<td>50</td>
</tr>
<tr>
<td>Help Menu</td>
<td>51</td>
</tr>
</tbody>
</table>
Data Workbench Dashboard User Guide

The Adobe Data Workbench dashboard is an interactive analytics application that brings web-based analytics and thin-client capabilities to Data Workbench. It lets you easily visualize Data Workbench data and analyze business trends from a browser-based interface customized for your specific needs.

Using the Data Workbench dashboard, business professionals can access web-based views of analytic information that is easy-to-understand and dynamically segmented across critical data feeds. These dashboards are optimized to consolidate business intelligence and analytical data that has been captured and given context through Adobe Data Workbench.

Business Opportunities

Executives, analysts, and marketing professionals can use the data workbench dashboard for a variety of tasks.

- Executives can draw meaningful insights with cursory views of easy-to-understand visualizations.
- Data analysts can track progress from enterprise data repositories and analytic systems.
- Marketing professionals can follow and react to fluctuations in channel and web campaigns.
- Your team can utilize timely analysis to improve its performance with informed, strategic decision-making and improved execution across the enterprise.
- Multiple groups within your organization achieve business optimization as they benefit from data access, enhance the analytic processes, and participate in a collaborative environment.

Features

The Adobe data workbench dashboard provides these features.

- Perform on-the-fly analysis of Adobe Data workbench datasets.
- Drill-down on and slice data with a simple mouse-driven interface.
- Create and save multiple analytic dashboards.
- Share analytics dashboards with others.
- Access dashboards created by other users.
- Export data for use in other applications, such as Microsoft® Excel®.

This guide provides information about the functionality and user interface features delivered with the Adobe data workbench dashboard. Because your implementation of the dashboard can be fully customized, your features and functionality may differ from what is documented in this guide.

Glossary

The most commonly used terminology and features of Adobe data workbench, including the dashboard.

Profiles

Profiles define a dataset. A profile includes data about a particular subject, as well as the breakdown of that data into user-friendly analytic components. Profiles are created and managed within Adobe data workbench and made accessible through the dashboard application. Profiles are typically designed to fulfill a specific purpose (such as analyzing marketing and website traffic) and define a set of analytic components known as Dimensions, Metrics, and Filters.
Dimensions

Dimensions are categories of like data types. For example, the Days of Week dimension is composed of the following data elements: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. Specifically, dimensions detail what is being measured. In the dashboard, dimensions are defined within Adobe data workbench and made accessible through the dashboard application. Each dimension has a unique name within the dashboard interface.

Metrics

Metrics are quantitative objects defined by a quantifiable expression. For example, Page Views per Session is derived from the expression from the count of Page Views divided by the count of Sessions. Metrics answer the question of “how many?” In the dashboard, metrics are defined within Adobe data workbench and made accessible through the dashboard application. Each metric has a unique name within the dashboard interface.

Filters

Filters allow you to segment your data in a specific way. Filters will reduce your data to a subset of the whole result, and are often combined to provide a unique perspective on the data. In the dashboard, filters are first defined within Adobe data workbench and made accessible through the dashboard application. Each filter has a unique name within the dashboard interface.
Getting Started

To begin using the Adobe data workbench dashboard, follow these steps.

1. Install supported browser.

   The dashboard is a web-based application that operates using the latest web browser technology. It can be used on any operating system provided that the operating system is equipped with a compatible web browser. Because the dashboard takes advantage of features not supported in older versions of web browsers, more recent browsers are required for an optimal experience when using the application.

   While many variations of browsers may work, only the following web browsers are officially supported:

   • Google Chrome 15 and above (available at https://www.google.com/chrome/)
   • Microsoft Internet Explorer 9 and above (available at http://www.microsoft.com/windows/ie/)
   • Mozilla Firefox 3.6 and above (available at http://www.mozilla.org/en-US/firefox/all-older.html)
   • Safari 5.1 and above (available at http://www.apple.com/safari)

   Beyond a compatible web browser, no additional software needs to be downloaded in order to use the dashboard.

2. Request an account.

   Contact your administrator to create an account for you. You will be provided with a user name, temporary password, and instructions to access the dashboard.

3. Access the Adobe data workbench dashboard.

   The dashboard is a rich internet application that requires only a web browser and appropriate network connection to operate. You only need to ensure that you have a compatible browser available and the ability to connect to the dashboard server in order to access the dashboard.

4. Log in to the dashboard.

   a) Open a compatible web browser.
   b) Browse to the URL where the Adobe Data workbench dashboard is hosted. If you are unsure of the URL where dashboard is hosted, please contact your administrator.
   c) Enter your username and password.
   d) Click Log in.

