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Frontline Advisor Manager Help

Using the Column Chooser to Select Metrics

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Important

Access to metrics and their time profiles and hierarchies/nodes is controlled by user roles defined by your administrator (role-based access). Only metrics and time profiles and hierarchies/nodes to which you have access are displayed in the **Column Chooser**. If you have no such access, you cannot change the column display.

- For additional information about any of the metrics, see the [Advisor's Metrics Reference Guide](#).

Overview

Use the **Column Chooser** to select the metrics to display on your dashboard. You can select many metrics for multiple time periods and for multiple channels (for example, voice, Web chat, or e-mail).

The **Column Chooser** has two panes:

- **Selected Metrics**—The metrics to display on the dashboard. You can select and move metrics from this pane to the **Available Metrics** pane.
- **Available Metrics**—All available metrics that are not in the **Selected Metrics** pane. Metrics on the **Available Metrics** pane do not appear on your dashboard. You can select and move metrics from this pane to the **Selected Metrics** pane.

You can change the size of the display area on the **Selected Metrics** and **Available Metrics** panes by dragging the splitter between the two panes.

Specifying the Metrics to Display on the Dashboard

To specify the metrics that appear on your dashboard:

1. Click the **Column Chooser** button to open the **Column Chooser** window.
2. Use the **Select** drop-down menu to choose the list of metrics to display on the **Selected Metrics** pane. The options are described in the [Column Chooser Feature Descriptions](#) table. You can then add to or remove metrics from this initial list.
 - To *remove* a metric from your dashboard display, click the yellow pin icon in the row for that metric in the **Selected Metrics** pane. The metric moves to the **Available Metrics** pane. The metric no longer appears on your dashboard after you click **OK** to apply your changes.

- To *add* a metric to your dashboard display, click the pin icon in the row for that metric in the **Available Metrics** pane. The metric moves to the **Selected Metrics** pane. The metric appears on your dashboard after you click **OK** to apply your changes.
 - To *filter* the list of metrics that appear on the **Available Metrics** pane, use the options at the top of the **Available Metrics** pane. The options are described in the [Column Chooser Feature Descriptions](#) table.
 - To *find* a specific metric on the **Available Metrics** pane, enter text in the **Search** field. For example, to find any metric with "handled" in the name or description, enter "handled" in the **Search** field, and then click  beside the **Search** field or hit **Enter** on your keyboard.
3. Optionally, *sort* the metrics on the **Available Metrics** pane by clicking on column headers.

Column Chooser Feature Descriptions

The following table describes additional features of the **Column Chooser** window.

Feature	Description
Select drop-down menu	Use this menu to specify which metrics display on the Selected Metrics pane. Options include: • From Dashboard: the Selected Metrics pane displays the metrics in the order in which they appear on the dashboard. This is the default option. • Default: the Selected Metrics pane displays the metrics that are shown by default on the Dashboard.
Available Metrics pane filter options	Use the filters on the Available Metrics pane to more efficiently find specific metrics to add to the Selected Metrics pane. For example, to include metrics for the Voice channel and exclude metrics for the E-mail and Web Chat channels, ensure that the Voice check box in the Channels filter is selected and the E-mail and Web Chat check boxes are cleared. The filter options in the Available Metrics pane include: • filter by Channel • filter by Object Type • filter by Metric Type • filter by Time Period • filter by initial letter of the metric name
OK button	Applies the selected metrics to the dashboard, closes the Column Chooser window, and saves the following to your preferences:

Feature	Description
	• filters states • selected metrics and their order
Cancel button	Cancels the changes that are not yet applied and closes the Column Chooser window.