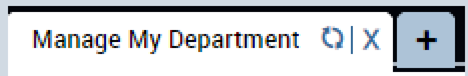
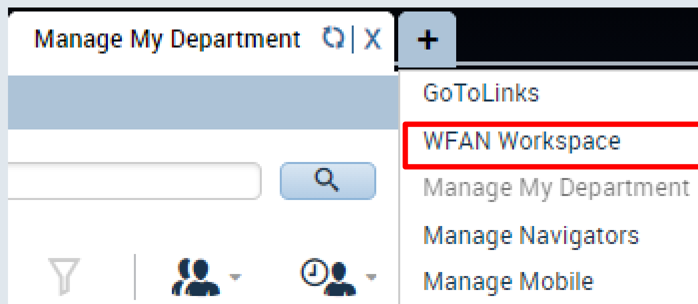
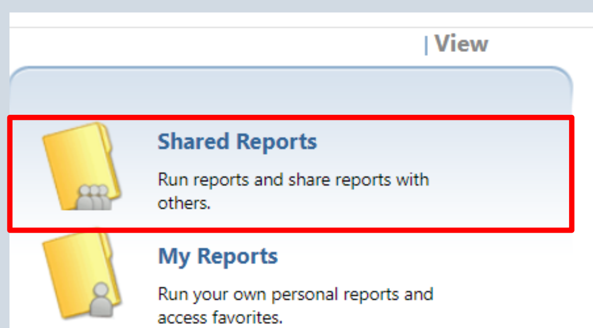
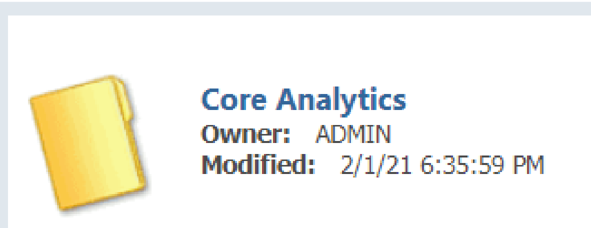
Using an Analytics Dashboard

Purpose:
This job aid will help you get started with using an Analytics Dashboard and being able to adjust it and filter the views.

<table>
<tr><th>Steps</th><th>Screenshots</th></tr>
<tr><td>Click on the ‘ + ‘ icon next to My Information or Manage my Department.</td><td>
</td></tr>
<tr><td>From the dropdown, select WFAN Workspace.</td><td>
</td></tr>
<tr><td>Here you have access to creating new reports or using existing reports.