Dashboard User Interface

The data workbench dashboard includes a Sidebar and Toolbar with feature menus and a Dashboard Canvas where you display data visualizations.
Dashboard Canvas
The Dashboard Canvas is the area of the interface used to create and interact with visualizations.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visualizations</td>
<td>Rendered data defined graphically based on a set of configured criteria. Multiple visualizations make up a dashboard.</td>
</tr>
</tbody>
</table>

Sidebar
The left sidebar provides quick access and visibility for defined menus:

<table>
<thead>
<tr>
<th>Menu</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick-access Menu</td>
<td>A fly-out menu to quickly open dashboards.</td>
</tr>
<tr>
<td>Selections Menu</td>
<td>Lists any current selections within the dashboard, providing additional details and the ability to remove selections at any time.</td>
</tr>
<tr>
<td>Exports Menu</td>
<td>Lists any pending or completed exports, providing the ability to retrieve the export when complete.</td>
</tr>
</tbody>
</table>

Toolbar
The top toolbar provides access to these specific menus. It also displays the title of the dashboard currently open.

<table>
<thead>
<tr>
<th>Menu</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard Menu</td>
<td>A drop-down menu for opening, creating, saving, and exporting dashboards.</td>
</tr>
<tr>
<td>Menu</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Add Visualization Menu</td>
<td>A drop-down menu for adding visualizations to the dashboard.</td>
</tr>
<tr>
<td>Dashboard Title</td>
<td>Displays the title of the current dashboard.</td>
</tr>
<tr>
<td>Update Menu</td>
<td>Clicking the <strong>Update</strong> indicator will update the current dashboard, taking into account any new selections and/or configuration changes. The menu provides the ability to adjust the <strong>Query-to</strong> parameter, along with some advanced functions for administrators.</td>
</tr>
<tr>
<td>Help Menu</td>
<td>This drop-down menu is used to access the User's Guide, FAQ, and About section of the application.</td>
</tr>
<tr>
<td>User Menu</td>
<td>A drop-down menu for logging out, accessing account settings, and accessing the administration area (for administrators only).</td>
</tr>
</tbody>
</table>
Visualizations

Visualizations are elements added to the dashboard canvas and configured to display various metric and dimension-based data.

All dashboards are composed of one or more visualizations. Each visualization can be created, removed, resized, and reconfigured independently of all other visualizations on the dashboard canvas.

Visualizations are also interactive, allowing users to quickly segment data by making selections on one or more data elements within the visualization. Selections made within one visualization will dynamically apply filters in real-time to other visualizations on the canvas. This renders the same data across all visualizations on the canvas.

There are eight different types of visualizations. Each one can be added, resized, configured, and removed independently of any other visualization. Visualizations display data defined in data workbench by a data workbench architect.

The eight types of visualizations available include:

• Column Charts
• Bar Charts
• Line Charts
• Tables
• Metric Legends
• Pie Charts
• Scatter Plots
• Rich Text

Visualization User Interface

The header portion of the visualization contains the visualization title and visualization tools, which vary depending on the type and state of the visualization. The body of the visualization contains the content, and is dependent on the type and configuration of the visualization being displayed. The visualization tools only appear when the mouse enters the visualization window. Otherwise they are hidden.
• Visualization Title. Describes this visualization. The title is automatically generated or manually overridden with a custom title.

• Amount Displayed. For the dimension being visualized, displays the amount of data shown versus the total amount available.

• Sample Indicator. Shown when the data visualized is a sample and not a 100% complete query result.

• Visualization Tools. Performs specific operations on the visualizations. Tools available depend on the visualization type, state, and current user permissions.

• Visualization Body. Displays the data of the visualization as configured. This area is interactive and depends on the type of visualization being displayed.

Visualization Types

Introduces the eight different visualization types.

When selecting a visualization, it is important to carefully consider the dimensions and metrics you are visualizing and how the data can be visualized most effectively. For example, some visualizations have limitations on the quantity of data that can be displayed at once.

There are eight different visualization types that can be used to visualize and analyze your data: Bar Charts, Column Charts, Line Charts, Pie Charts, Tables, Metric Legends, Scatter Plots, and Rich Text.
Column Charts

Column chart visualizations allow you to visualize metric and dimension data with each data element represented as a vertical column on the chart. Column charts allow up to 200 unique data elements to be displayed on the chart at once. The dimension values are labeled along the x-axis, while the metric increments are labeled along the y-axis. The column for each dimension value is labeled with its exact metric value.
Bar Charts

Bar chart visualizations allow you to visualize metric and dimension data with each data element represented as a horizontal bar on the chart. Bar charts allow up to 200 unique data elements to be displayed on the chart at once. The dimension values are labeled along the y-axis, while the metric increments are labeled along the x-axis. The bar for each dimension value is labeled with its exact metric value.

Line Charts

Line chart visualizations allow you to visualize metric and dimension data with each data element represented as a point on an x-y axis, and lines connecting adjacent points. Line charts allow up to 200 unique data elements to be displayed on the chart at once. The dimension values are labeled along the x-axis, while the metric increments are
labeled along the y-axis. Placing the mouse over a point in the line chart will display the exact metric value at that point.

Selections can be made in line charts by clicking a particular point. Pressing and holding the Alt key will retain selections as you click additional items. Pressing and holding the Alt key when clicking will also toggle the value of a selection. This is useful for removing just one selection from a group of already selected items.

