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- Archive of documentation for Logi Symphony v24

Logi Symphony 24

Use Visual Data Discovery Dashboards and Visuals in Symphony 24



Quick Start Reference - Use Visual Data Discovery Dashboards and Visuals

This applies to: *Visual Data Discovery*

Dashboards

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- [Use The Library For Dashboards](#)
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- [Dashboard Smart Loading](#)
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Visuals

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- [Specify Cross-Visual Filters for Cross-Visual Links](#)
- [Embed Cross-Visual Link Publish and Subscribe Settings Using JavaScript](#)
- [Publish Custom Cross-Visual Filters](#)
- [Subscribe to a Cross-Visual Filter](#)
- [Supported Cross-Visual Publish JavaScript Properties](#)
- [Published Cross-Visual JavaScript Message Structure](#)
- [Supported Cross-Visual Subscribe JavaScript Properties](#)
- [Date-Time Formats in Cross-Visual Filters](#)
- [Embedded Dashboard Cross-Visual Publish and Subscribe Example](#)
- [Custom Chart Support for Cross-Visual Links and Filters](#)
- [Control Filter Dialog Values](#)
- [Remove a Filter from a Visual, Filter Snippet or Dashboard](#)

Keysets

- [Use Keysets](#)
- [Create a Keyset](#)
- [Create a Keyset From the Visual Result Set](#)
- [Create a Keyset From a Data Point](#)



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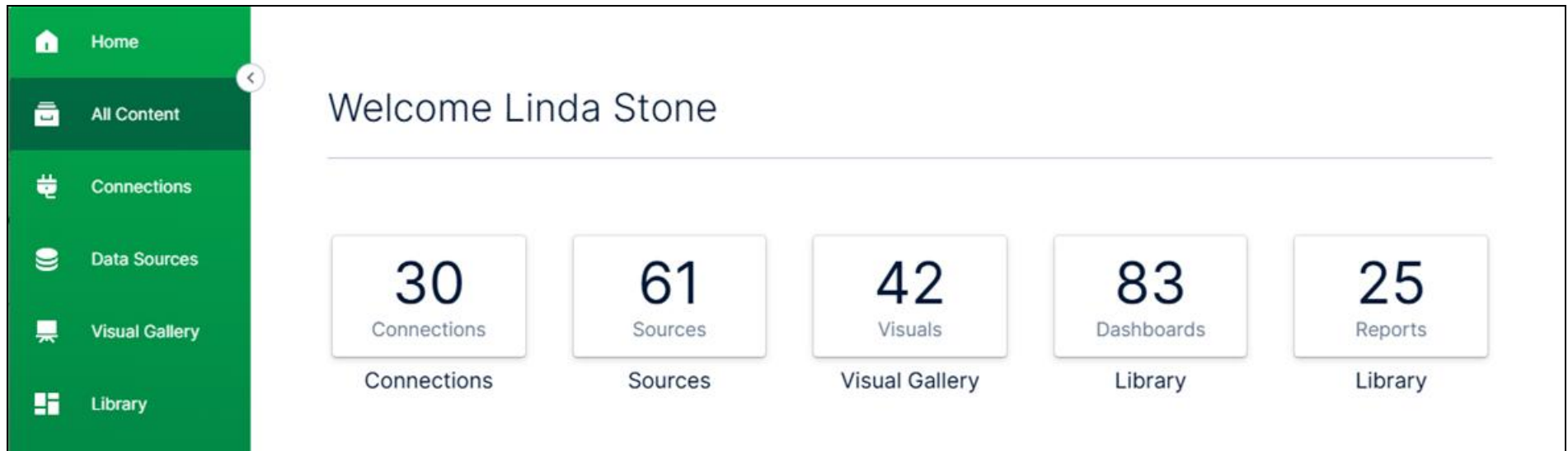
- [Create a Keyset From a CSV File](#)
- [Update Keyset Values From a CSV File Using the UI](#)
- [Upload Keyset Data From a CSV File Using the API](#)
- [Update Keyset Values From a CSV File Using the API](#)
- [Review and Apply a Keyset as a Visual Filter](#)
- [Delete a Keyset](#)

Use the Visual Data Discovery Work Area

This applies to: *Visual Data Discovery*

Launch the Visual Data Discovery work area by selecting the appropriate **Open** button on the Symphony [home page](#). You can access any tasks you need to accomplish in the Visual Data Discovery module here.

Use the [main menu](#) to navigate to any available connections, data sources, the visual gallery, and libraries. Select the **All Content** icon while working in the data discovery module to return to this work area.



You can access the [menu](#) at any time when you use Symphony. Select the expand () and collapse () arrows to expand and collapse the pane. Depending on the module you're working in, your application privileges, and licensed features, the menu reflects what you can do. Select the Home button at any time to return to the [home page](#) and navigate to another section or module of Symphony.

The main pane of this work area, by default, displays the number of connections, data sources, visuals, dashboards, and self service reports you can access in your environment. Select Connections, Sources, Visual Gallery, or a Library option to access available content. You will not see information or links to resources your application privileges restrict you from accessing. Available options you may see include:

Category	Description
Connections	Shows the number of connections defined in your environment. Select this box to manage connections to data stores. The Connections page appears. See Manage Data Discovery Data Store Connections .



Category	Description
Sources	Shows the number of data source configurations defined in your environment. Select this box to manage data source configurations. The Sources page appears. See Manage Visual Data Discovery Data Sources.
Visual Gallery	Shows the number of visuals defined in your environment. Select this box to manage visuals in the Visual Gallery. The Visuals page appears. See Manage Visuals and Use The Visual Gallery.
Library	Shows the number of dashboards and self service reports defined in your library. ▪ Select the Dashboards box to manage dashboards. The library opens to the Dashboards tab. ▪ Select the Reports box to manage your self service reports. The library opens to the Reports tab. See Manage Dashboards, Use The Library For Dashboards, Use the Self Service Reports Library, and Use the Self Service Reports Library.



Manage Dashboards

This applies to: *Visual Data Discovery*

After you have successfully connected to your data stores and configured your data sources in Symphony, you can immediately start exploring and interacting with the data using dashboards that contain visuals, rich text snippets, and filter snippets.

You have the flexibility to create a data discovery dashboard with a single visual or [rich text snippet](#), and expand as needed. Quickly build, edit, and filter dashboards. Adjust the responsive layout to suit the varied needs of your users, and share dashboards directly with others or integrate within your web application.

Users who access your environment using a tablet or mobile device are presented with a responsive design and layout that resizes and adjusts to the available screen size. Touch actions provide intuitive access to dashboard functions: a short touch brings up the context menu, while a long touch surfaces tooltips and dashboard layout options. Task-based work areas, including menus and dashboard report scheduling, are sized appropriately for ease of use.

A data discovery dashboard is a collection of visuals from one or more data sources. You can add as many data discovery dashboards as you need. Increasing the number of visuals within a dashboard may impact its performance. Add [rich text snippets](#) and [filter snippets](#) to further present and refine the data you share with your users.

Before you begin, make sure that the data sources you want to use have been added and you have privileges to save visuals and dashboards.

- [Use The Library For Dashboards](#)
- [Create Dashboards](#)
- [Edit A Dashboard](#)
- [Save A Dashboard](#)
- [List Dashboards](#)
- [Copy A Dashboard](#)
- [Rename A Data Discovery Dashboard](#)
- [Filter Data](#)
- [Link A Dashboard](#)
- [Dashboard Layouts](#)



- [Move, Swap, And Resize Visuals And Widgets In A Dashboard](#)
- [Lock And Unlock Widget Positions](#)
- [Using The Responsive Dashboard Layout](#)
- [Use Dashboard View Mode](#)
- [Share A Dashboard With Users](#)
- [About Scheduled Data Discovery Dashboard Reports](#)
- [About Dashboard Permissions](#)
- [Export Dashboards](#)
- [Import Dashboards](#)
- [Delete A Dashboard](#)



Note: You can force Symphony to bypass the visualization cache and query the underlying data source by selecting **Refresh All** from a dashboard menu.

Use the Library for Dashboards

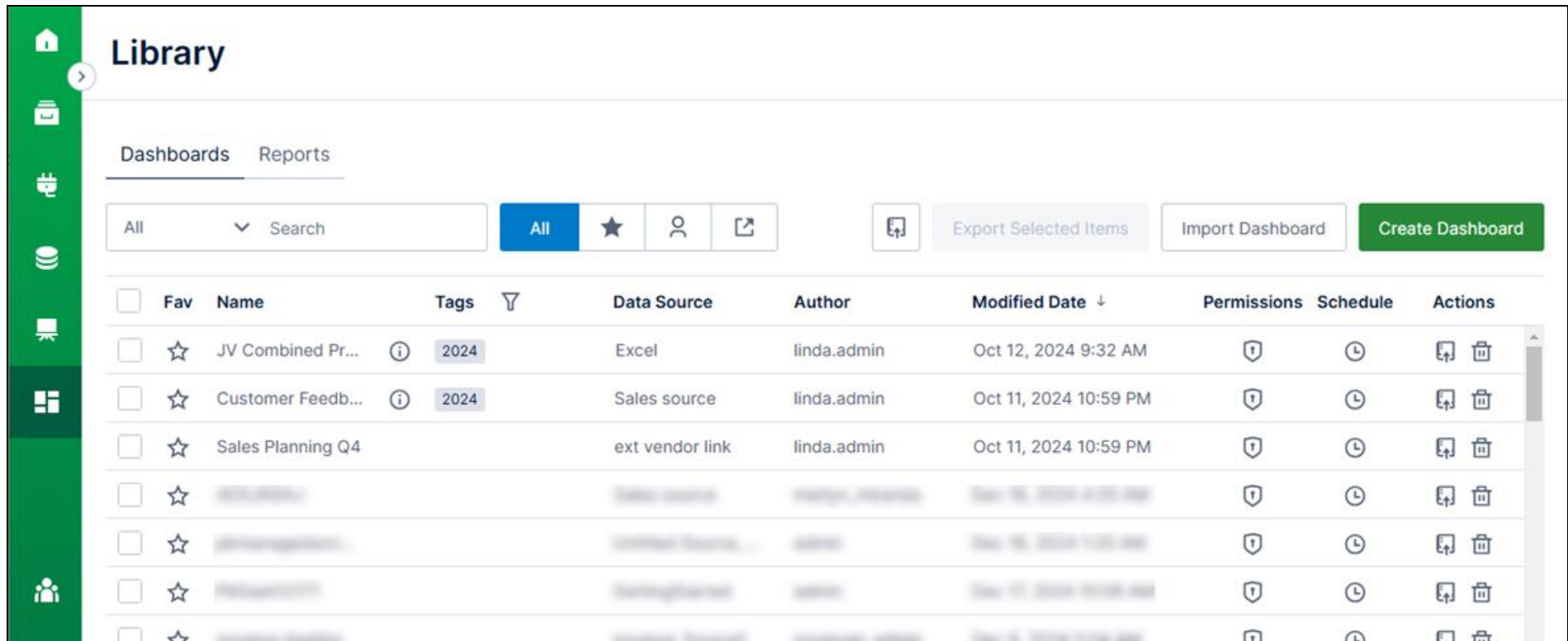
This applies to: *Visual Data Discovery*

The work area of the dashboards tab in library contains all dashboards in your environment to which you have access. You can make a dashboard a favorite, delete it (if your [privileges](#) allow), and open the dashboard.

If your user definition has not been given access to dashboards, you will see no dashboards in the dashboards tab in library and you will not be able to import any dashboards. You will be able to create dashboards, but you will not be able to save them. Contact your system administrator to increase your [privileges](#).

Access the Dashboard Library

To access the library, select **Library** on the [UI menu](#). The library opens to the dashboard tab, and dashboards display in a table (list) format.



☐	Fav	Name	Tags	Data Source	Author	Modified Date ↓	Permissions	Schedule	Actions
☐	☆	JV Combined Pr...	2024	Excel	linda.admin	Oct 12, 2024 9:32 AM	🛡️	🕒	🔗 🗑️
☐	☆	Customer Feedb...	2024	Sales source	linda.admin	Oct 11, 2024 10:59 PM	🛡️	🕒	🔗 🗑️
☐	☆	Sales Planning Q4		ext vendor link	linda.admin	Oct 11, 2024 10:59 PM	🛡️	🕒	🔗 🗑️
☐	☆						🛡️	🕒	🔗 🗑️
☐	☆						🛡️	🕒	🔗 🗑️
☐	☆						🛡️	🕒	🔗 🗑️
☐	☆						🛡️	🕒	🔗 🗑️

Search Field

You can use the search field to filter the dashboards in this work area by dashboard Name, Description (if provided), Data Source, or Author. For example, if you type a **C** in the search box, only dashboards that include the letter *C* in the selected field searched are shown in the working area. See [Search And Filter Lists](#).

Buttons

The buttons on the page allow easy access to saved dashboards, as well as other dashboards created by other users in your Symphony environment. They also allow you to create a new dashboard, filter the dashboards that are shown, import, or export dashboards.

Button	Description
All	Removes any filters for the dashboard library and displays all dashboards available to you within your environment.
	Displays only the dashboards you have marked as favorites.
	Displays only dashboards you created and saved. Dashboards created and saved by other users are hidden.
	Displays only the dashboards other users shared with you. See Share A Dashboard With Users .
	Select to generate an embeddable dashboard link.
Export Selected Items	Select to export multiple selected items. See Export Multiple Dashboards .
Import Dashboard	Select to import one or more dashboards. See Import Dashboards .
Create Dashboard	Select to create a new dashboard. See Create Dashboards .

List of Dashboards

The columns for this list are described below. Several of these columns can be used to sort the contents of the list: select the column header to sort first to last and again to sort last to first. You can search for items by the contents of several columns. See [Search and Filter Lists](#).

Column	Description
Select (not labeled)	Select or deselect one or more items to perform bulk actions, such as export, for your content.
Fav	Identifies favorite dashboards using a star icon. If the star is colored () , the dashboard is a favorite. If the star is empty () , the dashboard is not a favorite. If you change the favorite status of a dashboard while viewing or editing it, that change is reflected here.
Name	The name of the dashboard.
Description (not labeled)	The description icon is visible if a description associated with a dashboard. You can search for a dashboard by the contents of this field.
Tags	Content tags applied to the dashboard. Select the filter icon to open a drop down list and select tags to filter your list or to narrow your search results . If several tags are associated with an item, hover over the ellipsis to see all tags for this resource.
Filter icon	Select to filter the work area's contents by one or more content tags.
Data Source	The name of the data sources used by the dashboard.
Author	The user who created the dashboard.
Modified Date	The date the dashboard was last modified.
Permissions	Select the permissions icon in this column to assign permissions to a dashboard. The Dashboard Permissions dialog appears. See About Dashboard Permissions .
Schedule	Select the clock () in this column to create a scheduled dashboard report for the dashboard. The Scheduled Reports dialog appears. See About Scheduled Data Discovery Dashboard Reports .
Actions	Shows icons you can select to perform actions for the dashboard. - Select the delete icon () in this column to delete a dashboard. See Delete a Dashboard. - Select the code snippet icon () icon to generate an embeddable code snippet for the dashboard. The Embed Code dialog appears. See Embed Components Into Your Application.

Create Dashboards

This applies to: *Visual Data Discovery*

Dashboards allow you to collect, display, and [share](#) data and information with your users to analyze in a variety of ways. [Responsive dashboard layouts](#) make your data accessible to your users flexibly, accommodating different screen sizes and embedded presentation layouts.

- A dashboard is a collection of one or more visuals, filter snippets, and rich text snippets in individual widgets.
 - Visuals in a dashboard can include data from one or more data sources. For example, add visuals that use Solr, Impala, Elasticsearch, and a [fused data source](#) to provide a comprehensive view of information from these varied sources.
 - Dashboard filters allow your users to search on and highlight specific data temporarily.
 - Use [rich text snippets](#) to provide context to your visual data using formatted text, links, and images.
 - Symphony can [generate visual description](#) for any visual; add it to your dashboard in a rich text snippet.
 - Symphony's [responsive layout for dashboards](#) makes it easy for you and users arrange and layout these widgets as needed, flexible and optimized for multiple screen sizes, from large display boards to handy mobile devices.
- A visual is a single view of data source data.
 - [Local visuals](#) are unique to a dashboard; edit and adjust to test data and analysis difference approaches. Changes to local visuals do not affect other dashboards. [Convert](#) to a Visual Gallery visual at any time.
 - Visual Gallery visuals are stored in the visual gallery. Any changes saved for these visuals are reflected in all dashboards that contain these visuals. [Convert](#) to a local visual at any time.
- [Rich text snippets](#) round out your user's data experience by describing your data in context, linking external resources, including images, and generated [descriptions for visuals](#).
- A [filter snippet](#) is a series of links you build between visuals based on custom values and fields. Your users can use the filter to view connected data in multiple visuals quickly and easily.

When you create a new dashboard, you are prompted to add a new visual or an existing visual, but you can add a rich text snippet or simply save the dashboard and return to edit it later. The dashboard is saved in the [library](#).

Create a dashboard with a visual, rich text snippet, or filter snippet

1. Log in as an administrator or a user who has been assigned to a group with the [Administer Dashboards privilege](#) or **Create Dashboards** privilege.
2. Select **Library** from the main menu in the Data Discovery work area. The data discovery library opens to the Dashboards tab.

3. Select **Add Dashboard**. A blank dashboard appears showing your options. Add a new visual, place an existing visual, add a rich text snippet, or filter snippet.



4. Select **Add New Visual** to add a new local visual to the dashboard. Select **Add Existing Visual** to add an existing visual from the visual gallery to the dashboard.
 - i. If you select **Add New Visual**, follow the procedure described in [Add Visuals To A Dashboard](#)
 - ii. If you select **Add Existing Visual**, follow the procedure described in [Add Existing Visuals To A Dashboard](#).

5. Select  to add a rich text snippet to the dashboard. See [Add Rich Text Snippets To A Dashboard](#).

6. Select  to add a filter snippet to the dashboard. See [Add Filter Snippets to a Dashboard](#).

7. [Save](#) your dashboard. Accept the default name, or supply a name for the dashboard.

You can continue to add visuals and snippets. See [Add Visuals to a Dashboard](#) and [Add Existing Visuals To A Dashboard](#), [Add Rich Text Snippets To A Dashboard](#), and [Add Filter Snippets To A Dashboard](#).

After a dashboard is created, you can explore its data and work directly with its various visuals. You can modify, copy, export or delete its visuals. In addition, the data on the visual can be filtered (see [Filter Data](#)). Finally, you can share, export, or delete the dashboard (see [Manage Dashboards](#)).



Edit a Dashboard

This applies to: *Visual Data Discovery*

Edit a dashboard

1. Log in as an administrator or a user who has been assigned to a group with the [Administer Dashboards privilege](#).
2. Select **Library** on the [main menu](#). The library displays dashboards in a table (list) format.
3. Select the dashboard in the list. The dashboard opens.
4. Adjust the dashboard, adding or removing widgets that contain visuals, rich text snippets, or filter snippets on the dashboard as needed.
5. [Save](#) your dashboard.

Use Dashboard View Mode

This applies to: *Visual Data Discovery*

Dashboard view mode allows you, as a data discovery dashboard owner or editor, to see the same layout and options for dashboards you share with users.

Toggle between View and Edit modes using the dashboard view mode icon ().

See [Share A Dashboard With Users](#).

View Mode

Users with Viewer access can see a shared dashboard and data in visuals at the same level of access you as have for that dashboard. You don't need to grant access to individual visuals and sources. Viewers can navigate and adjust the dashboard and visuals on a temporary basis. Any changes made are discarded when they navigate away from the dashboard.

Toggle into View mode to generally see what your dashboard viewers see. Icons, options, or settings they can't access are disabled or hidden from view. If you are an editor or owner toggled into View mode, any changes you make are temporary as well. When you navigate away from the dashboard or switch back to Edit mode, the temporary changes are discarded.

You can configure your embedded dashboards to hide widgets for unavailable visuals from Viewer users using `hideRestrictedVisuals`. When enabled, available widgets adjust to fit the dashboard, replacing unavailable visuals. If no visuals are available, the dashboard displays a message that no visuals are available.



Note: Your access and permission levels as a dashboard owner are different from your typical viewer users. The icons and options you see when working in View mode may be different from users with Viewer access.

Edit Mode

Users with Editor access can see a shared dashboard and data in visuals at the same level of access you have for that dashboard. You don't need to grant access individually to visuals and sources. Editors can adjust the dashboard and visuals, saving changes to the dashboard while in Edit mode.

Dashboards are opened in Edit mode for dashboard owner and editor users. Toggle between Viewer and Edit modes to see generally what your dashboard viewers and editors see. Icons, options, or settings Viewers can't access are disabled or hidden from view..



Note: Your access and permission levels as a dashboard owner are different from your typical editor users. The icons and options you see when working in Edit mode may be different from users with Editor access.

Interactivity

When you create or edit a dashboard for your users using Symphony, you can also control what options they see and changes they can make by defining appropriate interactivity settings. For both standalone and embedded environments:

- You can define preferred interactivity settings
- Interactivity profile settings are applied

See [Control How Users Interact With A Dashboard](#).

Embedded Environments

In embedded environments, dashboards open in Edit mode for all Owners and Editors. Toggle between Viewer and Edit modes to see generally what your dashboard viewers and editors see. Any icons, options, or settings they can't access are disabled or hidden from their view.

You can also define a preferred embed configuration by

- Defining the default mode for Editors
- Enabling or disabling access to interactivity settings for Editors

See [Control How Users Interact With A Dashboard](#) and [Editor Configuration \(editorUserSettings Property\)](#).

Controls Visibility

Controls visibility for dashboards are shown below. If **Hidden**, the visibility can't be overridden. If **Default**, visibility is controlled by the interactivity profile, interactivity overrides, or user permissions.

Control	View Mode	Edit Mode
Dashboard Interactivity	Hidden	Default
Dashboard Layout	Hidden	Default
Changing Layout	Hidden	Default
Save	Hidden	Default
Add new or Place existing Visuals / Add Snippets	Hidden	Default
Dashboard Links	Hidden	Default

Control	View Mode	Edit Mode
Cross-Source Links / Cross-Visual Links	Hidden	Default
Delete	Hidden	Default
Unsaved Changes (Label, Alert)	Hidden	Default
Alerts	Default	Default
Save As	Default	Default
Share Dashboard	Hidden	Default
Export	Default	Default
Favorite	Default	Default
Refresh	Default	Default
Schedule	Default	Default
Filter	Default	Default

Controls visibility for widgets are shown below. If **Hidden**, the visibility can't be overridden. If **Default**, visibility is controlled by the interactivity profile, interactivity overrides, or user permissions.

Control	View Mode	Edit Mode
Widget Header	Default	Default
Widget Pickers	Default	Default
Maximize Widget	Default	Default
Export Visual Data	Default	Default
Export Raw Data	Default	Default
Export PDF/PNG	Default	Default
Change Widget Settings	Hidden	Default
Change Settings for Snippets	Hidden	Default
Copy Visual	Hidden	Default
Remove Widget	Hidden	Default
Add to Visual Gallery	Hidden	Default
Convert to Local Visual	Hidden	Default
Undo Changes	Default	Default
Save as Visual	Default	Default



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Control	View Mode	Edit Mode
Create Keyset	Hidden	Default
Visual Permissions	Hidden	Default
Edit Snippet	Hidden	Default



List Dashboards

This applies to: *Visual Data Discovery*

List the dashboards in a Symphony instance

1. Log into Symphony as an administrator or a user who has been assigned to a group with the [Administer Dashboards privilege](#).
2. Select **Library** on the [UI menu](#). The [library](#) displays dashboards in a table (list) format.

Use the Dashboard Icon Bars

This applies to: *Visual Data Discovery*

When you create or edit a dashboard, a series of icons are available you can use to perform specific dashboard functions.



Select an icon to perform a dashboard function, as described in the following table.



Note: The visibility of these icons on a dashboard are affected by dashboard interactivity settings. See [Control How Users Interact With A Dashboard](#).

Icon	Description
	Filter the data on a dashboard. Available only when all visuals on a dashboard are from the same data source.
	Open dashboard and visual interactivity settings. See Control How Users Interact With A Dashboard .
	Select to open the Dashboard Layout work area.
	Enable and disable the toggle to control widget locking in this dashboard. See Lock And Unlock Widget Positions .
	Enable and disable the toggle to control responsive layout for this dashboard. See Using The Responsive Dashboard Layout .
	Set the minimum widget width and height. See Using The Responsive Dashboard Layout .
	Toggle dashboard view mode between Viewer and Editor modes. See Use Dashboard View Mode .
	Search visuals content in the dashboard, if supported by the source.
	Manage alerts. See Manage Alerts .

Icon	Description
	Link fields between disparate data sources to create cross-source links. See Use Cross-Source Links .
	Link dashboard visuals to other dashboards. See Link A Dashboard .
	Export a dashboard. The Export drop-down menu appears. See Export Dashboards .
	Share a dashboard. The Share dashboard work area opens. See Share A Dashboard With Users .
	Schedule dashboard reports. The Scheduled Reports work area opens. See Schedule A Dashboard Report .
	Refresh the data on the dashboard. See Refresh Data On A Dashboard .
	Mark the dashboard as a favorite.
	Select to toggle the searchable information about this dashboard as visible in the dashboard header. When visible, you can select the description and edit it.
	Select to add a new local visual to the dashboard or add a Visual Gallery visual to the dashboard. See Add Visuals To A Dashboard and Add Existing Visuals To A Dashboard .
	Add a rich text snippet to the dashboard. See Add Rich Text Snippets To A Dashboard .
	Add a filter snippet to the dashboard. See Add Filter Snippets To A Dashboard .
	Delete the dashboard. See Delete A Dashboard .
	Save a dashboard with a new name (which copies it). See Copy A Dashboard .
	Save a dashboard. See Save A Dashboard .

Copy a Dashboard

This applies to: *Visual Data Discovery*

You can make a copy of an existing data discovery dashboard by saving it with a new name. Depending on the visuals and their state of changes in the dashboard, Symphony may prompt you to make decisions other than a new name for the copy of your dashboard.

Dashboard Contains	Save As Options
Local Visuals	Provide a unique Name and optional Description for the new dashboard.
Local Visuals and Visual Gallery Visuals (no unsaved visuals)	- Provide a unique Name and optional Description for the new dashboard. - Optionally, convert all visual gallery visuals to local visuals.
Local Visuals and Visual Gallery Visuals (visuals have unsaved changes)	- Provide a unique Name and optional Description for the new dashboard. - Optionally, convert all visual gallery visuals to local visuals. Unsaved changes are applied to the local visuals in the new copy of the dashboard. Note: If you do not convert visual gallery visuals to local visuals Symphony creates a copy of the dashboard using the saved versions of visual gallery visuals.

The following factors affect a user's ability to copy a dashboard and its visuals.

- The visuals on the dashboard are only saved if write [permission](#) for the visual has been granted to the user, one of the user's groups, or the user's Symphony account. See [About Visual Permissions](#).

Copy a dashboard

- In the dashboard header, select Save As icon () on the [dashboard icon bar](#). (The Save () icon allows you to [save](#) the dashboard.)
The Save As Options dialog appears.

Save As Options

×

Name *

JV Group Sales Q1 2023 test copy

Description

750 characters maximum

☐ Convert all visuals from the Visual Gallery to local visuals i

⚠

Changes to all Visual Gallery visuals will be carried over to the new dashboard. If you have appropriate permissions for these visuals, you can choose to save or undo the changes.

Cancel

Save

2. In the **Name** box, enter a new name for your dashboard. Symphony returns an error when you select **Save** if you do not enter a new name.
3. If you want to provide details about your dashboard, do this in the **Description** box. A maximum of 255 characters can be specified. Leading and trailing spaces are not allowed.
4. Use the checkbox to indicate whether you also want to convert all visual gallery visuals into local visuals.
 - i. If you select this option, all shared visual gallery visuals are converted into local visuals in the copied dashboard.
 - ii. If you do not select this option, Symphony creates a copy of the dashboard using the saved versions of visual gallery visuals.
5. Select **Save** to create the newly named copy the dashboard in the library.

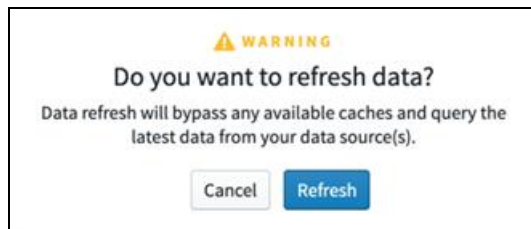
Refresh Data on a Dashboard

This applies to: *Visual Data Discovery*

You can refresh the data on a data discovery dashboard. This will obtain and display the latest data from every data source used by the visuals in your dashboard.

Refresh the data on a dashboard

1. On the dashboard, select the refresh icon  on the [dashboard icon bar](#). The Refresh dialog appears.



2. Select **Refresh** on the dialog. All visuals on the dashboard are refreshed.

Even if the dashboard has not been saved, the refresh obtains the latest data and honors whatever unsaved changes you have made to it. For example, if you had applied a filter or added visuals to the dashboard, the filter and the new visuals are retained when the data is refreshed.



Symphony Notifications (Alerts)

This applies to: *Managed Dashboards, Managed Reports*

Managed Dashboard and Managed Reports Alerts

Notifications offer a way to send reminders, alerts, or the latest data using a managed dashboard, managed report, or other view in Symphony, based on a schedule or under certain conditions. The related view is exported and attached as an image, PDF, Excel, or another format.

For more information on managed dashboard alerts and notifications, see:

- [Set Up A Notification](#)
- [Notification Types](#)
- [Notification Options](#)
- [View Or Update Notifications](#)

Scheduled Data Discovery Dashboard Reports

This applies to: *Visual Data Discovery*

You can generate scheduled data discovery dashboard reports and send them to your users who use Symphony, or external users to their email address. Send reports in PDF, PNG, Data (XLSX) > Raw Data or Data (XLSX) > Visual Data formats.

Log messages related to dashboard report scheduling are stored in the `zoomdata.log` [log file](#).

Specific prerequisites must be met to schedule dashboard reports. For more information, see:

- [Scheduled Dashboard Report Prerequisites](#)
- [Schedule A Dashboard Report](#)
- [Configure Recipient Rules](#)
- [Update A Scheduled Dashboard Report](#)



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- [Delete A Scheduled Dashboard Report](#)
- [Scheduled Dashboard Report Permissions and Behavior](#)
- [Scheduled Data Discovery Dashboard Report Properties](#)
- [Disable Sending Scheduled Dashboard Reports To External Users](#)

Set Up a Notification

This applies to: *Managed Dashboards, Managed Reports*

Use notifications to send reminders, alerts, or the latest data using a managed dashboard, managed report, or other view in Symphony, based on a schedule or under certain conditions. The related view is exported and attached as an image, PDF, Excel, or another format.

For example, you can set up a notification that emails your dashboard to your group once a week, or when the latest hourly data indicates a problem. You can also be notified of events such as when someone replies to your [note](#).

To create a notification for yourself or others, select **Notification** in the toolbar of any dashboard, report, scorecard, or small multiple, then choose the type of notification you want to create.



Note: You can set up scheduled notifications only for reports, scorecards, and small multiples, or for metric sets displaying raw data. For dashboards, remove *<Row Number>* from **Rows in the Data Analysis Panel** to add other notification types.

After you select your notification type, define notification options. See [Notification Types](#).

Notification Types

This applies to: *Managed Dashboards, Managed Reports*

Symphony offers a number of managed dashboard, managed report, and other notification types. Select an option that suits your needs.

Depending on the type of notification you've selected, there are a number of options for delivery. See [Notification Options](#).

After you've created a notification, you can view or update it as well. See [View or Update Notifications](#).

Scheduled Notifications

A scheduled notification occurs on a periodic schedule which you define by selecting recurrence and other scheduling options.

1. Select **Notification** in the toolbar of any dashboard, report, scorecard, or small multiple. The notification work area opens.
2. Select the **Scheduled** notification option. A **Notification** work area opens.
3. Enter a **Name**, an optional **Description**, then select **Define schedule** to configure scheduling options.
To run the scheduled event now, select **Run Immediately**.
4. Select **Add export content** and select a format for exported content to send.
5. Optionally change the delivery option from the default, **Email**, which sends the alert and content in an email and as an attachment.

Note

A note-based notification lets you know when a user has added a [note \(annotation\)](#) to data in a visualization.

1. Select **Notification** in the toolbar of any dashboard, report, scorecard, or small multiple. The notification work area opens.
2. Select the **Note** notification option. A **Notification** work area opens.
3. Enter a **Name**, an optional **Description**, then select **Define schedule** to configure scheduling options.
To run the scheduled event now, select **Run Immediately**.
4. Select **Add export content** and select a format for exported content to send.
5. Optionally change the delivery option from the default, **Email**, which sends the alert and content in an email and as an attachment.

Data Driven

A data driven notification occurs when a change in data is detected on a scheduled basis, for example, polling.

Choose from a variety of options to determining what conditions occur in the data to trigger your notification.

1. Select **Notification** in the toolbar of any dashboard, report, scorecard, or small multiple. The notification work area opens.
2. Select the **Data Driven** notification option. A **Notification** work area opens.
3. Enter a **Name**, and an optional **Description**.
4. Select **Add condition** to select the data changes to monitor, for example, a value increasing over the past three days.
5. Select **Define schedule** to configure scheduling options.
To run the scheduled event now, select **Run Immediately**.
6. Select **Add export content** and select a format for exported content to send.
7. Optionally change the delivery option from the default, **Email**, which sends the alert and content in an email and as an attachment.



Note: See [Notification Options](#) for more information about applicable [Data Driven Conditions](#).

Data Correction

A data correction-based notification lets you know when a user has added a measure correction ([data annotation](#)) to a metric set.

1. Select **Notification** in the toolbar of any dashboard, report, scorecard, or small multiple. The notification work area opens.
2. Select the **Data Driven** notification option. A **Notification** work area opens.
3. Enter a **Name**, and an optional **Description**.
4. Select from the available options in the **Metric Set** drop-down to select the visualization and metric set you want to monitor for data corrections.
5. Select **Add export content** and select a format for exported content to send.
6. Optionally change the delivery option from the default, **Email**, which sends the alert and content in an email and as an attachment.



Notification Options

This applies to: *Managed Dashboards, Managed Reports*

Symphony offers a number of managed dashboard, managed report, and other notification types. After you've selected your [notification type](#), define your notification options to suit your organizational needs. Options may vary depending on the type of notification you're creating.

Define a Schedule

Select **Define Schedule** when creating your notification to set up a schedule rule. Use to define scheduled notifications, and to determine when data driven notifications poll for data.

