Editing and Deleting Dashboards

Once you have successfully <u>created a new dashboard</u>, you can choose to edit it by adding widgets, adjusting the channels, changing the date range, adding metrics, and much more.

Note:

If your dashboard has been <u>shared internally</u> or <u>shared externally</u>, editing your dashboard will impact how others view it. For information on editing dashboards that have been shared with multiple users, visit our article on <u>editing a shared dashboard</u>.

View mode

When you open any dashboard, whether it's your own dashboard, or one that was shared internally from another user, by default you will view it in View Mode.

View Mode allows you to see all available widgets in the dashboard, though you can also use the <u>Channel filter</u> to select/deselect channels or use the <u>Calendar</u> to change the timeframe.

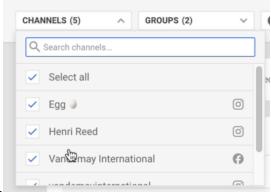
To make any further changes to the dashboard, such as to edit the metrics, add more channels, or add a new widget, find out how to access <u>Edit Mode</u> below.

Channels and Groups filters

While viewing a dashboard, you can filter your view based on the channels or completely selected channel groups which are included in the dashboard.

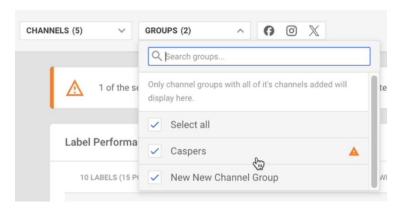
From the top left, click the **Channels** and/or **Groups** filters, followed by the checkbox on any channel or channel group you would like to select/deselect. You can also type to

< channel groups ex.1



search for the channel or group.

< channel groups ex.1



Once adjusted, the changes will be reflected in all widgets in the dashboard and the new selection will be saved.

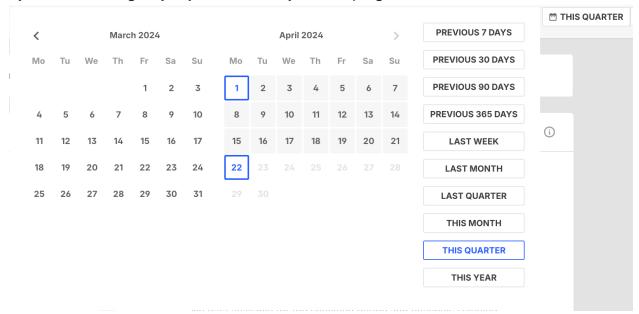
Note:

In **View Mode**, it is not possible to add/remove channels or channel groups to/from a dashboard. Instead, this must be done in **Edit Mode**. Please see below for more information on how to add/remove more channels or channel groups to your dashboard and how to customize the channels for a widget.

Changing the date range

While viewing a dashboard, you can adjust the timeframe by clicking the **calendar icon** from the top right. When you click on the calendar icon, you can either select a custom period or choose from the available options listed below. All applied periods are

dynamic, ensuring they adjust seamlessly as time progresses.



Previous 7 days

The last seven days of complete data, not including the current day.

Previous 30 days

The previous 30 days of complete data, not including today.

Previous 90 days

The last 90 days of complete data, not including today.

Previous 365 days

The last 365 days of complete data, not including today.

Last week

The previous calendar week from Monday to Sunday.

Last month

The last complete month from the first day to the last day of that month. For example, if selected in the middle of June, all of May will be selected.

Last quarter

The last complete quarter from the first day of the quarter to the last day of the quarter (Q1: January 1 - March 31; Q2: April 1 - June 30; Q3: July 1 - September 30; Q4: October 1 -

December 31). For example, if today is April 23, the last quarter would be Q1. For widgets supporting comparison periods, it will compare the last quarter with the preceding quarter.

This month

All available data from the 1st of the current month, not including today.

This quarter

Sets the period from the start of the quarter to yesterday and compares it with the same number of days from the start of the previous quarter. For example, if today is April 23, the period will be from the start of Q2 until April 22. For widgets supporting comparison periods, it will compare the timeframe to the same timeframe in the previous quarter (January 1 - January 22, 2024).

This year

Sets the period from the start of this year to yesterday and compares it with the same number of days from the start of the previous year. For example, if today is April 23, 2024, the period will be January 1, 2024 - April 22, 2024. For widgets supporting comparison periods, it will compare the timeframe to the same timeframe last year (January 1 - April 23, 2023; in this example, 2024 is a leap year, so one more day is included in the 2023 timeframe).

Note:

If you select previous 7 days, previous 30 days, this month, previous 90 days, or previous 365 days, channel metrics from the current day will not be considered due to API restrictions. However, posts from today may appear in <u>Content Performance widgets</u>.

