

FRD: Filter Management Enhancement

Filter Settings in Roles

Problem Statement

When dashboards are shared with users, the administrator has the option to provide certain rights of the dashboard like, read, write, delete, etc. These rights are for multiple attributes. Dashboard settings, widget settings, etc.

But there is no right to filters that is provided. So every sub user has access to the filter bar and can apply any filter in their segmentation.



User Stories

- As A XA administrator,
- I want to the option to restrict my sub users using filters
- So that I get a better understanding of the rights I can provide.



Roles >> Edit Roles

Edit Role Name ×

Role Name

Access Rights Provide all dashboard level access

User Rights	Read	Write	Delete
Manage Dashboard	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Tab	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Widget	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anonymity limit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Filter Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

User will be able to use filters

User will be able to create his/her new filters and save them

User will be able to delete filters created by anyone

New Row for Filter management

Filter Management

Dashboard level settings

Problem Statement

When dashboards are shared across multiple roles, all the roles get access to all the filters, based on the segments. There are some cases where certain sub users must NOT have access to any filters of the dashboard, and they should see the default filter based on the segmentation (if any).

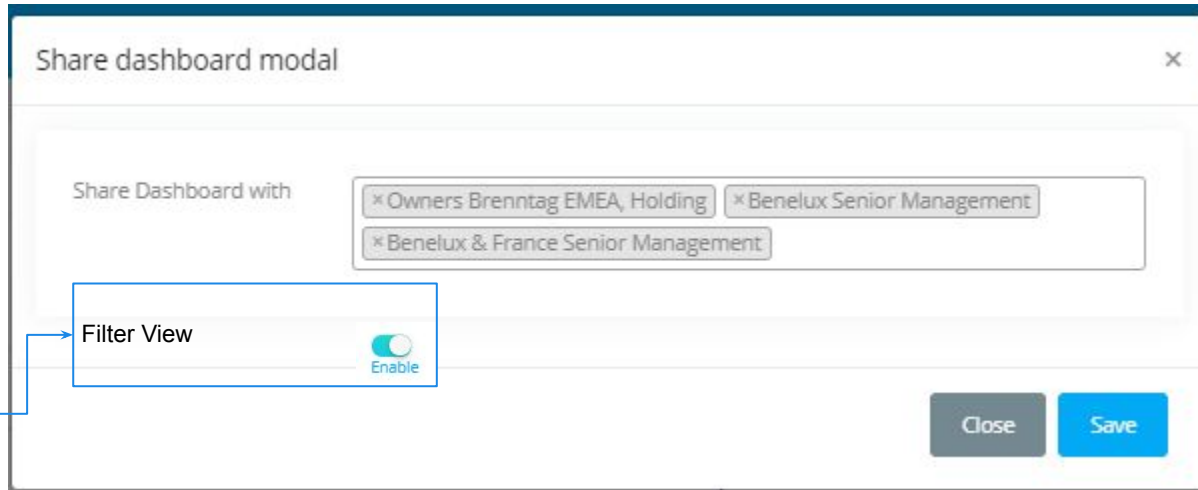


User Stories

- As A XA dashboard owner,
- I want to the ability to decide whether filters of a dashboard are shown/hidden while sharing it with other user
- So that I get a better control over the dashboard view



Dashboard List >> More >> Share



New setting.

ON: users can see the filter based on the rights provided to the roles

OFF: No user can see the filter irrespective of roles right.

ON By default.

Tab level settings

User Stories

- As A XA administrator,
- I want to the setting to turn ON/OFF the filter view on a tab level
- So that I get a better control over the dashboard view



Edit Dashboard Page Settings

New setting.

ON: users can see the filter based on the rights provided to the roles

OFF: No user can see the filter irrespective of roles right except the dashboard owner

ON By default.

Edit Dashboard Page Details

Page Details

Page Name

Select Dashboard Layout

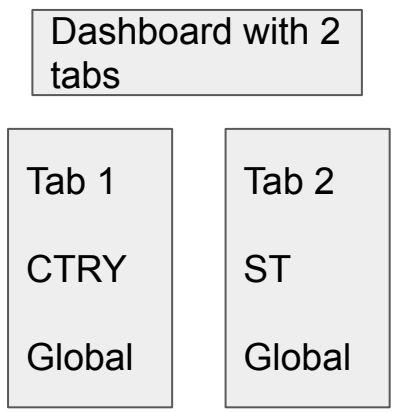
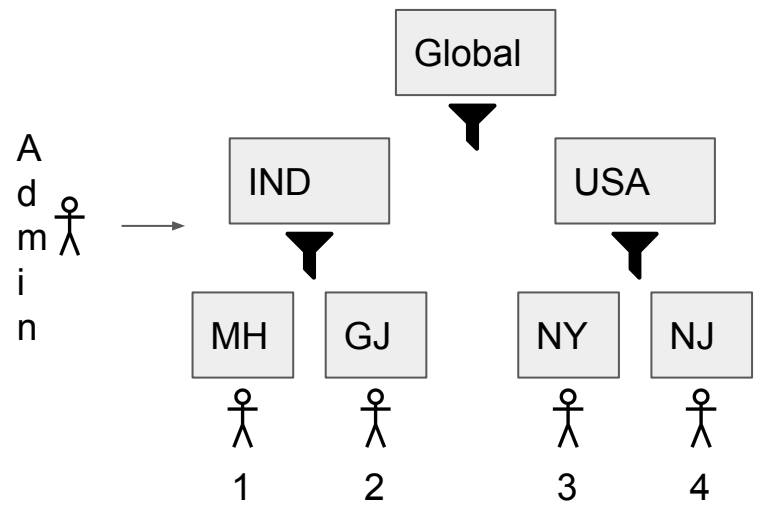
Share Filter View Enable