1. Select **Define Schedule** when setting up a notification. The **Schedule Rule** work area opens.
2. Select or clear the **Enabled** checkbox to enable or disable this rule.
 - i. When enabled, the rule runs based on the options you define.
 - ii. When disabled, the rule does not run until you enable it again.
3. Optionally, select a time zone and enable or disable the **Daylight Saving Time** checkbox. If you do not use this option, your rule is run at a constant interval between notifications (defined below).
4. Enter a **Start Date** and time to start the schedule.
5. Select a **Repetition Pattern** from the drop-down to define a scheduled day to run the rule.
 - i. **Daily** - Select to run the rule every day or every *n*th day.
 - ii. **Weekly** - Select to run the rule every week or every *n*th week.
 - iii. **Monthly** - Select to run the rule once a month. Select months to include, and days of the month in multiple ways, including by use of a comma separated list of days.
6. To run a the rule multiple times a day, enable the **Intra-Day Recurrence** checkbox.

- i. Change the drop-down from **Not Set** to **Minutes** or **Hours** to set up a regular **Recurrence Interval** .
 - ii. Alternatively, select **Add Occurrence** to set specific times of day to run the rule. Delete an occurrence by selecting the trash can icon.
7. Optionally, set an **End Date** to stop the rule from running after a specific number of occurrences, or by a specific date.

Select Your Export Content

Notifications export the current view you have open to the formats of your choice and deliver it along with the notification.

1. Select **Add export content** when setting up a notification. The **Notification Content** work area opens.
2. Select a **Format** to pick an available file format option, which may include Excel, PDF, Image (PNG), CSV, or PowerPoint.
3. Optionally edit the **Name** for your content. This name is shown in the notification work area, but you can select to the enable **Use Name for File Name** checkbox to deliver your content using the defined **Name**.
4. Depending on the format, you can choose to export the entire view (e.g., dashboard) or a selected data visualization. For more details about export options for each format in **Selection**, see [Share or export your work](#).

 **Note:** Dashboards designed in Responsive mode will be exported to PDF in Scale mode to better fit the selected page size.

5. Optionally, select **Preserve Current Parameter Values** to store the current parameter (filter) settings and use when this content is exported.
6. After you've defined an export content option, you can add more export content options if needed, for example, in a different format, for this notification.

Set Up Delivery Options

You have several delivery options to choose from for notifications and content.

- The default option is **Email**: your content is sent as one or more attachments to defined recipients.
- Optionally, select **File** to place the content in one or more file locations.

Email Notifications

1. Select **Delivery options** when setting up a notification. The **Delivery Options** work area opens.
2. The default, **Email**, is selected, and you are the first of the included **Recipients**. Select **Add recipient** to add users, groups, or email addresses to the email.
 **Note:** You can give your recipients an option to unsubscribe from the email notifications.
3. Add **Message Subject** and **Message Body** content. Optionally, select **Edit template in advanced editor** to apply formatting or add placeholders for generated content. See [Email Notification - Advanced Editor](#).
4. Optionally, customize the export for each recipient (report bursting) as needed. See [Report Bursting](#).

Email Notification - Advanced Editor

You can apply formatting and add placeholders to the message subject and body as needed.

1. Select the plus sign next to the **Message Subject** and **Message Body** fields, or right-click in the fields to select a placeholder to insert. Options include:
 - i. **Recipient name:** inserts the user name of the email recipient.
 - ii. **Creation date:** inserts the date the notification was generated.
 - iii. **User name:** inserts the user name of the notification creator.
 - iv. **View name:** inserts the name of the view (such as dashboard or report).
 - v. **View link:** inserts a link to the view directly in your environment.
 - vi. **Embedded image:** inserts the exported image. Only available if the export format is **Image**.
2. Add any other information you need into the provided fields.

Report Bursting

To customize the export for each user (also known as report bursting), you can use either of the following:

- When adding or editing a recipient, select **Customize parameters** to set specific filter settings for each. These parameter values will override any set on the dashboard or view.
- Or, to preserve row-level or other [security](#) already set up, select the option **Export Using Recipient Account**, which will use each recipient's account to access the view and its data when exporting.

 **Note:** Exporting different versions for each user will require generating reports separately, which may affect performance.

Create File

1. Select **Delivery options** when setting up a notification. The **Delivery Options** work area opens.
2. Select **File** to define the file delivery options as needed.
3. Enter a path where you want to deliver the file in the **Folder** field. This must be a location accessible to the server, such as a shared folder in your network.
4. Optionally, enter a prefix to add to the start of the file name in the **File Name Template** field.
5. Optionally, define a File Lifespan in hours. If a notification occurs before the file lifespan expired for the previous one, a new file is generated with a different name.

Notified on Failure

The option to set up a user to be **Notified on Failure** by email may appear if the notification runs on a schedule. This is in the main notification dialog below the delivery options button.

This option is available according to the [Job Failure Email Policy](#) set up by your administrator.

 **Note:** To cancel a notification and notify of failure if some of the data does not load, select **Abort On Data Errors** in the export content options.

Data Driven Conditions

The **Data Driven Condition** dialog is displayed when you add a new condition to a data driven notification. A data condition specifies the criteria for detecting or evaluating changes in data.

Select a **Condition Category** to determine when to notify the recipients:



- **Increases** - An increase is detected in the target data.
- **Continuously Increases** - Regular increases are detected in the target data over a specified period.
- **Decreases** - A decrease is detected in the target data.
- **Continuously Decreases** - Regular decreases are detected in the target data over a specified period.
- **Enters State** - The target data has entered a specified state.
- **Exits State** - The target data has left a specified state.
- **Stays in State** - The target data remains in a specified state for the specified period.
- **In State(s)** - The data is in the specified state.

The state of the data is determined by checking the values against some conditions of your choice.

When monitoring for a value that **Continuously Increases** or **Continuously Decreases**, you can either set the **Previous Number of Polls** that should show a value increasing/decreasing, or set the **Hourly Interval** to the number of hours during which the value should increase/decrease.

Choose Data to Monitor

Choose the **Visualization** and the **Metric Set** you want to monitor out of the list of visualizations that are currently displayed.

Under **Target Cells**, select one of the two buttons to choose which numeric data to monitor for changes.

If you select **Add target cell**, the current data is displayed in a table and you can directly select the values to monitor. You can add target cells multiple times, or for some conditions select a column header to monitor an entire column of values when adding a target cell.

Select **Add target cell manually** to instead select numeric data to monitor according to the filters you set. Select which **Measure values** to monitor from the drop-down.

A filter will appear for each hierarchy currently displayed by the metric set & visualization, allowing you to choose filter values. For date/time data, you can click the token menu button to the right to choose relative time options that will automatically change over time, such as **Today**.

State Conditions

If you chose a **state** condition category, expand the **States** section below to choose the conditions to check the numeric data against.

You can drag states that were already defined as part of the metric set, or select **Add custom state** to define your own conditions.



Note: Use [metric set states](#) for any advanced condition of your choice such as when a value is lower than [at this time last year](#), or when a value is detected as an [outlier](#).

Multiple Data Conditions

Select the **Submit** button at the bottom of the **Data Driven Condition** dialog when finished.

You can add multiple data conditions for the same notification. With multiple conditions, use the **Multiple Condition Operator** to indicate whether all conditions (And) or just any condition (Or) must be met for the notification to occur.

View or Update Notifications

This applies to: *Managed Dashboards, Managed Reports*

Existing notifications in managed dashboards and reports in Symphony can be viewed and updated by you or your administrator.

Personal Notifications

You can access your notifications from [your profile](#), which you can access from the [main menu](#).

In the **My Profile** dialog, scroll down and select **Notifications** to view a list of your notifications.

You can enable, disable, or run multiple notifications at a time by selecting the notifications and selecting one of these options at the top of the dialog.

Select the **Edit** icon for a notification to make updates to it.

When you edit certain types of notifications or one of their options such as **Select export content**, it may be necessary to open the dashboard or other view that the notification was created from. If not open already, you'll see a prompt telling you this along with its name - select **Ok** to open the required view and continue.



Note: When you have a different dashboard or another view open than the one used to create a scheduled notification, when you edit that notification you can click to add the view as additional export content.

Manage Notifications

Administrators can view all of the existing user-defined notifications for this instance. You may also want to configure options that determine how and which users can share their content with other users.

In the [administration area](#), expand **Account Service** on the left and select **Notifications**. You can search, sort, and filter the list of notifications by tenant (if applicable), account, or the kind of notification.

With a notification selected, you can edit it from the toolbar or view the related notification [job details](#), if applicable.

Projects / File System

Account Service

Accounts

Groups

Active Logons

Logon History

Custom Attributes

Notifications

Requests

SaaS / Multi-Tenancy

Licensing

General

Contextual

Refresh

Configure Sorting

Edit

View Scheduled Job

Delete

Notification Kind

Account Filter

Search Notifications

(All)

Select account

Name	Description	Kind	Created By
Down trend		Data Driven	Tom G (tomg)
Inventory Notes		Annotation	System Adminis
Report notification		Scheduled	Tom G (tomg)
Weekly Report		Scheduled	System Adminis

Alternatively, an administrator can also view the notifications for an individual user when editing their account.

For more information, see: [Symphony Notifications \(Alerts\)](#).

About Scheduled Data Discovery Dashboard Reports

You can generate scheduled dashboard reports and send them to your users. Select users from the list of users available to you in Symphony, or add an email address for a non-Symphony user to the scheduled report for delivery. Send reports in PDF, PNG, Data (XLSX) > Raw Data or Data (XLSX) > Visual Data formats.

Log messages related to dashboard report scheduling are stored in the `zoomdata.log` [log file](#).

Specific prerequisites must be met to schedule dashboard reports. For more information, see:

- [Scheduled Dashboard Report Prerequisites](#)
- [Schedule A Dashboard Report](#)
- [Configure Recipient Rules](#)
- [Update A Scheduled Dashboard Report](#)
- [Delete A Scheduled Dashboard Report](#)
- [Scheduled Dashboard Report Permissions and Behavior](#)
- [Scheduled Data Discovery Dashboard Report Properties](#)
- [Disable Sending Scheduled Dashboard Reports To External Users](#)



Note: By default, you can send scheduled dashboard reports to both users with Symphony accounts, and email addresses outside of Symphony. Work with Technical Support if you need to disable this functionality in your environment. See [Disable Sending Scheduled Dashboard Reports To External Users](#).



Scheduled Dashboard Report Prerequisites

This applies to: *Visual Data Discovery*

Before users can schedule and send dashboard reports, configure the mail server information and confirm memory settings in Symphony. Optionally, you can adjust the screenshot resolution based on your users' needs.

To schedule a dashboard report, you must be an administrator or assigned to a group with the **Create Scheduled Reports** or **Administer Scheduled Reports** [privilege](#).

Configure Mail Server Settings

Add JavaMail API properties to the `zoomdata.properties` file to identify the mail server and other mail properties required to send the scheduled dashboard report. This can include `mail.smtp.auth`, `mail.smtp.host`, `mail.smtp.port`, `mail.imap.host`, and `mail.imap.port`). Symphony supports both IMAP and SMTP protocols. Complete descriptions of IMAP and SMTP protocol JavaMail properties can be found at these links:

- IMAP: <https://javaee.github.io/javamail/docs/api/com/sun/mail/imap/package-summary.html>
- SMTP: <https://javaee.github.io/javamail/docs/api/com/sun/mail/smtp/package-summary.html>

See [Zoomdata.properties Properties](#) for information about the properties in the `zoomdata.properties` file.

Confirm Memory Settings

If you plan to schedule numerous concurrent dashboard reports, you may need to confirm the memory configuration settings for Symphony and the screenshot service pool configuration settings will meet your needs, or alter them if needed. See [Configure Memory Settings](#) and [Set Up The Screenshot Microservice](#).

Log messages related to dashboard report scheduling are stored in the `zoomdata.log` [log file](#).

Screenshot Resolution

Symphony's resolution for PNGs and PDFs created as scheduled reports is 1280 x 720. If your users require a higher resolution, adjust the height and width properties in `zoomdata.properties:dashboard.scheduling.screenshot.png.height` and `dashboard.scheduling.screenshot.png.width`. Restart the screenshot microservice after making changes to `zoomdata.properties`.

In environments where you distribute a high number of simultaneous reports (200 users or more), a higher screen resolution such as 4k or 2160p (3840 x 2160) can have performance impacts. Balance the resolution of your scheduled dashboard reports with the frequency and recipient list size for your reports.

See [Zoomdata.properties Properties](#) for information about the properties in the `zoomdata.properties` file. See [Scheduled Data Discovery Dashboard Report Properties](#).

Schedule a Dashboard Report

This applies to: *Visual Data Discovery*

Symphony sends dashboard reports to you and/or other persons you want, on a schedule, when you use the Scheduled Reports feature. This topic describes how to generate dashboard reports on a schedule.

Generate a scheduled dashboard report

1. Log into as an administrator or a user with the **Create Scheduled Reports** [privilege](#).
2. Select **Library** on the [UI menu](#). The [library](#) opens, displaying dashboards in a table (list) format.
3. Locate the dashboard you want.
4. Select the schedule icon () in the associated **Schedule** column. The Scheduled Reports work area opens. Any defined scheduled reports are listed on the left side of the work area.

Scheduled Reports

Sales Dashboard

Name

Sales Dashboard

Format

PDF

Recipients

To

mariael rojas

user@example.com

Subject

Report

Message

Enter Message...

Schedule

Frequency

Daily

Run Time

12 : 00 PM

From

January 1, 2023

To

December 31, 2023

Run Now

Cancel

Save

- i. If there are no schedules defined for this dashboard, select **New Schedule** to create a new scheduled report.

Field	Description
Name	Specify a name for the scheduled dashboard report definition.
Format	Select a format for the scheduled dashboard report using the arrows in the Format selection box. PDF, PNG, and Data (XLSX) > Raw Data or Data (XLSX) > Visual Data formats are supported. Note: When you export raw data from your visuals to XLSX, numeric fields are exported as numbers. Dates are exported as dates in ISO 8601 format.

Field	Description
To	The To text box contains your user name. Add more recipients here by typing their name or email address in this box. You must have at least one name in this field. - As you type in characters, existing user accounts are searched and defined users that match are shown. See Manage Users in Symphony. - You can also set up user attributes and use the Recipient Rules API to specify who your users can see in the recipients list, and select from those users who to send the report to. See Configure Recipient Rules. - Add users without user accounts to the recipients list: type in their full email address, then select add () to include them in the list. Non- Symphony user recipients are granted the same security based on the report scheduler's user attributes for interpolation, row and column security (if defined), and filtering.  Important: If you do not want to allow external users to receive scheduled dashboard reports, you can work with technical support to disable this in your environment. See Disable Sending Scheduled Dashboard Reports To External Users. See Scheduled Dashboard Report Prerequisites for information about JavaMail properties that you might need.
Subject	Specify a subject for the email that will be sent containing the scheduled dashboard report. By default, a subject of <dashboard-name> Schedule Report is used.
Message	Optionally provide a message for the email.
Frequency	Select a frequency for the scheduled dashboard report using the arrows in the Frequency selection box. Frequencies of Run Once , Days , Daily , Weekly , and Monthly are supported. Depending on the frequency you select, additional fields appear.
Run on the	This field only appears if the Days, Weekly, or Monthly frequencies are selected. - Select one or more available days of the week for Days. - Select one day of the week for Weekly. - Select a date for Monthly. Options range from 1 to 31 and will run on that date, if available, each month.
Run Time	This field only appears if the Days , Daily , Weekly , or Monthly frequencies are selected. Specify the hour and minute of the day at which the scheduled dashboard report should be generated and sent. Type the hour of the day on the left side of the colon and the minute of the day on the right side of the colon. Use the arrows in the box to the far right to select AM or PM.
From	This field only appears if the Days , Daily , Weekly , or Monthly frequencies are selected. Select the starting date for the scheduled

Field	Description
	dashboard report. Click in the box to bring up a calendar in which you can select the date.
To	This field only appears if the Days , Daily , Weekly , or Monthly frequencies are selected. Select the ending date for the scheduled dashboard report. Click in the box to bring up a calendar in which you can select the date.
Date	This field only appears if you select the Run Once frequency. Select the date for the scheduled dashboard report. Click in the box to bring up a calendar with in you can select the date.
Run Now	Slide the Run Now switch on (to the right) to send the scheduled dashboard report immediately. By default, this switch is off (on the left). You can enable Run Now simultaneously with any other Frequency selected. The report will be delivered immediately and at the specified Frequency . For example, if you select Run Once and switch on Run Now you will get your report two times.

 **Note:** Only the report scheduler can see the non- Symphony users included in the recipient list.

5. Select **Save** to save the scheduled dashboard report. The name of the scheduled dashboard report appears in the list on the left of the Scheduled Reports dialog.

Update a Scheduled Dashboard Report

This applies to: *Visual Data Discovery*

After you create a scheduled dashboard report, you can go back and make updates as you wish. This topic describes how you can update a scheduled dashboard report.

Update a scheduled dashboard report

1. Log in as an administrator or a user with the **Create Scheduled Reports** [privilege](#).
2. Select **Library** on the [UI menu](#). The [library](#) opens, displaying dashboards in a table (list) format.
3. Locate the dashboard in the library list containing the scheduled dashboard report you want to update.
4. Select the schedule icon () in the associated **Schedule** column. Symphony displays the Scheduled Reports dialog box.

Scheduled Reports



● Sales Dashboard Q2 2023 Sc...

Name

Sales Dashboard Q2 2023 Schedule

Format

XLSX



Visual Data



Raw Data for Visual

Recipients

To

mariel gonzales × user@example.com ×

Subject



user@example.com

No users found

Schedule Report

Message

Enter Message...

Schedule

Frequency

Daily

Run Time

12 : 00

PM

From

April 1, 2023

To

June 30, 2023

Run Now



Scheduled dashboard reports for this dashboard that have already been defined appear on the left side of the dialog.

5. Select the scheduled dashboard report that you want on the left side of the Scheduled Reports dialog box. Symphony displays the settings.
6. Update the settings for the report on the right side of the Scheduled Reports dialog.

Field	Description
Name	Specify a name for the scheduled dashboard report definition.
Format	Select a format for the scheduled dashboard report using the arrows in the Format selection box. PDF, PNG, and Data (XLSX) > Raw Data or Data (XLSX) > Visual Data formats are supported.  Note: When you export raw data from your visuals to XLSX, numeric fields are exported as numbers. Dates are exported as dates in ISO 8601 format.
To	The To text box contains your user name. Add more recipients here by typing their name or email address in this box. You must have at least one name in this field. - As you type in characters, existing user accounts are searched and defined users that match are shown. See Manage Users in Symphony. - You can also set up user attributes and use the Recipient Rules API to specify who your users can see in the recipients list, and select from those users who to send the report to. See Configure Recipient Rules. - Add users without user accounts to the recipients list: type in their full email address, then select add () to include them in the list. Non- Symphony user recipients are granted the same security based on the report scheduler's user attributes for interpolation, row and column security (if defined), and filtering.  Important: If you do not want to allow external users to receive scheduled dashboard reports, you can work with technical support to disable this in your environment. See Disable Sending Scheduled Dashboard Reports To External Users. See Scheduled Dashboard Report Prerequisites for information about JavaMail properties that you might need.
Subject	Specify a subject for the email that will be sent containing the scheduled dashboard report. By default, a subject of <dashboard-name> Schedule Report is used.
Message	Optionally provide a message for the email.

Field	Description
Frequency	Select a frequency for the scheduled dashboard report using the arrows in the Frequency selection box. Frequencies of Run Once , Days , Daily , Weekly , and Monthly are supported. Depending on the frequency you select, additional fields appear.
Run on the	This field only appears if the Days, Weekly, or Monthly frequencies are selected. ▪ Select one or more available days of the week for Days. ▪ Select one day of the week for Weekly. ▪ Select a date for Monthly. Options range from 1 to 31 and will run on that date, if available, each month.
Run Time	This field only appears if the Days , Daily , Weekly , or Monthly frequencies are selected. Specify the hour and minute of the day at which the scheduled dashboard report should be generated and sent. Type the hour of the day on the left side of the colon and the minute of the day on the right side of the colon. Use the arrows in the box to the far right to select AM or PM.
From	This field only appears if the Days , Daily , Weekly , or Monthly frequencies are selected. Select the starting date for the scheduled dashboard report. Click in the box to bring up a calendar in which you can select the date.
To	This field only appears if the Days , Daily , Weekly , or Monthly frequencies are selected. Select the ending date for the scheduled dashboard report. Click in the box to bring up a calendar in which you can select the date.
Date	This field only appears if you select the Run Once frequency. Select the date for the scheduled dashboard report. Click in the box to bring up a calendar with in you can select the date.
Run Now	Slide the Run Now switch on (to the right) to send the scheduled dashboard report immediately. By default, this switch is off (on the left). You can enable Run Now simultaneously with any other Frequency selected. The report will be delivered immediately and at the specified Frequency. For example, if you select Run Once and switch on Run Now you will get your report two times.



Note: Only the report scheduler can see the non-Symphony users included in the recipient list.

7. Select **Save** to save the scheduled dashboard report.



Delete a Scheduled Dashboard Report

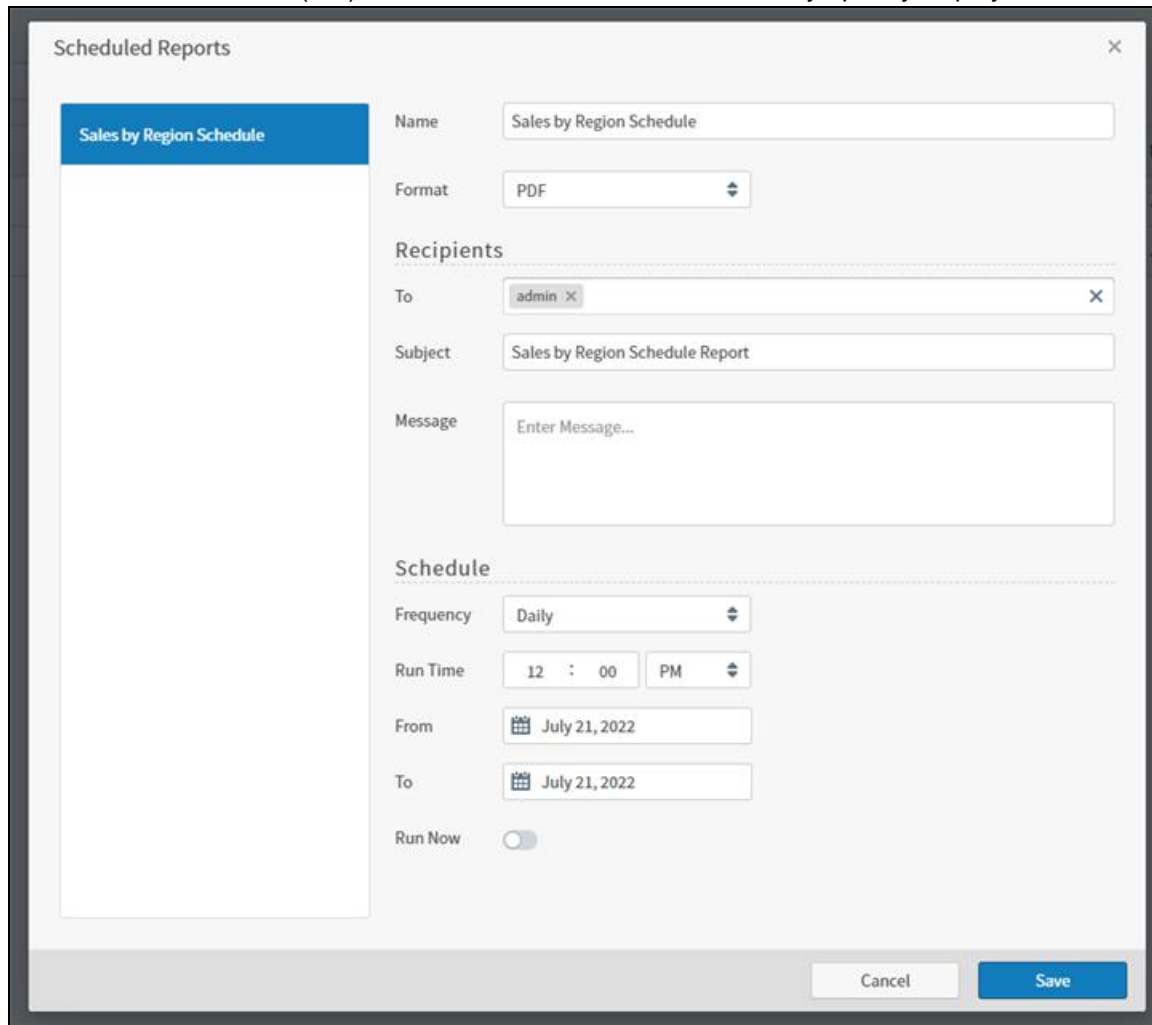
This applies to: *Visual Data Discovery*

You can easily delete scheduled dashboard reports you no longer need. This topic describes how to delete a scheduled dashboard report.

Delete a scheduled dashboard report

1. Log in as an administrator or a user with the **Create Scheduled Reports** [privilege](#).
2. Select **Library** on the [UI menu](#). The [library](#) opens, displaying dashboards in a table (list) format.
3. Locate the dashboard in the list containing the scheduled dashboard report you want to remove.

4. Select the schedule icon () in the associated **Schedule** column. Symphony displays the Scheduled Reports dialog box.



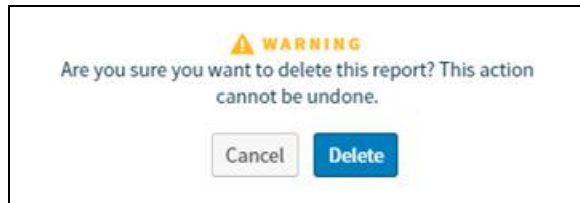
The screenshot shows the 'Scheduled Reports' dialog box. On the left, there is a list of scheduled reports, with 'Sales by Region Schedule' selected and highlighted in blue. The main area of the dialog contains the following fields:

- Name:** Sales by Region Schedule
- Format:** PDF
- Recipients:**
 - To:** admin (with a close button)
 - Subject:** Sales by Region Schedule Report
 - Message:** Enter Message...
- Schedule:**
 - Frequency:** Daily
 - Run Time:** 12 : 00 PM
 - From:** July 21, 2022
 - To:** July 21, 2022
 - Run Now:** (toggle switch)

At the bottom right, there are 'Cancel' and 'Save' buttons.

Scheduled dashboard reports for this dashboard that have already been defined appear on the left side of the dialog.

5. Locate and select the scheduled report that you want to remove on the left side of the Scheduled Reports dialog. Symphony displays the settings for the report.
6. Select Delete () next to the scheduled report name on the left side of the dialog. Symphony displays a warning.



7. Select **Delete** to delete the scheduled dashboard report. Symphony removes the name of the scheduled report from the Scheduled Reports dialog box. Select **Cancel** if you do not want to delete the report.



Scheduled Dashboard Report Permissions and Behavior

This applies to: *Visual Data Discovery*

Users who create scheduled dashboard reports require specific permissions to perform these tasks. When you make changes to user accounts, these changes also affect scheduled reports in specific ways. This topic describes actions and Symphony behaviors.

To create a scheduled dashboard report, you must be an administrator or assigned to a group with the **Create Scheduled Reports** and **Administer Scheduled Reports** [privilege](#).

The following table describes the scheduled dashboard report behaviors that occur when users are removed or disabled in Symphony or in a Symphony account.

Who	Action	From	Behavior
Report creator	Disabled	Tenant	The scheduled dashboard report remains in the system. Symphony recipients continue to receive scheduled reports. All recipients included only by email address are removed from the report recipients list.
	Removed	Tenant	
	Deleted	System	The scheduled dashboard report is removed from the system.
Report recipient	Disabled	Tenant	The Symphony recipient remains on the recipients list but the recipient no longer receives the report. A warning message is logged.
	Removed	Tenant	
	Removed	System	The Symphony recipient is removed from the recipients list.

Log messages related to scheduled dashboard reports are stored in the `zoomdata.log` [log file](#).

Scheduled Data Discovery Dashboard Report Properties

This applies to: *Visual Data Discovery*

Specific properties control the behavior of scheduled dashboard reports. These properties are stored in `zoomdata.properties`.

Property	Required?	Description
<code>dashboard.scheduling.screenshot.png.height</code>	No	Identifies the height (in pixels) of the screenshot PNG file that will be sent. The default is 720 pixels.
<code>dashboard.scheduling.screenshot.png.width</code>	No	Identifies the width (in pixels) of the screenshot PNG file that will be sent. The default is 1280 pixels.
<code>dashboard.scheduling.screenshot.timeout</code>	No	 Important: Specifies the timeout (in seconds) to take a screenshot for a dashboard email report. The default is 60 seconds. The time specified by this property must be less than or equal to the time set by the <code>screenshot.service.http.client.read.timeout.milliseconds</code> property. If you increase the value of this property, make sure that you increase the value of the <code>screenshot.service.http.client.read.timeout.milliseconds</code> property accordingly. Bear in mind that this property is specified in seconds, but the <code>screenshot.service.http.client.read.timeout.milliseconds</code> property is specified in milliseconds.
<code>mail.from</code>	Yes	Specifies the email address identifying where the email comes from.
<code>mail.login</code>	Yes	Specifies the email login to use to access the mail server.
<code>mail.password</code>	Yes	Specifies the password associated with the email login identified in the <code>mail.login</code> property.
<code>screenshot.service.http.client.connect.timeout.milliseconds</code>	No	Specifies the number of milliseconds that can elapse before Symphony stops trying to connect to the screenshot microservice client. The default is 10000 milliseconds.
<code>screenshot.service.http.client.read.timeout.milliseconds</code>	No	Specifies the number of milliseconds that can elapse before Symphony

Property	Required?	Description
<code>screenshot.service.http.client.read.timeout.milliseconds</code>		stops trying to read from the screenshot microservice client. The default is 60000 milliseconds. Note: If you increase the time set by the <code>dashboard.scheduling.screenshot.timeout</code> property, make sure that you increase the value of this property as well. The total time set by <code>screenshot.service.http.client.read.timeout.milliseconds</code> should always be greater than or equal to the time set by the <code>dashboard.scheduling.screenshot.timeout</code> property. Bear in mind that this property is specified in milliseconds, but the <code>dashboard.scheduling.screenshot.timeout</code> property is specified in seconds.
<code>screenshot.service.http.client.write.timeout.milliseconds</code>	No	Specifies the number of milliseconds that can elapse before Symphony stops trying to write to the screenshot microservice client. The default is 60000 milliseconds.

In addition, JavaMail properties should be added to the `zoomdata.properties` file to identify the mail server and other mail properties required to use that server to send the scheduled dashboard (for example, `mail.smtp.auth`, `mail.smtp.host`, `mail.smtp.port`, `mail.imap.host`, and `mail.imap.port`). Symphony supports both IMAP and SMTP protocols. Complete descriptions of IMAP and SMTP protocol JavaMail properties can be found at these links:

- IMAP: <https://javaee.github.io/javamail/docs/api/com/sun/mail/imap/package-summary.html>
- SMTP: <https://javaee.github.io/javamail/docs/api/com/sun/mail/smtp/package-summary.html>

For information about the properties in the `zoomdata.properties` file, see [Zoomdata.properties Properties](#).

Log messages related to dashboard report scheduling are stored in the `zoomdata.log` [log file](#).



Configure Recipient Rules

This applies to: *Visual Data Discovery*

Symphony enables you and your users [to schedule and send](#) dashboard reports, and [share dashboards](#) with other Symphony users as needed.

If you're running a multi tenancy Symphony environment, you regulate your users' data access using custom attributes and you can further use these custom attributes to filter dashboard report recipients. This ensures your customers can only schedule reports for users that meet specific criteria, such as tenant, location, department, or other attribute you define.

Use the Recipients Rules API to create filters for your customers using your custom attributes.



Note: Users you add to scheduled reports using a full email address are not affected by recipient rules. See [Schedule A Dashboard Report](#).

Recipient Rules Prerequisites

- Recipient rules can only be defined by an administrator or a user assigned to a group with the [Administer Users](#) privilege.
- Recipient rules rely on the use of custom attributes in your environment.

Use the APIs available in `users segregation` section of the Swagger documentation provided by insightsoftware to create filters for your customers using your custom attributes..

API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.

How the Recipient Rules API Uses Custom Attributes

Use the Recipient Rules API to define what list of recipients specific users can see based on a combination of their own custom attributes and the custom attributes of others. Rules can use both `AND` and `OR` operators. Two object attributes are supported: `User` and `OtherUser`.

The examples below show possible scenarios illustrating how to filter report recipients out. Define the custom `User` attributes you need and pair them with an appropriate `OtherUser` attribute. In the examples below, we use `User.tenant` and `OtherUser.tenant`, `User.region` and `OtherUser.region`, and `User.department` and `OtherUser.department`.

Define recipient rules as broadly or narrowly as you need. Combine and filter `User` and `OtherUser` attributes with both `AND` and `OR` operators to achieve your desired result.