![Graph of Calls by Week](image)

**Tables**

Tables are the most detail-oriented visualizations available in the dashboard application. Tables allow you to visualize metric and dimension data with each data element represented as a row in a table. One column holds the dimension values, while the other columns contain the corresponding metric values. Multiple metrics can be displayed, and there is no restriction on the number of dimension values that can be displayed in a table. All values for a selected dimension that exist in the data workbench data will be displayed in the table.

Column order can be rearranged by clicking-and-dragging one column header to another location in the column header area. Sorting can be performed at any time by clicking on the appropriate column header. Clicking the column header again will reverse the sort order.

Selections can be made in tables by clicking a particular row. Pressing and holding the Control key will retain selections as you click additional items. Pressing and holding the Control key when clicking will also toggle the value of a selection. This is useful for removing just one selection from a group of already selected items. A range of rows can be selected by first clicking a row to select it, then pressing the Shift key while clicking the last row.
Metric Legends

Metric legend visualizations allow you to display metric totals in a tabular format. The first column holds the metric name, while the second column holds the metric value. A scrollbar will be displayed in the event that all the rows cannot be displayed on the window at once.

Selections cannot be made within the metric legend since no specific dimension value is being displayed.

Pie Chart

Pie chart visualizations allow you to display relative percentages of the metric values for a limited number of dimensions. A pie chart allows up to 20 unique data elements to be displayed on the chart at once. Each wedge of the pie represents a dimension in the dataset, along with its percentage. Each percentage is calculated relative to the metric values of the other dimensions displayed on the pie chart, which may not necessarily be the entire dataset.
Selections can be made in pie charts by clicking any particular wedge.

![Pie Chart Example](image)

**Scatter Plot**

Scatter plot visualizations allow you to visualize two metrics against a dimension, with each data element represented as a point on an x-y axis. Scatter plots allow up to 200 unique data elements to be displayed on the chart at once. The first metric's increments are labeled along the y-axis, while the second metric's increments are labeled along the x-axis. Placing the mouse over a point in the line chart will display the exact value at that point.

Selections can be made in scatter plots by clicking a particular point. Pressing and holding the Alt key will retain selections as you click additional items. Pressing and holding the Alt key when clicking will also toggle the value of a selection. This is useful for removing just one selection from a group of already selected items.

![Scatter Plot Example](image)
Rich text

Rich text visualization allows you to embed text-based information within the dashboard. This is useful for providing descriptions, hyperlinks, or instructional information. The text formatting toolbar at the top of the Rich Text window allows you to manipulate the format of text within the window body.

To add text to the rich text window, place the cursor within the body of the rich text window and begin typing. To edit text within the rich text window, use the text formatting toolbar at the top of this window.

Creating Visualizations

Steps to add a visualization to the dashboard canvas.

1. Go to the Add Visualization menu at the top of the dashboard interface. You will see a list of available visualizations that can be created.
2. Select one of these menu items to create a new empty visualization and add it to the dashboard canvas. The visualization's configuration dialog opens automatically to allow you to configure the visualization. See Configuring Visualizations for details on how to configure the visualization.

   - **Note:** Cancelling the initial configuration window removes the visualization from the dashboard canvas.

### Configuring Visualizations

Shows how to configure Title, Profile, Dimension, Metric, Filter, Display Top, Sort By, and Time Period.

Each visualization on the dashboard canvas has its own configuration. When a visualization is first added to the dashboard canvas, its configuration window will appear automatically. Once configured, the visualization can be modified at any time by clicking the gear icon in the upper right-hand portion of the visualization window.

   - **Note:** Configuration options vary slightly depending on the type of visualization being displayed.

#### Visualization Title

This field allows you to customize the title displayed at the top of the visualization. By default the title is set to **Automatic Title**, which will automatically generate a title for the visualization window. By clearing the **Automatic Title** button, you may place any title in this field. (This field applies to all visualizations.)
Profile

This field allows you to select which profile you wish to visualize data from. Clicking on the dropdown menu will provide you with a list of profiles for which you have access. (This field is not applicable for Rich Text visualizations.) Profiles are data sets defined within Data workbench that contain data about a certain domain, along with the dimensions, metrics, and filters that accompany the data. A profile is often designed to fulfill a specific purpose (such as marketing or website traffic).

💡 Note: You can see only the profiles for which you have been granted access. For more information see Access Controls.
Dimension

Let's select the dimension you would like to visualize. The list is populated from the list of dimensions available from the profile selected in the Profile field. Click on the desired dimension and then click the Select button. (This field is not applicable for Metric Legends and Rich Text visualizations.)

Dimensions are categories of like data types. For example, the Days of Week dimension is composed of the following data elements: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. Dimensions show what is being measured.
Metric(s)

Let's you select the metrics to visualize. Metrics are quantitative objects and are defined by some quantifiable expression. For example, Page Views per Session is derived from the expression of the count of Page Views divided by the count of Sessions. Metrics answer the question of “how many?”