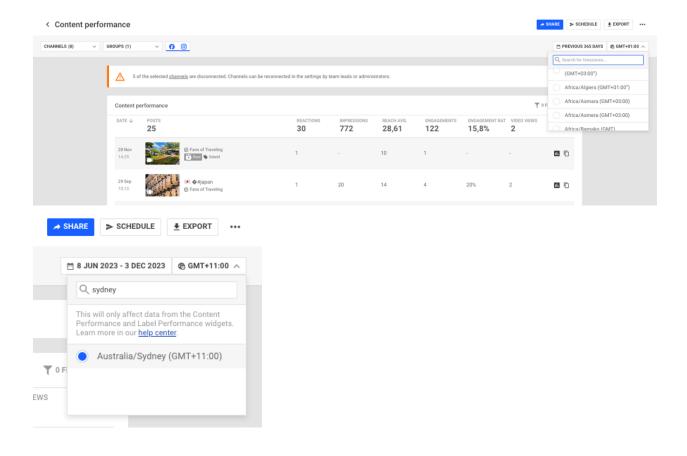
Customizing the time zone for a dashboard

Note:

Time zone customization is currently only available for Content Performance and Label Performance dashboards.

By selecting a custom time zone for your dashboard, you can ensure an accurate representation of your post timings and content metrics in your specific time zone.

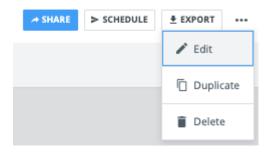
From View mode, select the time zone drop-down menu in the top right. Use the search bar to search for a specific time zone.



Edit mode

You can make changes to the widgets, channels and channel groups, and metrics in your dashboard by entering Edit Mode.

To enter Edit Mode, click the **context menu** (three dots) in the top right, followed by **Edit**.

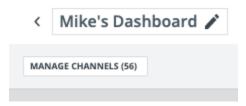


Note:

Edit Mode is not available on any dashboards which were <u>shared with you</u>. It's only possible to edit dashboards which you created. Similarly, other users cannot access **Edit Mode** while viewing one of your dashboards.

Changing the dashboard name

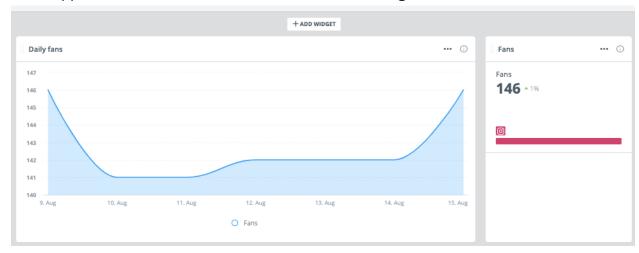
- 1. Go into Edit Mode.
- 2. From the top left, click on the name or the pencil icon.



- 3. Enter the new name then hit Enter on your keyboard.
- 4. Click Save Dashboard from the top right.

Adding widgets

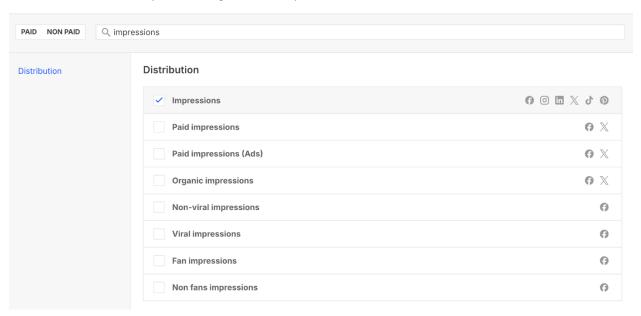
- 1. Go into Edit Mode.
- 2. In the applicable area of the Dashboard, click + Add Widget.



3. Choose a widget type.

4. Search for and select the metrics you would like to include.

Select content metrics for Content performance widget - "Paid content performance"



- 5. Click Create Widget.
- 6. (Optional) Rename the widget by clicking its name.



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7. Click Save Dashboard from the top right.

Rearranging widgets

In Edit mode, you can resize, reorder, and reposition the widgets in your dashboard by dragging and dropping. In the title bar of the widget, you will see a drag and drop symbol (vertical dots) in the top-left corner of each widget, indicating that it can be repositioned.

Label Performance 🧪

When hovering over the title bar of the widget, your cursor will then change to a drag and drop cursor. Click on this area to drag and drop the widget to the desired position.

Tip:

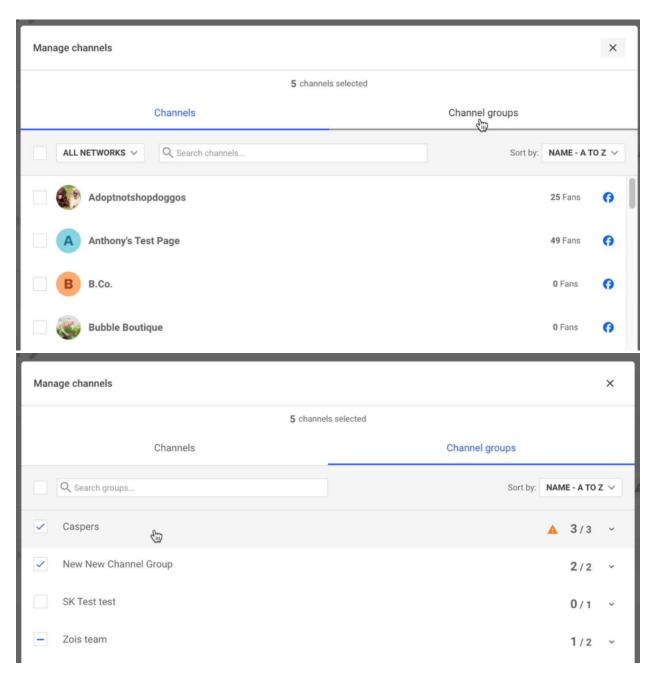
As you drag and drop widgets in your dashboard, **blue guidelines** will appear to show placement options for your widget. For example, you can position multiple widgets next to each other on a row, or place an expanded version of an individual widget on its own row.