Use Case	Recipient Rule Construction	Custom Attributes Example	Result
You want users in specific tenants to see and select other users in their shared tenant in the report recipient field.	<code>(User.tenant = OtherUser.tenant)</code>	<code>User.tenant</code> <code>WidgetCo</code> <code>SprocketInc</code>	Users with attribute <code>User.tenant WidgetCo</code> can see and include all other <code>WidgetCo</code> users in a recipient list. Users with attribute <code>User.tenant SprocketInc</code> can see and include all other <code>SprocketInc</code> users in a recipient list.
You want users in specific tenants to see and select other users in their shared tenant and region in the report recipient field.	<code>(User.tenant = OtherUser.tenant AND User.region = OtherUser.region)</code>	<code>User.tenant</code> <code>WidgetCo</code> <code>SprocketInc</code> <code>User.region</code> <code>USA</code>	Users with attributes <code>User.tenant WidgetCo</code> <code>User.region USA</code> can see and include all users with the same attributes in a recipient list. Users with attributes <code>User.tenant SprocketInc</code> <code>User.region USA</code> can see and include all users with the same attributes in a recipient list.
You want users in specific tenants to see and select other users in their shared tenant and region, or other users of the defined type in the report recipient field.	<code>(User.tenant = OtherUser.tenant AND User.region = OtherUser.region AND User.type = "EndUser") OR User.type = "Admin"</code>	<code>User.tenant</code> <code>WidgetCo</code> <code>SprocketInc</code> <code>User.region</code> <code>USA</code> <code>User.type</code>	Users with attributes <code>User.tenant WidgetCo</code> <code>User.region USA</code> <code>User.type EndUser</code> can see and include all users with the same attributes in a recipient list. Users with attributes

Use Case	Recipient Rule Construction	Custom Attributes Example	Result
		<i>EndUser</i> <i>Admin</i>	<i>User.tenant SprocketInc</i> <i>User.region USA</i> <i>User.type EndUser</i> can see and include all users with the same attributes in a recipient list. Users with attribute <i>User.type Admin</i> can see and include all users in a recipient list.
You want users in specific tenants to see and select other users in their shared tenant, region, and department, or other users of the defined type in the report recipient field.	(<i>User.tenant = OtherUser.tenant AND User.region = OtherUser.region AND User.department = OtherUser.department AND User.type = "EndUser"</i>) OR <i>User.type = "Admin"</i>	<i>User.tenant</i> <i>WidgetCo</i> <i>SprocketInc</i> <i>User.region</i> <i>USA</i> <i>User.department</i> <i>Marketing</i> <i>User.type</i> <i>EndUser</i> <i>Admin</i>	Users with attributes <i>User.tenant WidgetCo</i> <i>User.region USA</i> <i>User.department Marketing</i> <i>User.type EndUser</i> can see and include all users with the same attributes in a recipient list. Users with attributes <i>User.tenant SprocketInc</i> <i>User.region USA</i>

Use Case	Recipient Rule Construction	Custom Attributes Example	Result
			▪ <code>User.department</code> <i>Marketing</i> ▪ <code>User.type</code> <i>EndUser</i> can see and include all users with the same attributes in a recipient list. Users with attribute ▪ <code>User.type</code> <i>Admin</i> can see and include all users in a recipient list.
You want users of a specific type to see and select all users in the account in the report recipient field.	<code>(User.type = "user_attribute_name")</code>	<code>User.type</code> ▪ <i>BI Engineers</i>	Users with attribute ▪ <code>User.type</code> <i>BI Engineers</i> can see and include all users from the account in a recipient list. Use this mechanism to configure visibility for users from different groups. To do this, substitute <code>User.group</code> for <code>User.type</code>.  Note: Each user must have a group custom attribute configured to use (e.g. <code>User.group = BI Engineers</code>).



Disable Sending Scheduled Dashboard Reports to External Users

This applies to: *Visual Data Discovery*

You can send scheduled dashboard reports, by default, to both users with Symphony accounts, and email addresses outside of Symphony.

Disable the sending of scheduled data discovery dashboard reports by working with [Technical Support](#) to disable the toggle `allow-sending-reports-to-external-emails..`

Symphony Scheduled Report Options - External Recipients Disabled

By default, you can send reports to external users by adding their email address to the Recipient field when creating a schedule for a dashboard report. When you disable sending reports to external users:

- Users can no longer add external email addresses to report schedules.
- External users included in an existing schedule remain, with an added warning that the report will not be sent to external users. This does not prevent the report from being sent to Symphony users.
- If you remove an external user from a scheduled report, they can't be re-added to the recipient list.
- Reports that include external users in the recipient list are sent to Symphony users only, not external users.



Dashboard Smart Loading

This applies to: *Visual Data Discovery*

Symphony uses smart loading to load visuals on a dashboard. Smart loading improves the performance for loading visuals on a dashboard, especially for dashboards containing many visuals.

Without smart loading, visuals cannot be used until all the visuals in a dashboard are loaded. With smart loading, an initial maximum number of visuals are loaded simultaneously. The rest of the visuals are put on hold. After one or more initial visuals are loaded, other visuals in the dashboard are taken off hold and loaded, but only up to the set maximum. As visuals are loaded, they can be used immediately, without waiting for all the dashboard visuals to load.

Visuals are loaded from the top down. The immediately viewable visuals (the ones at the top of the dashboard) are loaded first, up to the set maximum. If you scroll down through a dashboard, a visual that is on hold and is placed farther from the top of the dashboard is started at a higher priority than other visuals on the dashboard.

For information on managing smart loading, including changing the maximum number of visuals that are loaded simultaneously (the default is eight visuals), contact insightsoftware [Technical Support](#).

Descriptions

This applies to: *Visual Data Discovery*

Descriptions give you an opportunity to provide more information about resources in your standalone or embedded environment for all or some of your users.

You can provide descriptions for most major objects that make up your environment:

- **Sources:** Add a Description when you create or update a source in your environment. This information is viewable and searchable from the Sources work area. See [Add Or Edit The Description For A Source](#).
- **Visuals:** Add a Visual Description to shared visuals in the Visual Gallery. This information is viewable and searchable from the Visual Gallery work area. See [Add Or Edit The Visual Description For A Visual](#).
- **Dashboards:** Add a Description to dashboards in your Library. This information is viewable and searchable from the Library work area. See [Add Or Edit The Description For A Dashboard](#).
- **Widgets:** Add a Description to any widget on a dashboard: visuals, text snippets, or filter snippets. For shared visuals from the Visual Gallery, this does not replace the Visual Description. See [Add Or Edit The Description For A Widget](#).

Add or edit the Description for a source

1. Create or edit a data source.
2. Edit the Description field in the Source Definition work area, then select **Save** to save your changes.
3. Open the Sources work area, then select the info icon () to view the description for this source.
Optionally, use the **Search** field to search for a source by information in its description.

Add or edit the Visual Description for a visual

1. Create or edit a visual in the Visual Gallery.
2. Select the info icon () to open the info sidebar menu.
3. Edit the Visual Description field in the info work area, then select **Save** to save your changes.

4. Select the save icon () to save the visual.

5. Open the Visual Gallery work area, then select the info icon () to view the visual description.

Optionally, use the Search field to search for a visual by information in its visual description.

 **Note:** Alternatively, you can add or edit the Visual Description when you save a visual, use Save As to rename a visual, and when you convert a local visual to a shared visual.

Add or edit the Description for a dashboard

1. Create or edit a dashboard.
2. With the dashboard open, select Save or Save As to save the dashboard. The appropriate Save dialog opens.
3. Edit the Description field, then select **Save** to save your changes.

4. Open the Library, then select the info icon () to view the description for this dashboard.

Optionally, use the **Search** field to search for a dashboard by the information in its description.

 **Note:** Select the info icon () in the dashboard tool bar to show or hide the dashboard description for viewers. You can also edit the description when visible.

Add or edit the Description for a widget

1. Select a widget in your dashboard, then select Settings to open the sidebar menu. The menu opens to the Widget Settings panel.
2. Edit the Description field, then select **Apply** to apply your changes.
3. Select the save icon () to save the dashboard.



Use Cross-Source Links

This applies to: *Visual Data Discovery*

You can link fields in dashboard visuals that use different data sources to create cross-source links. After cross-source links have been defined, you can simultaneously apply filters based on the linked fields to all visuals on the dashboard. If you have time fields that are linked in different data sources, you can simultaneously apply the same time filter using the linked time field in the [time bar](#). In addition, you can publish and subscribe cross-source links in a dashboard. See [Control How Cross-Visual Filters Interact In A Dashboard](#).

Cross-source links can only be created on a dashboard that uses at least two different data sources.

This topic provides the following information:

- [Define Cross-Source Links](#)
- [Edit Cross-Source Links](#)
- [Remove Cross-Source Links](#)
- [Use Cross-Visual Links For Cross-Visual Filtering](#)

Define Cross-Source Links

This applies to: *Visual Data Discovery*

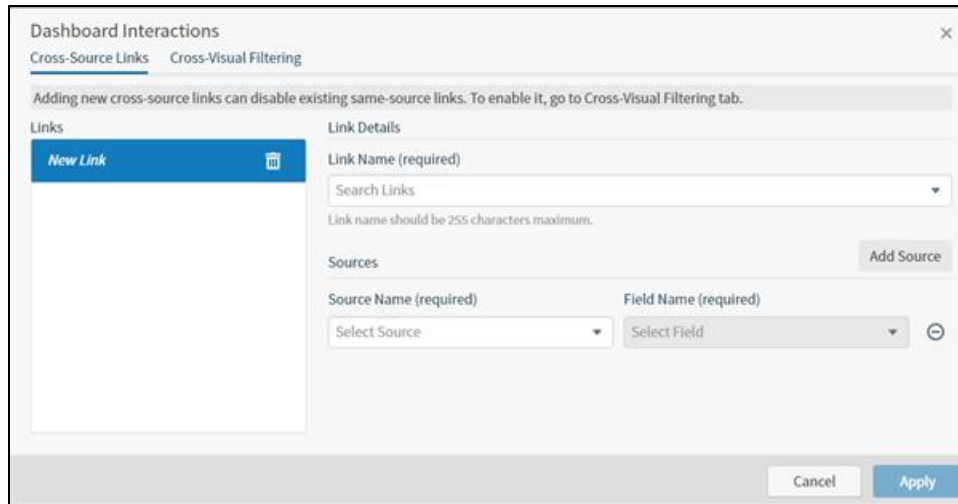
Cross-source links are defined on the Cross-Source Links tab of the Dashboard Interactions dialog. Each cross-source link on your dashboard must use unique sources and fields. There is a one-to-one relationship between cross-source link names and your data fields. You cannot create multiple cross-source links for the same data field. In addition, you cannot use the same cross-source link name for multiple data fields.

Define a cross-source link in a dashboard

1. Verify that your dashboard includes at least two visuals using different data sources. Cross-source links will not work on dashboards that use only one data source.
2. Select  on the [dashboard icon bar](#). The Dashboard Interactions dialog appears. In the following image, no cross-source links are defined for the dashboard.



3. On the **Cross-Source Links** tab, select **Add Link**. The tab populates with fields appear to help you define the cross-source link.



Dashboard Interactions

Cross-Source Links Cross-Visual Filtering

Adding new cross-source links can disable existing same-source links. To enable it, go to Cross-Visual Filtering tab.

Links

New Link

Link Details

Link Name (required)

Search Links

Link name should be 255 characters maximum.

Sources

Add Source

Source Name (required)

Select Source

Field Name (required)

Select Field

Cancel Apply

- Supply a name for the cross-source link in the **Link Name** field. When you select the Link Name field to enter a name, a link name list appears listing all the link names that exist on other dashboards in the system. You can use this list to keep your naming consistent across dashboards. Select a name in the list or supply a new one. When you supply a new name the list shows a "Create new link ..." option which you must select to create the new link definition. In the example below, you would select **Create new link "State"** to create the cross-source link definition for the State field.

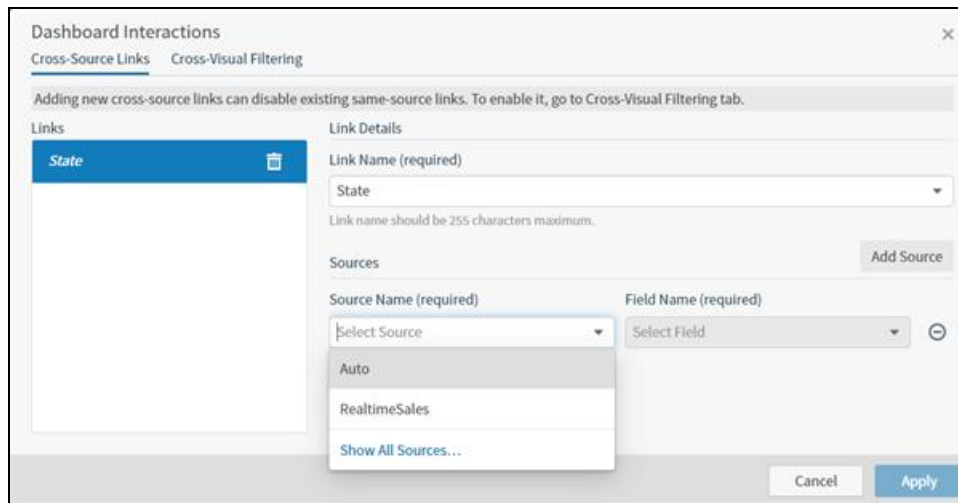


Link Name (required)

State

+ Create new link "State"

- Select a first source using the **Source Name** drop-down list.



Dashboard Interactions

Cross-Source Links Cross-Visual Filtering

Adding new cross-source links can disable existing same-source links. To enable it, go to Cross-Visual Filtering tab.

Links

State

Link Details

Link Name (required)

State

Link name should be 255 characters maximum.

Sources

Add Source

Source Name (required)

Select Source

Auto

RealtimeSales

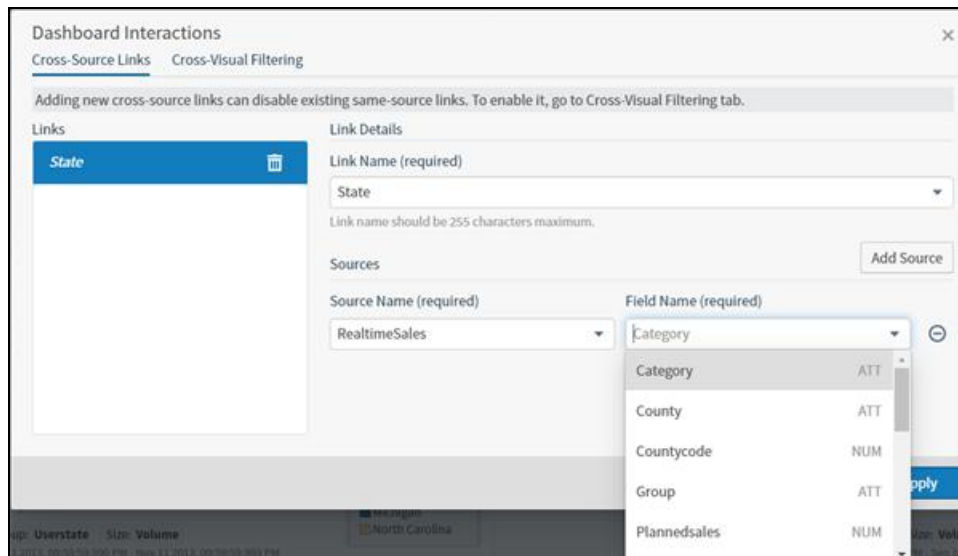
Show All Sources...

Field Name (required)

Select Field

Cancel Apply

6. Select a field from the first source using the **Field Name** drop-down list.



Dashboard Interactions

Cross-Source Links Cross-Visual Filtering

Adding new cross-source links can disable existing same-source links. To enable it, go to Cross-Visual Filtering tab.

Links

State

Link Details

Link Name (required)

State

Link name should be 255 characters maximum.

Sources

Add Source

Source Name (required)

RealtimeSales

Field Name (required)

Category

Category ATT

County ATT

Countycode NUM

Group ATT

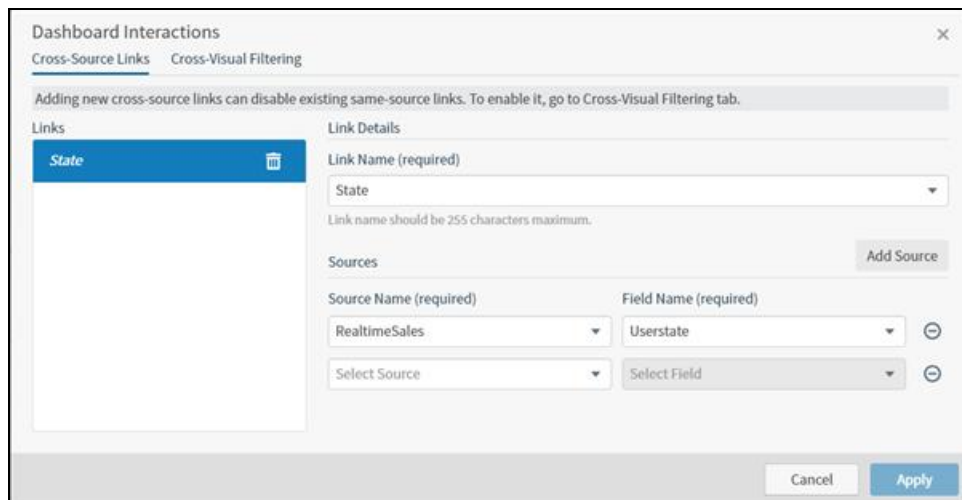
Plannedsales NUM

Apply

sp. Userstate Size Volume

North Carolina

7. Select the **Add Source** button to add another source for the cross-source link definition. A new row appears in the Sources area of the tab.



8. Select a second source using the **Source Name** drop-down list in the new row.
9. Select a field from the second source using the **Field Name** drop-down list in the new row.
10. If more than two data sources are used in your dashboard, repeat Steps 7 through 9, as appropriate, to add additional sources and fields to the cross-source link. The fields you select in the sources that comprise a cross-source link should contain the same kind of data.

Note: Symphony does not check cross-source links to determine whether they contain the same kind of data. If you do this, the cross-source link will not work.

11. Select **Apply**. A warning dialog appears prompting you to confirm the creation of the link.



 **Note:** Creating the cross-source link automatically disables any same-source published links for the cross-source linked field. This prevents you from accidentally having duplicate filters. You can, however, re-enable the same-source link later. See [Control How Cross-Visual Filters Interact In A Dashboard](#).

12. Select **Continue**. The cross-source link has been created. The non-table visuals in the dashboard that use the sources that are linked and that are grouped by their cross-source linked fields show a  icon in the upper left corner.
13. [Save](#) the dashboard to save the cross-source link definition.

The cross-source link data you supply on the dialog is validated. If you forget to supply some information, error messages display.

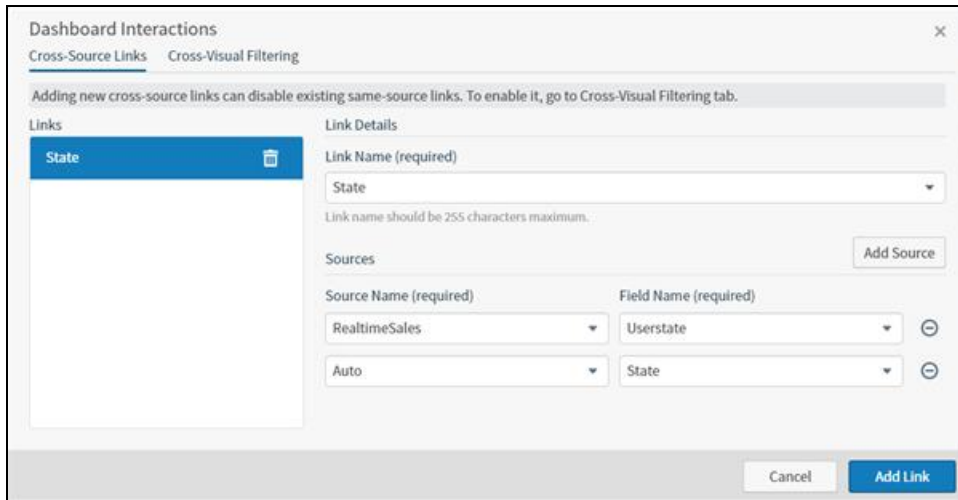
Edit Cross-Source Links

This applies to: *Visual Data Discovery*

Cross-source links can be modified on the **Cross-Source Links** tab of the Dashboard Interactions dialog.

Modify a cross-source link in a dashboard

1. Open the dashboard containing the cross-source link you want to edit.
2. Select  on the [dashboard icon bar](#). The Dashboard Interactions dialog appears. Cross-source links are listed on the **Cross-Source Links** tab.



Dashboard Interactions

Cross-Source Links Cross-Visual Filtering

Adding new cross-source links can disable existing same-source links. To enable it, go to Cross-Visual Filtering tab.

Links

State

Link Details

Link Name (required)

State

Link name should be 255 characters maximum.

Sources

Add Source

Source Name (required)

RealtimeSales

Field Name (required)

Userstate

Auto

State

Cancel Add Link

3. Select the link you want to modify in the **Links** list on the left of the tab. Its definition appears on the right.
4. Modify the cross-source link definition as needed. See [Define Cross-Source Links](#) for detailed information about defining cross-source links.
5. Select **Apply**. A warning dialog appears prompting you to confirm the link updates.



6. Select **Continue**. The cross-source link is updated.

7. [Save](#) the dashboard to save the cross-source link definition.

The cross-source link data you supply on the dialog is validated. If you forget to supply some information, error messages display.



Note: Symphony does not check cross-source links to determine whether they contain the same kind of data. If you do this, the cross-source link will not work.

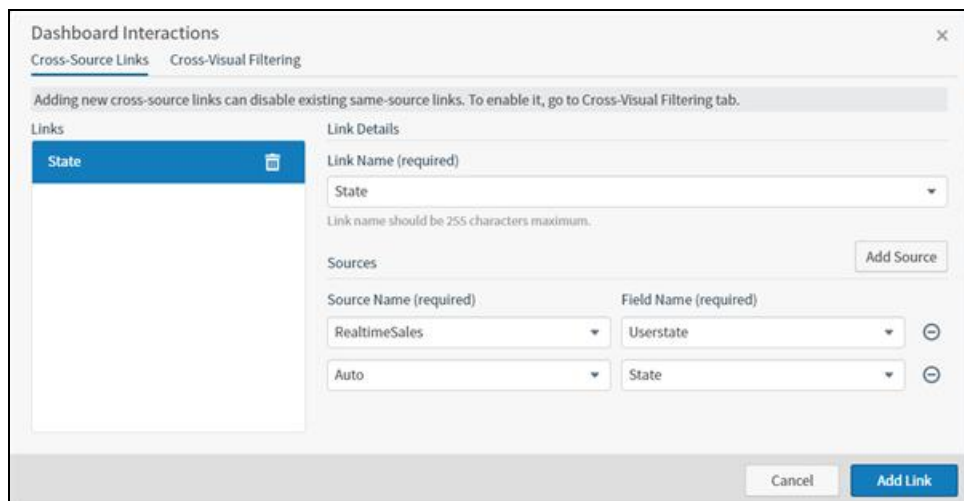
Remove Cross-Source Links

This applies to: *Visual Data Discovery*

Cross-source links can be removed on the Cross-Source Links tab of the Dashboard Interactions dialog. This will delete the cross-source link definition from the Symphony data discovery environment.

Remove a cross-source link from a dashboard

1. Open the dashboard containing the cross-source link you want to edit.
2. Select  on the [dashboard icon bar](#). The Dashboard Interactions dialog appears. Cross-source links are listed on the **Cross-Source Links** tab.



Dashboard Interactions

Cross-Source Links Cross-Visual Filtering

Adding new cross-source links can disable existing same-source links. To enable it, go to Cross-Visual Filtering tab.

Links

State

Link Details

Link Name (required)

State

Link name should be 255 characters maximum.

Sources

Add Source

Source Name (required)

RealtimeSales

Field Name (required)

Userstate

Auto

State

Cancel Add Link

3. Select the link you want to remove in the **Links** list on the left of the tab. Its definition appears on the right.
4. Select the  icon associated with the link you want to remove. A warning dialog appears prompting you to confirm the deletion.



Warning

Are you sure you want to delete this link? Deleting this link will delete the corresponding cross-visual filters.

Cancel Delete



- Archive of documentation for Logi Symphony v24

5. Select **Delete**. The cross-source link is removed from the dialog.
6. [Save](#) the dashboard to delete the cross-source link definition.

Use Cross-Visual Links for Cross-Visual Filtering

This applies to: *Visual Data Discovery*

After you have defined cross-source or same-source links for a dashboard, you can use them in cross-visual filtering. Cross-visual filtering allows you to simultaneously apply the same filter across all visuals in your dashboard that use the linked fields. Cross-visual filters must be applied from a visual's context menu or from the time bar.



Note: Unlike row-level filters, cross-visual filters are not saved with the visual.

Cross-source link must be defined on a dashboard before you can use them in cross-visual filtering. However, same-source links are created automatically and can be automatically used in cross-visual filtering. In addition, cross-visual filters are only applied to a dashboard visual if the visual subscribes to its associated cross-visual link. See [Define Cross-Source Links](#), [Publish A Link](#), and [Subscribe A Visual To A Link](#).

This section includes the following topics.

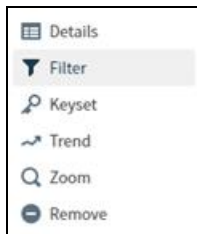
- [Apply Cross-Visual Filtering To Dashboard Visuals](#)
- [Apply Cross-Visual Filtering From The Time Bar](#)

To view the filters applied to a visual, see [Viewing The Applied Filters For A Visual Or Filter Snippet](#).

Apply Cross-Visual Filtering to Dashboard Visuals

Apply a cross-visual filter from a visual to the dashboard visuals

1. After cross-visual links are created, select an area of the visual that uses a linked field. The [context menu](#) for that area of the visual displays:



Note: Filters for cross-source and same-source links must be defined using the [context menu](#). You cannot create a link filter from the [Filters sidebar](#). Filters created from the sidebar apply only to the selected visual. Filters for cross-source and same-source links are called *cross-visual filters* and are listed in the [Filters sidebar](#) separately from filters that are applied from the Filters sidebar.

2. Select **Filter** on the [context menu](#).

The filter is automatically applied to all of the visuals that are subscribed to the link. For more information about published and subscribed links, see [Control How Cross-Visual Filters Interact In A Dashboard](#).

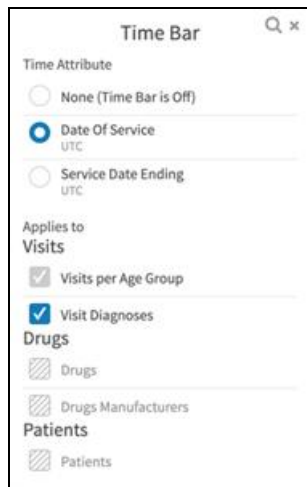
3. [Save](#) the dashboard.

Apply Cross-Visual Filtering From the Time Bar

To apply a cross-visual filter from the time bar, a same-source or cross-source link for time fields in the data sources must first be created.

Apply a cross-visual filter to the dashboard using a time field from the time bar

1. After cross-visual links are created, select the time field in the time bar. The Time Bar dialog appears.



2. Select the linked time field you have defined in the **Time Attribute** section of the Time Bar dialog.
3. Select the visuals to which you want the time filter applied in the **Applies to** section. The **Applies to** section lists all the visuals in the dashboard that use data from:
 - i. The same data source with a same-source link subscribed for the linked time field.
 - ii. Different data sources with a linked time field for the data you have selected.
4. Adjust the time bar minimum or maximum to filter the visuals. See [Use The Time Bar](#).

Control How Cross-Visual Filters Interact in a Dashboard

This applies to: *Visual Data Discovery*

You can control how cross-visual filters interact in a dashboard. Cross-visual filters are filters created using same-source and cross-source link fields established in the dashboard. You can control which same-source and cross-source link fields each dashboard visual can publish (apply cross-visual filters for) and which links each dashboard visual subscribes to (which cross-visual filters can be applied to the visual).



Note: When more than one dashboard is embedded in an application, the cross-visual filters that are published for a visual on one of the dashboards can be subscribed to by any visual on any of the embedded dashboards. However, this is not true unless the dashboards are embedded in the same application. Visuals in a dashboard open in one window or tab cannot subscribe to cross-visual filters published by visuals in a different window or tab.

Using the **Cross-Visual Filtering** tab of the Dashboard Interactions dialog, you can specify which links each dashboard visual publishes and which each visual subscribes to.

- When a visual publishes a link, that visual can apply cross-visual filters using the link field to other dashboard visuals that have subscribed to the link. Cross-visual filters can only be applied if the associated link is published. In addition, they can only be applied using the **Filter** option on the [context menu](#).
- When a visual subscribes to a link, the visual will be filtered by the link field if another visual creates a cross-visual filter for the same field.

Custom cross-visual filters can also be created in your Javascript code. See [Publish Custom Cross-Visual Filters](#).

Dashboard links are created for a dashboard in two ways:

- Each visual in a dashboard automatically creates *same-source links* for each field (column) in the data source that it uses. Same-source link names have the format: `<source-name>.<field-name>`.

When a visual is added to a dashboard, its same-source links are created and the links are published. In addition, the visual is automatically subscribed to its own same-source links.

- You can create *cross-source links* for common fields in different data sources used on the same dashboard. See [Use Cross-Source Links](#). These links can also be published and subscribed in a dashboard.

See the following topics:

- [Understand The Cross-Visual Filtering Tab](#)
- [Publish A Link](#)



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- [Mute A Published Link](#)
- [Revoke A Published Link](#)
- [Subscribe A Visual To A Link](#)
- [Mute A Subscribed Link For A Visual](#)
- [Specify Cross-Visual Filters For Cross-Visual Links](#)
- [Publish Custom Cross-Visual Filters](#)
- [Subscribe To A Cross-Visual Filter](#)
- [Date-Time Formats In Cross-Visual Filters](#)
- [Embed Cross-Visual Link Publish And Subscribe Settings Using JavaScript](#)
- [Custom Chart Support For Cross-Visual Links And Filters](#)

Understand the Cross-Visual Filtering Tab

This applies to: *Visual Data Discovery*

The **Cross-Visual Filtering** tab of the Dashboard Interactions dialog allows you to specify which same-source and cross-source links each dashboard visual publishes and which each visual subscribes to. The Dashboard Interactions dialog can be accessed by selecting  on the [dashboard icon bar](#) and then selecting the **Cross-Visual Filtering** tab.

- When a visual publishes a link, that visual can apply cross-visual filters using the link field to other dashboard visuals that have subscribed to the link. Cross-visual filters can only be applied if the associated link is published. In addition, they can only be applied using the **Filter** option on the [context menu](#).
- When a visual subscribes to a link, the visual will be filtered by the link field if another visual creates a cross-visual filter for the same field.

Dashboard Interactions

Cross-Source Links
Cross-Visual Filtering

Auto Sales by State
Group - State

Planned Sales by Category
Group - Category

Raw Sales Data
Group - N/A

Sales by State
Group - Userstate

Auto Sales by State (Group - State)

Published filters

Enable All ☐

Enable or disable filter links in this section to apply filters to other visuals on the dashboard

Field Name	Link Name	Enabled
State	Auto.State	☐ ⓘ
State	State	☒

Subscribed filters

Enable All ☒

Enable or disable filter links in this section to apply filters to this visual

Field Name	Link Name	Enabled
All Fields (27) ▼	Same source link	☒

Deselect fields to remove them from

A unique link name is automatically generated for

Cancel

Apply

On the left side of this tab, the visuals on the dashboard are listed. The right side of the dashboard is split into two sections: **Published filters** and **Subscribed filters**. You can alter the publish and subscribe settings for each visual in the dashboard. When you select a visual in the **Visuals** list on the left, the published and subscribed filters for the selected visual appear on the right.

The fields on the right side of the tab are described in the following table.

Field	Description
Enable All (toggle)	This switch appears at the top of the Published filters and Subscribed filters sections of the tab. It allows you to quickly enable or mute (disable) all of the automatic filtering listed in those sections.

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Field	Description
	In the Published filters table, when Enable All is on (slid to the right), all of the filters associated with the link fields are published for use by other visuals in the dashboard. In the Subscribed filters section, when Enable All is on, all of the links are enabled for the visual. When it is off, all of the links are disabled for the visual, although they can be individually switched on.
Field Name	This column shows the field name associated with each link.
Link Name	This column shows the same-source and cross-source link names. Same-source link names have the format: <source-name>.<field-name>. Cross-source link names do not have the same format as same-source links, but are defined when the cross-source link definition is created. See Define Cross-Source Links.
Enabled column	This column allows you to enable or mute (disable) a specific published or subscribed filter. To enable a filter, slide the switch on (to the right). To mute a filter, slide the switch off (to the left).

For more information, see these topics:

- [Publish A Link](#)
- [Mute A Published Link](#)
- [Subscribe A Visual To A Link](#)
- [Mute A Subscribed Link For A Visual](#)

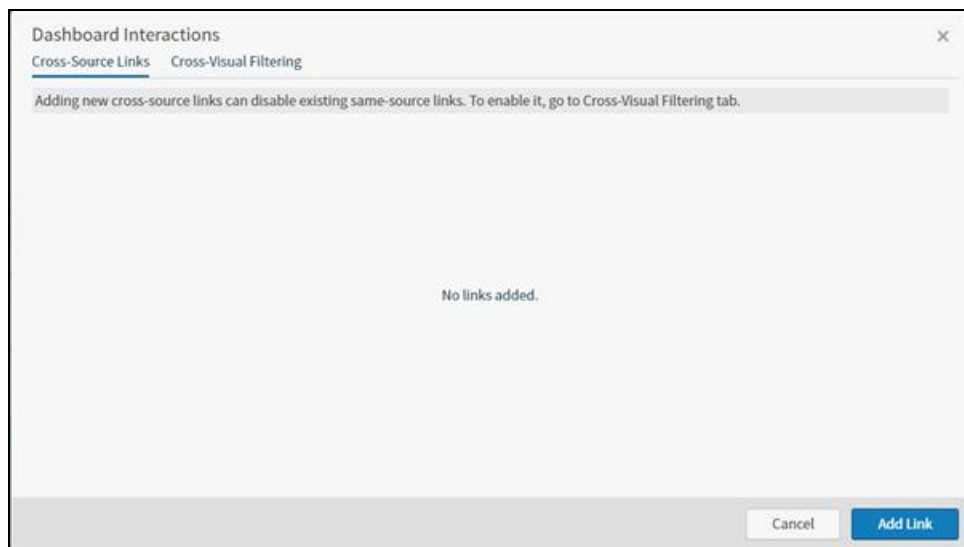
Publish a Link

This applies to: *Visual Data Discovery*

For each visual in a dashboard, you can select cross-source and same-source links to publish. When a visual publishes a link, that visual can apply cross-visual filters using the link field to other dashboard visuals that have subscribed to the link. Cross-visual filters can only be applied if the associated link is published. In addition, they can only be applied using the **Filter** option on the [context menu](#).

Publish a same-source or cross-source link for a dashboard visual

1. Select  cross-link icon on the [dashboard icon bar](#). The Dashboard Interactions dialog appears. In the following image, no cross-source links are defined for the dashboard.



2. Select the **Cross-Visual Filtering** tab.

Dashboard Interactions
Cross-Source Links
Cross-Visual Filtering

Visuals

- Auto Sales by State
Group - State
- Planned Sales by Category
Group - Category
- Raw Sales Data
Group - N/A
- Sales by State
Group - Userstate

Auto Sales by State (Group - State)

Published filters

Enable or disable filter links in this section to apply filters to other visuals on the dashboard

Field Name	Link Name	Enabled
State	Auto.State	☐
State	State	☒

Subscribed filters

Enable or disable filter links in this section to apply filters to this visual

Field Name	Link Name	Enabled
All Fields (27)	Same source link	☒

Deselect fields to remove them from
A unique link name is automatically generated for

- Select a visual in the **Visuals** list on the left of the tab. The right side of the tab show the link filters available to be published in the **Published filters** table.