Single-metric visualizations have a single-metric selection window:

Multi-metric visualizations have a multi-metric selection window:
The list is populated from the list of metrics available from the profile selected in the Profile field.

Click on the desired metrics and then click **Select**. (This field is not applicable for Rich Text visualizations.)

**Filters**

Select the filters you would like to apply to your visualization. The filter selection window allows you to select multiple filters from the filter list. The list is populated from the list of filters available from the profile selected in the Profile field. Click on the desired filter and then click **Select**.

*Note:* Filters applied here are only applied to their corresponding visualization, not the entire dashboard. This is useful for comparing the results of two different visualizations with different filters applied.
Display Tops

Visualizations in the dashboard are not designed to display the entirety of the data. Rather, they allow you to specify the number of dimension records you would like to display on the visualization. This displays the top number of dimensions depending on the sort-by value given below. (This field is not applicable for Tables, Metric Legends, and Rich Text visualizations.)

Sort By

This allows you to specify how the data should be sorted when it is displayed within the visualization. (This field is not applicable for Tables, Metric Legends, and Rich Text visualizations.) There are multiple sorting options:

- **Default** – Return the data unsorted based on the sort order stored in data workbench. This is the option to use for time-based data such as hour, day, week, or month.
- **Dimension** – Sort the data based on the alphanumeric dimension value.
- **Metric** – Sort the data based on the metric value and is good for quickly visualizing the top dimensions.
- **Descending** – Sort the data in descending order.
- **Ascending** – Sort the data in ascending order.

Time Period

This visualization allows you to specify the desired start and/or end date of the data to display within the visualization. Selecting **All Dates** displays the entire date range available in the profile.

Selecting **Range** displays only the data that falls within a specified range. To enter the date range, you can type in the beginning and/or end date, or use a calendar input by selecting the calendar icon.

(This field is not applicable for Rich Text visualizations.)

💡 **Note:** Date ranges applied here are only applied to their corresponding visualization, not the entire dashboard. This is useful for comparing the results of two different visualizations with different date ranges applied.
Manipulating Visualizations

The visualization's tool menu allows you to quickly perform certain operations on the visualization. Placing your cursor over any of the icons within the visualization tool menu will provide an explanation of that icon's function.

Locking and Unlocking Visualizations

Locks/unlocks the current visualization.

Visualizations can be locked to preserve selections and help guide analysis for viewers of a particular dashboard. Locks can be toggled by using the lock icon within the visualization's tool menu. For all visualizations except Rich Text and Metric Legends, applying a lock will prevent users from altering selections within that visualization. Any
selections that were made prior to locking the visualization will always be applied, and no adjustments to the selections can be made while the visualization is locked.

If no selections were made within the visualization before locking, the lock will serve to prevent users from making any selections within that visualization. Regular users and Administrators can dynamically toggle visualization locks, but Read-only users will always be restricted to any locks that have been placed on visualizations.

Locking visualizations is useful for guiding analysis by pre-selecting items that the entire dashboard should be filtered on. This provides an on-screen visual cue of what's being filtered without allowing it to be altered. Locking is also useful for reducing the potential for confusion by only allowing users to select on visualizations that are relevant to their analysis.

**Collapsing and Expanding Visualizations**

Collapses/expands the current visualization.

Visualizations can be collapsed and expanded at any time. Collapsing a visualization will reduce the height of the visualization to just the title and tools portion, hiding the visualization body. Expanding a collapsed visualization will restore its size to its original height.

Collapsing a visualization is particularly useful for preserving a large number of visualizations within a dashboard while taking up minimal space. Users can expand a collapsed visualization to see its contents only when necessary.

**Exporting Visualizations**

Exports data from the current visualization.

Data from visualizations can be quickly exported using the export icon at the top-right of the visualization window. Clicking this icon will initiate an export on the server and allow you to download the data in several formats. See [Exporting Data](#) for more information.

**Configuring Visualizations**

Visualizations can easily be configured and reconfigured.

Visualizations can be configured and reconfigured by clicking the gear icon at the top-right of the visualization window. This will bring up the visualization's configuration window to allow adjustments to be made to that visualization. For details on configuring visualizations, see [Configuring Visualizations](#).

**Removing Visualizations**

You can remove a visualization from the dashboard canvas at any point.

This is done using the X icon at the upper right-hand portion of the visualization window. This will remove it from the dashboard canvas, but will not impact any saved versions of dashboards unless the current dashboard is saved. Any selections that were present within the visualization being closed will be removed from the dashboard's selections.

**Sizing Visualizations**

In addition to expanding and collapsing a visualization, you can also resize them.

Just use the resize handle at the bottom of the visualization window. By hovering over the bottom edge of a visualization window, you can click-and-drag to make the window taller or shorter on the dashboard canvas. Any
other visualizations within the dashboard will automatically be repositioned to fit the new size of the resized visualization. The width of visualization is fixed relative to the width of the browser and cannot be manipulated.