Close Save changes

This setting will be visible ONLY if the Layout is "Full Page Filter Bar"

Tab level settings

Edit Dashboard Page Settings >>

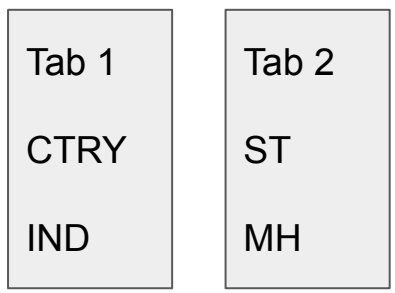
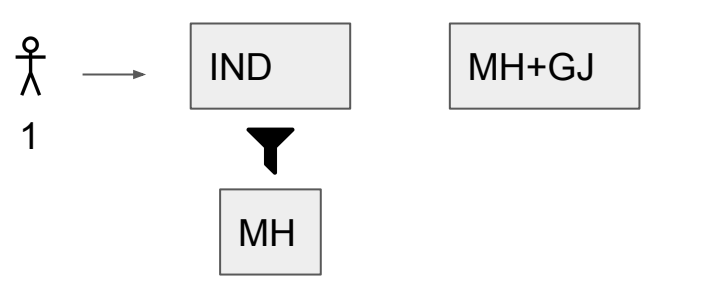


Segments: IND; USA; MH; GJ; NY; NJ

Roles: IND; USA; MH; GJ; NY; NJ

Users: 1,2,3,4

Create widget level filters
4 filters: MH, GJ, NY, NJ



Problem Statement

When dashboards are shared across multiple roles, all the roles get access to all the filters, based on the segments. There are some cases where sub users must NOT have access to filters of a particular tab, and they should see the default filter based on the segmentation (if any).

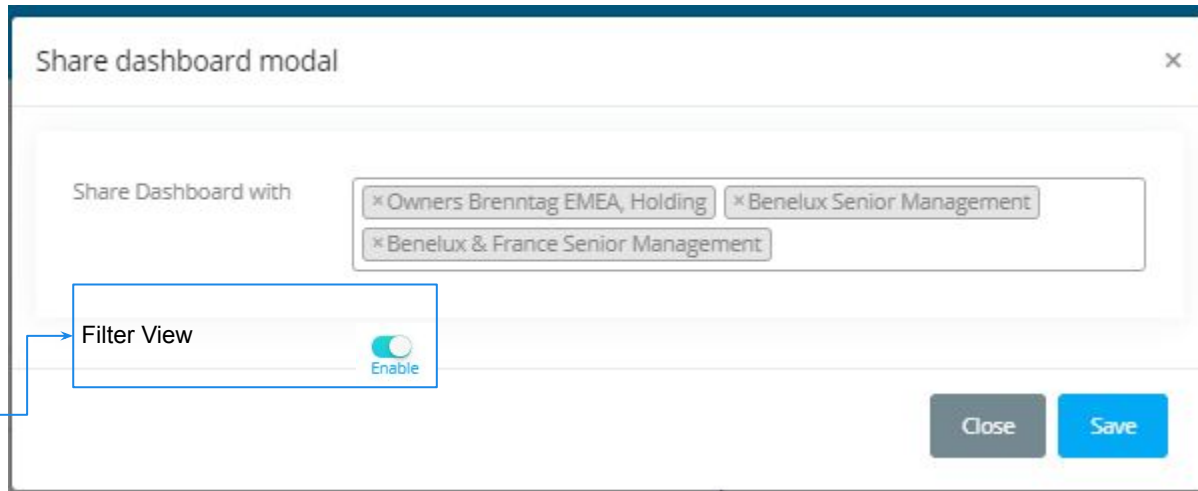


User Stories

- As A XA administrator,
- I want to the setting to turn ON/OFF the filter view on a tab level
- So that I get a better control over the dashboard view



Edit Dashboard Page Settings >>



New setting.

ON: users can see the filter based on the rights provided to the roles

OFF: No user can see the filter irrespective of roles right.

ON By default.

Create Segmentation

Problem Statement

If segmentation needs to be created, users need to go into another page, create a segmentation (where they manually add CV and CV values), then assign a role to the segmentation and then share the dashboard with the role.

This is a very lengthy process and needs to be addressed.