Auto Sales by State (Group - State)

Published filters

Enable or disable filter links in this section to apply filters to other visuals on the dashboard

Field Name	Link Name	Enabled
State	Auto.State	☐
State	State	☒

- If you want to publish all of the links available for the visual, slide the **Enable All** switch on (to the right).
If you just want to publish an individual link, locate the link name in the table of **Published filters**, and slide its corresponding switch in the **Enabled** column on. Repeat this for every individual link you want published.
- When you have finished identifying the published links for a visual, select **Apply**.
- Optionally, repeat Steps 3 through 5 for other visuals listed on the left of the tab. Remember to select **Apply** after each update or the link settings for a visual will not be stored.

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7. [Save](#) the dashboard to save the cross-visual link specifications.

Mute a Published Link

This applies to: *Visual Data Discovery*

For each visual in a dashboard, you can mute (disable) cross-source and same-source links for the dashboard. When they are muted, they can no longer be used by the visual to create cross-visual filters. You can mute links from the Dashboard Interactions dialog.

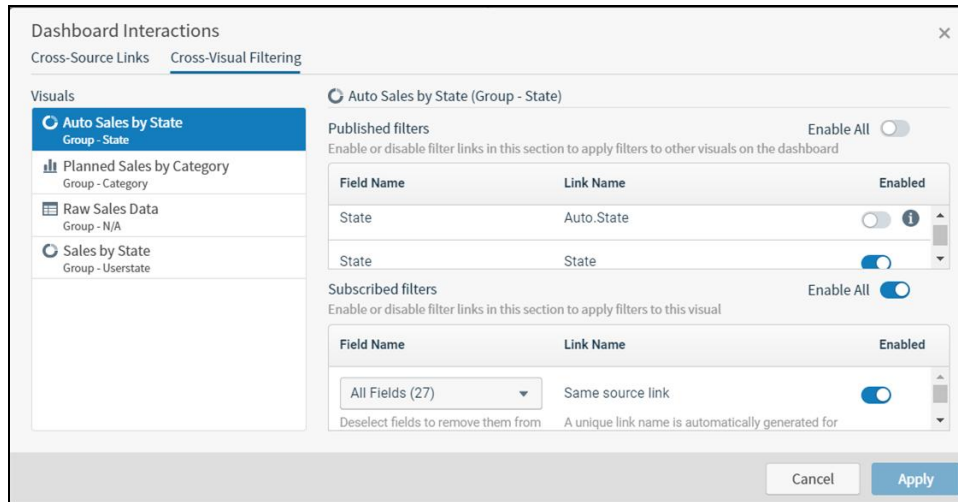
You can also revoke (undo) published links from the visual itself. See [Revoke A Published Link](#).

Mute a same-source or cross-source link from the Dashboard Interactions dialog

1. Select  cross-link icon on the [dashboard icon bar](#). The Dashboard Interactions dialog appears. In the following image, no cross-source links are defined for the dashboard.



2. Select the **Cross-Visual Filtering** tab.



3. Select a visual in the **Visuals** list on the left of the tab. The right side of the tab show the link filters available to be published in the **Published filters** table.



4. If you want to mute all of the links available for the visual, slide the **Enable All** switch off (to the left). It no longer is blue.
If you just want to mute an individual link, locate the link name in the table of **Published filters**, and slide its corresponding switch in the **Enabled** column off. Repeat this for every individual link you want muted.
5. Optionally, repeat Steps 3 and 4 for other visuals listed on the left of the tab.
6. When you have finished muting the links, select **Apply**.
7. [Save](#) the dashboard to save the cross-visual link specifications.

Revoke a Published Link

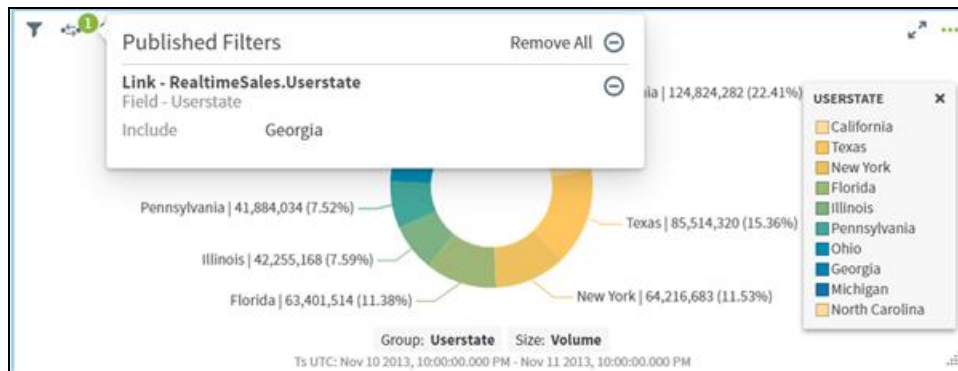
This applies to: *Visual Data Discovery*

You can revoke (undo) published links from the visual itself. This does not mute the published link, but simply removes its application from the dashboard visuals.

You can also mute a published link using the Data Interactions dialog. See [Mute A Published Link](#).

Revoke a published same-source or cross-source link from the dashboard visual

1. Select  dashboard interaction icon on the visual. A drop-down dialog appears for the visual, listing all of the links resulting in published filters for the other visuals on the dashboard.



2. Select the remove icon  next to the link you want to revoke or select the remove icon  next to Remove All to revoke all the links published by the visual.
The links are revoked and all filters applied by the links are removed.
3. [Save](#) the dashboard to save the cross-visual link specifications.

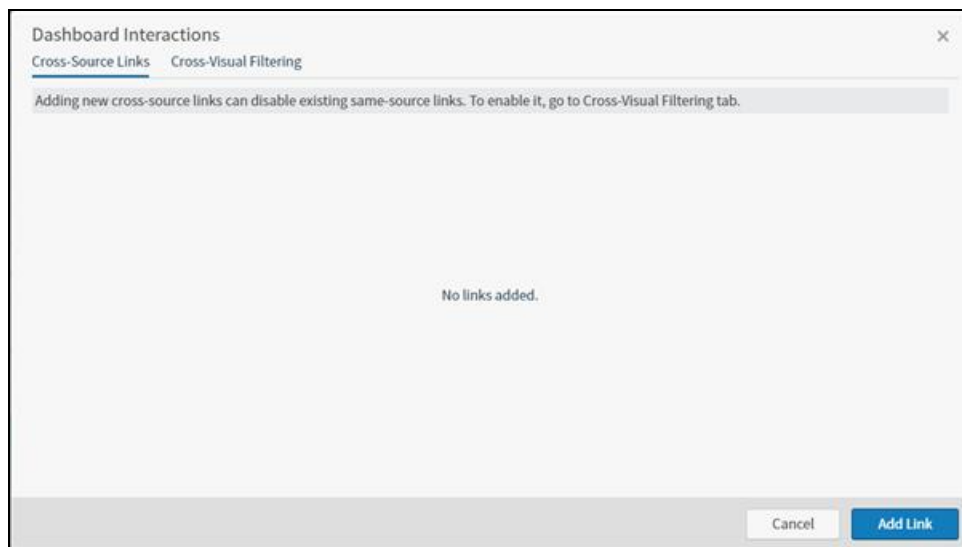
Subscribe a Visual to a Link

This applies to: *Visual Data Discovery*

You can select cross-source and same-source links to which a visual on a dashboard should subscribe (use). When a visual subscribes to a link, the visual will be filtered by the link field if another visual creates a cross-visual filter for the same field.

Subscribe to a same-source or cross-source link for a dashboard visual

1. Select the link icon  on the [dashboard icon bar](#). The Dashboard Interactions dialog appears. In the following image, no cross-source links are defined for the dashboard.



2. Select the **Cross-Visual Filtering** tab.

Dashboard Interactions

Cross-Source Links

Cross-Visual Filtering

Visuals

Auto Sales by State
Group - State

Planned Sales by Category
Group - Category

Raw Sales Data
Group - N/A

Sales by State
Group - Userstate

Auto Sales by State (Group - State)

Enable All

Published filters

Enable or disable filter links in this section to apply filters to other visuals on the dashboard

Field Name	Link Name	Enabled
State	Auto.State	☐
State	State	☒

Subscribed filters

Enable or disable filter links in this section to apply filters to this visual

Enable All

Field Name	Link Name	Enabled
All Fields (27)	Same source link	☒

Deselect fields to remove them from

A unique link name is automatically generated for

Cancel

Apply

3. Select a visual in the **Visuals** list on the left of the tab. The right side of the tab show the link filters to which the visual can subscribe in the **Subscribed filters** table.

Subscribed filters

Enable All

Enable or disable filter links in this section to apply filters to this visual

Field Name	Link Name	Enabled
All Fields (15)	Same source link	☒
Deselect fields to remove them from the filter		
A unique link name is automatically generated for each selected field		
Userstate	State	☒

4. If you want the visual to subscribe to all of the links available, slide the **Enable All** switch on (to the right).
If you just want the visual to subscribe to an individual link, locate the link name in the table of **Subscribed filters**, and slide its corresponding switch in the **Enabled** on. Repeat this for every individual link to which you want the visual subscribed.
5. Optionally, repeat Steps 3 and 4 for other visuals listed on the left of the tab.
6. When you have finished identifying the subscribed links, select **Apply**.

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7. [Save](#) the dashboard to save the cross-visual link specifications.

Mute a Subscribed Link for a Visual

This applies to: *Visual Data Discovery*

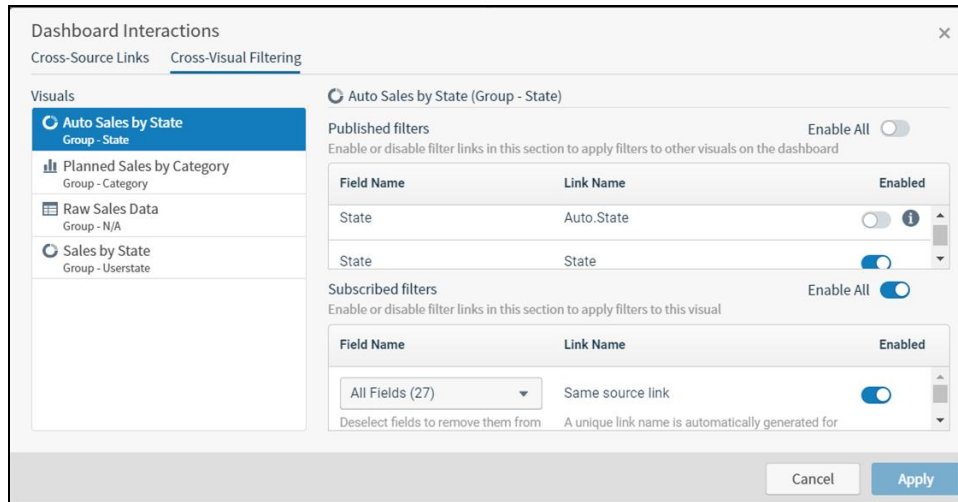
You can mute (disable) cross-source and same-source links that you do *not* want a visual on a dashboard to subscribe (use). When a visual mutes a link subscription, the visual can no longer be filtered by the link field if another visual creates a cross-visual filter for it.

Mute to a same-source or cross-source link for a dashboard visual

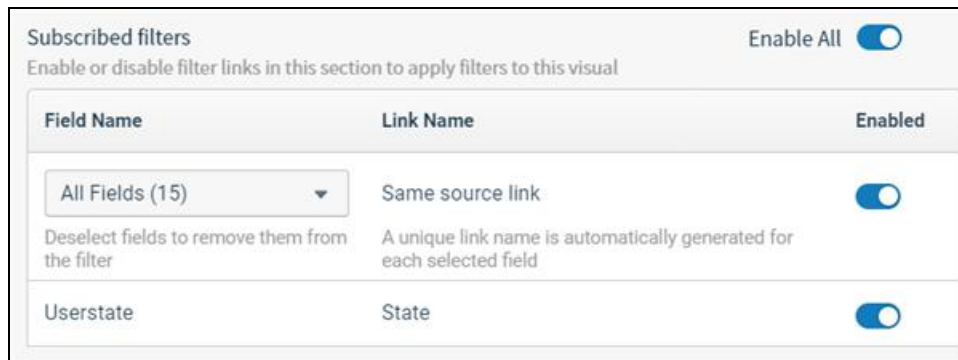
1. Select the link icon  on the [dashboard icon bar](#). The Dashboard Interactions dialog appears. In the following image, no cross-source links are defined for the dashboard.



2. Select the **Cross-Visual Filtering** tab.



3. Select a visual in the **Visuals** list on the left of the tab. The right side of the tab show the link filters to which the visual can subscribe in the **Subscribed filters** table.



4. If you want the visual to mute all of the links available, slide the **Enable All** switch off (to the left). It no longer is blue.
If you just want the visual to mute an individual link, locate the link name in the table of **Subscribed filters**, and slide its corresponding switch in the **Enabled** off. Repeat this for every individual link you want muted.
5. Optionally, repeat Steps 3 and 4 for other visuals listed on the left of the tab.
6. When you have finished muting the links, select **Apply**.



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7. [Save](#) the dashboard to save the cross-visual link specifications.

Specify Cross-Visual Filters for Cross-Visual Links

This applies to: *Visual Data Discovery*

Filters can be applied across dashboard visuals for both same-source and cross-source links. As long as a visual is subscribed to a particular published link field, any filters applied for that link field will be applied to the visual. For example, if Visuals A and B are both subscribed to the link for field Z, and you use the context menu to apply a filter for field Z on Visual B, the filter will also be applied to Visual A.

Filters for cross-source and same-source links are called *cross-visual filters* and are listed in the [Filters sidebar](#) separately from filters that are applied from the Filters sidebar.

Cross-visual filters are not saved with the visual, unlike row-level filters. In addition, if you change the visual style



Note: Filters for cross-source and same-source links must be defined using the [context menu](#). You cannot create a link filter from the [Filters sidebar](#). Filters created from the sidebar apply only to the selected visual.

See [Apply a Filter to Dashboard Visuals Using the Context Menu](#).



Embed Cross-Visual Link Publish and Subscribe Settings Using JavaScript

This applies to: *Visual Data Discovery*

Cross-visual link publish and subscribe settings for a dashboard can be specified for embedded dashboards using JavaScript. Two JavaScript methods are provided: `publish` and `subscribe`. After `embed.js` is run (see [Embed Composer Symphony Components Using JavaScript And Trusted Access](#)), these methods become available for use with the global `Zoomdata` object on `window`.

Cross-visual links (channels) are used primarily for cross-visual filtering. Visuals can publish cross-visual filters for cross-visual links. Other visuals can listen (subscribe) to the links and apply them when a cross-visual filter is specified.

Prerequisites

Embedding applications should listen for the `composer-dashboard-loaded` event on the first embedded dashboard before calling these methods. See [Embedded Events](#).

See the following topics:

- [Supported Zoomdata Methods](#)
- [Supported Cross-Visual Publish JavaScript Properties](#)
- [Published Cross-Visual JavaScript Message Structure](#)
- [Supported Cross-Visual Subscribe JavaScript Properties](#)
- [Embedded Dashboard Cross-Visual Publish And Subscribe Example](#)

Publish Custom Cross-Visual Filters

This applies to: *Visual Data Discovery*

You can build and enable your own custom cross-visual filters. An example is provided below.



Note: If you use date-time fields in your custom cross-visual filters, they must be in the format required by Symphony. See [Date-Time Formats In Cross-Visual Filters](#) for information on the required date-time format and an example for how to convert your data to the required format.

```
// START: PUB/SUB COMMON SECTION
// An embedding application should listen for the 'composer-dashboard-ready' event
// BEFORE attempting to publish or subscribe to cross-visual filters. The code below
// should be specified at the beginning of both publish and subscribe Javascript code.

const DASHBOARD_READY_EVENT = 'composer-dashboard-ready';
const pubSubReady = new Promise((resolve) => {
  const resolvePubSubReady = (message, publisherId) => {
    resolve();
    document.removeEventListener(DASHBOARD_READY_EVENT, resolvePubSubReady);
  }
  document.addEventListener(DASHBOARD_READY_EVENT, resolvePubSubReady);
});
/* END: Pub/Sub common section */

/* START: Publish to Cross-Visual Filters */

// The following code represents the From and To date pickers on the
// embedding application's page that allow users to filter the data by
// a date range. The BETWEEN operator is used for the link name
// defined in the dashboard called 'LaunchedDate'. Note that the first part of
// this code converts the date-time data to the format expected by Composer.

const dateFromInput = document.getElementById('date-from');
const dateToInput = document.getElementById('date-to');

const formatDate = (date) => {
  const d = new Date(date);
  const year = `${d.getFullYear()}`;
  let month = `${d.getMonth() + 1}`;
  let day = `${d.getDate()}`;
  if (month.length < 2) {
    month = `0${month}`;
  }
}
```

```

    if (day.length < 2) {
      day = `0${day}`;
    }

    return `${year}-${month}-${day}`;
  }

const getEndOfDayString = dateString => `${dateString} 23:59:59.999`;
const getStartOfDayString = dateString => `${dateString} 00:00:00.000`;

const dateInputChangeHandler = (event) => {
  const dateFromInputValue = dateFromInput.value;
  const dateToInputValue = dateToInput.value;

  const dateFrom = dateFromInputValue ? new Date(dateFromInput.value) : null;
  const dateTo = dateToInputValue ? new Date(dateToInput.value) : null;

  const dateFromString = dateFrom ? formatDate(dateFrom) : null;
  const dateToString = dateTo ? formatDate(dateTo) : null;

  const dateTimeFromString = dateFromString ? getEndOfDayString(dateFromString) : null;
  const dateTimeToString = dateToString ? getStartOfDayString(dateToString) : null;

  let operation = 'BETWEEN';
  let value = [dateTimeFromString, dateTimeToString];

  if (!dateTimeFromString) {
    operation = 'LT';
    value = dateTimeToString;
  }

  if (!dateTimeToString) {
    operation = 'GT';
    value = dateTimeFromString;
  }

  let publishObject = {
    type: 'selection',
    valueType: 'TIME',
    ranges: [
      {
        operation: '<operation>',
        value: '<value>'
      }
    ]
  }

```

```
    ]
  }

  if (!dateTimeFromString && !dateTimeToString) {
    publishObject = null;
  }

  pubSubReady.then(() => embedManager.publish('LaunchedDate', publishObject));
}

dateFromInput.addEventListener('change', dateInputChangeHandler);
dateToInput.addEventListener('change', dateInputChangeHandler);

// This represents a drop-down field on the embedding application's page that
// lists a set of countries the user can filter by. After selecting a value,
// the embedding application calls its 'publishValue' function, defined
// below with the link name '<linkname>' and the selected country value.
// The link name is defined in the dashboard. To clear the value filter,
// make sure you pass a null value as shown below.

const fieldSelect = document.getElementById('field-select');
fieldSelect.addEventListener('change', (event) => {
  const value = event.target.value;
  const publishObject = value !== 'null' ? {
    type: 'selection',
    valueType: 'ATTRIBUTE',
    ranges: [
      {
        operation: 'IN',
        value: '<value>'
      }
    ]
  } : null;
  pubSubReady.then(() => embedManager.publish('Country', publishObject));
});
/* END: Publish to Cross-Visual Filters */
```

Subscribe to a Cross-Visual Filter

This applies to: *Visual Data Discovery*

When a visual subscribes to a cross-visual filter, the visual is filtered by the link field in the filter if another visual creates a cross-visual filter for the same field.

When a visual publishes a link, that visual can apply cross-visual filters using the link field to other dashboard visuals that have subscribed to the link. Cross-visual filters can only be applied if the associated link is published. In addition, they can only be applied using the **Filter** option on the [context menu](#).

The following example shows how to subscribe to a cross-visual filter:

```
// An embedding application should listen for the 'composer-dashboard-ready' event
// before attempting to publish or subscribe

const DASHBOARD_READY_EVENT = 'composer-dashboard-ready';
const pubSubReady = new Promise((resolve) => {
  function resolvePubSubReady() {
    resolve();
    document.removeEventListener(DASHBOARD_READY_EVENT, resolvePubSubReady);
  }
  document.addEventListener(DASHBOARD_READY_EVENT, resolvePubSubReady);
});

// The following covers an example of how to subscribe to a linkName and receive
// the latest value published

function subscriptionHandler(<message>, <publisherId>) {
  if (<message> === null) {
    alert(<publisherId> + ' cleared its publication');
  } else {
    const value = message.ranges[0].value;
    alert(<publisherId> + ' published ' + value);
  }
}

let unsubscribe;
pubSubReady.then(() => {
  // The returned unsubscribe function should be stored and called when the
  // subscriber should stop receiving messages.
  unsubscribe = window.Zoomdata.subscribe('<linkname>', subscriptionHandler);
});
```

The subscribe Method

The `subscribe` method attaches a subscription handler to a cross-source or same-source link (filter). Each time a new cross-visual filter is published to the link, the subscription handler is called and passed the newly published filter.

When you call the `subscribe` method, the `unsubscribe` function is returned. Run the `unsubscribe` function to remove the handler for the link. This guarantees that the handler will no longer be notified when new messages are published for the link.

Messages passed on the channel can be an arbitrary message object or `null`. Because the message objects are not restricted, the subscription handler should never assume its structure and always check that the message is in the structure the handler is expecting.

Messages that are `null` are interpreted as a clearing of the channel and should be handled by undoing any actions taken based on the last messages received by the handler. For example, when a Symphony visual receives a `null` message in its filtering logic, it removes any filters created by previous messages on the given channel (link).

If a message is published to the channel before the `subscribe` method is called, the subscription handler is executed immediately with the latest message that was published on the channel.

The subscribe Properties

The properties for the `subscribe` method of the `Zoomdata` class are described in the following table.

Property/Object	Description
<code><linkName></code>	The link (channel) name to which the subscription handler should subscribe. The link name is defined when you define a cross-source link. See Define Cross-Source Links. It is published for use by a dashboard as a cross-visual filter. See Publish A Link. The link name represents the channel from which the message should be subscribed. It is typically called a <i>topic</i> in standard publish/subscribe systems.  Important: There is a one-to-one relationship between cross-source link names and your data fields. You cannot use the same link name for multiple data fields. In you cannot create multiple cross-source links for the same data field. Type: string
<code>subscriptionHandler</code>	The handler that will be called upon new messages. This handler will be provided with the published message as the first argument and the ID of the publisher as the second argument. Type: function

Supported Zoomdata Methods

This applies to: *Visual Data Discovery*

The following methods for the `Zoomdata` class can be used to manage embedded settings for published and subscribed cross-visual links in a dashboard. Sample code showing the use of these methods in an application are provided. See [Embedded Dashboard Cross-Visual Publish And Subscribe Example](#).

Method	Description
<code>publish()</code>	The <code>publish</code> method publishes a message (filter) for a specific cross-source or same-source link (channel). Publishing a link filter causes any subscribing handlers for the link to be called and passed the filter message. There is no registration process for a link, simply call the <code>publish</code> method with a link name and it will be created. No value is returned. The filter message structure is described in Published Cross-Visual JavaScript Message Structure. The properties for the <code>publish</code> method are described in Supported Cross-Visual Publish JavaScript Properties.
<code>subscribe()</code>	The <code>subscribe</code> method attaches a subscription handler to a cross-source or same-source link (filter). Each time a new cross-visual filter is published to the link, the subscription handler is called and passed the newly published filter. When you call the <code>subscribe</code> method, the <code>unsubscribe</code> function is returned. Run the <code>unsubscribe</code> function to remove the handler for the link. This guarantees that the handler will no longer be notified when new messages are published for the link. Messages passed on the channel can be an arbitrary message object or <code>null</code>. Because the message objects are not restricted, the subscription handler should never assume its structure and always check that the message is in the structure the handler is expecting. Messages that are <code>null</code> are interpreted as a clearing of the channel and should be handled by undoing any actions taken based on the last messages received by the handler. For example, when a Symphony visual receives a <code>null</code> message in its filtering logic, it removes any filters created by previous messages on the given channel (link). If a message is published to the channel before the <code>subscribe</code> method is called, the subscription handler is executed immediately with the latest message that was published on the channel. The properties for the <code>subscribe</code> method are described in Supported Cross-Visual Subscribe JavaScript Properties.

Supported Cross-Visual Publish JavaScript Properties

This applies to: *Visual Data Discovery*

The properties for the `publish` method of the `Zoomdata` class are described in the following table.

Property/Object	Description
<code><linkName></code>	The link (channel) name. Link names can be custom names, specified when a cross-source link is created, or names in the format <code><source-name>.<field-name></code>, automatically generated for every field in a data source for same-source links. The link name is defined when you define a cross-source link. See Define Cross-Source Links. It is published for use by a dashboard as a cross-visual filter. See Publish A Link. The link name represents the channel into which the message should be published. It is typically called a <i>topic</i> in standard publish/subscribe systems.  Important: There is a one-to-one relationship between cross-source link names and your data fields. You cannot use the same link name for multiple data fields. In addition, you cannot create multiple cross-source links for the same data field. Type: string
<code><message></code>	The message sent with the link. The message published can either be an arbitrary object or null. An object published to a link channel is not restricted to any particular structure but a Symphony dashboard only recognizes messages in the structure described in Published Cross-Visual JavaScript Message Structure. Publishing a null message can clear the last published message from the channel. If the last published message's <code>publisherId</code> matches the null message's <code>publisherId</code>, the last message is removed from the channel and subscribers receive a null message. If the <code>publisherId</code> of the last published message on the channel does not match the null message's <code>publisherId</code>, nothing happens. The most recently published message on each channel is stored and sent to new subscribers at the time of subscription. Type: object or null
<code><options></code>	Options for how the link should be applied. All values are optional. Options include: <code>options.publisherId</code>: An arbitrary sting identifying the publisher of the link. This can be used to handle subscriptions differently based on publisher. For example, a subscriber may decide not to apply messages they posted themselves. <code>options.timestamp</code>: A number representing the time at which the link is published. It defaults to <code>Date.now()</code>. <code>options.targetComponents</code>: A string that allows the publisher to target only specific dashboards when more than one

Property/Object	Description
	dashboard is embedded on a page. If not provided, it applies the link to all embedded dashboards. To target a component, add its <code>componentInstanceId</code> (provided in the return from the call to embedManager.createComponent). Type: object

Published Cross-Visual JavaScript Message Structure

This applies to: *Visual Data Discovery*

All messages (cross-visual filters) that can be consumed by Symphony or that will be published by Symphony must conform to the following structure. The value of the `type` property defines the structure of the rest of the message.

The properties for the message (filter) structure are described in the following table:

Property	Description
<code>type: 'selection'</code>	Only a value of <code>selection</code> is supported at this time, identifying a selection of values on a visual or widget. This signifies that the message is a <code>SelectionMessage</code> . Type: string
<code>valueType: 'NUMBER'</code>	Identifies the type of value being selected. The following value types are supported: ▪ <code>ATTRIBUTE</code> - Use for string values ▪ <code>NUMBER</code> - Use for integer and floating point values ▪ <code>TIME</code> - Use for date and date-time values Type: string
<code>ranges</code>	An array of selected ranges. The set of allowed operations depends on the specified <code>valueType</code> . Currently only a single range is supported per message (filter). Ranges after the first range will be ignored. Ranges should be structured as follows: <pre> ranges: [{ operation: '<operation>', value: '<value>' },] </pre> The <code>operation</code> and <code>value</code> properties are described next. Type: array
<code>operation: 'EQUALS'</code>	The filter operation. Supported operations include: ▪ <code>IN</code> - Includes. Supported for <code>ATTRIBUTE</code> and <code>NUMBER</code> <code>valueTypes</code>. Provide an array of values for <code>value</code>.

Property	Description
	- NOTIN - Excludes. Supported for ATTRIBUTE and NUMBER valueTypes. Provide an array of values for value. - BETWEEN - Between. Supported for NUMBER or TIME valueTypes. Provide a two-item array of the start and end values for value. - GT - Greater Than. Supported for NUMBER or TIME valueTypes. Provide a single value to compare against for value. - GE - Greater Than or Equal To. Supported for NUMBER or TIME valueTypes. Provide a single value to compare against for value. - EQUALS - Equal To. Supported for NUMBER or TIME valueTypes. Provide a single value to compare against for value. - NOTEQUALS - Not Equal To. Supported for NUMBER or TIME valueTypes. Provide a single value to compare against for value. - LE - Less Than or Equal To. Supported for NUMBER or TIME valueTypes. Provide a single value to compare against for value. - LT - Less Than. Supported for NUMBER or TIME valueTypes. Provide a single value to compare against for value. Type: string
value: '6'	Provide a value as described for each filter operation. Type: string, number, array<string number null>

Supported Cross-Visual Subscribe JavaScript Properties

This applies to: *Visual Data Discovery*

The properties for the `subscribe` method of the `Zoomdata` class are described in the following table.

Property/Object	Description
<code><linkName></code>	The link (channel) name to which the subscription handler should subscribe. The link name is defined when you define a cross-source link. See Define Cross-Source Links. It is published for use by a dashboard as a cross-visual filter. See Publish A Link. The link name represents the channel from which the message should be subscribed. It is typically called a <i>topic</i> in standard publish/subscribe systems.  Important: There is a one-to-one relationship between cross-source link names and your data fields. You cannot use the same link name for multiple data fields. In you cannot create multiple cross-source links for the same data field. Type: string
<code>subscriptionHandler</code>	The handler that will be called upon new messages. This handler will be provided with the published message as the first argument and the ID of the publisher as the second argument. Type: function

Date-Time Formats in Cross-Visual Filters

This applies to: *Visual Data Discovery*

When you specify a date-time field in a cross-visual filter, the data must be in a specific format: `MMM DD YYYY, HH:MM:SS.sss`, where:

MMM	Represents the three-character month of the year (JAN, FEB, MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, NOV, or DEC).
DD	Represents the two-digit day of the month (01 through 31).
YYYY	Represents the four-digit year (for example, 2024).
HH	Represents the two-digit hour of the day (00 through 23)
MM	Represents the two-digit minute of the hour (00 through 59)
SS	Represents the two-digit second of the minute (00 through 59)
sss	Represents the hundredths of a second (000 through 999)

If the data for your date-time fields is not in this format, it must be converted in the Javascript code of your embedding application.

The following example converts date data in the format `MM/DD/YYYY` to the required `MMM DD YYYY, HH:MM:SS.sss` format. Because no hour of the day is provided in the data, the conversion ensures that full days are used (00:00:00.000 through 23:59:59.999).

```
const formatDate = (date) => {
  const d = new Date(date);
  const year = `${d.getFullYear()}`;
  let month = `${d.getMonth() + 1}`;
  let day = `${d.getDate()}`;

  if (month.length < 2) {
    month = `0${month}`;
  }
  if (day.length < 2) {
    day = `0${day}`;
  }

  return `${year}-${month}-${day}`;
}

const getEndOfDayString = dateString => `${dateString} 23:59:59.999`;
const getStartOfDayString = dateString => `${dateString} 00:00:00.000`;
```

Embedded Dashboard Cross-Visual Publish and Subscribe Example

This applies to: *Visual Data Discovery*

The following JavaScript example uses methods, properties, and embedded events of the `Zoomdata` and `EmbedManager` classes to publish and subscribe cross-visual links and filters in an embedded dashboard.

```
// EmbedManager is a singleton and `initComposerEmbedManager` can create a new
// manager or return an existing one. See other samples for howto properly
// initialize the embed manager.
const getEmbedManager = async () => window.initComposerEmbedManager();

// An embedding application should listen for the 'composer-dashboard-loaded'
// event before attempting to publish or subscribe. If multiple dashboards are
// added to the page, listeners can be added the object returned upon embedding
// to specifically target an individual dashboard
const DASHBOARD_LOADED_EVENT = 'composer-dashboard-loaded';
const pubSubReady = new Promise((resolve) => {
  function resolvePubSubReady() {
    resolve();
    document.removeEventListener(DASHBOARD_LOADED_EVENT, resolvePubSubReady);
  }
  document.addEventListener(DASHBOARD_LOADED_EVENT, resolvePubSubReady);
});

// `countrySelect` represents a drop-down field on the embedding application's
// page that lists a set of countries the user can filter by. After selecting a
// value, the embedding application calls its 'publishValue' function, defined
// below with the link name 'country' and the selected country value. The
// link name is defined in the dashboard. To clear the value filter, make sure
// you pass a null value as shown below.
const countrySelect = document.getElementById('country-select');
countrySelect.addEventListener('change', (event) => {
  const value = event.target.value;
  publishValue('country', value);
});

// The sample function publishValue below takes a link name and single string
// value and publishes the value on the link name. This causes all visuals on
// any loaded dashboards that are subscribed to the given link to filter
// themselves by the selected value. A visual can be set to subscribe to an
// arbitrary link name by adding a cross-source link using that link name and
// assigning any relevant field to that link.
```

```
// PUBLISHER_ID is an arbitrary string that subscribers can use to associate a
// message with who sent it.
const PUBLISHER_ID = 'Embedding Application';
async function publishValue(linkName, value) {
  const embedManager = await getEmbedManager();
  const message = {
    type: 'selection',
    valueType: 'ATTRIBUTE',
    ranges: [
      {
        operation: 'IN',
        value: value
      }
    ]
  };
  const options = {
    publisherId: 'PUBLISHER_ID'
  };

  await pubSubReady;
  embedManager.publish(
    linkName,
    message,
    options
  );
}

// This sample function creates a subscription to the linkname provided using the
// handler provided. The returned unsubscribe function should be stored and
// called when the subscriber should stop receiving messages.
async function subscribe(linkname, handler) {
  const embedManager = await getEmbedManager();
  await pubSubReady;
  return embedManager.subscribe(linkname, handler);
}

// The following code provides an example of how to subscribe to a linkname on
// page load and receive the latest value published. It creates a simple alert
// popup on receipt of each message.
function subscriptionHandler(message, publisherId) {
  if (message === null) {
    alert(`${publisherId} cleared its publication`);
  } else {
    const value = message.ranges[0].value;
  }
}
```

```
        alert(`${publisherId} published ${value}`);  
    }  
    const countryUnsubscribe = subscribe('country', subscriptionHandler);
```

Custom Chart Support for Cross-Visual Links and Filters

This applies to: *Visual Data Discovery*

The `cmp-chart` CLI supports the ability to publish and subscribe to cross-visual links. To implement publish/subscribe cross-visual filtering for custom charts, use the CLI to edit your charts and enable the controls for publish and subscribe. See [Part 4: Custom Chart Controls](#).



Note: Publish should only be enabled if the custom chart uses the context menu and filtering.

Cross-source links and same-source links are automatically populated and supported on the **Cross-Visual Filtering** tab of the [Dashboard Interactions dialog](#) for custom charts when they are added to a dashboard, in the following circumstances.