Moving Visualizations

Visualizations can be easily moved and rearranged within the dashboard canvas. To move a visualization, simply click the visualization’s title bar, drag the visualization, and drop it in another location on the dashboard canvas. The dashboard canvas will assist in positioning the visualization by making room for it at the desired location. Existing visualizations will automatically be shifted up or down to make room for the visualization being moved to avoid overlapping.
Dashboards

Dashboards are created to visualize metrics and provide interactive analytic capability with data. By clicking on items within a dashboard, you can quickly and easily segment the data to derive information from your analysis. An unlimited number of dashboards can be created, either for short-term on-the-fly analysis or for long-term dashboard capability. Dashboards can be kept private or easily shared with other dashboard users. You can also export data from any dashboard for use in other tools such as Microsoft® Excel™.

Opening and Viewing Dashboards

Dashboards can be opened in one of three ways: through the quick-access menu, through the Dashboard Browser, or by using a dashboard hyperlink. Though dashboards can only be opened one at a time in the dashboards interface, you may create a separate browser tab or window to view multiple dashboards at the same time.

Quick-Access Menu

One of the easiest methods to open a dashboard is by using the quick-access menu on the left-hand navigation panel of the dashboard interface.

Placing the cursor over a folder menu item (denoted by the right-facing arrow) will expand its contents and allow you to quickly navigate through the dashboard folder hierarchy to find your desired dashboard. Clicking on the dashboard's menu item (denoted by the dashboard title and no right-facing arrow) will open the dashboard for viewing and analysis.

This method is ideal when you know the name and location of the dashboard you would like to open. If you're unsure of the name and/or location of the dashboard, the Dashboard Browser will help you locate and open the dashboard.
Dashboard Browser

The Dashboard Browser facilitates browsing, searching, and opening dashboards that you and other members of your organization have created and saved.

You can browse and access all dashboards that you have permissions to view (for more information on access controls, see section Access Controls). The Dashboard Browser works well when you need to find a dashboard but are uncertain about which one you need or where it resides. The Dashboard Browser is also useful for getting additional details and performing special functions on a given dashboard.

Opening the Dashboard Browser

When you log into Adobe Data workbench dashboard, the Dashboard Browser will appear by default. You can also access the Dashboard Browser at any time by clicking on the Dashboard menu in the toolbar and selecting Browse....

Dashboard Browser Views

Explains the Thumbnail View and the List View.
There are two views that can be used to navigate dashboards within the Dashboard Browser: the Thumbnail View and the List View. The Thumbnail View provides thumbnails of dashboards as you browse, while the List View is a more detail-oriented table-based view of the available dashboards.

**Thumbnail View**

The Thumbnail View provides a gallery of thumbnails that correspond with the dashboards for which you have access. If a thumbnail displays a default icon, please contact your administrator to have a thumbnail established for that dashboard. The icons to the left of the search bar allow you to toggle between Thumbnail and List Views.

In the thumbnail view, the left-hand navigation panel of the Dashboard Browser displays the folder hierarchy that organizes the storage of dashboards. To view the contents of a folder, click on the folder to show its contents as thumbnails in the center panel of the Dashboard Browser. If there are no dashboards saved in that level of the folder, the message “no dashboards in this location” will display in the center panel of the window.

You can also explore subfolders by clicking on the arrow to the left of the folder of interest. This will expand a list of subfolders and dashboards within the folder you selected. By selecting a folder that contains at least one dashboard, the center panel will display a thumbnail for each of the dashboards located at the level of that selection. The center panel title will also change to indicate the path of the selected folder.
You can then select the dashboard of interest by clicking on it. Once you have clicked on a dashboard thumbnail, the right-hand frame will populate with the details about the dashboard. The dashboard details contain a thumbnail view of the selected dashboard, its name, a brief description, the owner, creation date, last modification date, profile(s) used to compile the data, visibility controls, and offers a selection of operations.

**List View**

The List View provides table-based information on the dashboards for which you have access. Each row in the List View’s table represents a unique dashboard. Clicking on column headers will allow you to sort the table by that column in either descending or ascending order.

Clicking on a dashboard entry will display the dashboard’s details in the right-hand panel of the dashboard browser. To switch between views, re-select the desired view option.

**Searching within the Dashboard Browser**

The Dashboard Browser also allows you to perform searches to find existing dashboards.

To perform a search, use the search box in the Dashboard Browser’s toolbar. Your search results will appear in the Dashboard Browser as you type. You can clear a search at any time by deleting the search text or clicking the X icon in the search box.
You can also sort your results using the sort functions in each column header. Clicking on a column header will toggle sorting on that column. You can also access the sorting options using the drop-down menu on each column header.

This **Columns** menu also allows you to modify visible columns in the dashboard list view. Here you can toggle the visibility of columns by selecting or deselecting the column(s) of choice.
Details Panel

The Dashboard Details Panel displays a dashboard's detailed information along with a thumbnail version of the dashboard. Information found in the panel includes the dashboard's name, a brief description, the owner and date of creation, the last date in which it was modified, and the profile(s) that were used to create the dashboard. The dashboard's visibility (whether it is private or shared) is also available in this panel.