Here we will select Shared Reports.</td><td>
</td></tr>
<tr><td>Click Core Analytics to advance to the next page.</td><td>
</td></tr>
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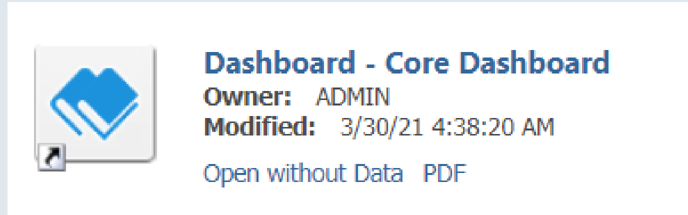
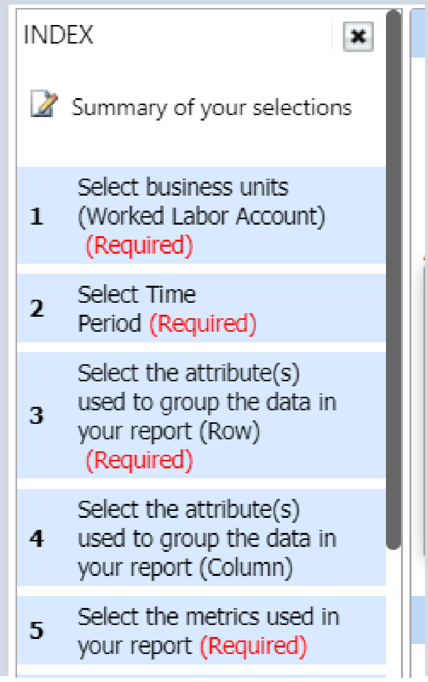
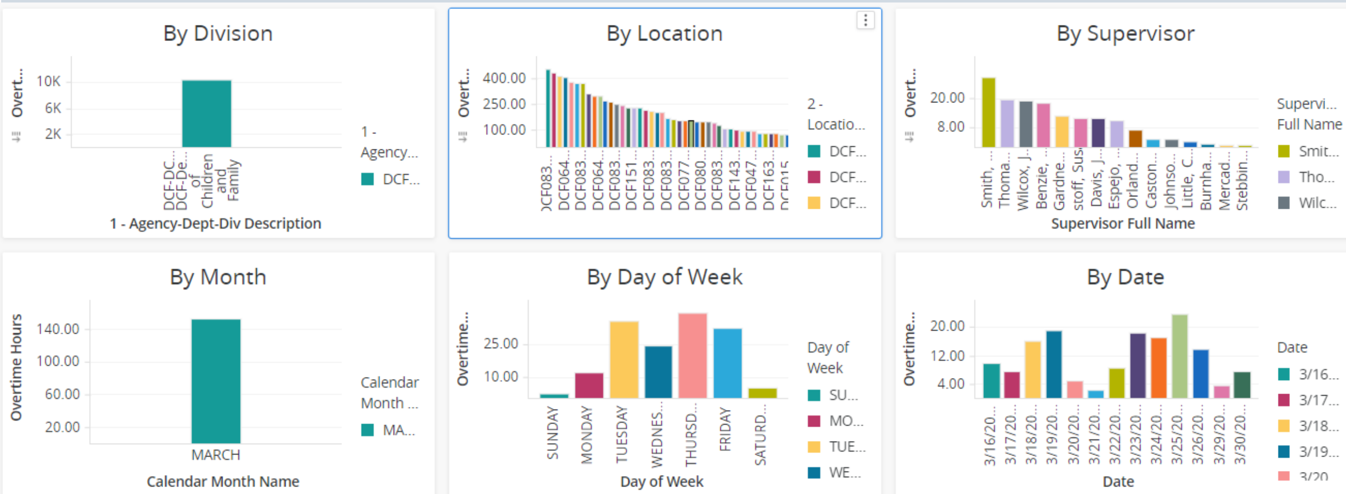
<tr><th>Steps</th><th>Screenshots</th></tr>
<tr><td>Click on Core Dashboard to advance to the next step.</td><td>
</td></tr>
<tr><td>On the far left of the page, you will see all the fields you will need to address in order to run the Dashboard. Once this is done click Run Dossier at the bottom.</td><td>
</td></tr>
</table>

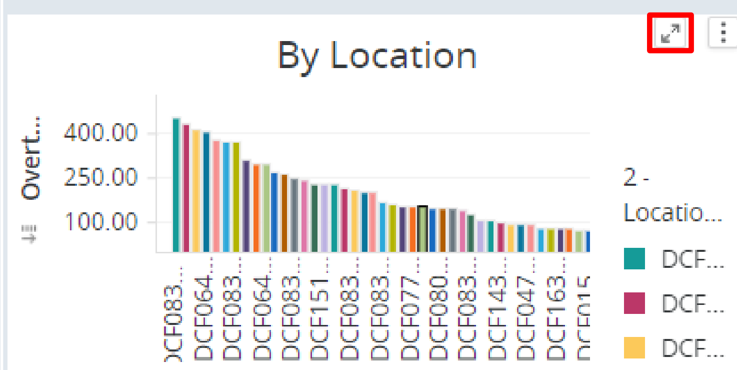
Steps	Screenshots

When you open a dashboard, you will see multiple figures giving you information from a wide view into a granular level.