Adding and removing channels or channel groups

1. Go into Edit Mode.



- 2. From the top left, click Manage Channels.
- 3. The list of all channels and channel groups available to you in your Social Media Management organization will appear. Scroll or search to select/deselect applicable channels or channel groups to add or remove from the dashboard.



- 4. Click Update.
- 5. Click Save Dashboard from the top right.

Adding and removing channels this way will affect all widgets in your dashboard. In addition, the <u>Channels and Groups filters</u> will be reset. For help adjusting which channels are visible for each widget, see the guide <u>below</u>.

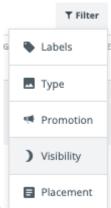
Applying filters

Filters can be applied to any Content or Label Performance widget.

1. Go into Edit Mode.



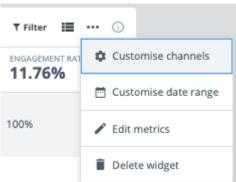
2. Click Filter.



- 3. Select the applicable filter.
- 4. Customize and add more filters. Visit the full guide to <u>Content Performance filters</u> for more information.
- 5. Click Save Changes.

Customizing the channels for a widget

- 1. Go into Edit Mode.
- 2. From the top right of the applicable widget, click the **context menu** (three dots).



- 3. Click Customize channels.
- 4. The list of all channels available to you in your Social Media Management organization will appear. Scroll or search to select/deselect channels to add to this widget only. You can add channels which are not yet included in your dashboard.
- 5. Click Save Custom Channels.

Adding and removing channels this way will affect only the widget you are editing. When adding and removing channels from a widget, you can select from any channel you have access to in Social Media Management, even if not yet included in the dashboard.

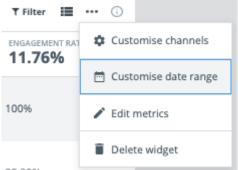
If you add a channel to your widget which is not yet included in the dashboard, the channel will not appear in your dashboard's <u>Channel filter</u>. This is because the addition of the new channel will only impact the widget you have edited rather than the whole dashboard.

Note:

You can reset the channels in your widget to the dashboard default by following steps 1-3 then clicking **Reset to Dashboard Channels**.

Customizing the date range for a widget

- 1. Go into Edit Mode.
- 2. From the top right of the applicable widget, click the **context menu** (three dots).



- 4. Use the calendars to select a new date range or choose from the preset time periods on the right (more information on the available presets can be found <u>above</u>).
- 5. Click Save Custom Period.

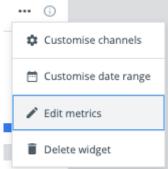
The new dates will be displayed in the top right of the widget. To make any further adjustments, click the displayed dates.

Note:

You can reset the date range in your widget to the dashboard default by clicking on the dates in the top right, followed by **Reset to Dashboard Period**.

Editing widget metrics

- 1. Go into Edit Mode.
- 2. From the top right of the applicable widget, click the **context menu** (three dots).

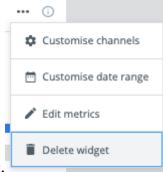


- 3. Click Edit metrics.
- 4. Scroll or search to select/deselect metrics for your widget. Selected metrics will appear listed at the top.
- 5. Click Save Changes.

Please visit our <u>Complete Guide to Measure Metrics</u> article for descriptions of all available metrics in Measure by network.

Deleting widgets

- 1. Go into Edit Mode.
- 2. From the top right of the applicable widget, click the **context menu** (three dots).



- 3. Click Delete widget.
- 4. When the confirmation appears, click **Delete**.

Deleting a dashboard

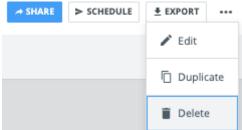
There are two ways you can delete an existing dashboard in Measure.

Note:

It's not possible to delete any dashboards which were <u>shared with you</u>. It's only possible to delete dashboards which you created. Similarly, other users cannot delete one of your dashboards.

Deleting a dashboard from View mode

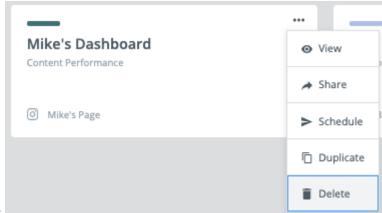
1. From the top right, click the **context menu** (three dots).



- 2. Click Delete.
- 3. When the confirmation appears, click **Delete**.

Deleting a dashboard from the dashboards list

1. While viewing your list of dashboards, click the **context menu** (three dots) from the top right of the applicable dashboard.



- 2. Click Delete.
- 3. When the confirmation appears, click **Delete**.