- When a custom chart has the **Filter** option in its context menu, same-source links appear in the **Published filters** and **Subscribed filters** sections of the tab.
- When a custom chart does *not* have the **Filter** option in its context menu, same-source links appear in the **Subscribed filters** section of the tab, but no **Published filters** section is shown.
- When two custom charts using different data sources are added to the dashboard and a cross-source link is added between their data sources, the cross-source link appears in the **Published filters** section for the chart that can publish the link (the chart using the first data source in the cross-source link) only. However, the cross-source link appears in the **Subscribed filters** section for both charts.
- Cross-visual filters are *automatically* applied to custom charts when they are added to a dashboard, in the following circumstances.
 - When two custom charts using the same data source are added to the dashboard, a cross-visual filter specified for the same-source link field on one custom chart is automatically applied to the other custom chart.
 - When two custom charts using different data sources are added to the dashboard and a cross-source link is added between their data sources, a cross-visual filter specified for the cross-source link field on one custom chart is automatically applied to the other custom chart.

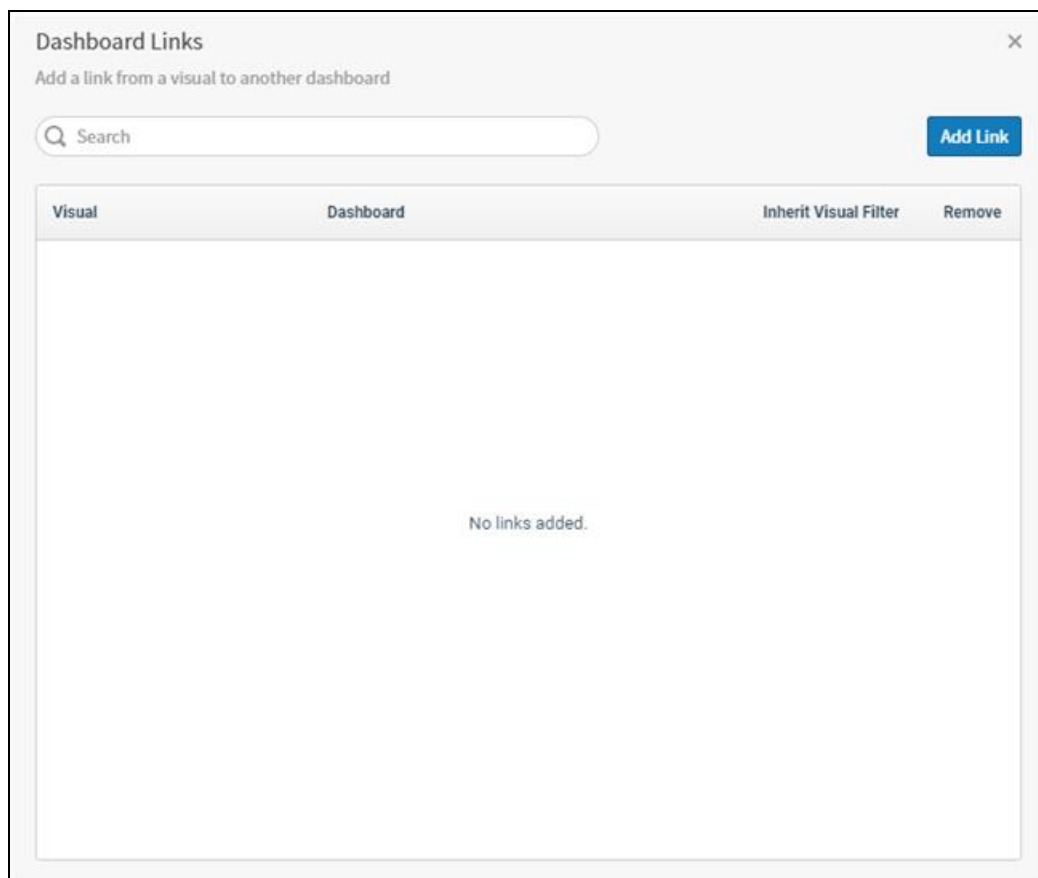
Link a Dashboard

This applies to: *Visual Data Discovery*

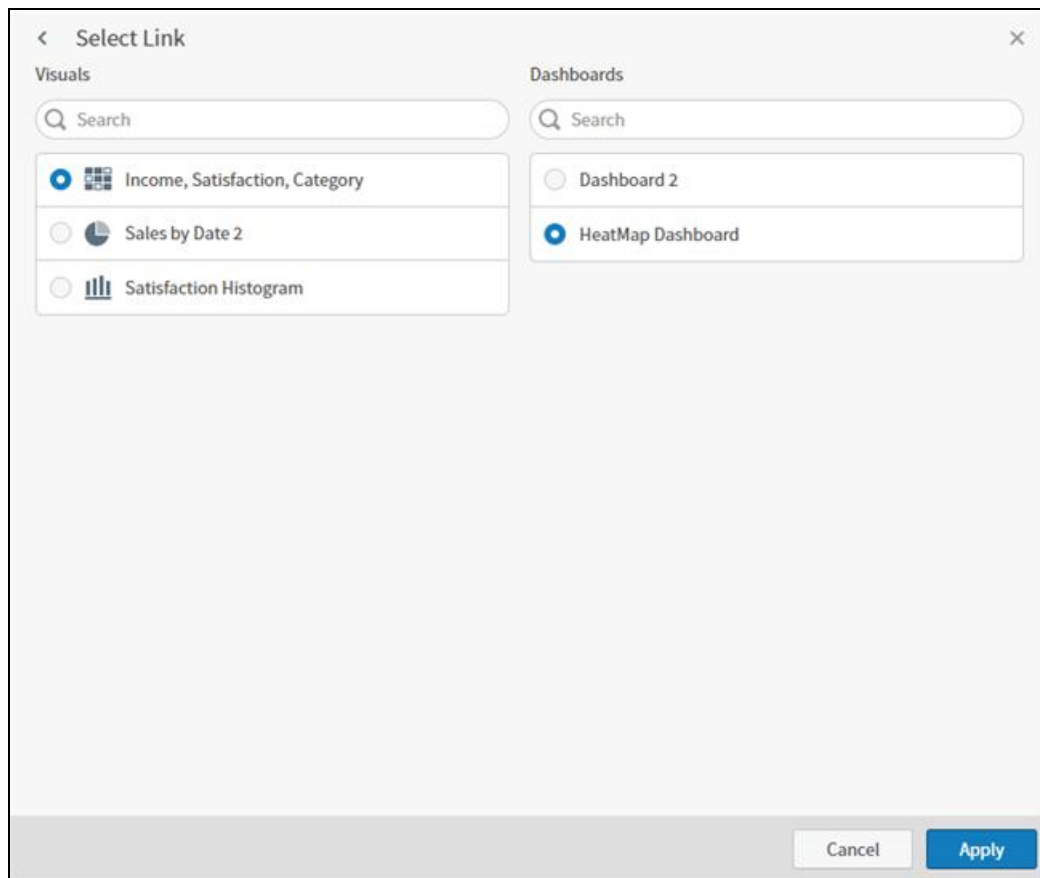
While working with your dashboard, you may need to analyze data from other data discovery dashboards. You can link a visual from your dashboard to another dashboard. This allows you to quickly access other dashboards with related information. To link dashboards, you must have permissions to share and link dashboards. When linking one dashboard to another, you can elect to have the target dashboard inherit the filters from the source dashboard.

Link a dashboard visual to another dashboard

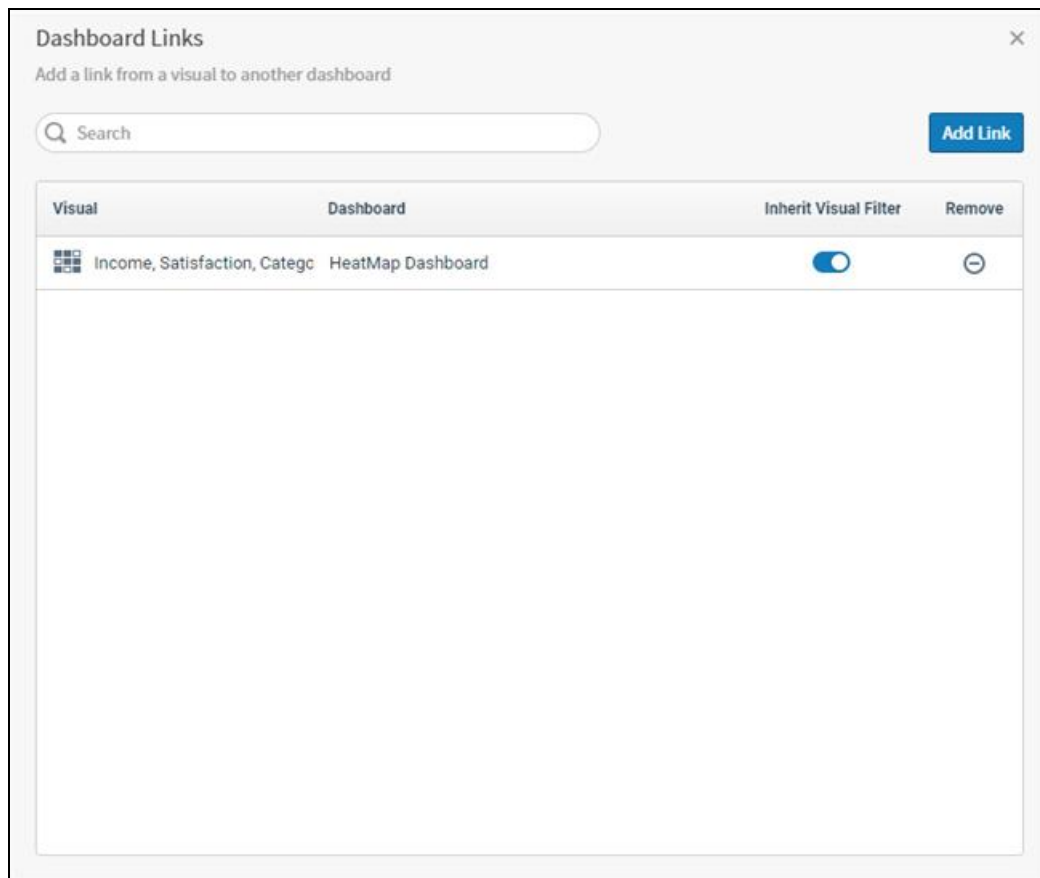
1. Open the dashboard you want to link.
2. Select dashboard links  on the [dashboard icon bar](#). The Dashboard Links dialog appears.



3. Select **Add Link**. The Select Link dialog opens.



4. Select a visual and dashboard to link, then select **Apply**. The Dashboard Link dialog opens, showing the visual and dashboard links.



5. By default, **Inherit Visual Filter** is enabled, and the dashboard passes the filters currently used on the dashboard (or the filters applied based on what is selected when the dashboard link occurs) to the linked dashboard. If you do not want the filters from the dashboard carried over, disable **Inherit Visual Filter**. The filters are only carried over if the dashboards are using the same data source configuration.
6. Close the dialog.
7. [Save](#) the dashboard to save the dashboard link settings.
8. On the [visual drop-down menu](#) for the linked visual, a new option in the following format appears:

 Go to "<dashboard>"



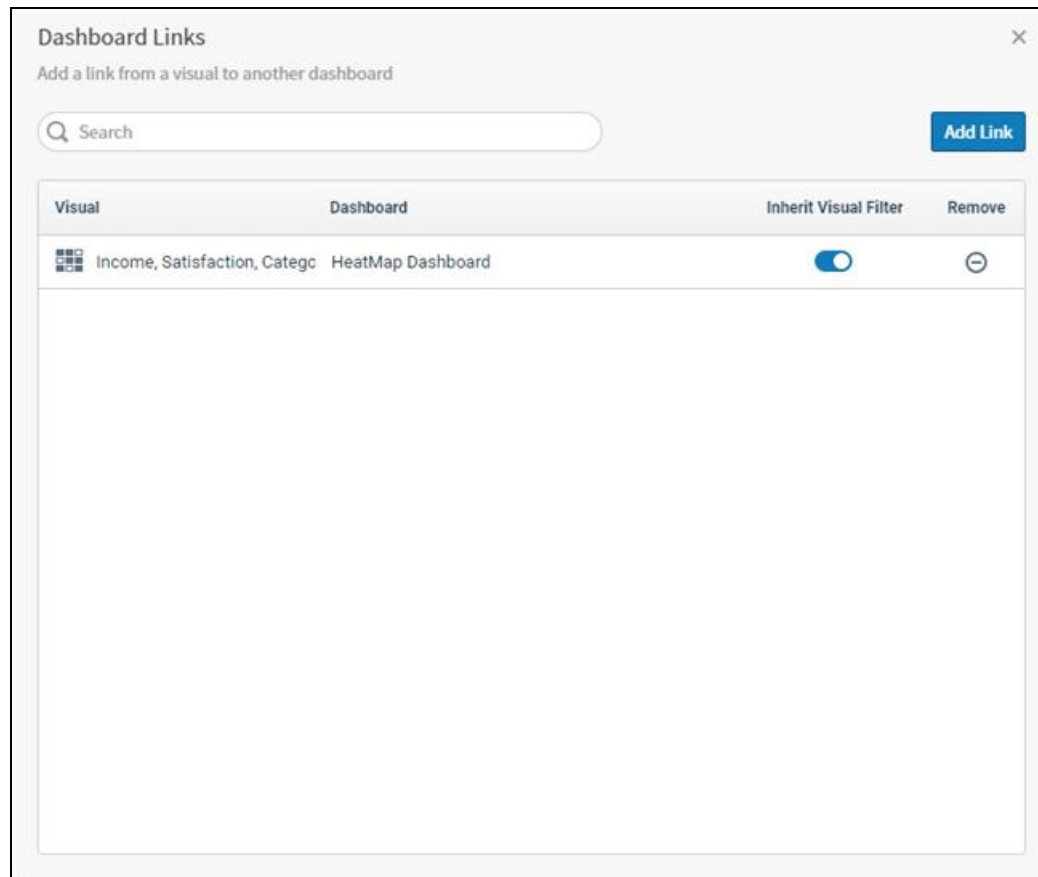
Select this option to jump to the linked dashboard.

Navigate to a linked dashboard

- Select the  Go to "<dashboard>" link on the [visual drop-down menu](#).
- You can also navigate to the linked dashboard by selecting **LINK** on the dashboard [context menu](#).

Delete a dashboard link

1. Open the dashboard containing the visual you want to unlink.
2. Select  on the [dashboard icon bar](#). The Dashboard Links dialog appears showing the links to other dashboards.



3. On the Dashboard Links dialog, select the visual and select the remove (⊖) icon. The link is removed.
You must remove all links to a dashboard before you can delete the dashboard.
4. [Save](#) the dashboard to save the dashboard link settings.

Save a Dashboard

This applies to: *Visual Data Discovery*

When you create a new dashboard, you can save it with no content in the [library](#). You are prompted to add a new visual or an existing visual, but you can add a rich text snippet or simply save the dashboard and return to edit it later. The dashboard is saved in the [library](#).

When you attempt to save changes to a dashboard, Symphony automatically saves any changes to:

- local visuals
- rich text snippets
- filter snippets
- added and repositioned shared visuals with no unsaved data changes

If your dashboard includes shared visual gallery visuals, Symphony checks to for unsaved data changes to the visuals. If there are unsaved changes, you can elect to save each affected visual when you save the dashboard.



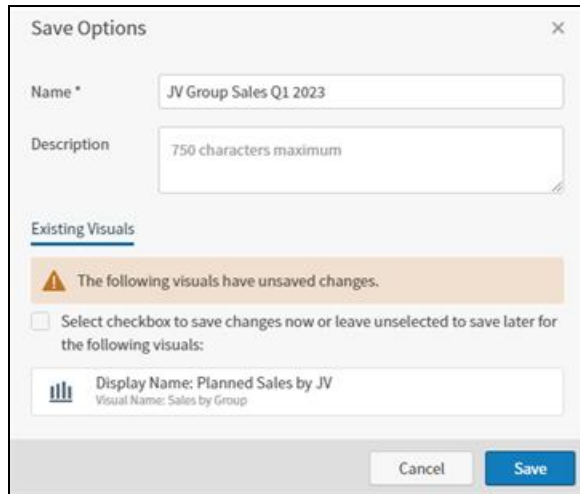
Note: When you save a dashboard, only the last time bar field you were using and its range and playback configuration are saved.

The following factors affect your ability to save a dashboard and its visuals.

- You must log in as an Owner or Editor of a dashboard, or have the **Create Dashboards** [privilege](#).
- Shared visual gallery visuals are saved if you have **Create Visuals** (or **Administer Visuals**) [privilege](#).
- The visuals on the dashboard will only be saved if write [permission](#) for the visual has been granted to the user, one of the user's groups, or the user's Symphony account. See [About Visual Permissions](#).

Save a dashboard

1. In the dashboard header, select the Save icon () on the [dashboard icon bar](#). (The Save As () icon allows you to make a [copy](#) of the dashboard.)
The Save Options dialog appears.



Save Options

Name *

Description

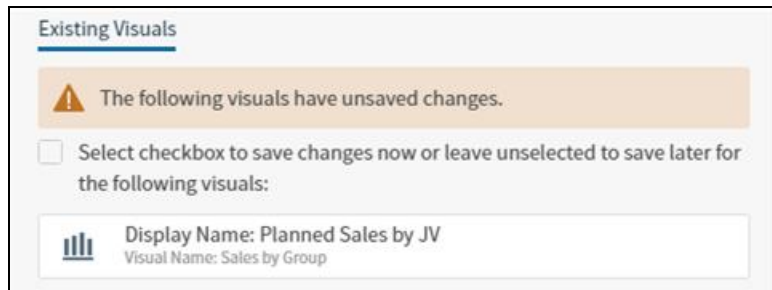
Existing Visuals

 The following visuals have unsaved changes.

☐ Select checkbox to save changes now or leave unselected to save later for the following visuals:

 Display Name: Planned Sales by JV
Visual Name: Sales by Group

2. In the **Name** box, enter a title for your dashboard. This is the name by which the dashboard will be saved.
 - i. If you want to save the dashboard using a different name, change it here. The original dashboard is renamed. See [Rename A Data Discovery Dashboard](#)
 - ii. If you want to make a copy of a dashboard using a different name, see [Copy A Dashboard](#).
3. If you want to provide details about your dashboard, do this in the **Description** box. A maximum of 750 characters can be specified. Leading and trailing spaces are not allowed.
4. Review the list of shared visuals with unsaved changes on the **Existing Visuals** tab, if there are any.



Existing Visuals

 The following visuals have unsaved changes.

☐ Select checkbox to save changes now or leave unselected to save later for the following visuals:

 Display Name: Planned Sales by JV
Visual Name: Sales by Group



- Archive of documentation for Logi Symphony v24

Select the checkbox on this tab to save the changes to the visuals. Leave the checkbox cleared if you do not want to save the changes to the existing visuals. When you save them, the visuals are changed on every dashboard on which they are used. If you do not save the visuals, your changes will be discarded when you close the dashboard (a warning dialog displays first).

5. Select **Save** to save the dashboard or **Cancel** to cancel.

Rename a Data Discovery Dashboard

This applies to: *Visual Data Discovery*

When you build a dashboard, it is assigned a default name. You can change the name of your dashboard any time. You can rename it at the top of the dashboard or you can rename it when you save it.



Note: You can also copy a dashboard and save the copy with a new name. See [Copy A Dashboard](#).

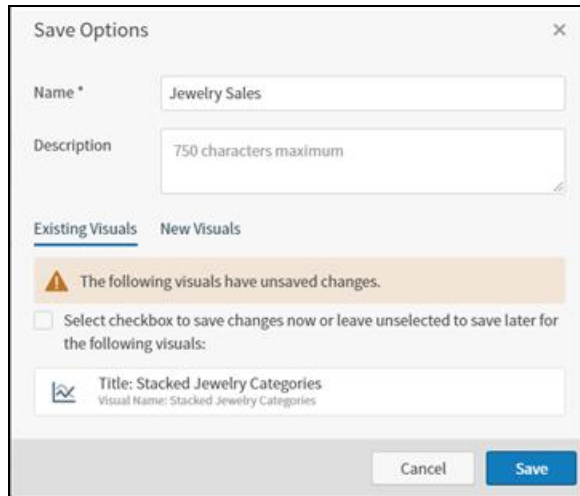
Rename a dashboard at the top of the dashboard

1. Select **Library** on the [UI menu](#). The library displays dashboards in a table (list) format.
2. [Edit](#) the dashboard you want to rename.
3. Select the name of the dashboard at the top of the dashboard.
4. Specify the **new** name for your dashboard.
5. [Save](#) the dashboard.

Rename a dashboard when you save it

1. Select **Library** on the [UI menu](#). The library displays dashboards in a table (list) format.
2. [Edit](#) the dashboard you want to rename.
3. In the dashboard header, select  in the upper right corner of the dashboard.

The Save Options dialog appears.



The image shows a 'Save Options' dialog box with a close button (X) in the top right corner. It contains two text input fields: 'Name *' with the value 'Jewelry Sales' and 'Description' with the placeholder '750 characters maximum'. Below these fields are two tabs: 'Existing Visuals' (selected) and 'New Visuals'. Under the 'Existing Visuals' tab, there is an orange warning banner that says 'The following visuals have unsaved changes.' Below the banner is a checkbox labeled 'Select checkbox to save changes now or leave unselected to save later for the following visuals:'. Under this checkbox, there is a list of visuals, with the first one being 'Title: Stacked Jewelry Categories' and 'Visual Name: Stacked Jewelry Categories'. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

4. In the Name box, specify the **new** name for your dashboard.
5. Optionally modify the description of the dashboard in the **Description** box. A maximum of 750 characters can be specified. Leading and trailing spaces are not allowed.
6. Select **Save** to save the dashboard.

Dashboard Layouts

This applies to: *Visual Data Discovery*

Symphony's data discovery dashboard canvas uses an underlying grid layout, populated by information you add in widgets: visuals, rich text snippets, and filter snippets. You can:

- Move, rearrange, and resize widgets. See [Move, Swap, And Resize Visuals And Widgets In A Dashboard](#).
- Lock widgets in place by rows or columns to support your preferred layout. See [Lock And Unlock Widget Positions](#).
- Serve your dashboard information on a variety of screen sizes, making use of responsive dashboard behavior to support mobile devices. See [Using The Responsive Dashboard Layout](#).

New dashboards you create after upgrading to this version of Symphony use the grid layout by default.

Convert Dashboards

When you upgrade your environment, or import a dashboard from an earlier release, you must convert the dashboard to use the grid layout, widget locking, and responsive dashboard features. Converted dashboard widgets are presented in the responsive layout format in the same row and columnar layouts as in their previous configuration.

Convert a dashboard layout:

1. Open an imported dashboard or an existing dashboard after upgrading. Symphony prompts you to convert the dashboards to responsive format.
2. Select the **Convert Now** option to convert the dashboard to responsive layout.

Alternatively, select **X** to temporarily hide the conversion banner.

3. Save  the dashboard to save the converted dashboard.

Alternatively, use  to save the converted dashboard using a new name. The original dashboard remains unconverted and unchanged.

Note: Once converted, you can move, swap, and resize widgets more easily, [lock and unlock](#) widgets, and enable or disable the responsive layout as needed.

You can additionally convert the dashboard using the experimental API `api/dashboards/convert-layout/`.

API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.

Show or Hide the Conversion Option

Use the property `suppressAutoLayoutWarning` to control visibility of the conversion banner. By default, this is set to `false`, making the banner visible. In embedded environments, set to `true` to hide the banner.

If the banner is hidden, select the dashboard layout icon () to make the banner and conversion option visible again.

Move, Swap, and Resize Visuals and Widgets in a Dashboard

This applies to: *Visual Data Discovery*

Symphony's dashboard canvas is populated by information you add in widgets: visuals, rich text snippets, and filter snippets. Move and rearrange the sequence of these widgets, resize your widgets, or lock some in place by layout row or layout columns to present your information effectively on a variety of screen sizes. See [Using The Responsive Dashboard Layout](#).

The dashboard layout works in a grid format, grouping widgets in rows and columns when you add them in [Edit mode](#). Symphony automatically adds new widgets in rows, up to 4 widgets side by side in a single row. You can move, swap, or resize widgets to include more in a variety of arrangements.



Note: When you add a new widget, Symphony automatically sizes it to fit in with existing widgets (if any) in a row. If your dashboard contains only one widget, you can't move or resize it; the widget takes up the entire dashboard area.

Widget Indicators

When you hover over or grab a widget to move, swap, or resize it, Symphony may change your browser pointer to reflect an action you can take, such as resizing a widget, or can't take, such as resizing a locked widget. Additionally, indicators are shown in the dashboard itself, indicating where a widget will move to when you drop the widget.

Widget Indicator	Description / Actions
	Your browser pointer is hovering over a widget title pane or header, or hovering over a handle () for minimally-sized widgets. Select to grab and drag the widget to move or swap the widget.
	A handle you can select to grab and drag the widget for moving or swapping.
	A resizing handle you can select to resize the contents of your widget vertically and horizontally within the responsive row and column.
	Your browser pointer is hovering over the top or bottom of a widget row. Select to drag to resize the row and the widgets in it taller or shorter. If you have stacked widgets in a column in the row, they are resized proportionally.
	Your browser pointer is hovering over the left or right side of a widget column. Select to drag and resize the column and the widgets in it wider or narrower.

Widget Indicator	Description / Actions
	You can't move, swap, or resize the widget you are dragging here.
	Swap the widget you are dragging with the widget you are hovering over. The two widgets swap locations, each occupying the same footprint and position as each original widget. You can swap widgets not locked in place with widgets that are locked in a dashboard. See Lock And Unlock Widget Positions .
	Insert the widget you are dragging next to the widget, widget column, or widget row, as indicated by a solid blue guidance line at the insertion point. Drop your widget when the solid blue line is alongside the position you want. - Widget: Drag a widget above, below, or next to another widget. - Widget column: Drag a widget above, below, or next to a widget to stack them together in the same layout row or layout column. - Widget row: Drag a widget above or below a row to insert the widget as a new row.  Note: If a widget position is row or column locked, the solid blue guidance line is a dashed gray line, indicating a widget can't be inserted in the position you want. See Lock And Unlock Widget Positions.

Move Widgets

After you've added two or more widgets of any type to your dashboard, you can rearrange the widgets to position your visuals, rich text snippets, or filter snippets in a layout convenient to your users. To move a widget to a specific place on your dashboard, grab it by the title pane, header, or handle () while in [edit mode](#), then drag and drop to the desired location.

Swap Widgets

After you've added two or more widgets of any type to your dashboard, swap widgets quickly and easily to reorder their position in the dashboard.

- To swap unlocked widgets, grab one by the title pane, header, or handle while in [edit mode](#), then drag and drop over the widget you want to swap it with.
- To swap an unlocked widget with a locked widget, grab the unlocked widget by the title pane, header, or handle while in [edit mode](#), then drag and drop over

the widget you want to swap it with.

- To swap locked widgets, unlock at least one widget, swap the widgets, then relock the widgets. See [Lock And Unlock Widget Positions](#).

Resize Widgets

After you've added two or more widgets of any type to your dashboard, you can resize the widgets to display the information more clearly. For example, pair a wide visual chart with a narrow rich text snippet of information to give context to your data.

Resize a widget

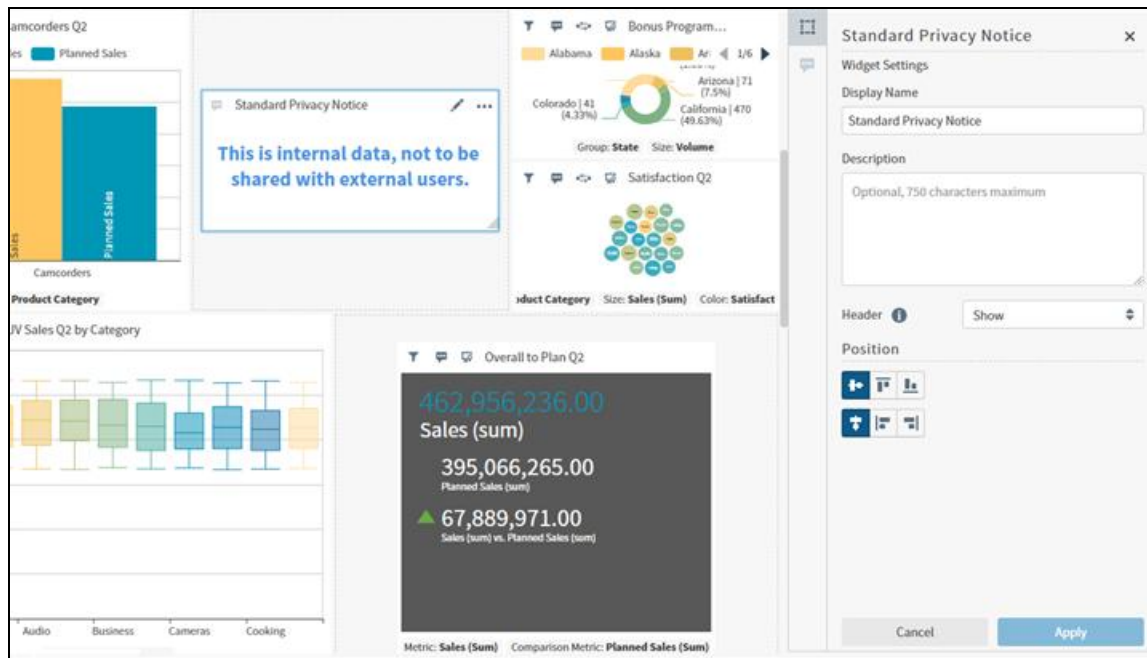
1. Select an unlocked widget in a dashboard you have open in [Edit mode](#).
2. Drag it by the handle () from an available side (top or bottom) to make it and the widgets in its row taller or shorter. Minimum height for a widget is 50 pixels.
3. Drag it by the handle () from an available side (left or right) to make it and the widgets in the column narrower or wider.
4. Alternatively, drag it horizontally, vertically, or diagonally using the resize handle () . Adjust the Position options for the widget in the Widget Settings sidebar menu to frame it appropriately in the widget cell.
5. Save your changes.

Position Resized Widgets

After you've used the resizing handle () to resize the contents of a widget, select a Position option to align it the way you want in the widget cell in the Widget Settings panel. When you select a position option, the icon colors invert to indicate the selection. Select **Apply** to align the widget using your new selections.

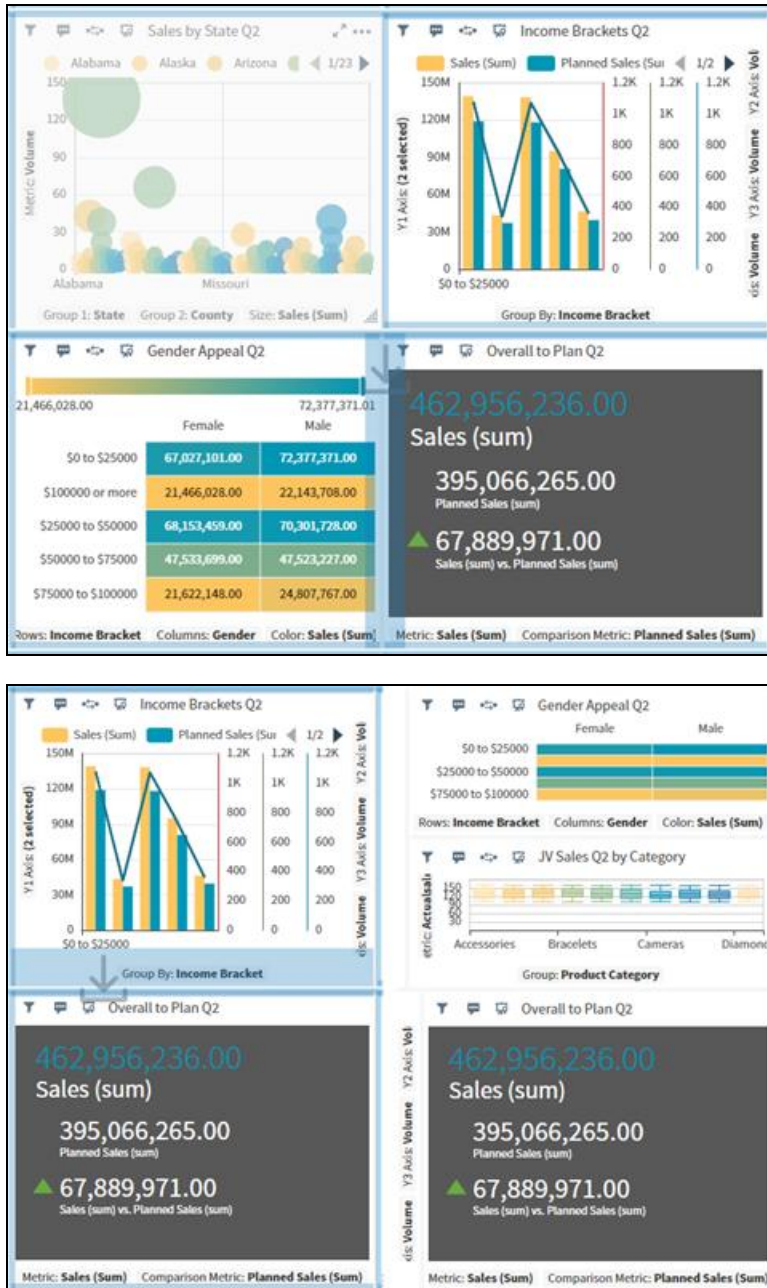
Position Alignment	Description
	Select to align the widget centered, horizontally.
	Select to align the widget at the top of the available area, horizontally.