Note that you will only see analytics for staff in your employee group.

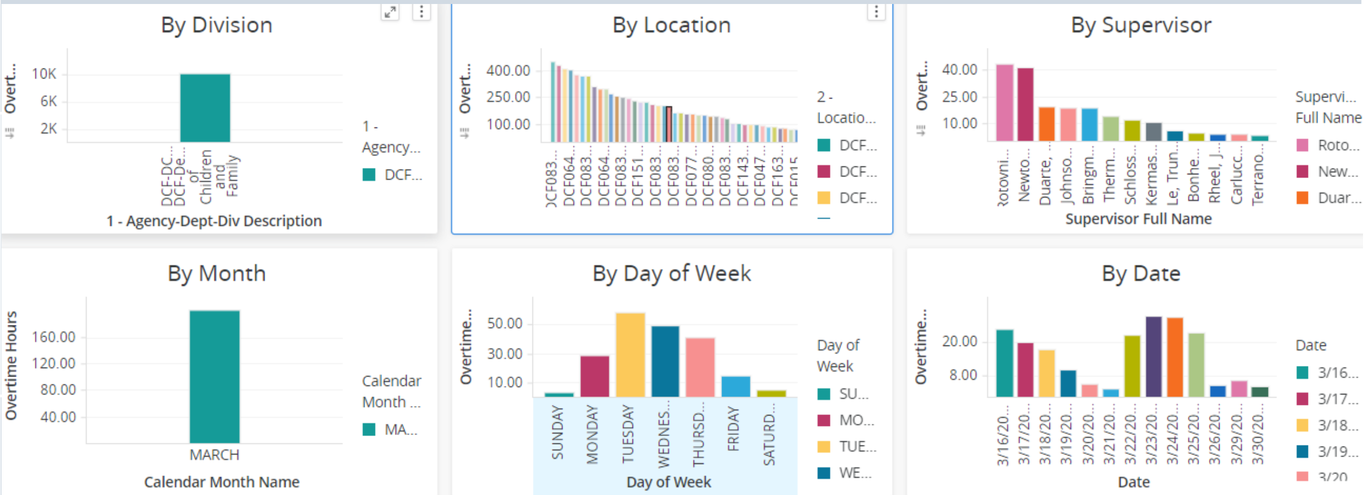


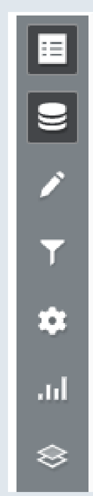
Using the button on the top right corner you can make the individual charts full screen. You can also drag the charts around to resize them

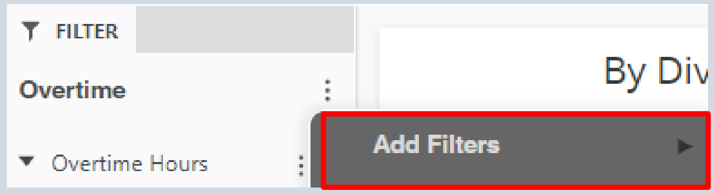
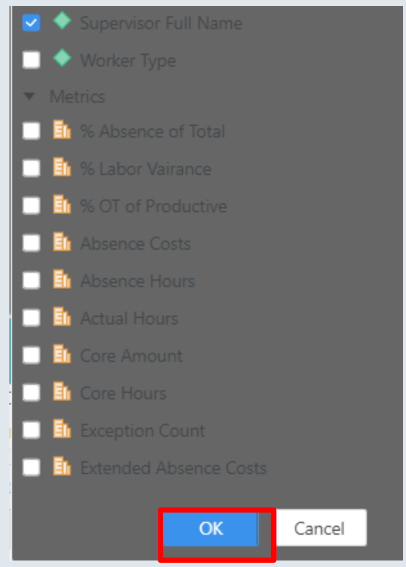
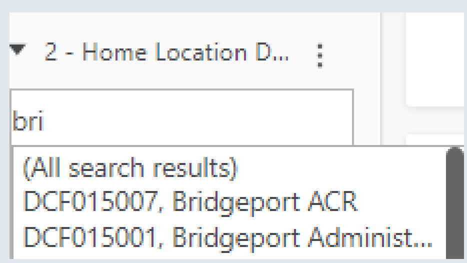