Dashboard Hyperlink

The third way that a dashboard can be opened is by using a dashboard's hyperlink.

Each dashboard has a unique hyperlink that can be used to open the dashboard through the browser's address bar. Dashboard hyperlinks can also be used for bookmarking and sharing via e-mail.

If you have a dashboard's hyperlink, simply enter it into the browser's address bar and navigate to the link. You'll be directed to the dashboard site and prompted to log in (if not already logged in). Once logged in, the dashboard will load in the interface.

💡 Note: You will be prompted with a message if the dashboard no longer exists or you do not have proper permissions to access the dashboard.
Query-To Parameter

The dashboard allows you to visualize samples of data from Adobe data workbench versus querying your dataset to completion.

Since sample results are returned quickly, using a lower Query To percentage feature facilitates quick dashboard creation and analysis until a full result is returned. The Query To parameter can easily be adjusted at any time using the Query To menu within the Update menu of the toolbar.

Since running queries to 100 percent completion can take several minutes, it is recommended that you adjust the Query To parameter to a lower value while building dashboards, or adding and configuring visualizations. It is also recommended to lower this value when fine-tuning your selections within a dashboard until you are sure you are ready to run the query to 100% completion.

Note: An indicator will be shown in the header for each visualization that does not have a 100 percent complete query result.
Creating a Dashboard

Creating a dashboard is recommended even for short-term, ad-hoc analytical needs.

Note: Read-only users cannot create dashboards. This section applies only to regular users and administrators.

Users can decide to create dashboards for several reasons:

• A new dashboard can be started from scratch for on-the-fly analysis with no intent of reusing or sharing the dashboard.
• A new dashboard can be created for the purpose of performing your own personal analysis that you would like to save and reuse, but not share.
• A new dashboard can be created, saved, and shared for you and the rest of the dashboard user population to access. Whatever the case, each scenario starts at the same point: a blank dashboard canvas.

Note: Before starting to build out your dashboard, it's a good idea to reduce your Query-to percentage to something low, such as 10 percent or 25 percent. This will pull samples of data from Data workbench much quicker than performing a complete query. Since these sampled results return much more quickly, it provides ideal responsiveness while framing out your dashboard and analysis. Once you're ready to run queries to completion, you can update the query-to parameter to 100 percent. For adjusting query completion, see the Query-to Parameter.

To create a new dashboard, select New under the Dashboard menu.
You will be presented with a blank dashboard canvas that is ready to have visualizations added and configured based on your analytic needs. As you work, nothing will be updated on the server until you save.

Next, decide what kind of data you want to display and how you want to display it. It generally helps to start with table visualizations to see the raw data, and then build out other charts to suit. For details on how to add and configure visualizations, see Creating Visualizations. After adding and configuring visualizations to build out the dashboard, you will end up with the following:

From this point you can simply perform your analysis and discard the dashboard, or you can choose to save the dashboard to the server for reuse and/or sharing. For information on how to interact with a dashboard to perform analysis, see the section Making Selections within the Dashboard.

Saving a Dashboard

1. To save a new dashboard, select either Save or Save As... from the Dashboard Menu at the top of the dashboard interface. For a new dashboard, both options have the same result. This launches the Save New Dashboard window where you can enter a title, a brief description, and location to store the dashboard.

   Note: Dashboards can be either private or shared. If a dashboard is labeled Private on the Visibility field, only you (or a system administrator) can view and edit the dashboard. If a dashboard is labeled Shared on the Visibility field, every user of the system can view and edit the dashboard.

2. Under the Source field, choose an image thumbnail to represent the dashboard. By default, a screenshot of the dashboard will be taken and used as the thumbnail for the dashboard.
This thumbnail will be used if the Captured Screenshot option is selected. If you would like to use another image file, select the Image File option and choose the image you would like to represent the dashboard.

**Note:** If your browser does not support screenshot capture, then a default screenshot will be used. In this case you may wish to select an image file to represent the dashboard instead.

3. Click **Save** to save the dashboard to the server. You will be the owner of this dashboard and will have full control over it in the future.

**Editing or Updating a Dashboard**

Existing dashboards can be edited at any time, either for temporary ad hoc purposes or to make permanent changes to be saved to the server.

**Note:** Only regular users and administrators can edit dashboards. Only the original dashboard creator or an administrator can save changes to the original copy of a dashboard. Otherwise, the only way to edit and save an existing dashboard is to save it as a copy. For more information on saving dashboards, see Saving a Dashboard.

Any changes made to a dashboard will not be changed on the server unless they are saved. To make changes to a dashboard's visualizations, please refer to the chapter on visualizations, which contains information on adding, configuring, and manipulating visualizations.

**Note:** To simply update a dashboard's title, description, location, or visibility settings, you must be the owner of that dashboard or an administrator.