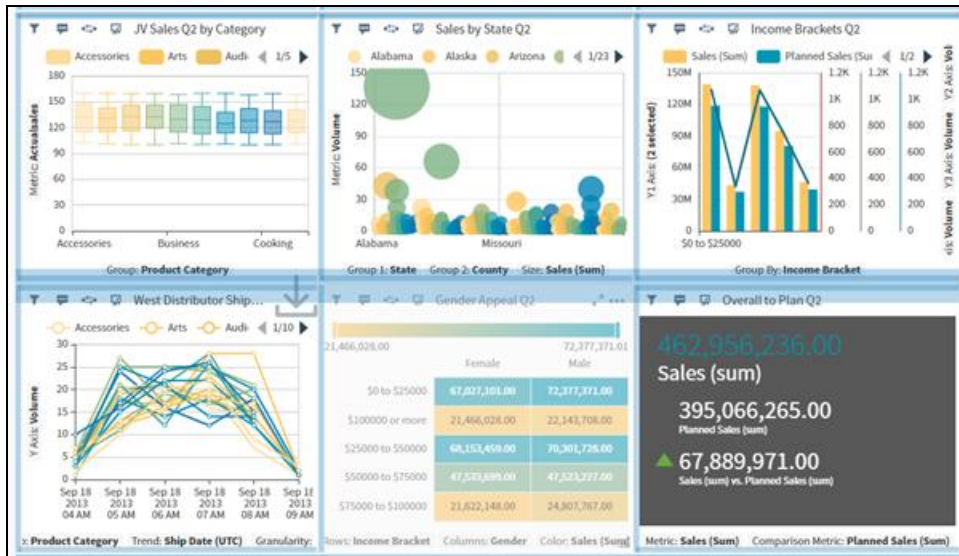
Position Alignment	Description
	Select to align the widget at the bottom of the available area, horizontally.
	Select to align the widget centered, vertically.
	Select to align the widget to the left of the available area, vertically.
	Select to align the widget at the right of the available area, vertically.



Placement Indicators

Placement indicators help you see where you can move a widget you have selected to drag and reposition. A wide bar appears along the edge of the target widgets when you attempt to reposition a widget above, below, or alongside a widget, or as a new row between widget rows.





Lock and Unlock Widget Positions

This applies to: *Visual Data Discovery*

The dashboard layout provides a flexible grid format, grouping widgets in rows and columns you can move, swap, or resize to meet your users' needs. Additionally, you can lock some widgets in place by layout row or layout column to preserve their position and placement in your dashboard.

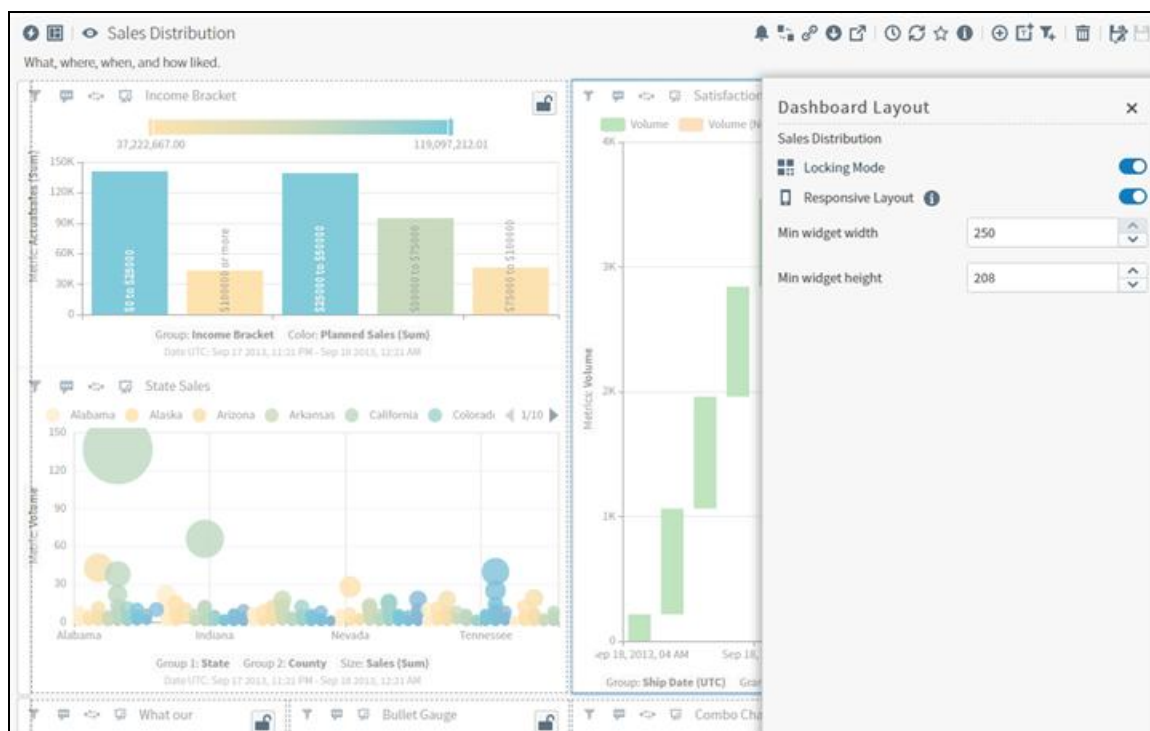


Note: You must convert older dashboard layouts to use this feature. See [Convert Dashboards](#).

Lock and unlock widgets

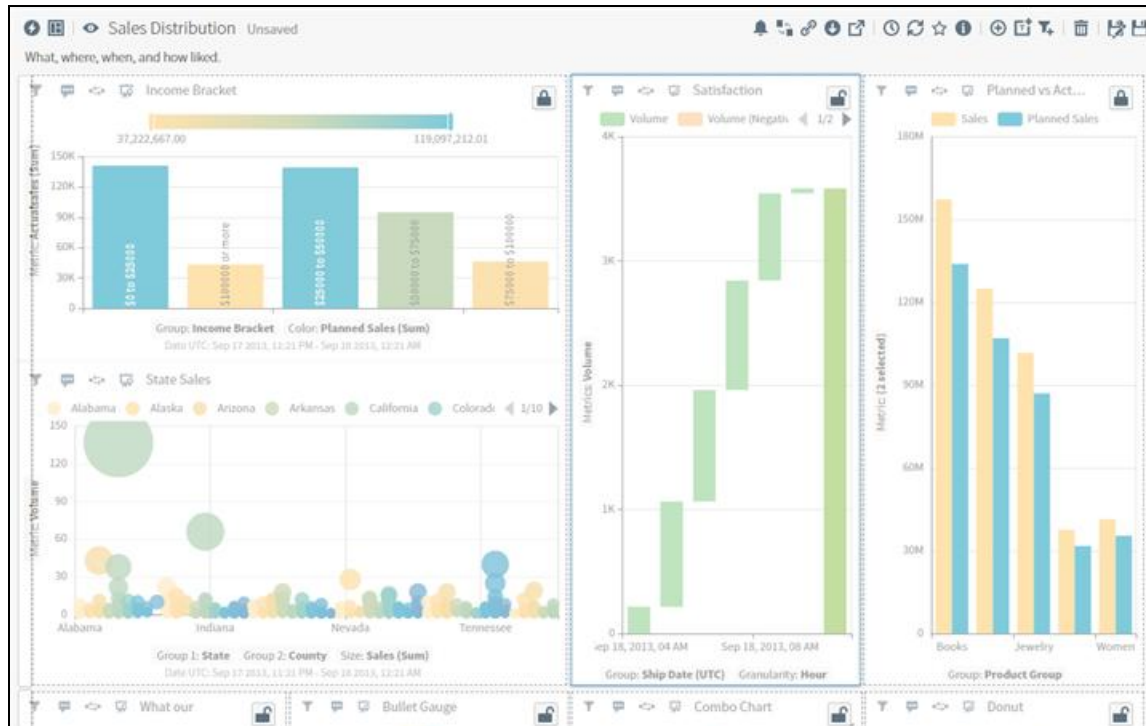
1. Open a dashboard as an Owner or Editor.
2. Select the Dashboard Layout icon . The Dashboard Layout work area opens. Select the toggle and enable Locking Mode.

The dashboard layout changes, displaying locked or unlocked icons on widgets and locked icons on locked rows.

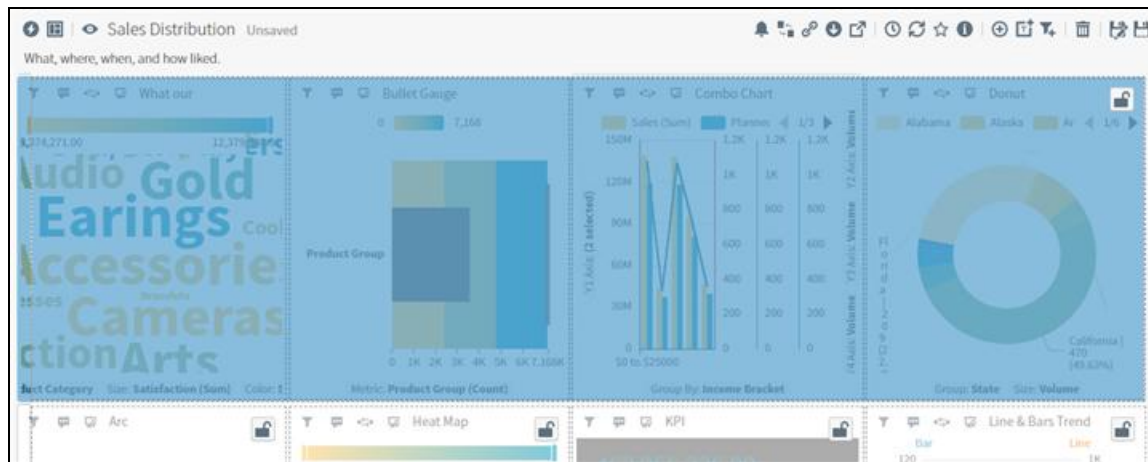


3. To lock a widget, select  to lock the column position and row height of the widget. The icon changes to  to show it is locked.

To unlock a widget, select  to unlock the column position and row height of the widget. The icon changes to  show it is unlocked.



4. To lock or unlock a row of widgets, select the far left border of a row to highlight the row. The dashboard layout changes, displaying an unlocked icon on the selected unlocked row.



5. Select  to lock the row's height and position, or  to unlock the row.

6. Select the Dashboard Layout icon  and disable the Locking Mode toggle.

7. Save your changes.

After you've locked the position of some of the widgets in your dashboard, you can't:

- Change the width of the locked layout column.
- Move the locked widgets.
- Change the height of a locked layout row or any layout row that includes locked widgets.
- Insert widgets next to or among some sides of locked widgets. Instead of a solid blue guidance line, Symphony displays a gray dashed line.

You can swap an unlocked widget with a locked widget: select and drag an unlocked widget to swap it with a locked widget. See [Move, Swap, And Resize Visuals And Widgets In A Dashboard](#).

Using the Responsive Dashboard Layout

This applies to: *Visual Data Discovery*

Symphony's dashboard layout is responsive, building on a grid format that presents your dashboards to Users with Viewer access a flexible, mobile-friendly layout on a variety of screen sizes. Symphony rebuilds the dashboard layout on smaller screen sizes for any widget wider than 250 pixels. Preview the dashboard in [View mode](#).

Edit mode:



View mode:



When you add widgets in [Edit mode](#), Symphony groups the widgets in rows and columns. These rows include up to four widgets side by side in a single row. When you add a fifth widget to a dashboard that includes four widgets in a row, Symphony starts a new row with the new widget.

If you move, resize, or reposition widgets, then add a new one, Symphony will add any new widgets to the first row that contains fewer than three widgets.

Manage Your Dashboard Layout

Select the Dashboard Layout icon () to open the Dashboard Layout work area. Here you can enable and disable locking mode, the responsive layout, and manage the minimum widget widths and heights.

Dashboard Layout Option	Description / Actions
Locking Mode	 Enable and disable the toggle to control widget locking in this dashboard. See Lock And Unlock Widget Positions .

Dashboard Layout Option	Description / Actions
Responsive Layout	 Enable and disable the toggle to control responsive layout for this dashboard.
Min widget width	By default, the width is 250 pixels. Set from 1 to 250 pixels. When the dashboard is in View mode, widgets are resized to no smaller than the defined size, based on browser window size.
Min widget height	By default, the height is 50 pixels. Set from 1 to 250 pixels. When the dashboard is in View mode, widgets are resized to no smaller than the defined size, based on browser window size.



Note: Use the property `supressResponsiveLayout` to control if the responsive layout is enabled or disabled. By default, this is set to `false`, enabling responsive layout. In embedded environments, set to `true` to suppress responsive layout.

About Dashboard Permissions

This applies to: *Visual Data Discovery*

Dashboard permissions allow you to permit your entire tenant, groups within your tenant, or users within your tenant to read, write, or delete a dashboard. This allows you to share a dashboard with other users.

If a user belongs to a group that has the **Administer Dashboards** [privilege](#) enabled, the user can read, add, modify, or remove any dashboard in the tenant. However, if the user does not belong to a group with this privilege enabled, the user can still be granted permission to read, write, or delete specific dashboards in the tenant using dashboard permissions. Dashboard permissions allow users in an tenant or group to read, write, or delete a dashboard, regardless of any group privilege settings that ordinarily limit their ability to do so.



Note: To manage permissions of a dashboard, a user must meet **one** of the following criteria:

- Must be an administrator, belonging to the [Administrators](#) group or [Content Distributors](#) group.
- Must belong to a group with the **Administer Dashboards** (ROLE_ADMINISTER_DASHBOARDS) [privilege](#) enabled.
- Must belong to a group with the **Manage Dashboard Permissions** (ROLE_PERMISSION_DASHBOARDS) [privilege](#) enabled. If your user definition has only this privilege (and *not* the **Administer Dashboards** privilege), you will only be able to manage permissions for the dashboards for which you have `READ` permission.

In addition, you may be restricted in which permissions you can assign. You can only assign permissions equivalent to your own. For example, if your user account has read permission for a dashboard, you can grant and revoke the read option available on the Dashboard Permissions panel. If you have write permission for a dashboard, you can grant and revoke the write option on the Dashboard Permissions panel.



Note: If your user account does not have read permission for a dashboard, you cannot see the dashboard on the Library page.

Dashboard permissions are determined using a most permissive model. For more information, see [How Dashboard Permissions Are Determined](#).

Dashboard permissions can also be managed using the API endpoints `GET /api/dashboards/{dashboardId}/acls`, `PUT /api/dashboards/{dashboardId}/acls/bulk`, `GET /api/inventory/DASHBOARD/{id}`, and `GET /api/user/permissions/dashboards/{dashboardId}`.

API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.



- Users who have the [group privilege](#) **Export Dashboards** (ROLE_EXPORT_DASHBOARDS) and READ for dashboards can export dashboards.
- Users who have [group privileges](#) of **Manage Connections** (ROLE_MANAGE_CONNECTIONS), and **Administer Sources** (ROLE_ADMINISTER_SOURCES), and **Administer Visuals** (ROLE_ADMINISTER_VISUALS), and **Administer Dashboards** (ROLE_ADMINISTER_DASHBOARDS) can import dashboards.

For more information, see the following topics:

- [Export Dashboards](#)
- [Import Dashboards](#)
- [Grant Permissions For A Data Discovery Dashboard](#)
- [Modify Permissions For A Dashboard](#)
- [Revoke Permissions For A Dashboard](#)
- [How Dashboard Permissions Are Determined](#)

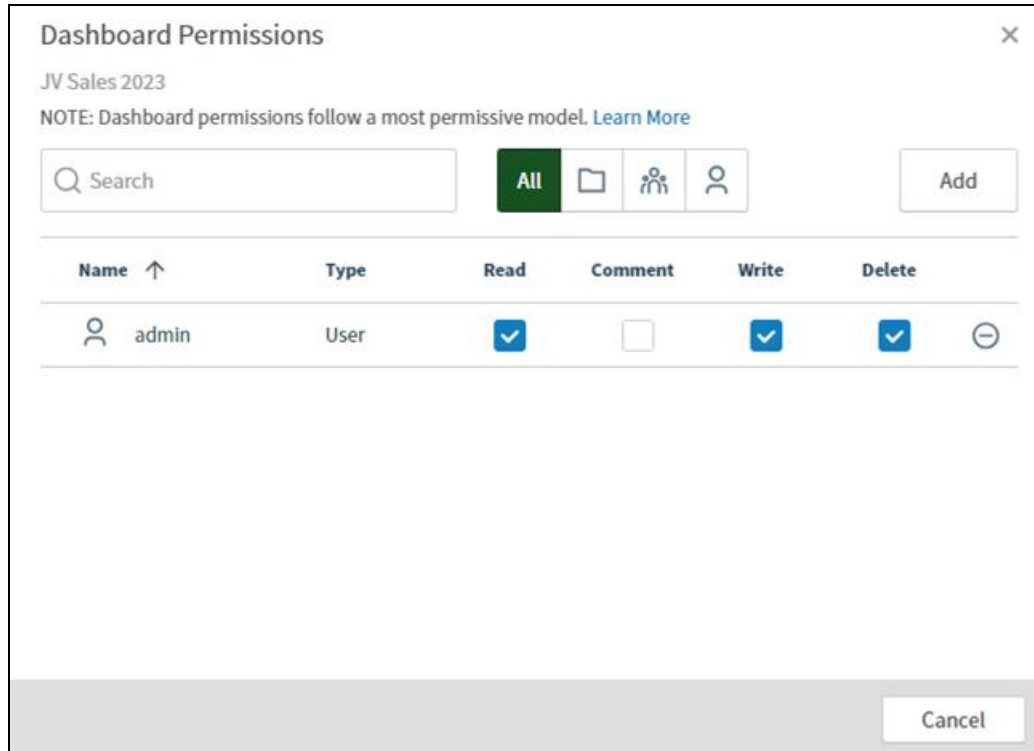
Grant Permissions for a Data Discovery Dashboard

This applies to: *Visual Data Discovery*

You can grant read, write, or delete dashboard permissions for your tenant, groups in your tenant, or specific users in your tenant.

Grant permissions for a dashboard

1. Log in as an administrator or a user belonging to a group that includes the **Administer Dashboards** or the **Manage Dashboard Permissions** [privilege](#). If you are logged in as a tenant admin, verify you're in or switch to the appropriate tenant.
2. Select **Library** on the [UI menu](#). The library displays the list of dashboards.
3. Locate the row for the dashboard in the list and select the permissions icon in the Permissions column. The Dashboard Permissions dialog appears.



Dashboard Permissions ×

JV Sales 2023

NOTE: Dashboard permissions follow a most permissive model. [Learn More](#)

Q Search

All    Add

Name ↑	Type	Read	Comment	Write	Delete
 admin	User	☒	☐	☒	☒ 

Cancel

4. Select **Add** on the Dashboard Permissions dialog and then select **Groups**, **Users**, or **Tenant** from the drop-down menu.



- i. If you select **Groups**, the Add Groups dialog appears, listing all the groups available in your tenant. The [supplied groups](#) are not shown; permissions can not be changed for those groups.
 - ii. If you select **Users**, the Add Users dialog appears, listing all the users available in your tenant.
 - iii. If you select **Tenant**, Read permission is selected for your tenant on the Source Permissions dialog.
 - iv. Members of the Administrators group have data access, read, write, and delete permissions for every data source in the tenant.
 - v. The user who creates a data source is automatically selected and has **Data Access**, **Read**, **Write**, and **Delete** permissions unless you revoke these permissions.
5. Select tenants or any specific groups or users you want to permit to read, write, or delete the dashboard and select **Apply**. The Dashboard Permissions dialog lists your selections.

Dashboard Permissions

JV Sales 2023

NOTE: Dashboard permissions follow a most permissive model. [Learn More](#)

All

Add

Name ↑	Type	Read	Comment	Write	Delete	
admin	User	☒	☐	☒	☒	
Visual Dat...	Tenant	☒	☒	☒	☐	

Cancel

Save

6. Select the **Read**, **Comment**, **Write**, or **Delete** checkboxes for a tenant, groups, or users to indicate what they can do with the dashboard. **Read** permission is assumed and is always selected. If you clear (uncheck) the **Read** box (revoke **Read** permission), permission for the entire dashboard is revoked for the tenant, group, or user after you save.
7. Select **Save**. The Save Details dialog appears, listing the changes that you made.

←

Save Details

×

JV Sales 2023 Q4

The following changes will be saved

Visual Data Discovery	Added
admin	Modified

Cancel

OK

8. Review the changes and select **OK**. The dashboard permissions are set.

Permissions for imported objects

When you [import dashboards](#), associated resources such as visuals, sources, and connections are imported as well. You can quickly grant default access levels to all imported and associated objects in your tenants by enabling **Share Default Access With All Users** at import time. Users are granted Data Access to Sources and Read access to Visuals and Dashboards.

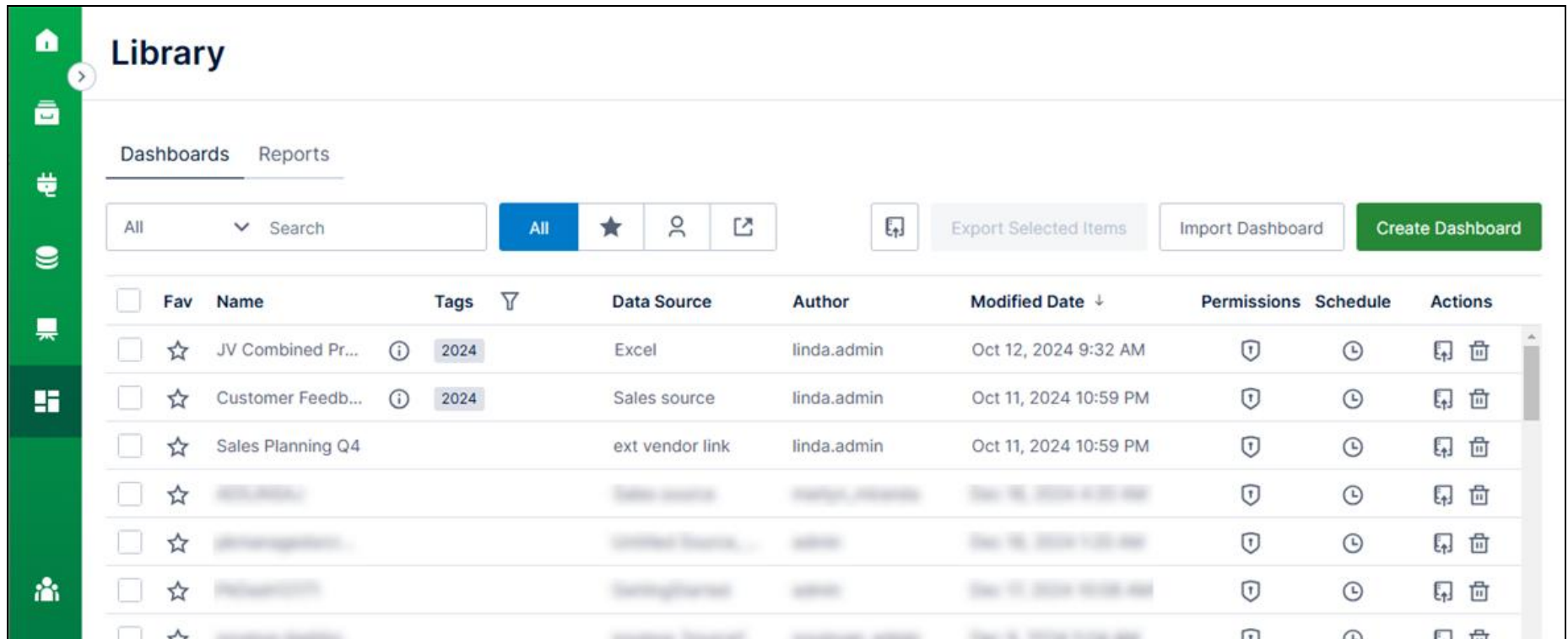
Modify Permissions for a Dashboard

This applies to: *Visual Data Discovery*

You can modify the dashboard permissions you granted to your tenant, to groups in your tenant, or to specific users in your tenant.

Modify permissions for a dashboard

1. Log into Symphony as an administrator or a user belonging to a group that includes the **Administer Dashboards** or the **Manage Dashboard Permissions** privilege.
2. Select **Library** on the **UI menu**. The library displays the list of dashboards.



The screenshot shows the 'Library' page in Logi Symphony. The left sidebar contains a green menu with icons for Home, Library, Reports, Dashboards, and Users. The 'Library' tab is selected. The main area has a 'Dashboards' tab and a 'Reports' tab. Below the tabs is a search bar with a dropdown menu set to 'All'. To the right of the search bar are buttons for 'All', a star icon, a user icon, a share icon, 'Export Selected Items', 'Import Dashboard', and a green 'Create Dashboard' button. The main content is a table of dashboards with the following columns: Fav, Name, Tags, Data Source, Author, Modified Date, Permissions, Schedule, and Actions. The table lists several dashboards, including 'JV Combined Pr...', 'Customer Feedb...', and 'Sales Planning Q4'. Each row has a checkbox in the 'Fav' column, a star icon, the dashboard name, a tag (e.g., '2024'), the data source, the author (e.g., 'linda.admin'), the modified date, a permissions icon (a shield with a 'T'), a schedule icon (a clock), and action icons (a share icon and a trash icon).

Fav	Name	Tags	Data Source	Author	Modified Date	Permissions	Schedule	Actions
☐	JV Combined Pr...	2024	Excel	linda.admin	Oct 12, 2024 9:32 AM			
☐	Customer Feedb...	2024	Sales source	linda.admin	Oct 11, 2024 10:59 PM			
☐	Sales Planning Q4		ext vendor link	linda.admin	Oct 11, 2024 10:59 PM			
☐	...		...	...	...			
☐	...		...	...	...			
☐	...		...	...	...			

3. Locate the row for the dashboard in the list and select the permissions icon in the Permissions column. The Dashboard Permissions dialog appears, showing current rights for tenants, groups, and users.



4. If you want to add permissions for all users in your tenant or for additional groups or users in your tenant, select **Add** on the Dashboard Permissions dialog and then select **Groups**, **Users**, or **Tenant** from the drop-down menu.
 - i. If you select **Groups**, the Add Groups dialog appears, listing all the groups available in your tenant. The [supplied groups](#) are not shown; permissions can not be changed for those groups.
 - ii. If you select **Users**, the Add Users dialog appears, listing all the users available in your tenant.
 - iii. If you select **Tenant**, Read permission is selected for your tenant in the Dashboard Permissions dialog. When finished, select **Apply**.
 - iv. Members of the Administrators group have read, write, and delete permissions for every dashboard in the tenant.
 - v. The user who created the dashboard is automatically selected and has **Read**, **Write**, and **Delete** permissions, although these permissions can be changed.
5. Modify the **Read**, **Write**, or **Delete** checkbox selections for the tenant or any of the users or groups on the Dashboard Permissions dialog to indicate what users in them can do with the dashboard.

Read permission is assumed and is always selected. If you clear (uncheck) the **Read** box (revoke **Read** permission), permission for the entire dashboard is revoked for the tenant, group, or user after you save.
6. Select **Save**. The Save Details dialog appears, listing the changes that you made.
7. Review the changes and select **OK**. The dashboard permissions are set.



Revoke Permissions for a Dashboard

This applies to: *Visual Data Discovery*

You can revoke the dashboard permissions you previously granted to your tenant, to groups in your tenant, or to specific users in your tenant.

Revoke permissions for a dashboard

1. Log into Symphony as an administrator or a user belonging to a group that includes the **Administer Dashboards** or the **Manage Dashboard Permissions** [privilege](#).
2. Select **Library** on the [UI menu](#). The library displays the list of dashboards.
3. Locate the row for the dashboard in the list and select icon in its Permissions column. The Dashboard Permissions dialog appears.
4. To completely revoke all dashboard permissions for the tenant or for a group or user, locate the row for the tenant, group or user on the Dashboard Permissions dialog and select the delete icon. The tenant, group, or user is removed from the dialog.

You can also revoke specific permissions by changing the checkbox selections for the tenant or group on the Dashboard Permissions dialog. If you clear (uncheck) the **Read** box (revoke **Read** permission), permission for the entire dashboard is revoked for the tenant, group, or user after you save. See [Modify Permissions For A Dashboard](#).

5. Select **Save**. The Save Details dialog appears, listing the changes that you made.
6. Review the changes and select **OK**. The dashboard permissions are set.

How Dashboard Permissions Are Determined

This applies to: *Visual Data Discovery*

The creator of a dashboard always has permission to read, write, and delete the dashboard. If the user who created the dashboard is removed from the Symphony environment, the dashboards they created are retained.

If conflicting dashboard permissions are specified for the tenant, the group within the tenant, and the user within the tenant, the permissions granted to the users in both are determined using a most permissive model. The users are granted the highest level of permission specified for the tenant, group, and user.

For example, if the tenant is granted read and write permissions, but Group A is granted write and delete permissions, users in Group A will be able to read, write, and delete the dashboard. However, users in any other groups in the tenant will only be able to read and write the dashboard.

Here's another example. If the tenant is granted read, write, and delete permissions, but the groups are only granted read permissions, all users in the tenant will have read, write, and delete permissions.

How source permissions affect dashboard use

Users must have access to the data sources used on the dashboard to see the data from the data sources.

For example, assume your tenant is granted read, write, and delete permissions for a dashboard. If Linda (a user in the tenant) does not have access to the data source used by the dashboard or if Linda is not assigned to any group at all, Linda will be able to see the dashboard in the library and will be able to open the dashboard, but no data will be shown.

Now suppose the dashboard uses three data sources on different visuals in the dashboard, but Linda only has access to two of the data sources. Linda will be able to see only the visuals that use data from the two data sources to which she has access.

Permissions for imported objects

When you [import dashboards](#), associated resources such as visuals, sources, and connections are imported as well. You can quickly grant default access levels to all imported and associated objects in your tenants by enabling **Share Default Access With All Users** at import time. Users are granted Data Access to Sources and Read access to Visuals and Dashboards.

Export Dashboards

This applies to: *Visual Data Discovery*

You can export your dashboards in a variety of formats. Exported dashboards enable you to share your data with others. JSON configuration exports allow you to transfer a dashboard to another Symphony environment. See [Import Dashboards](#).



Note: Special characters are not supported for exports. If your visual name or the name of the data source contains special characters, change the name before continuing.



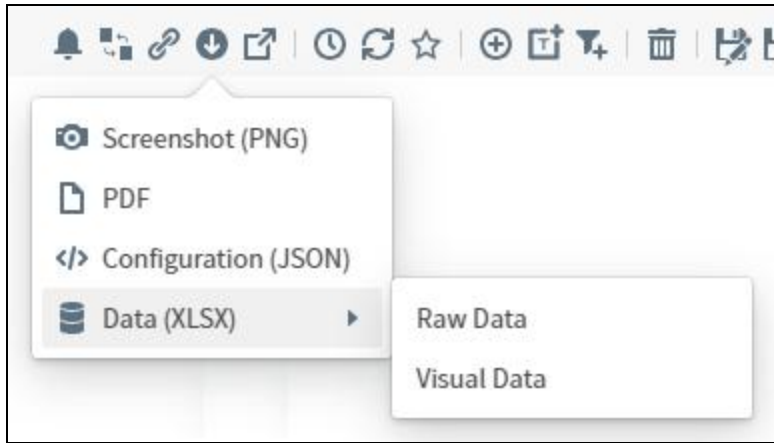
Note: To export a dashboard, you must be a user belonging to a group with the **Export Dashboards** [privilege](#).

Dashboards can be exported in the following formats:

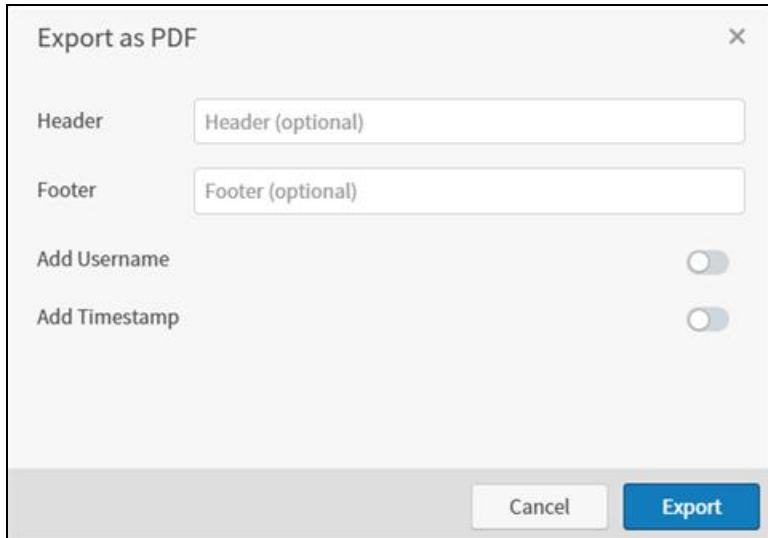
- PNG Screenshot (as an image).
- PDF file (as an image).
- JSON configuration (for one or more entire dashboards). JSON exports include [dashboard interactivity profile](#) settings to allow import of the same interactivity profile.
- XLSX format - as a spreadsheet with Raw Data or Visual Data. Each visual is included on its own sheet.

Export a dashboard

1. On the dashboard, select  on the dashboard icon bar. A drop-down menu appears.



2. Select an export file format.
 - i. When you select **Screenshot (PNG)**, Symphony creates a PNG file. This is downloaded to your browser.
 - ii. When you select **PDF** format, the Export as PDF dialog appears.



The image shows a dialog box titled "Export as PDF" with a close button (X) in the top right corner. Inside the dialog, there are two text input fields: "Header" with the placeholder text "Header (optional)" and "Footer" with the placeholder text "Footer (optional)". Below these fields are two toggle switches: "Add Username" and "Add Timestamp", both of which are currently turned off. At the bottom of the dialog, there are two buttons: "Cancel" and "Export".

Optionally, specify a header and footer for the PDF. Slide the **Add Username** switch on (to the right) to add a user name to the PDF. Slide the **Add Timestamp** switch on (to the right) to add a time stamp to the PDF. Then select **Export**.

- iii. When you select **Configuration (JSON)** format, the JSON file is automatically downloaded to your browser.
- iv. When you select **Data (XLSX) > Raw Data** or **Data (XLSX) > Visual Data** format, the XLSX file is automatically downloaded to your browser.

Export multiple dashboards

1. Log in as a user with the [Export Dashboards privilege](#). Open the Library to view a list of the dashboards you can access.
2. Select to export one or more dashboards by selecting the checkbox for a dashboard to export. The **Export Selected Items** button becomes active.
3. Select **Export Selected Items**. Your browser downloads the selected items in JSON format, placing them in the location you select or the default location for your browser downloads.

Dashboards exported using the export API can include source cache settings for the data and statistics caches in the payload.

API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.



Import Dashboards

This applies to: *Visual Data Discovery*

Import one or more dashboards

1. Log in as an admin or user with the **Manage Connections, Administer Sources, Administer Visuals and Administer Dashboards** [privilege](#). If you are logged in as a tenant admin, verify you're in or switch to the appropriate tenant.
2. Select **Library** from the [menu](#). The library displays dashboards in a table (list) format.
3. Select **Import Dashboard** in the library work area. The Import Dashboards dialog opens.
4. Browse to and choose the `json` file for the dashboards you want to import, then select **Open**.

The Import Dashboards dialog populates with information about the objects that make up your dashboards and the settings you can use to define how your

software inserts each object.