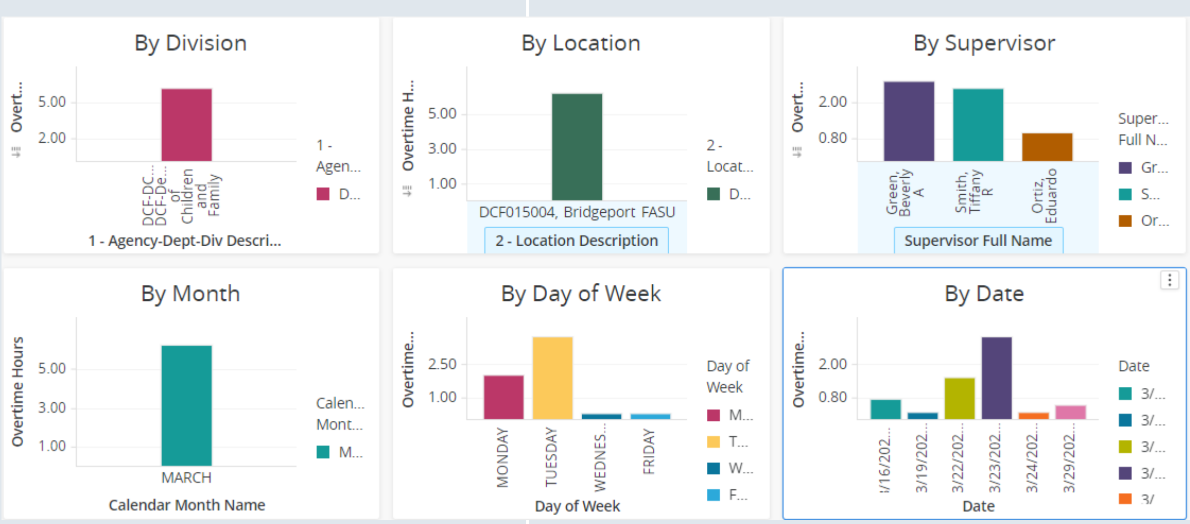
Steps	Screenshots

Every graph is linked and affects each other from top left to bottom right. That means that if you click on a specific Supervisor, the Month, Weekday, and Date will be filtered to reflect only the information for that supervisor.



Steps	Screenshots
On the far left you will see a list of sections you can toggle to open and close. The sections are Contents, Data Sets, Edits, Filters, Settings, Visuals, and Layers.	

Steps	Screenshots
Click on the Filter icon on the far left, this will allow you to narrow your view of the data. Click on the three dots and select add Filters.	
Select the filter that you would like to add, then scroll down and click OK.	
Back on the filter section in the far left, start typing the name of the location you want to focus on, once you select it all data will be filtered by this name.	