1. Open the dashboard.
2. Once the dashboard has finished loading, select **Save** from the dashboard drop-down menu.
3. When the Update Existing Dashboard window appears, adjust the dashboard title, description, location, and sharing options as needed.
4. Click **Update** to save any updates to the server. See Saving a Dashboard.
Making a Copy of a Dashboard

Steps to copy a dashboard.

1. Load the dashboard you want to make a copy of.
2. Select Save As... from the dashboard menu at the top of the dashboard interface.
3. When the Save Dashboard As... window appears, enter in a new name for the copy of the dashboard.

Other Dashboard Functions

Special functions include sharing, exporting, and deleting dashboards and are performed from the details panel of a selected dashboard.

Sharing a Dashboard Hyperlink

The Share operation provides a URL that can be used to either bookmark the dashboard or mail a link for another user to access the dashboard. A Dashboard Link window will appear that provides you with the information needed to share the link to the desired dashboard.

💡 Note: Recipients of the link must also have access to the dashboard in order to view the dashboard.

Exporting Dashboard Data

The Export Data operation initiates an export of the selected dashboard to be saved as an Excel or CSV (Comma Separated Values) file.
Deleting Dashboards

The **Delete** operation will delete a dashboard. To delete a dashboard, the user must be the owner of the dashboard or have administrator access. Clicking the Delete operation will display a window to confirm that you would like to delete the dashboard.

Dashboard Sharing and Access Controls

Dashboards can either be private or shared.

If a dashboard is set to **Private**, then only the dashboard creator or a system administrator can view and edit the dashboard.

If a dashboard is set to **Shared**, then every user with proper access can view the dashboard. For users to have proper access, they must have an active account on the dashboard application and have been granted access to each profile that the dashboard contains. Aside from administrators, other users cannot permanently edit dashboards that they did not create. Users can, however, make edits and save the dashboard as a copy.
Making Selections within the Dashboard

Data within a dashboard can easily be segmented and explored by the use of selections.

Selections are made by clicking certain elements within visualizations to identify how the data in the dashboard should be segmented. Making a selection in one visualization will segment the data being represented in the other visualizations within the dashboard. Any number of selections can be made, adjusted, or removed at any time, and encourages the user to interact with the data to derive analytical information.

When saving a dashboard, the state of any selections will be preserved at the time of save. Similarly, when a dashboard is loaded, any selections that were preserved during the save will be made effective when the dashboard is loaded.

Selections can be made by clicking on one or more data elements within one of a dashboard's visualizations. Data elements are represented by things like bars in bar charts, columns in column charts, rows in a table, and so on. Selections are highlighted as they are made, and making selections within a visualization will give the visualization an orange border. The exact method for making selections depends on the type of visualization being used.

For each selection that has been made from a visualization, an entry will also appear in the Selections Menu. This entry is listed using the selected dimension name, with one selections entry appearing per visualization.
Note: Visualized data is not automatically updated each time a selection is made. Rather, after you have made your desired selections, you must initiate an update in order to segment the data and update your visualizations.

Locked Selections

Selections within one or more visualizations on a dashboard can be locked to preserve current selections and prevent further alteration.

Locking visualizations is useful for guiding analysis since certain items can be pre-selected and permanently applied to the entire dashboard. This provides an on-screen visual indicator of what is being filtered without allowing it to be altered.

Locking is also useful for guiding analysis by only allowing users to select on visualizations that are relevant to the analysis that the dashboard is aiming to achieve. For example, in the sample dashboard below, drilling down to the zip code level may be beyond the scope of high-level call volume analysis. In this case it may make sense that the Metric Breakdown by Zip table be locked and have selections only allowed on the Month, Day of Week, and Datacenter visualizations.

If you try to make selections on a locked visualization, you will see a message indicating that the visualization is locked. You will also see a gold lock icon in the visualization header when the mouse cursor is hovered over the locked visualization.
As with any selection, locked selections are preserved when a dashboard is saved and remain active when a dashboard is loaded. For more information see *Locking and Unlocking Visualizations*.

### Applying Selections

Selections are not automatically applied to the dashboard's data results.

Finished making your desired selections and click **Update**. If the **Update** button is orange, this indicates that you must click it to apply some change in the dashboard's selections. This feature allows you to make multiple selections on the screen and frame out your analytical questions without having a query initiated every time you make a change.
Removing Selections

Selections can be removed at any time.

Just click the X icon inside the corresponding selections item in the Selections Menu.

If a visualization’s selections are locked, you will see a small padlock icon replacing the X icon. Locked selections cannot be removed without unlocking the visualization first.
Determining What's Selected

There are two ways to determine which selections have been made within a dashboard.

• First, all selections that have been made on the dashboard will be represented by an item in the Selections menu. Each group of selections from a visualization will appear as one item in the list. These will be labeled with the corresponding dimension name (i.e. ‘Day’, ‘Month’, etc.). Placing the mouse cursor over this entry will display a popup that identifies exactly which metric values have been selected.
• Another feature to help identify the selections that have been made is visualization highlighting. Any visualization that has a selection will be outlined in orange. Also, placing the mouse cursor over a selection item will highlight its corresponding visualization in bright yellow, showing the user where the selection came from.