5. Add and remove tenants by selecting the **Tenants** field. Add or remove them from the list or field.

Note: Only system admins or members of the Content Distributors group (VDD Content Distributor) see the Tenants field. If this field is not shown, the content is imported into the tenant you are currently working in.

6. Optionally, enable or disable **Ignore Warnings**.

When you enable **Ignore Warnings**, a Tags field is added to the Import work area. Add or create tags to apply to objects that do not import cleanly.

- i. If errors occur during import, your software adds the tags you select to the affected objects.

- ii. Use the tags to find dashboards, visuals, filter snippets, or sources you need to fix.

Note: When you enable Ignore Warnings, items that can be imported with warnings are imported and tagged. Use these tags to find and fix the warnings in tagged objects. When disabled, no objects are imported, and errors are returned to aid in troubleshooting.

7. Select an **Insertion Strategy** for each group of objects.

Note: The groups of objects varies based on what objects are in your JSON file. For example, dashboards that contain only local visuals will not import visuals as separate objects to include in the Visual Gallery.

- i. **Always create objects:** Select to create an object every time, even if an existing object exists with the same name or unique ID.
 - ii. **Reuse existing objects:** Select to create an object if no object with the same name exists. If an object with the same name or unique ID exists, the original object is reused.
 - iii. **Update existing objects:** Select to update (overwrite) an existing object with the same name or unique ID. If an object with the same name does not exist, an object is created.
8. Use the default **Matching Strategy** or select the appropriate strategies for your sources in the order you want the strategies to be processed. See [Matching Strategies](#).
9. Enable **Share Default Access With All Users** to immediately give your users access to the content you import.

10. After you've confirmed your choices, select **Import**. The visuals are imported and a success message is returned if objects import successfully or with accepted warnings. Any items imported with warnings have your selected tags applied

Note: If you import an exported source that has an associated translation file, you must re-upload the translation for that source.

Dashboard Import Defaults

- Dashboards with a unique name are imported with that name. If the name is not unique, the newly imported dashboard is imported and the name appended with a date and time.

Important: Trying to import a dashboard that uses the same source name as an existing source but uses different connection details or credentials may cause issues. Change the name of the source before you export it from one instance and import it into another.

- Items unique to a dashboard, such as local visuals, rich text snippets, and filter snippets are created with the new dashboard.

Matching Strategies

When you import objects into Symphony, combine these matching strategies with your selected insertion strategies to meet your organization's needs. The strategies are applied in the order you select. When you create new objects, matching strategies are not used.

Dashboards

Strategy	Notes
By Name	The default strategy used if no other strategies are selected.
By Origin ID	

Visuals

Strategy	Notes
By Name	The default strategy used if no other strategies are selected.
By Origin ID	

Sources

Strategy	Notes
By Name	The default strategy used if no other strategies are selected.
By Origin ID	

Connections

Strategy	Notes
By Id, Type, and Parameters	A default strategy used if no other strategies are selected. Used with By Type and Parameters if it's not deselected.
By Type and Parameters	A default strategy used if no other strategies are selected. Used with By Id, Type, and Parameters .
By Name	
By Name and Type	
By Origin ID	
By Type and Parameter Keys	

Delete a Dashboard

This applies to: *Visual Data Discovery*

You can delete a dashboard from the library or from the dashboard itself.



Note: The delete option is only available to the dashboard creator and the Symphony administrator.

If you delete a dashboard that has been shared with another user, it is deleted for all users.

You cannot delete a linked dashboard. If any other visual is linked to the dashboard, you must first remove the link from the visual or delete the visual's source dashboard.



Note: If you try to delete a visual, filter snippet, dashboard, dashboard link, source, or source field, Symphony displays an error message naming any objects dependent on the item you're trying to delete. You can delete the item after you've removed the association from the dependent object. See [Fields Usage](#).

Delete a dashboard from the library

1. Log in as an administrator or a user who has been assigned to a group with the [Administer Dashboards](#) privilege.
2. Select **Library** on the [UI menu](#). The library displays dashboards in a table (list) format.
3. Locate the dashboard you want to delete.
4. Select delete () icon in the **Actions** column.
5. Confirm by selecting the **Delete** button on the warning dialog.

Delete a dashboard from the dashboard itself

1. [Edit](#) the dashboard.
2. Select delete () icon from the [dashboard icon bar](#).
3. Confirm by selecting the **Delete** button.

Manage Self Service Reports

This applies to: *Visual Data Discovery*

After you have successfully connected to your data stores and configured your data sources in Symphony, you can immediately start using your data to generate self service reports. Quickly build, edit, and filter reports. Group your data and apply conditional formatting to highlight specific information. Add header and footer information to provide context to the information you're presenting in each report.

A self service report is an easy to create from a data source. Create as many self service reports as you need to share with users or distribute as a PDF.

Before you begin, make sure that the data sources you want to use have been added and you have privileges to access the sources and create reports.

- [Use the Self Service Reports Library](#)
- [Create Self Service Reports](#)
- [Edit and Delete a Self Service Report](#)
- [Use the Report Icon Bars](#)



Note: You can force Symphony to bypass the visualization cache and query the underlying data source by selecting the Refresh icon in the [reports icon bar](#).

Use the Self Service Reports Library

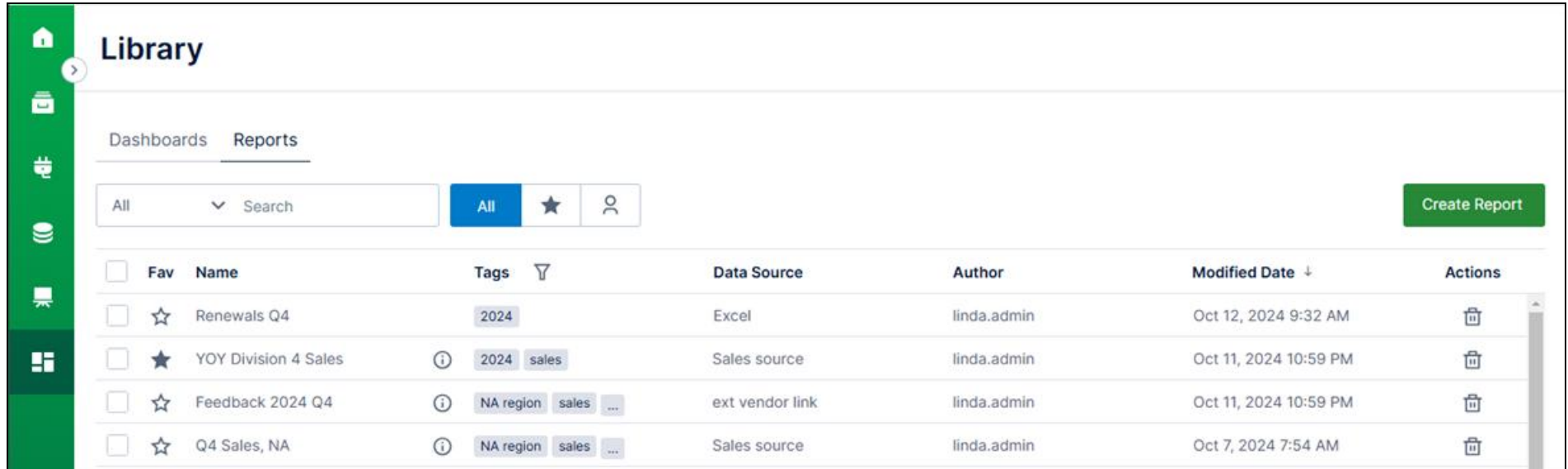
This applies to: *Visual Data Discovery*

The work area of the reports library contains all reports in your environment to which you have access. Make a report a favorite, delete it (if your [privileges](#) allow), and open the report.

If your user definition has not been given access to dashboards, you will see no dashboards in the dashboard library and you will not be able to import any dashboards. You will be able to create dashboards, but you will not be able to save them. Contact your system administrator to increase your [privileges](#).

Access the Reports Library

To access the reports library, select the **Reports** Library from the Visual Data Discovery work area (select **All Content** on the UI menu), or select **Library** on the [UI menu](#), then the Reports tab. The reports library opens, and reports display in a table (list) format.



The screenshot shows the 'Library' interface with the 'Reports' tab selected. The table displays the following data:

Fav	Name	Tags	Data Source	Author	Modified Date ↓	Actions
☐	☆ Renewals Q4	2024	Excel	linda.admin	Oct 12, 2024 9:32 AM	
☐	★ YOY Division 4 Sales	2024 sales	Sales source	linda.admin	Oct 11, 2024 10:59 PM	
☐	☆ Feedback 2024 Q4	NA region sales	ext vendor link	linda.admin	Oct 11, 2024 10:59 PM	
☐	☆ Q4 Sales, NA	NA region sales	Sales source	linda.admin	Oct 7, 2024 7:54 AM	

Search Field

You can use the search field to filter the reports in this work area by report Name, Description (if provided), Data Source, or Author. For example, if you type a **C** in the search box, only reports that include the letter **C** in the selected field searched are shown in the working area. See [Search And Filter Lists](#).

Buttons

The buttons on the page allow easy access to saved dashboards, as well as other dashboards created by other users in your Symphony environment. They also allow you to create a new dashboard, filter the dashboards that are shown, import, or export dashboards.

Button	Description
All	Removes any filters for the reports library and displays all reports available to you within your environment.
	Displays only the reports you have marked as favorites.
	Displays only reports you created and saved. Reports created and saved by other users are hidden.

List of Reports

The columns for this list are described below. Several of these columns can be used to sort the contents of the list: select the column header to sort first to last and again to sort last to first. You can search for items by the contents of several columns. See [Search and Filter Lists](#).

Column	Description
Select (not labeled)	Select or deselect one or more items.
Fav	Identifies favorite reports using a star icon. If the star is colored () , the report is a favorite. If the star is empty () , the report is not a favorite. If you change the favorite status of a report while viewing or editing it, that change is reflected here.
Name	The name of the self service report. This is a searchable field.
Description (not labeled)	The description icon is visible if a description associated with a report. This is a searchable field.
Tags	Content tags applied to the report. Select the filter icon to open a drop down list and select tags to filter your list or to narrow your search results . If several tags are associated with an item, hover over the ellipsis to see all tags for this resource. This is a searchable field.
Filter icon	Select to filter the contents by one or more content tags.
Data Source	The name of the data sources used by the report. This is a searchable field.
Author	The user who created the report. This is a searchable field.
Modified Date	The date the report was last modified.
Actions	Shows icons you can select to perform actions for the report. Select the delete icon () in this column to delete a report.

Create Self Service Reports

This applies to: *Visual Data Discovery*

Generate and manage reports using Symphony's new self-service reporting capability inside the Visual Data Discovery module. Create customized reports using a table visual, adding a report header and footer as needed.

Additionally, you can apply filtering, conditional formatting, and grouping to your data. Apply aggregate functions on different fields to produce the report you need. Export easily as a PDF, including all of your customizations.



Note: Self service reports are limited to 15 columns of data, 1,000 groups of data, and 100,000 records.

Create a self service report

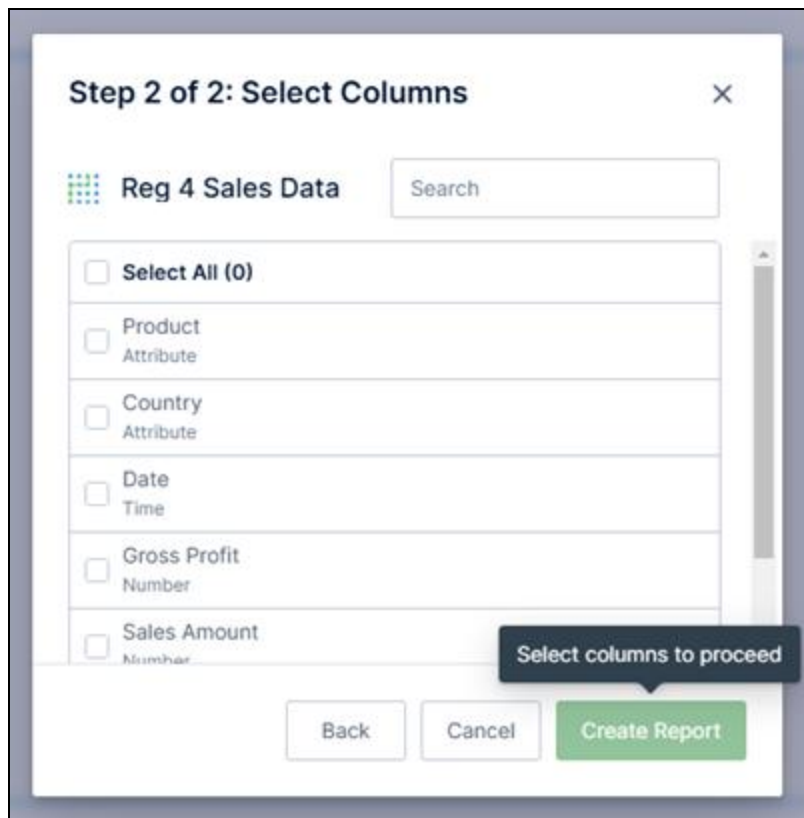
Create a report from any available data source, and apply any [filtering](#), [grouping](#), or [conditional formatting](#) as needed. Add a header and footer to provide information and context as needed. After you create a report, you can favorite it, save a copy of it, and easily export it (up to 15 columns of data) as a PDF.

1. Navigate to the [Reports work area](#) in the Visual Data Discovery module.
2. Select **Create Report**. A blank **Untitled report** work area opens.
3. Use the **Select source** option to pick a source to include in this report.
4. Select an available source from the options provided in the **Select a Source** modal. After selection, a **Select Columns** modal opens.



Note: Only sources with data that can be presented in a table are shown.

5. Select one or more columns from your data source to build your report. Scroll through the options or use the Search feature to find specific fields.



Step 2 of 2: Select Columns ×

 **Reg 4 Sales Data**

- ☐ **Select All (0)**
- ☐ Product Attribute
- ☐ Country Attribute
- ☐ Date Time
- ☐ Gross Profit Number
- ☐ Sales Amount Number

Select columns to proceed

Note: You can control the fields used and shown to users for self service reports by adjusting the field visibility in your sources. See [Hide Fields](#).

- When you have picked all of the columns you wish to include in the report, then select **Create Report**. Symphony generates your report and displays the report data in a widget in the Untitled report work area.

Note: The maximum number of columns you can include in a report is fifteen.

Enter header text

Reg 4 Sales Data

#	Product	Country	Date UTC	Gross Profit	Sales Amount	Order Quantity
1	All-Purpose Bike Sta...	Australia	Jul 26, 2016	99.53	159.00	1.00
2	All-Purpose Bike Sta...	Canada	Jul 31, 2016	99.53	159.00	1.00
3	All-Purpose Bike Sta...	United States	Jul 26, 2016	99.53	159.00	1.00
4	AWC Logo Cap	Australia	Jul 25, 2016	4.14	17.98	2.00
5	AWC Logo Cap	Australia	Jul 27, 2016	2.07	8.99	1.00
6	AWC Logo Cap	Australia	Jul 29, 2016	2.07	8.99	1.00
7	AWC Logo Cap	Canada	Jul 27, 2016	2.07	8.99	1.00
8	AWC Logo Cap	Canada	Jul 29, 2016	2.07	8.99	1.00
9	AWC Logo Cap	Canada	Jul 30, 2016	2.07	8.99	1.00
10	AWC Logo Cap	Canada	Jul 31, 2016	6.20	26.97	3.00
11	AWC Logo Cap	France	Jul 28, 2016	2.07	8.99	1.00
12	AWC Logo Cap	Germany	Jul 28, 2016	2.07	8.99	1.00
13	AWC Logo Cap	United Kingdom	Jul 31, 2016	2.07	8.99	1.00
14	AWC Logo Cap	United States	Jul 25, 2016	4.14	17.98	2.00
15	AWC Logo Cap	United States	Jul 26, 2016	4.14	17.98	2.00
16	AWC Logo Cap	United States	Jul 27, 2016	2.07	8.99	1.00
17	AWC Logo Cap	United States	Jul 29, 2016	2.07	8.99	1.00
18	AWC Logo Cap	United States	Jul 30, 2016	2.07	8.99	1.00
Total	NONE	NONE		NONE	NONE	NONE

Enter footer text

20 December, 2024 | Enter trademark text

Jul 24, 2016 Jul 31, 2016

7. Name and save your report when you're ready, updating the name, adding a description, and assigning tags as needed.

Define a header and footer to your self service report



Note: By default, the report header and footer are enabled for all reports. Select the Report Header & Footer icon in the reports icon bar to toggle the header and footer sections on and off.

1. Select edit icon in the header or footer area of the report to make changes to it. The selected section expands and opens for editing.
2. Enter the header or footer text you'd like to include, then select the edit icon again to save your changes. The section shrinks and your changes are visible in the report work area.
3. By default, the current date is included in the footer work area, and you can optionally add trademark text, copyright information, or other static information alongside the date.
4. When you are satisfied with your edits, **Save** your changes.



Important: The name of the report, the date of the report, pagination information, and any trademark information you provide are included in all reports, even if the headers and footers are disabled.

Export your self service report

1. After you create and save your report, you can access and select the export icon.
2. Select the export icon. A preview window displaying the first few rows of entries in your report opens.
3. If you like the look of your report, select **Export PDF** to download the report. Select **Cancel** to go back and make further changes to your report.

Use the Report Icon Bars

This applies to: *Visual Data Discovery*

When you create or edit a report, a series of icons are available you can use to perform specific report functions.



Select an icon to perform the function described in the following table.

Note: The visibility of these icons on a report are affected by interactivity settings defined for dashboards in the library.

Icon	Description
	Toggle view mode between Viewer and Editor modes.
	Export a report. Enabled if there are no unsaved changes to your report. Select to open a preview window of your report; review and export or cancel the export. See Export your self service report .
	Refresh the data in the report.
	Mark the report as a favorite.
	Select to enable and disable the header and footer. See Edit the header and footer in a self service report .
	Delete the report. See Edit and Delete a Self Service Report .
	Save a report with a new name (which copies it).
	Save a report.

Edit and Delete a Self Service Report

This applies to: *Visual Data Discovery*

All self service reports you create can be edited, updated, and deleted as needed.

Edit the data in a self service report

1. Log in as an administrator or a user who has been assigned to a group who can create and edit self service reports.
2. Select the **Library** option from the [main menu](#), then the **Reports** tab in the library. The library displays dashboards in a table (list) format.
3. Select the report in the list. The report opens.
4. Adjust the data in the report, adding or removing columns, [grouping](#) or ungrouping data, changing the order of columns, or applying [conditional formatting](#) as needed. Use the [reports icon bar](#) to make other adjustments, such as refreshing the data, marking the report as a favorite, or saving a copy of the report with a new name.
5. Save your report.

Edit the header and footer in a self service report

1. Log in as an administrator or a user who has been assigned to a group who can create and edit self service reports.
2. Select the **Library** option from the [main menu](#), then the **Reports** tab in the library. The library displays reports in a table (list) format.
3. Select the report in the list. The report opens.
4. Adjust the headers and footers. Toggle the Report Header and Footer widgets to enable or disable using [reports icon bar](#). When enabled, select the Edit icon to change the info presented in the header and footer.
5. Save your report.



Important: The name of the report, the date of the report, pagination information, and any trademark information you provide are included in all reports, even if the headers and footers are disabled.

Delete a report from the library

1. Log in as an administrator or a user who has been assigned to a group who can create and edit self service reports.
2. Select the **Library** option from the [main menu](#), then the **Reports** tab in the library. The library displays reports in a table (list) format.

3. Locate the report you want to delete.
4. Select delete () icon in the **Actions** column.
5. Confirm by selecting the **Delete** button on the warning dialog.

Delete a report from the report itself

1. [Edit](#) the report.
2. Select delete () icon from the [reports icon bar](#).
3. Confirm by selecting the **Delete** button.

Use Tags in Symphony Visual Data Discovery

This applies to: *Visual Data Discovery*

Categorize your Symphony inventory and create themed groups of content by associating tags with dashboards, data sources, and visual gallery visuals. Create an overarching themed content structure for your users, or use tagging to improve your object migration flow. Tag content to create groupings for everyone in the organization for ease of use. Filter content or [search results](#) for dashboards in the Library, data sources in Sources, and visuals in the Visual Gallery to view content associated with specific tags.



Note: All tags added to your environment are visible to all users within the tenant.

Users who can add, and in some cases, remove tags, include:

- Users who belong to a group with the [privilege Administer Tags](#) can add tags and delete tags added by any user, as needed.
- Users who belong to a group with the [privilege Create Tags](#) can create new tags but can only delete their own tags.
- Users with [Editor access](#) to a data discovery dashboard, data source, or visual gallery visuals), which is equivalent to READ + WRITE permissions can assign or remove an existing tag to the data discovery resource.

When you export or import dashboards, data sources, or visuals the associated tags are exported and can be imported as well.

For more information on using content tags in your Visual Data Discovery environment:

- [Add Tags](#)
- [Remove Tags](#)
- [Remove Tags](#)

You can also manage tags in embedded environments, or using the API.

API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.

Add Tags

This applies to: *Visual Data Discovery*

Users with the [privileges Administer Tags, Create Tags](#) or who have READ + WRITE permissions to dashboards, data sources, and visual gallery visuals can add tags to these resources. Once tags are added to a resource within an environment or tenant, users can filter dashboards, data sources, and visuals they see by content tag.



Note: All tags added to your environment are visible to all users within the tenant.



Note: Only users with the [privilege Administer Tags](#) can delete other users' tags.

Add a tag to a dashboard

1. Open a dashboard you have permissions to access and edit, then select the manage tags icon . The Manage Tags work area opens.
2. Select the **Tags** Search field. Any tags available in your environment or tenant appear as a list: select tags to add from the list.
3. Enter a few characters: a shorter list of matching tags is returned. Select an existing tag to add it to this dashboard.
4. If a matching tag does not exist, and you have appropriate privileges, you can select the add icon  to add the tag to the dashboard. Your software returns a success message.
5. When you've added the tags you need, select **Save** to save your tags with this dashboard.



Note: You can also add a new or existing tag to a dashboard when you save the dashboard: select an existing tag or add a new one.

Add a tag to a Visual Data Discovery data source

1. Open a data source you have permissions to access and edit, then expand the **Source Definition** work area.
2. Select the **Tags** Search field. Any tags available in your environment or tenant appear as a list: select tags to add from the list.
3. Enter a few characters: a shorter list of matching tags is returned. Select an existing tag to add it to this data source.

4. If a matching tag does not exist, and you have appropriate privileges, you can select the add icon  to add the tag to the data source. Your software returns a success message.
5. When you've added the tags you need, select **Save Source** to save your tags with this data source.

Add a tag to a Visual Data Discovery visual gallery visual

1. Open a visual gallery visual you have permissions to access and edit, or create a new visual in the visual gallery.
2. Select the **Tags** icon in the upper left corner of the visual. The **Manage Tags** work area opens.
3. Select the **Tags** Search field. Any tags available in your environment or tenant appear as a list: select tags to add from the list.
4. Enter a few characters: a list of matching tags is returned if the tags exist. Select an existing tag to add it to this visual.
5. If a matching tag does not exist, and you have appropriate privileges, you can select the add icon  to add the tag to the visual. Your software returns a success message.
6. When you've added the tags you need, select the save icon to save your tags with this visual.



Note: You can also add a new or existing tag to a visual gallery visual when you save the visual: select an existing tag or add a new one.

Remove Tags

This applies to: *Visual Data Discovery*

Some users can remove tags associated with your content when no longer needed for that item.

Users with the [privileges Administer Tags, Create Tags](#) or who have READ + WRITE permissions to dashboards, data sources, and visual gallery visuals can remove tags from these resources.

Remove a tag from a data discovery dashboard

1. Open a dashboard you have permissions to access and edit, then select the manage tags icon (). The Manage Tags work area opens.
2. Select a tag in the **Tags** field; select the **x** icon to remove the tag.
3. Make any other changes to the tags associated with this dashboard.
4. Select **Save** to save your changes to this dashboard.

 **Note:** You can also remove a tag from a dashboard when you save the dashboard: select the **x** icon to remove the tag.

Remove a tag from a data discovery data source

1. Open a data source you have permissions to access and edit, then expand the **Source Definition** work area.
2. Select a tag in the **Tags** field; select the **x** icon to remove the tag.
3. Make any other changes to the tags associated with this data source.
4. Select **Save Source** to save your tags with this data source.

Remove a tag from a Visual Data Discovery visual gallery visual

1. Open a visual you have permissions to access and edit, then select the manage tags icon (). The Manage Tags work area opens.
2. Select a tag in the **Tags** field; select the **x** icon to remove the tag.
3. Make any other changes to the tags associated with this visual.
4. Select the save icon to save your tags for this visual.

Delete Tags

This applies to: *Visual Data Discovery*

Users with the **Administer Tags** [privilege](#) can delete tags associated with your content when no longer needed in your software environment. If you belong to a group with the **Create Tags** [privilege](#), you can delete your own tags.

When you delete a tag from your environment, it is removed from all resources in your tenant or environment.

Delete a tag

1. Open a dashboard, data source, or visual gallery visual.
 - i. Dashboards: Open a dashboard and then select the manage tags icon () to open the Manage Tags work area.
 - ii. Data sources: Open a data source and expand the Source Definition work area.
 - iii. Visual gallery visuals: Open a visual gallery visual and select the manage tags icon () to open the Manage Tags work area.
2. Select the **Tags** field. A list of tags appears you can add, remove, or delete.
3. Select the delete icon () for the tag you want to delete. A success message indicates the tag was deleted from your environment.
4. Optionally, **Save** your dashboard, data source, or visual gallery visual.

 **Important:** Even if you close your work area without saving after you make this change, the tag is deleted and no longer associated with any content in your environment.

Control How Users Interact With a Dashboard

This applies to: *Visual Data Discovery*

You can control how users can interact with a dashboard, and access to self service reports in Visual Data Discovery. Control their ability to:

- Resize or move visuals in a dashboard
- Add visuals, text snippets, and filter snippets to a dashboard
- Refresh, save or delete a dashboard
- Filter a dashboard
- Rename a dashboard
- Mark the dashboard as a favorite
- Link a dashboard or set up cross-source links in the dashboard
- Export a dashboard

You can also apply a global set of visual interactivity settings to all of the visuals on the dashboard that overrides the interactivity settings for the individual visuals on the dashboard.



Important: User attributes are not resolved when previewing interactivity settings, and default fallbacks will be used in the Preview mode.

Control user interactions with a dashboard and its visuals

1. Select the visual on the dashboard or in the Visual Gallery.
2. Select the interactivity option () to the left of the dashboard title.



The dashboard interactivity panel appears.

Dashboard Interactivity

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JV Sales - Q2

Preview Interactivity Settings

Some features are restricted for Viewers regardless of the interactivity settings.

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Dashboard

Visuals

Editing

Change Layout

i

☒

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Add Existing Visuals

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Add New Visuals

i

☒

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Add Text Snippets

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Add Filter Snippets

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Delete

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Save

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Save as

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Filter

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Rename

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By default, all interactivity settings are activated (enabled) for a dashboard. Each setting is controlled by a toggle switch. Slide the switch to the right to turn an interactivity setting on; slide them to the left to turn a setting off.

There are two tabs on the dashboard interactivity panel: **Dashboard** and **Visuals**. The settings on each tab are described at the end of these instructions.

In addition, you can use the **Preview Interactivity Settings** option to test the dashboard and visual interactivity settings. When this switch is turned on, the dashboard and visuals behave as they will when the dashboard is embedded, based on the interactivity settings for the dashboard and its visuals. The **Preview Interactivity Settings** switch is a temporary switch: by default it is off each time you access the dashboard. It is not saved with the dashboard; so if you turn it on and save the dashboard, it will still be off the next time you edit the dashboard.

3. Slide the switch on or off for the interactivity settings you want to change on the **Dashboard** tab. See [Dashboard Interactivity Settings \(Dashboard Tab\)](#).
 4. Slide the switch on or off for the interactivity settings you want to change on the **Visuals** tab. See [Visual Interactivity Settings \(Visuals Tab\)](#).
 5. Select **Save** to save the interactivity settings.
 6. Optionally, preview the behavior with the interactivity settings applied. Slide the **Preview Interactivity Settings** switch on (to the right).
-
- Note:** Custom attributes are not evaluated in Preview mode. If custom attributes are used, Symphony uses defaults to preview the interactivity settings. Customer attributes will be applied correctly in an embedded workflow.
7. [Save](#) the dashboard. When you save a dashboard (Save option), the dashboard interactivity settings are also saved (if there are any). If there are no dashboard interactivity settings or if they have not been changed, they are not saved. When you save a dashboard with a new name (Save As option), the dashboard interactivity settings are saved to the new dashboard, but the interactivity settings for the original dashboard remain unchanged.

Dashboard Interactivity Settings (Dashboard Tab)

Each dashboard interactivity setting is described in the following table.

Dashboard Feature Group	Setting	Controls the ability to...
Editing	Change Layout	Resize or move visuals and rich text snippet widgets in the dashboard.
	Add Existing Visuals	Add existing visuals to the dashboard.
	Add New Visuals	Add new visuals to the dashboard.
	Add Text Snippets	Add text snippets to the dashboard.
	Add Filter Snippets	Add filter snippets to the dashboard.
	Delete	Delete the dashboard. When this setting is turned off, the  dashboard icon is not available.
	Save	Save the dashboard. When this setting is turned off, the  dashboard icon is not available.
	Save As	Save the dashboard and unsaved changes as a dashboard using a different name. When this setting is turned off, the  dashboard icon is not available.
	Filter	Apply filters to the dashboard. When this setting is turned off, the  dashboard icon is not available. You can still apply filters to the visuals, however.
	Rename	Rename the dashboard.
	Change Description	Allow users to change the description on the Info sidebar menu if one exists.
	Add to Favorites	Mark the dashboard as a favorite. When this setting is turned off, the  dashboard icon is not available.
	Share Filter Sets	Share saved filter sets with other users. When this setting is turned off, other users cannot view or use the filter sets for the dashboard.
	Schedule Reports	Schedule reports for the dashboard.
Data	Share Dashboard	Share the dashboard with specific users.
	Comments	Allow users with Commenter access or higher to create, view, and manage their own comments. See Manage Widget Comments .
	Set Up Dashboard Link	Link dashboards. When this setting is turned off, the  dashboard icon is not available.
	Refresh	Refresh the dashboard data. When this setting is turned off, the  dashboard icon is not available.
	Change Dashboard Interactions	Link fields between disparate data sources to create cross-source links. When this setting is turned off, the  dashboard icon is not available.

Dashboard Feature Group	Setting	Controls the ability to...
	Set Up Dashboard Alerts	Define alerts for the dashboard.
Exporting	Export to PNG/PDF	Export the dashboard as a PNG or PDF file. When this setting is turned off, the Export dialog no longer provides an option to export an image. If all settings for Exporting are turned off, the  dashboard icon is not available.
	Export Configuration	Export the JSON configuration for the dashboard. When this setting is turned off, the Export dialog no longer provides an option to export the configuration. If all settings for Exporting are turned off, the  dashboard icon is not available.
	Export Data	Export the dashboard in Excel (XLSX) format as raw data or visual data. When this setting is turned off, the Export dialog no longer provides an option to export the dashboard in this format. If all settings for Exporting are turned off, the  dashboard icon is not available.

Visual Interactivity Settings (Visuals Tab)

The Visuals tab allows you to override the interactivity settings for the individual visuals in the dashboard. When the **Override Visual Interactivity** switch is turned on, the individual visual interactivity settings for each visual on the dashboard are overridden and ignored and the visual interactivity settings set for the dashboard are used for all of the visuals in the dashboard.

These settings are only applied to the visuals while they are used in this dashboard and not universally. The interactivity settings for the visuals themselves are not affected when used elsewhere. In other words, if a visual is used in one dashboard (Dashboard A) with **Override Visual Interactivity** turned on and is also used in a second dashboard (Dashboard B) with **Override Visual Interactivity** turned off, the individual visual interactivity settings are not honored in Dashboard A, but are honored in Dashboard B.

Each visual interactivity setting is described in the following table.

Visual Feature Group	UI Setting	JavaScript Setting	Controls the ability to...
Data Interactivity	Metrics	METRICS	Change metric fields (other than a metric that might be in the Group field) on the axes for the visual. This setting also controls whether a user can control the aggregation method (SUM, AVG, MIN, MAX, etc.) used for metrics in a table.
	Group	GROUPING	Change the Group field on the x-axis of the visual. This setting also controls whether a user can group tables.
	Filter	FILTER	Filter data using the Filter option from the visual drop-down menu and to the left of the visual name on a visual, or a display name if viewed in a dashboard. (To fully remove filtering functionality for a visual, be sure to turn off the Filter switch in the Context Menu settings on the interactivity sidebar too.)

Visual Feature Group	UI Setting	JavaScript Setting	Controls the ability to...
	Sort	<code>SORT</code>	Sort and limit the data in a visual. The sort and limit () visual sidebar menu option is disabled when this switch is off and you cannot access the Sort & Limit sidebar.
	Format	<code>FORMAT</code>	Format specific data in a visual. These formatting options are disabled when the switch is off.
Context Menu	Zoom	<code>ZOOM_ACTION</code>	Drill Down to a selected data point on a visual using this option on the context menu .
	Filter	<code>FILTER_ACTION</code>	Filter data using the Filter option on the context menu . (To fully remove filtering functionality for a visual, be sure to turn off the Filter switch in the Data Interactivity settings on the interactivity sidebar too.)
	Details	<code>DETAILS_ACTION</code>	Display additional information about a specific visual data element using the Details option on the context menu .
	Trend	<code>TREND_ACTION</code>	View trends for a selected data point using the Trend option on the context menu .
	Keyset	<code>KEYSET_ACTION</code>	Create a keyset from a selected data point using the Keyset option on the context menu . (To fully remove keyset functionality for a visual, be sure to turn off the Create Keyset switch in the Visualization settings on the interactivity sidebar too.)
	Actions	<code>ACTIONS_ACTION</code>	Invoke an action using the Actions option on the context menu . (To fully remove actions functionality for a visual, be sure to turn off the Actions switch in the Visualization settings on the interactivity sidebar too.)
	Link	<code>LINK_ACTION</code>	Link to another dashboard using the Link option on the context menu .
Visualization	Settings	<code>SETTINGS</code>	Specify settings for the visual. The visual settings () visual sidebar menu option is disabled when this switch is off and you cannot access the visual settings sidebar.
	Rulers	<code>RULERS</code>	Add visual reference lines and customize the markers used on the metric axis. The ruler settings () sidebar menu option is disabled when this switch is off and you cannot access the ruler sidebar.
	Colors	<code>COLORS</code>	Change the color palette used by the visual. The color settings () visual sidebar menu option is disabled when this switch is off and you cannot access the color sidebar.