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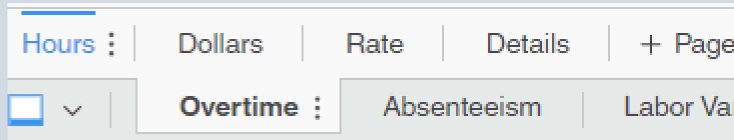
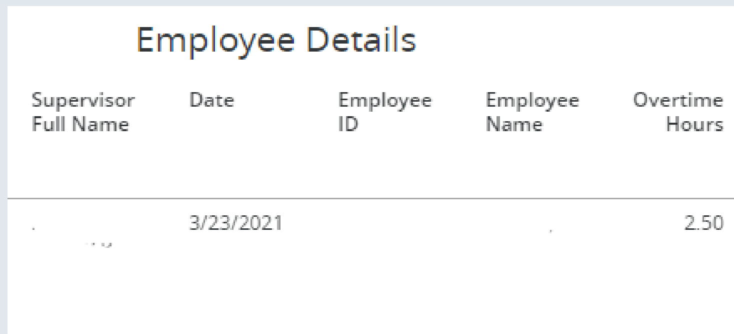
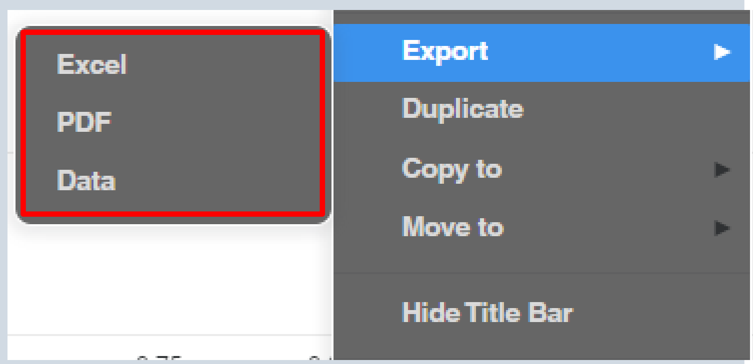
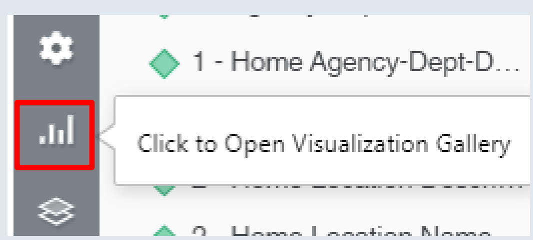
<tr><td>On the bottom you can see all the different parts of the dashboard that you have access to (Overtime, Exceptions, Etc.) and the units that you can use to view them.</td><td>
</td></tr>
<tr><td>Clicking on the Details section will show you an excel style view of all the data which you can export.</td><td>
</td></tr>
<tr><td>Clicking on the three dots on the top right will give you the option to Export the data and then select the preferred format.</td><td>
</td></tr>
<tr><td>After adding filters you will also be able to create new charts/graphs by clicking the visualization button.</td><td>
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</table>