User Stories

- As A XA user,
- I want to create filters AND a segmentation simultaneously
- So that I do not need to jump to multiple screens as well as manually type the CV and CV values.



Dashboard >> Create Filter

The screenshot displays a dashboard interface for creating filters. At the top, there is a navigation bar with a home icon, a search icon, and a user profile icon. Below the navigation bar, the page title is "Page 1 | Heatmap +". The main content area is titled "Townhall Apr 1 2021 > Page 1" and includes a "Filters" dropdown and a "New Widget" button.

The filter configuration section includes the following fields:

- Select Filter: No Filter
- Survey Status: ALL
- Date: Start date, End date
- Reset button
- AND / OR: and
- Select Survey Groupings: Please select
- Select Survey: Townhall Feb 11 2021 - Survey A
- Select Option: System Variable
- system variable: CTRY
- Variable Values: [In] [Mex]

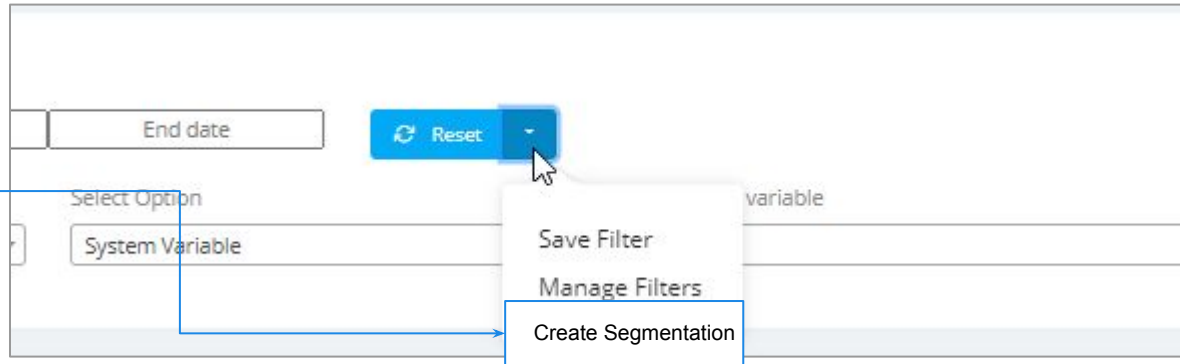
Below the filter configuration, there are two NPS charts:

- Global NPS:** Considering your complete experience with our company, how likely would you be to recommend our products to a friend or colleague? Total responses: 92. The chart shows a score of -26.09.
- Regional NPS:** Considering your complete experience with our company, how likely would you be to recommend our products to a friend or colleague? Total responses: 42. The chart shows a score of -19.05.

Each chart includes a "More details" button.

Filter as per segmentation

Dropdown >> Create Segmentation



New Field to create segmentation as per the filter

Enter Segmentation Name

The screenshot displays a software interface with a modal dialog titled "Edit New Segmentation". The dialog is overlaid on a dashboard background that includes a heatmap and several gauge charts. The dashboard title is "Townhall Apr 1 2021 > Page 1".

The "Edit New Segmentation" dialog contains the following elements:

- Segmentation Name:** An empty text input field.
- Restrict to Question/Custom Variables:** A toggle switch that is currently turned off.
- Select Separator:** A dropdown menu set to "Comma (,)" with a downward arrow.
- Variable Selection:** A row of five dropdown menus and a plus sign button. The selected values are: "Survey", "Townhall Feb 11 2021 - Survey A", "System Variable", "CTRY", and "USAIndia".
- Roles:** A text input field containing "USA" with a small "x" icon to its left.
- Buttons:** "Close" and "Save" buttons located at the bottom right of the dialog.

The background dashboard shows a heatmap and several gauge charts. One gauge chart displays a value of -26.09, and another displays -19.05. There are also "More details" buttons below the gauges.

Enter Segmentation Name

The screenshot displays a software interface with a modal dialog box titled "Edit New Segmentation". The dialog box contains the following elements:

- Title:** India and USA
- Restrict to Question/Custom Variables:** A toggle switch that is currently turned off.
- Select Separator:** A dropdown menu set to "Comma (,)"
- Fields:** A row of four input fields: "Survey" (with a dropdown arrow), "Townhall Feb 11 2021 - Survey A" (with a dropdown arrow), "System Variable" (with a dropdown arrow), and "CTRY" (with a dropdown arrow). To the right of these fields is a text input field containing "USAIndia" and a "+" button.
- Roles:** A text input field containing "USA" with a small "x" icon to its left.
- Buttons:** "Close" and "save" buttons at the bottom right of the dialog.

The background interface shows a dashboard with several charts and a "More details" button. The top navigation bar includes "Page 1", "Heatmap", and "Townhall Apr 1 2021 > Page 1".

Notes

1. Admin has created roles and dashboards
2. Admin creates segmentation using filters in a dashboard
3. Assigns the segmentation to the respective roles
4. Once a segmentation is assigned to a role, the dashboard gets automatically shared with the role and hence the users that are in that role.



Thank You!