Cross-Profile Selections

You can visualize data from multiple profiles in one dashboard.

In some cases, selections from one visualization can also be applied to visualizations from another profile. For example, if you create visualizations from a Call Center profile and a Website Traffic profile on one dashboard, you could select a target month to have the data in all visualizations simultaneously segmented on that month, despite being entirely different datasets.

When visualizations from multiple profiles exist in a dashboard, you may make a selection in a visualization if that visualization's dimension also exists on all other profiles represented on the screen. However, selections will be disabled if a dimension is not found globally across all other visualizations on the screen, and users will see a Selections Disabled message.
Note: Even though dimensions may share the same name across multiple profiles, they may not have the same meaning. It is important to investigate each dimension to determine whether it is appropriate to use it to make selections across multiple profiles.
Exporting Data

Shows 3 ways of exporting data, and how to retrieve exports.

Data can be exported from the dashboard in three ways.

First, you can export data from an individual visualization. Second, you can export your current working dashboard, including any configurations and selections you've made. Third, you can export a saved dashboard without opening it.

Exports are performed using a two-step process. First, exports are queued on the server using one of the three methods above. The status of the export will be displayed in the Exports menu as the export is being prepared. Next, when exports are ready, you can download the data in either CSV or Excel format.

Exports may take several minutes, but you can continue to use the application during an export.

Exporting Visualizations

To export data from a visualization, click Save in the visualization’s tool menu.

![Image of Calls by Day of Week visualization]

Your export will be initiated on the server and an export indicator will be added to the Exports Menu.

Exporting Dashboards

To initiate a data export from a working dashboard, select Export from the Dashboard menu.
Your export will be initiated on the server and an export indicator will be added to the Exports Menu.

**Exporting Saved Dashboards**

To initiate a data export from a saved dashboard, use the Dashboard Browser. Within the Dashboard Browser, browse to your desired dashboard and select it so the dashboard's details appear. In the right-hand details panel, under the **Operations** section, select **Export Data**.

Your export will be initiated on the server and an export indicator will be added to the **Exports** menu.

**Retrieving Exports**

When an export is complete, a popup notification appears to notify you that the export is ready.

To retrieve the export, use the **Exports** menu. Clicking the green checkmark to the right of the desired export's item will show a drop-down menu. Within this menu, under the **Save Export As...** submenu, select the appropriate menu option to download the export in either CSV or Excel format.
Your browser’s file download process now starts.

Exports are not removed automatically, so you can easily download the export in each format. You may remove exports from the **Exports** menu in the left navigation panel. Otherwise, they will automatically be removed when you log out.

To remove an export from the **Export List**, click the checkmark to the right of the export title and select **Remove From List**.
Dashboard Access Controls

Dashboards can have two levels of visibility: Private and Shared.

- **Private**: When a dashboard is set to **Private**, it is only accessible by the dashboard owner and administrators. Other users of the system cannot see the existence of the dashboard nor open it.
- **Shared**: When a dashboard is set to **Shared**, every user with proper access can see and open the dashboard. For users to have proper access, they must have been granted access to each profile that the dashboard contains. If a user has not been granted access to one or more profiles within a dashboard, they will not see the existence of the dashboard nor be able to open it.

Only the original owner or an administrator may make changes to a dashboard. This includes making changes to the dashboard content, updating the dashboard name, description, visibility, or deleting a dashboard. Other users may make a copy of the dashboard in order to make changes.
User Account Management

Information on how to access your account settings and change your password.

Accessing your Account Information

To access your account information, select Account Settings from the User menu.

A window will appear that details your account information. This includes your username, e-mail address, group membership, and the data profiles available to you. To verify your user profile has been configured correctly and that you have access to all your data profiles, you can review the profiles listed in the Granted Access To section. If you are missing data profiles, contact your administrator.

Changing your Password

To change your password, first access your account information. To access your account information, select Account Settings from the User menu. Click Change Password.
Help Menu

Using the Help drop-down menu, you can access the dashboard product documentation

• **User’s Guide** - Selecting the User’s Guide option from the Help drop-down menu directs you to a web link in which you can access this document at any time.
• **FAQ** - The FAQ provides you with a list of frequently asked questions and answers specific to the dashboard. This section serves as a quick reference guide for common user issues.
• **About** - The About portion contains system information, including the version number and legal agreement. It also contains your user-agent string, which is a useful piece of information to provide when seeking technical support.

Additional Support

For further support regarding technical or software performance issues, contact your system administrator. To facilitate the resolution process, be prepared to provide the following information:

• Your Adobe data workbench dashboard user name
• Web browser type and version
• Operating system name and version
• Dashboard version number
• Detailed explanation of the issue you are experiencing
• Screen shots of issue (if possible)