FRD: Filter Management Enhancement

QuestionPro

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   USA

Access Rights

Provide all dashboard level access ⚪

User Rights	Read	Write	Delete
Manage Dashboard	🔵	⚪	⚪
Manage Tab	🔵	⚪	⚪
Manage Widget	🔵	⚪	⚪
Anonymity limit	⚪	⚪	⚪
Filter Management	🔵	⚪	⚪

Close   Save changes

New Row for Filter management

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

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).
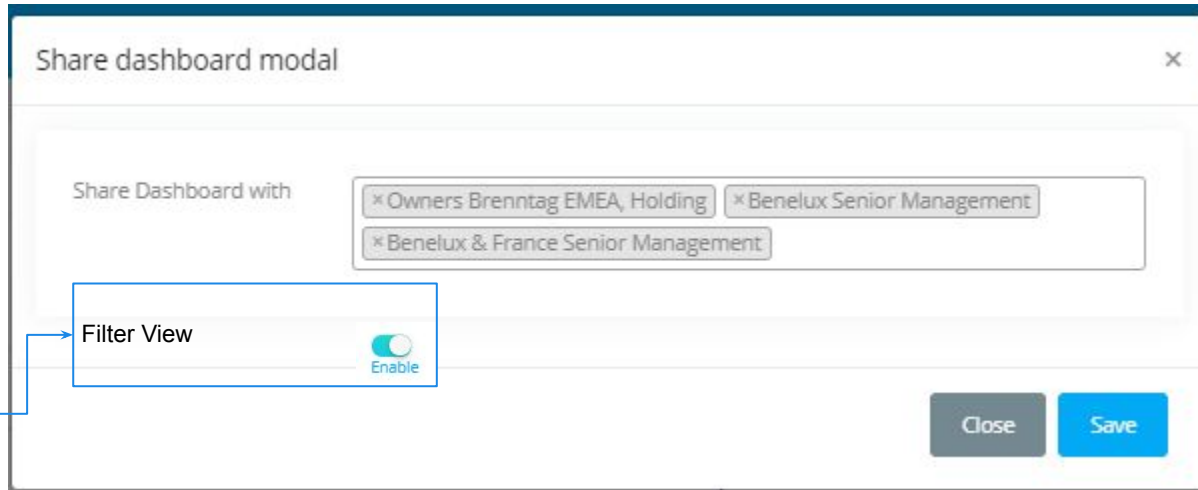
User Stories

- **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

Share dashboard modal   ×

Share Dashboard with   ×Owners Brenntag EMEA, Holding   ×Benelux Senior Management
                              ×Benelux & France Senior Management

Filter View   Enable

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.
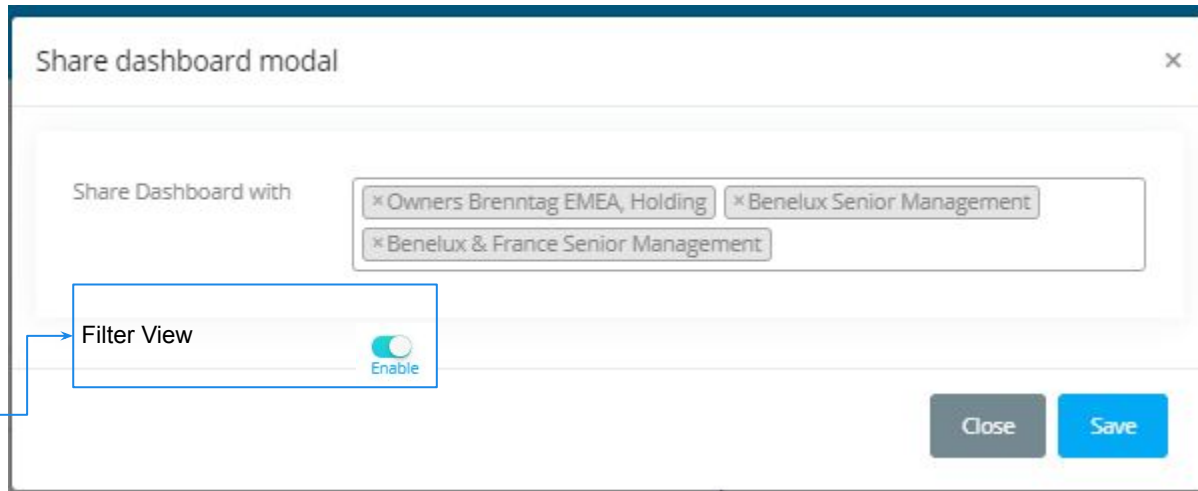
Close   Save

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

Edit Dashboard Page Details ✕

Page Details

Page Name

Page 1

Select Dashboard Layout

Full Page Filter Bar ▼

Share Filter View

Enable

Close   Save changes

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.