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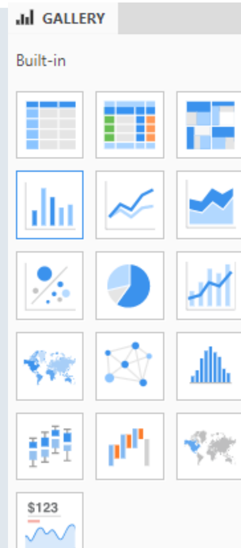
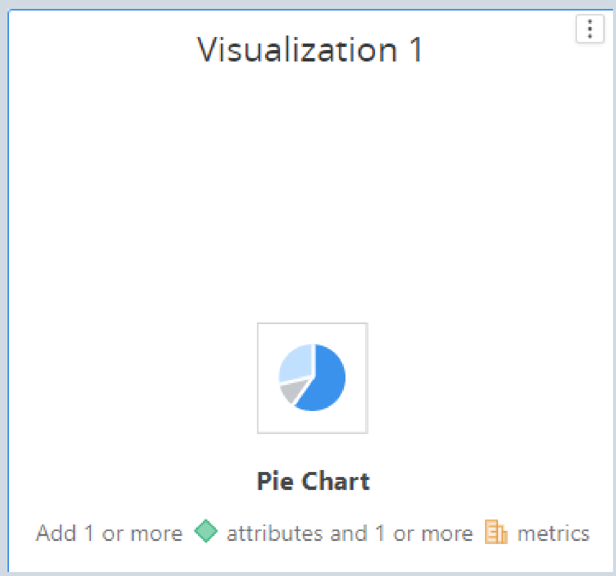
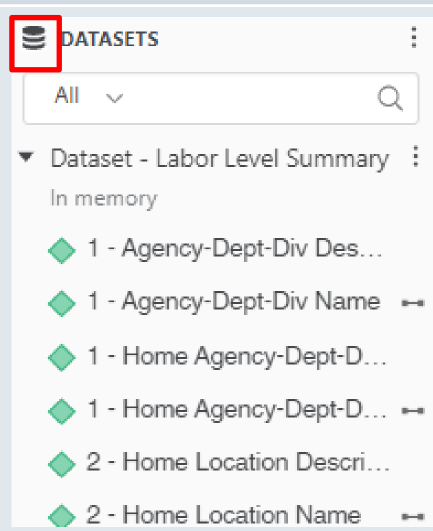
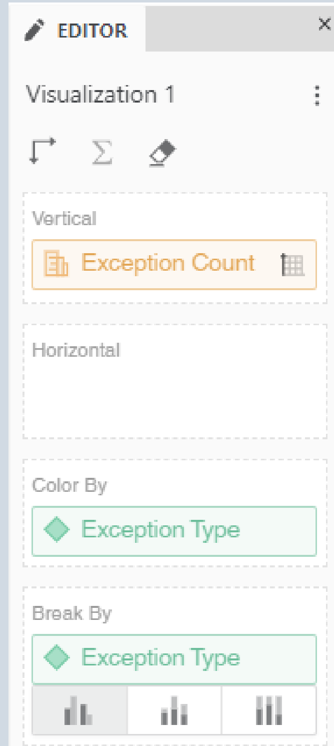
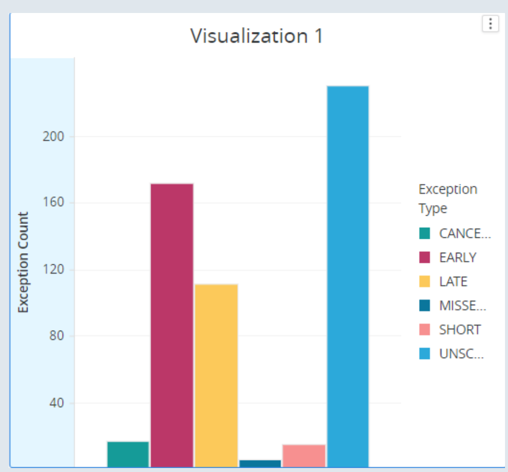
On the right side, a gallery of available charts will populate. Drag the one you would like to use to the center in order to start creating the new chart.	
Once you drag the chart to the center, you will see the information show up as a visualization, you will need to drag actual metrics to the chart to populate it.	
Click on the first button on the top left, this is the datasets dropdown. From this list you will be able to pull in categories and specific metrics to fill in the chart.	

Steps	Screenshots
Once you click on the chart, you can click the editor icon on the left. Here you will be able to drag around and manipulate the data in the chart. In this case we want the vertical to show the count for exceptions and the data to be broken out by exception type.	
Once this data has been filled in, you will see the chart fill up with the data. If this is not correct, you can go back to the editor to update the information.	

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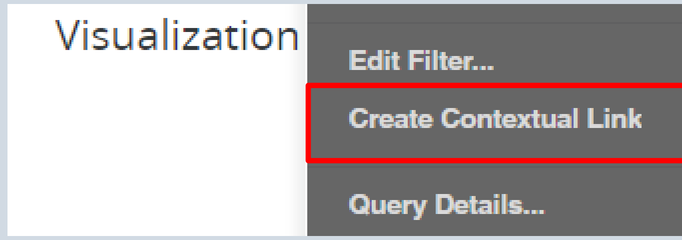
When you finish creating a visualization, click on the three dots and select Create Contextual Link. Linking charts to others makes it so that you can click on a column and edit the data shown in the other charts as well.	

As an example of this, by clicking the Unscheduled time exception shown below, it will edit the four charts marked as Target on the far left.