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

Tab level settings

Edit Dashboard Page Settings >>

Global

IND

USA

MH GJ

NY NJ

A
d
m
i
n

1   2   3   4

Dashboard with 2 tabs

Tab 1	Tab 2
CTRY	ST
Global	Global
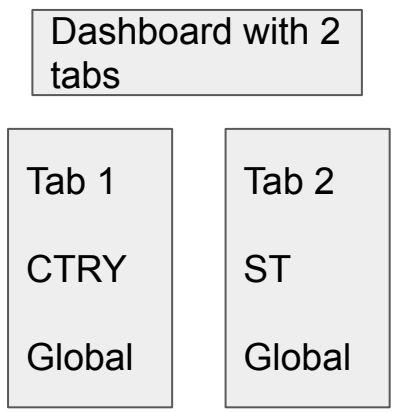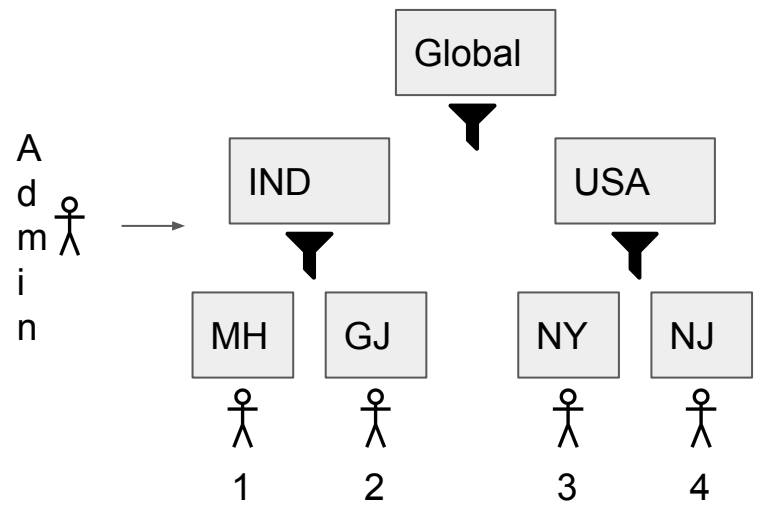
Segments: IND; USA; MH; GJ; NY; NJ

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

Users: 1,2,3,4

Create widget level filters
4 filters: MH, GJ, NY, NJ
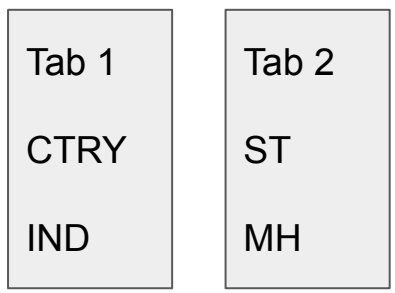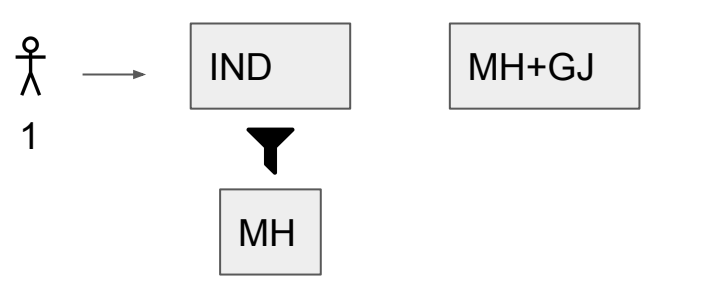
1

IND

MH

MH+GJ

Tab 1	Tab 2
CTRY	ST
IND	MH

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 >>

Share dashboard modal

Share Dashboard with

×Owners Brenntag EMEA, Holding   ×Benelux Senior Management
×Benelux & France Senior Management

Filter View   Enable

Close   Save

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

Filter as per segmentation

Dropdown >> Create Segmentation
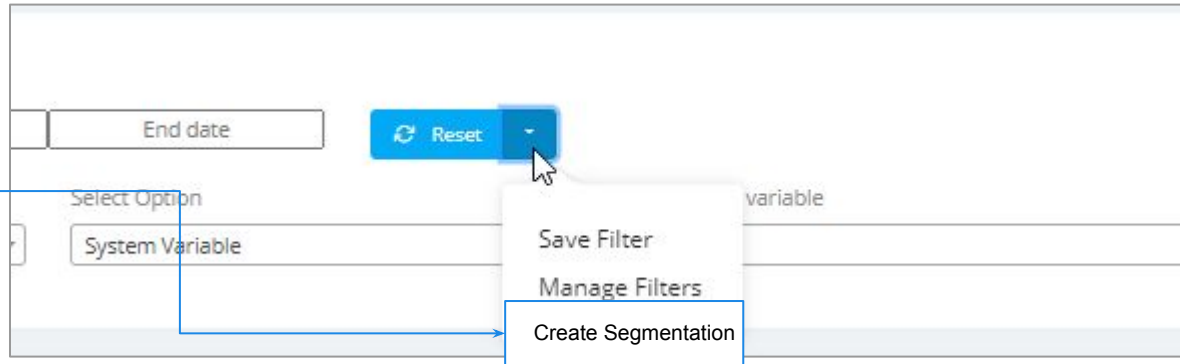
New Field to create segmentation as per the filter

Enter Segmentation Name

Enter Segmentation Name

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!

QuestionPro