Visual Feature Group	UI Setting	JavaScript Setting	Controls the ability to...
	Conditional Formatting	CONDITIONAL_FORMATTING	Apply conditional formatting to data in the visual. The conditional formatting () visual sidebar menu option is disabled when disabled.
	Create Keyset	KEYSET	Create a keyset from the visual data using the Create Keyset option from the visual drop-down menu . (To fully remove keyset functionality for a visual, be sure to turn off the Keyset switch in the Context Menu settings on the interactivity sidebar too.)
	Save	SAVE	Save the visual.
	Save As	SAVE_AS	Save the visual using a new name.
	Copy	COPY	Copy a visual using the Copy Visual option from the visual drop-down menu .
	Actions	ACTIONS	Invoke an action using the Actions option from the visual drop-down menu . (To fully remove actions functionality for a visual, be sure to turn off the Actions switch in the Context Menu settings on the interactivity sidebar too.)
	Remove	REMOVE	Remove a visual using the Remove Visual option from the visual drop-down menu .
	Visual Style	VISUAL_STYLE	Change the style of a visual. The visual style settings () visual sidebar menu option is disabled when this switch is off and you cannot access the visual type sidebar.
	Select Time Bar Field	TIMEBAR_FIELD	Change the time field on the time bar .
	Maximize	MAXIMIZE	Maximize a visual for optimal viewing.
	Rename	RENAME	Rename a visual.
	Show Time Bar Panel	TIMEBAR_PANEL	Show the time bar for the visual.
	Info	INFO	Allow users to edit information in the Info sidebar menu.
Exporting	Export to PNG/PDF	EXPORT_PNG_PDF	Export a visual to PNG/PDF using the Export option from the visual drop-down menu .
	Export to CSV	EXPORT_CSV	Export a visual to a CSV file using the Export option from the visual drop-down menu .
	Export to XLSX	EXPORT_XLSX	Export a visual to an XLSX file using the Export option from the visual drop-down menu .

Manage Widget Comments

This applies to: *Visual Data Discovery*

You can now enable and disable comments for widgets in your dashboards in both standalone and embedded environments. Assign a Commenter role to users you'd like to be able to add comments: comments are visible to all users who can view the associated widget in a dashboard.



Note: When users create a widget comment, it is linked to the widget in dashboard you've added it to. If you delete the widget or dashboard, the comments are deleted as well.



To create, edit, or view widget comments, select  in a widget or the [visual sidebar](#) (if available).

For more information on creating and managing widget comments, see the following topics:

- [Add Widget Comments](#)
- [Format Comments](#)
- [Edit Comments](#)
- [Delete Comments](#)

Add Widget Comments

This applies to: *Visual Data Discovery*

Users with Commenter or Editor roles for a dashboard can add comments to widgets in the dashboard: ask questions, spark conversations, or provide context. Comments are visible to all users who can access the widget in a dashboard.

- Commenter users can create, edit, format, and delete their own comments, as well as view all available comments associated with a widget.
- Editor users can create and edit their own comments, as well as delete other user's comments and view all available comments associated with a widget.



Note: When users create a widget comment, it is linked to the widget in dashboard you've added it to. If you delete the widget or dashboard, the comments are deleted as well.

Add a comment to a widget



1. Select  in a widget or the [visual sidebar](#) (if available). The Widget Comments work area opens.
2. Enter your comment using the [widget format tools](#) to adjust the look and layout of your text, or add links.
As you add and update your text, you can use keyboard shortcuts to undo and redo text changes.
3. When you've added the information you need, select **Save** to save your comment.

Format Comments

This applies to: *Visual Data Discovery*

If you are an Editor or Commenter user on a dashboard, you can add comments to widgets in this dashboard, and format your comments to emphasize points or provide links to more information. You can edit or delete your own comments, and Editor users can delete any comments.



Format options include:

Formatting Option	Description
Text Color	Apply a color to selected text. There are five ways to select a color: ▪ Color Picker: Select a color; the Hex and RGB fields update to indicate color code information. ▪ Color Slider: Select a color; the Hex and RGB fields update to indicate color code information. ▪ Hex: Enter a color by hexadecimal color code number. ▪ RGB: Enter a color by R G B color code number. ▪ Color Presets: Select a preset color; the Hex and RGB fields update to indicate color code information.
Background Color	Apply a background color to selected text. There are five ways to select a background color: ▪ Color Picker: Select a color; the Hex and RGB fields update to indicate color code information. ▪ Color Slider: Select a color; the Hex and RGB fields update to indicate color code information. ▪ Hex: Enter a color by hexadecimal color code number. ▪ RGB: Enter a color by R G B color code number. ▪ Color Presets: Select a preset color; the Hex and RGB fields update to indicate color code information.

Formatting Option	Description
Bold	Apply bold formatting to selected text.
Italic	Apply italic formatting to selected text.
Underline	Underline the selected text.
Bullet List	Select to start a bulleted list. Alternatively, selected text and convert it to a bulleted list of body text.
Numbered List	Select to start a numbered list. Alternatively, selected text and convert it to a numbered list of body text.
Add Link	Select to insert a link to an external website. Opens the Add Link work area. - Enter Text and a Link to an external UR to create a link. - If you're adding a link to selected text, that text is prefilled in the Text field.  Note: Formatting applied to link text is converted to the browser's default link and visited link colors. On hover, an underline is shown under the link text. To edit or remove the link, select the link while you are in edit mode and choose the Edit or Remove option.
Clear Formatting	Select to clear color and font formatting (bold, italic, underline) from a paragraph.

Edit Comments

This applies to: *Visual Data Discovery*

- Commenter users can create, edit, format, and delete their own comments, as well as view all available comments associated with a widget.
- Editor users can create and edit their own comments, as well as delete other user's comments and view all available comments associated with a widget.

Edit a comment

1. Select  in a widget or the [visual sidebar](#) (if available). The Widget Comments work area opens.
2. Select the more menu () of the comment you want to edit.
3. Select **Edit** from the menu. An edit pane loads your comment; change and format contents as needed.
4. Select **Save** to save your comment changes.

Delete Comments

This applies to: *Visual Data Discovery*

Some users can delete comments associated with a widget if no longer needed.

- Commenter users can create, edit, format, and delete their own comments, as well as view all available comments associated with a widget.
- Editor users can create and edit their own comments, as well as delete other user's comments and view all available comments associated with a widget.

Delete a comment

1. Select  in a widget or the [visual sidebar](#) (if available). The Widget Comments work area opens.
2. Select the more menu () of the comment you want to delete.
3. Select **Delete** from the menu. A removal confirmation dialog opens.
4. Select **Delete** on the warning dialog to confirm the deletion.

Manage Visuals

This applies to: *Visual Data Discovery*

Symphony includes a wide array of different visual styles and tools you can use visualize and explore your data.

Visuals take data from your data sources so you can present information in an easy to view, adjust, and update layout. You can create visuals that are used in multiple dashboards, stored and shared among Symphony users in the Visual Gallery, or local visuals unique to a single dashboard.

Icon	Description
	Visual Gallery visuals are visuals created by users and saved in the Visual Gallery. Share these visuals with other users to use in multiple dashboards. Any changes you make and save to a visual are reflected on all dashboards that include the shared visual.
	Local visuals are visuals created by users directly on a dashboard. These visuals are unique to the dashboard. Any changes you make are saved when you save the dashboard.

This section links multiple articles to guide you through setting up and exploring your data using Symphony's robust capabilities.

- [Use the Visual Gallery](#)
- [Add Visuals To A Dashboard](#)
- [Add Local Visuals To A Dashboard](#)
- [Add Existing Visuals To A Dashboard](#)
- [Create And Add Visuals To The Visual Gallery](#)
- [Visual Names And Display Names](#)
- [The Visual Interface](#)
- [Use The Visual Menu](#)



- [Create And Add Visuals To The Visual Gallery](#)
- [Edit Visuals](#)
- [Copy Visuals](#)
- [Export Visuals](#)
- [Export Visual Gallery Visuals](#)
- [Import Visual Gallery Visuals](#)
- [Convert Visual Gallery Visuals And Local Visuals](#)
- [Delete And Remove Visuals](#)
- [Control How Users Interact With A Visual](#)
- [Change The Visual Style](#)
- [Change The Axes](#)
- [Change The Visual Color Metric](#)
- [Use The Context Menu](#)
- [Use The Time Bar](#)
- [About Visual Permissions](#)
- [Symphony Data Discovery Visual Metrics And Attributes Reference](#)
- [Metric Aggregation Functions](#)



Visual Setup

This applies to: *Visual Data Discovery*

You can control visuals available for each data source configuration you create using the Available Visual Types work area. See [Available Visual Types](#).

After saving a data source definition, adjust settings applicable to new visuals on the [Global Settings Tab](#).

To add a visual, see:

- [Create Dashboards](#)
- [Create And Add Visuals To The Visual Gallery](#)
- [Add Visuals To A Dashboard](#)
- [Add Local Visuals To A Dashboard](#)
- [Add Existing Visuals To A Dashboard](#)

After you create a visual, you can alter its settings. See [The Visual Interface](#).



- Archive of documentation for Logi Symphony v24

The Visual Interface

This applies to: *Visual Data Discovery*

Symphony's canvas provides a comprehensive suite of tools to help you conduct in-depth analysis, filter data points, and discover needed insights quickly and efficiently.

Tools in the Visual Interface



- Display Name:** By default, a visual's display name is the name of the data source used for the visual for local visuals, or the display name for a visual from the visual gallery. Select the title to edit.



2. **Dashboard Name or Title:** The dashboard name if editing a visual in a dashboard. Select the name to edit it or save the dashboard to be prompted for a dashboard name. The default name of the dashboard is **Untitled dashboard**.
3. Indicates whether the dashboard has been saved. This information is not available if you are editing a visual from the Visual Gallery.
4. Indicates whether a visual gallery visual has been saved.
- i. If the visual is a local visual, this area is blank. All local visuals are saved when you save the dashboard.
5. **Time Bar and Time Controls:**
 - i. Filter your data by a time attribute.
 - ii. Zoom into specific period within the selected date range.
 - iii. Explore the dynamics of your data using the **Play/Pause** button.

See [Use The Time Bar](#).
6. **X- and Y- Axis Labels** and the **Color Metric** (availability varies, depending on the visual style): Select an axis label to change an attribute or metric. See [Change The Axes](#) and [Change The Visual Color Metric](#).

If you disable the Volume property in a data source configuration, it does not appear in visual tooltips. The only exception to this is in histograms which plot the volume or number of records.
7. **Legend:** By default, a legend is available for supported visual styles, and can be switched on or off in the Colors sidebar menu.
8. The dashboard icon bar. Use the options here to manage the dashboard. See [Use The Dashboard Icon Bars](#). This is only available on a dashboard; not on a visual edited from the [Visual Gallery](#).
9. Select  to expand a visual on a dashboard. This allows you to get a closer look at it. This is only available on a dashboard; not on a visual edited from the [Visual Gallery](#).
10. The  at the top right of a visual displays the [visual drop-down menu](#). This menu includes an option to open **Settings** for the visual, and its [sidebar menu](#).
11. The visual [sidebar menu](#). Select a sidebar menu option to open an appropriate sidebar for a visual. See [Use The Visual Sidebar Menu](#).

12. Select  to undo the most recent change you made to a visual.
13. Visual-specific options:
 - a. Select  to filter the data on a visual.
 - b. Select  to view published filters.
 - c. The visual icon indicates if a visual is local () or a visual gallery visual ()
14. Dashboard-specific options:
 - a. Select  to filter the data on a dashboard. The dashboard-level filter icon is available only when all visuals on a dashboard are from the same data source.
 - b. Select  to open dashboard and visual interactivity settings.
 - c. Select  to toggle dashboard view mode between [Viewer and Editor](#) modes.
 - d. Select  to enable and disable locking the dashboard layout.
 - e. Select  to enable and disable responsive layout for this dashboard. See [Using The Responsive Dashboard Layout](#).
15. The context menu. Use menu options to view or adjust data. See [Use The Context Menu](#).

Use the Visual Sidebar Menu

This applies to: *Visual Data Discovery*

Symphony's visual canvas provides a comprehensive suite of tools to help you tailor visuals quickly so they provide the information you need in the best way for you to analyze your data. These tools are available from the [visual menu](#) and from the visual sidebar menu. This topic discusses the visual sidebar menu.

The visual sidebar menu appears to the right of every visual edited from the Visual Gallery. With the exception of the visual interactivity option, it is also available when you select **Settings** on the [visual menu](#) when editing a visual in a dashboard.

Selecting options on the visual sidebar menu opens and closes sidebars that allow you to control:

- The style of a selected visual
- The settings used for a selected visual
- The configuration of pivot tables and tables of raw data
- The filters used for a selected visual
- Time bar settings for a visual
- Sort and limit options for a selected visual
- Ruler and reference line settings for a selected visual
- Colors for a selected visual
- Interactivity settings for a selected visual (only available in the Visual Gallery)
- General information for a selected visual
- View and manage comments, if applicable, for a visual or widget

When you are editing a visual on a dashboard, you must first select a visual (a blue border appears around the selected visual) and then select **Settings** on the [visual drop-down menu](#). This makes the visual sidebar menu available.

If an option on the visual sidebar menu cannot be selected, the settings controlled by that sidebar are not available for the visual style you have selected.

The following visual sidebar menu options are available:

Menu Option	Opens Sidebar
	Opens or closes the Visual Style sidebar. Use this sidebar to change the visual style used for the selected visual (for example, to change a pie chart to a donut chart). See Use The Visual Style Sidebar. This option is not available for list filter visuals.
	Opens or closes the Sort & Limit sidebar. Use this sidebar to sort and limit the data for the selected visual. See Sort And Limit Visual Data. This option is not available for list filter visuals.
	Opens or closes the Filter sidebar. Use this sidebar to filter the data for the selected visual. See Apply Row-Level Filters, Apply Wildcard Filters To A Visual, Filter Snippet, Or Dashboard, Apply Group Filters, Create A Keyset From A CSV File, and Review And Apply A Keyset As A Visual Filter.
	Opens or closes the Time Bar sidebar. Use this sidebar to control the time bar for the selected visual. See Use The Time Bar Sidebar. This option is not available for list filter visuals.
	Opens or closes an appropriate Visual Settings sidebar. Use this sidebar to change settings for the selected visual. Different settings can be altered for different visual styles. In addition, some visual styles do not have any settings you can control in this way; this icon is disabled for these visual styles. See Change Visual Settings.
	Opens or closes the Ruler sidebar. Use this sidebar to control the rulers and reference lines on the selected visual. See Use Rulers and Use Reference Lines. This option is not available for list filter visuals.
	Opens or closes the Color sidebar. Use this sidebar to change the color settings for the selected visual. Different color settings are available for different chart styles. See Change Color Schemes. This option is not available for list filter visuals.
	Opens or closes the Conditional Formatting sidebar. Use this sidebar to define table formatting for specific data based on the attributes and conditions you set. See Using The Conditional Formatting Sidebar.
	Opens or closes the visual interactivity sidebar. Use this sidebar to control how users can interact with the selected visual. See Control How Users Interact With A Visual.

Menu Option	Opens Sidebar
	This option is only available for a visual when you are viewing it in the Visual Gallery.
	Opens or closes the visual information sidebar. Use this sidebar to view basic information for the selected visual, and edit the Visual Description when opened in the Visual Gallery.
	Opens or closes the widget settings sidebar. Use this sidebar to edit basic information and reposition a widget in a widget cell for the selected visual. See Modify Visual Names, Display Names, And Descriptions and See Position Resized Widgets .
	Opens or closes the comments sidebar. View comments, or add and manage comments, depending on your dashboard access role. Use this sidebar to edit basic information for the selected visual. See Manage Widget Comments.

Use the Visual Menu

This applies to: *Visual Data Discovery*

Symphony's visual canvas provides a comprehensive suite of tools to help you tailor visuals quickly so they provide the information you need in the best way for you to analyze your data. These tools are available from the visual drop-down menu or from the [visual sidebar menu](#). This topic discusses the drop-down menu.

The visual drop-down menu lists options that help you modify and use your visuals more effectively. Access by selecting the Visual Menu, labeled as the Show more menu () icon in the upper right corner of a visual.

The menu options are described in the following table. Some options are only available for specific visual styles. Some options are available when you are working with a visual in a dashboard and are not available when you are working with a visual in the Visual Gallery. Controls for some of these options are available on the interactivity sidebar. See [Control How Users Interact With A Visual](#).

The list of options available on an embedded [visual's drop-down menu](#) depends on:

- The mode setting for the dashboard. If the embed mode is `readonly` or **Read Only**, no menu is available at all.
- The [visual interactivity settings](#) specified in the visual definition.
- The [dashboard interactivity settings](#) specified for the dashboard, if those settings include override interactivity settings for all visuals in the dashboard.

When options are shown for a visual in an embedded dashboard, they may be shown in the [visual sidebar menu](#) or within the [visual drop-down menu](#) itself, depending on the setting of the `editor.placement` property.

- If `editor.placement` is set to `dockRight`, the options appear in sidebars using the [visual sidebar menu](#) and the resulting sidebar editing panels.
If `editor.placement` is set to `modals`, the options appear in the [visual drop-down menu](#) itself and the resulting floating dialogs.

Option	Description
Add to Visual Gallery	Add a local visual to the Visual Gallery. See Convert Visual Gallery Visuals And Local Visuals .
Actions	Invoke an action if an action template has been enabled for the visual's data source. See Invoke An Action .
Convert to Local	Make a copy of a visual gallery visual as a local visual on the dashboard. See Convert Visual Gallery Visuals And Local Visuals .
Copy Visual	Copy a visual.

Option	Description
	See Copy Visuals .
Create Keyset	Create a keyset from the visual data. See Create A Keyset .
Create Alert	Create an alert from the visual data for this dashboard. See Create An Alert Definition .
Describe Visual	Generate a description of the visual, for most visual types. ▪ Select Copy Visual Summary to copy it to your device's clipboard; paste it where you need. ▪ Select Create Snippet and Insert to generate the visual's summary in a new rich text snippet, ready to edit.
Export	Export a visual or visual data. See Export Visuals .
Maximize	Maximize a visual on the dashboard for optimal viewing.
Minimize	Minimize a visual so you can see other visuals on the dashboard.
Permissions	Quickly allows you to update the user, group, and account permissions for the visual. The Visual Permissions dialog appears. See About Visual Permissions . You can only see this option if your user account has been granted the Manage Visual Permissions privilege .
Remove Widget	Remove a visual from the dashboard. This will not delete the visual from Symphony. For more information, see Delete And Remove Visuals .
Save As	Save the visual with a new name. See Save Visuals With New Names .
Settings	Opens the sidebar menu for a visual. See Use The Visual Sidebar Menu . Formerly Edit.
Undo	Undo a change you made to the visual. See Undo A Visual Action .

Keyboard Controls

This applies to: *Visual Data Discovery*

If keyboard controls are supported for a UI widget, you can use the following keyboard controls instead of a mouse:

Keyboard Control	Description
Tab key	Use the tab key to move between areas of the widget.
Space bar	Use the space to select or clear a value or item in a widget.
Space bar + Up or Down Arrow key	Drag and drop items in the widget. Hold the space bar down while you use the up and down arrow keys. When you have placed reached the location where you want the item, push the space bar key again to place it.

Use the Visual Gallery

This applies to: *Visual Data Discovery*

Use the Visual Gallery to manage the visuals defined in a Symphony instance and shared with other users.

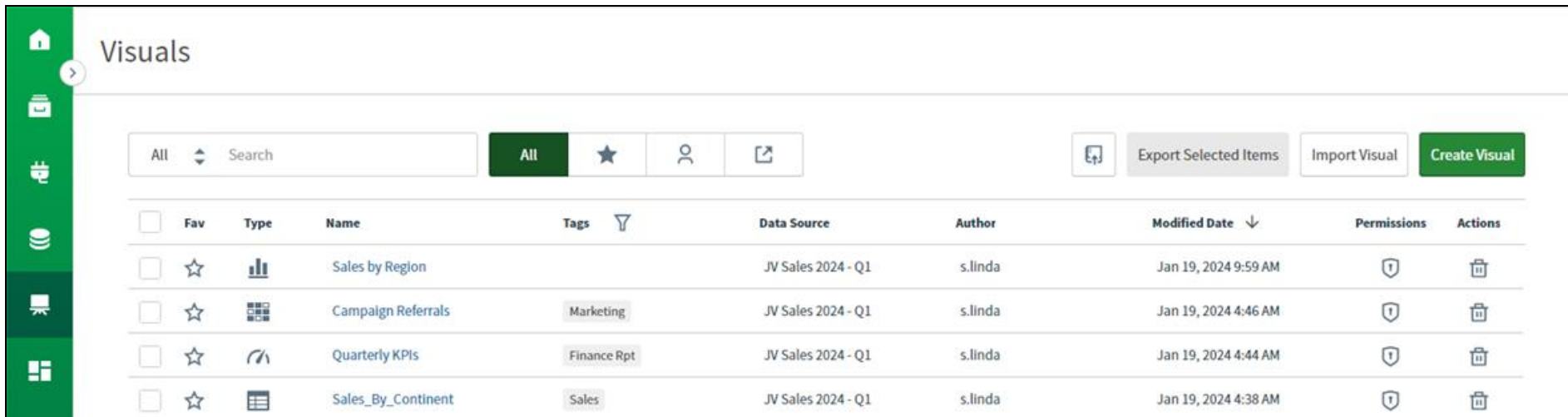
You must be logged in as a user in a group with the **Administer Visuals** privilege to see the Visual Gallery. Read, write, and delete permissions for a visual gallery visual are controlled by the permissions assigned the data source used by the visual in combination with the user's group [privileges](#).

As creator and owner of a visual, you are automatically granted read, write, and delete for the visual in the Visual Gallery. When you remove a user who has created visuals from the system, items created by that user are retained.

Note: Local visuals exist only on the dashboard on which they were created. Convert to a Visual Gallery visual and add to the Visual Gallery at any time. Visual gallery visuals can be converted to a local visual at any time. See [Convert Visual Gallery Visuals And Local Visuals](#).

Access the Visual Gallery

To access the visual gallery, log into Symphony as an administrator or as a user with the **Administer Visuals** [privilege](#). Select the **Visual Gallery** option from the main menu. The Visuals page appears, and visuals are listed in a table format.



Fav	Type	Name	Tags	Data Source	Author	Modified Date	Permissions	Actions
☐		Sales by Region		JV Sales 2024 - Q1	s.linda	Jan 19, 2024 9:59 AM		
☐		Campaign Referrals	Marketing	JV Sales 2024 - Q1	s.linda	Jan 19, 2024 4:46 AM		
☐		Quarterly KPIs	Finance Rpt	JV Sales 2024 - Q1	s.linda	Jan 19, 2024 4:44 AM		
☐		Sales_By_Continent	Sales	JV Sales 2024 - Q1	s.linda	Jan 19, 2024 4:38 AM		

Note: You can select and open a visual in the visual gallery to make a copy of a visual if needed. See [Copy Visuals](#).

Search Field

Use the search field to filter the visuals shown by visual Type, Name, Description, Data Source, or Author. For example, if you type a **C** in the search box, only visuals that include the letter *C* in the selected field searched (or all fields if All is selected) are shown in the working area. See [Search And Filter Lists](#).

Buttons

The buttons on the page allow easy access to saved visuals, as well as other visuals created by other users in your Symphony environment. They also allow you to create a new visual and filter the visuals shown.

Button	Description
All	Removes any filters for the visual gallery and displays all visuals you can access within your Symphony environment.
	Displays only the visuals that you have marked as favorites.
	Displays only visuals that you created and saved. Visuals created and saved by other users are hidden.
	Displays only the visuals that other users shared with you. See Grant Permissions for a Visual .
	Select to generate an embeddable visual link. See Generate a Visual Gallery HTML Snippet .
Export Selected Items	Select to export multiple selected items. See Export Visual Gallery Visuals .
Import Visual	Select to import one or more visuals. See Import Visual Gallery Visuals .
Create Visual	Select to create a new visual. See Create and Add Visuals to the Visual Gallery .

The Visual Gallery List

Each column in the table is described below. Several of these columns can be used to sort the list: select the column header to sort first to last and again to sort last to first. You can search for items by the contents of several columns. See [Search and Filter Lists](#).

Column	Description
Select (not labeled)	Select one or more items to perform bulk actions, such as export, for your resources.
Fav	Identifies favorite visuals using a star icon. If the star is colored () , the visual is a favorite. If the star is empty () , the visual is not a favorite.
Type	An icon identifying the visual type (style) of the visual in the visual. See Symphony Data Discovery Visual Metrics And Attributes Reference to see all the possibilities.
Name	The name assigned to the visual. The visual name is not necessarily the same as the display name. See Visual Names And Display Names for more information about how visual names and display names are set.
Description (not labeled)	The description icon is visible if a description associated with a visual. You can search for a visual by the contents of this field.
Tags	Content tags applied to the visual. Select the filter icon to open a drop-down list and select tags to filter your list or to narrow your search results . If several tags are associated with an item, hover over the ellipsis to see all tags for this resource.
Data Source	The name of the data source used by the visual. If a user doesn't have permission to view the data source, this field is blank.
Author	The name of the user who defined the visual.
Modified Date	The time stamp indicating when the visual was last modified.
Permissions	Assign and manage the permissions for a visual. Visible if you are logged in as a user with the Administer Sources privilege , or as a user with the Manage Source Permissions privilege.
Actions	Delete a visual if you have delete permissions. Before you delete a visual, you must remove it from all the dashboards that use it. See Delete And Remove Visuals .

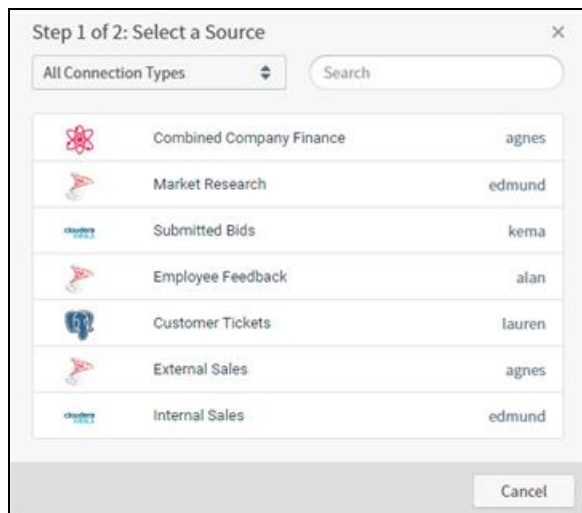
Create and Add Visuals to the Visual Gallery

This applies to: *Visual Data Discovery*

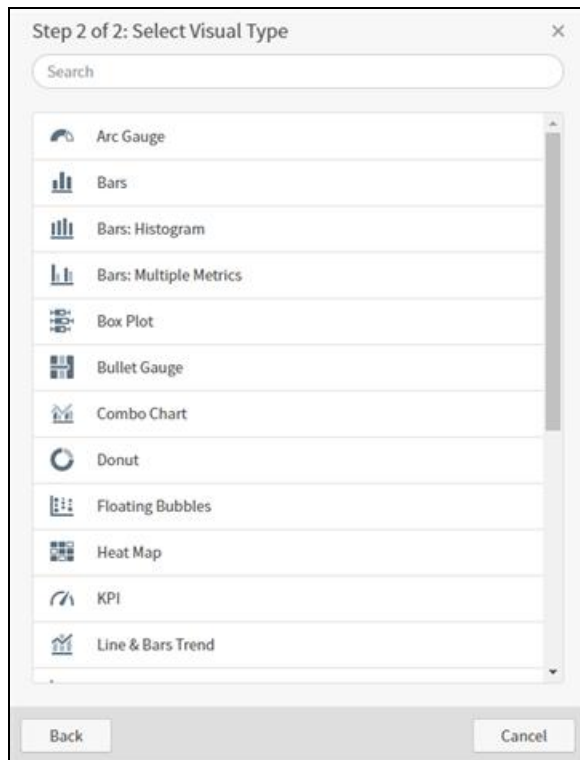
When you access the visual gallery, it displays a list of all the visuals you and other content authors have created and can use, based on your access permissions. You can add visuals directly to this gallery, or convert a local visual to add it to the visual gallery to make it available to others for use.

Create a visual in the Visual Gallery

1. Log into Symphony as a user with the **Create Visuals** or **Administer Visuals** [group privilege](#).
2. Select the **Visual Gallery** option from the main menu. The Visuals page appears.
3. Select **Add Visual** to add a new visual. The Select a Source dialog appears.



4. Select a data source on the **Step 1 of 2: Select a Source** dialog. The Select a **Visual** Type dialog appears.



5. Select a visual style on the **Step 2 of 2: Select Visual Type** dialog. For example, select **Bars**. The visual is created.



Note: If you [create a table visual](#), you are prompted to select one or more columns to include. Select your columns, then select **Create Visual** to generate the visual.

6. Optionally, select the default visual name (**Untitled Visual**) and change it. See [Visual Names And Display Names](#).

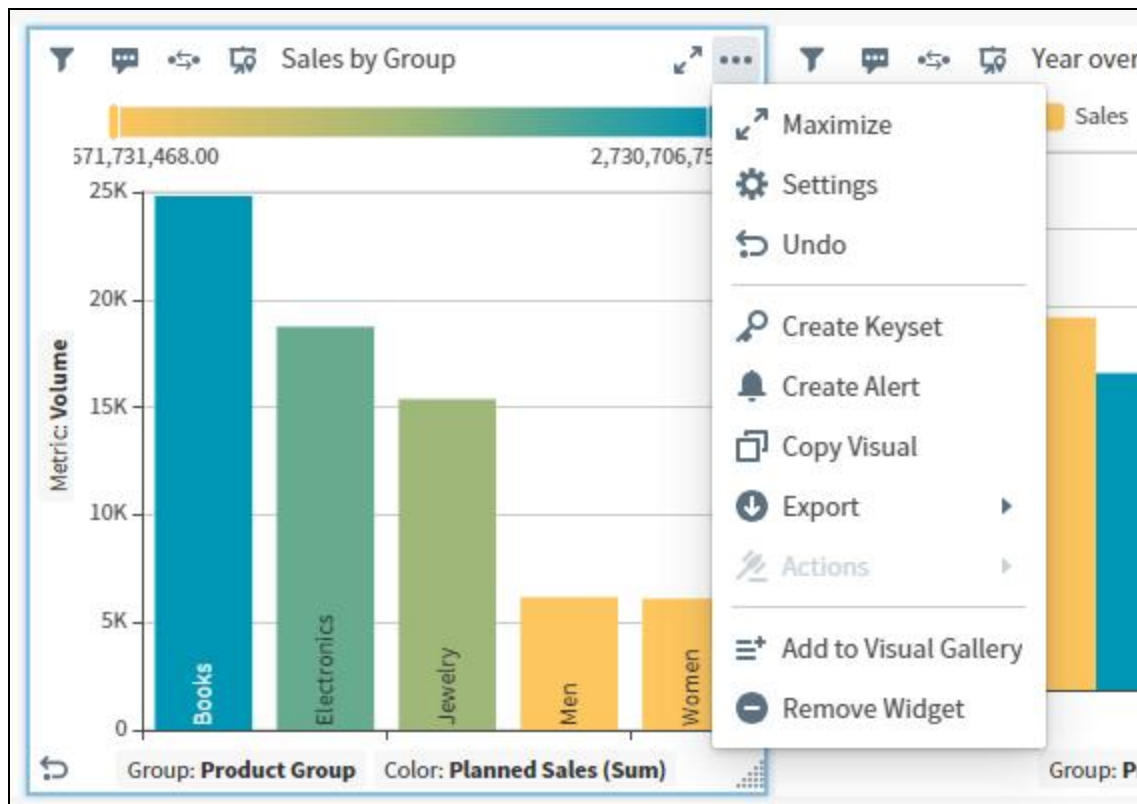
The minimum length of visual names and display names is one character; the maximum length is 255 characters. Names can start with and contain numbers, special characters, and uppercase and lowercase characters. Names can contain spaces, but cannot start with a space. Names can't be empty, contain only spaces, or include leading or trailing spaces.

Visual name uniqueness is enforced. When you attempt to save a visual in the Visual Gallery with the same name as another visual, an error message appears and the visual is not saved.

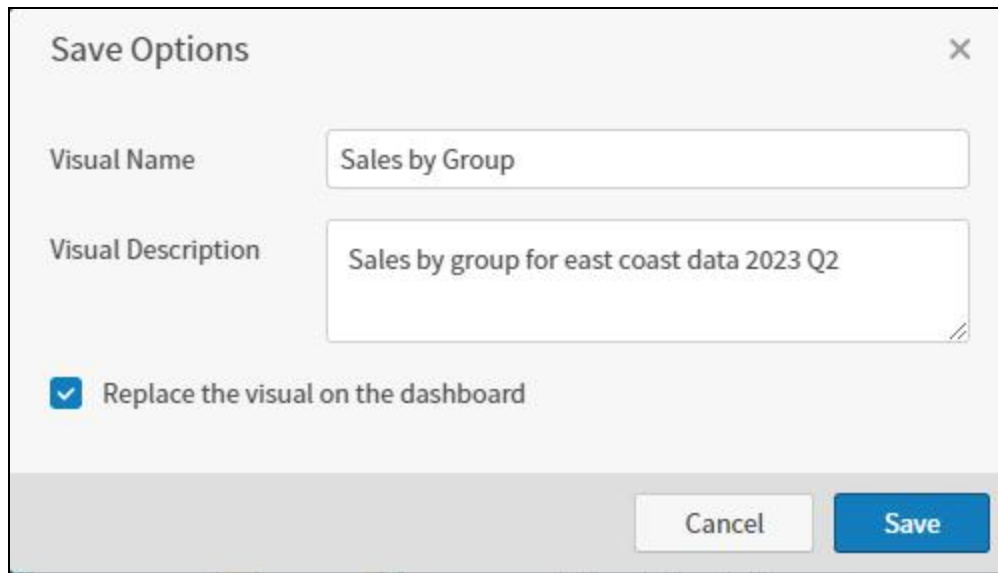
7. You can also add a **Visual Description** for this visual. This content is searchable in the visual gallery, and appears in the info panel of the visual both in the gallery and dashboards.
8. Make any other changes to the visual that you need.
9. Save the visual.

Add a local visual to the Visual Gallery

1. Create or select a local visual in your dashboard, then select  to view available visual options.



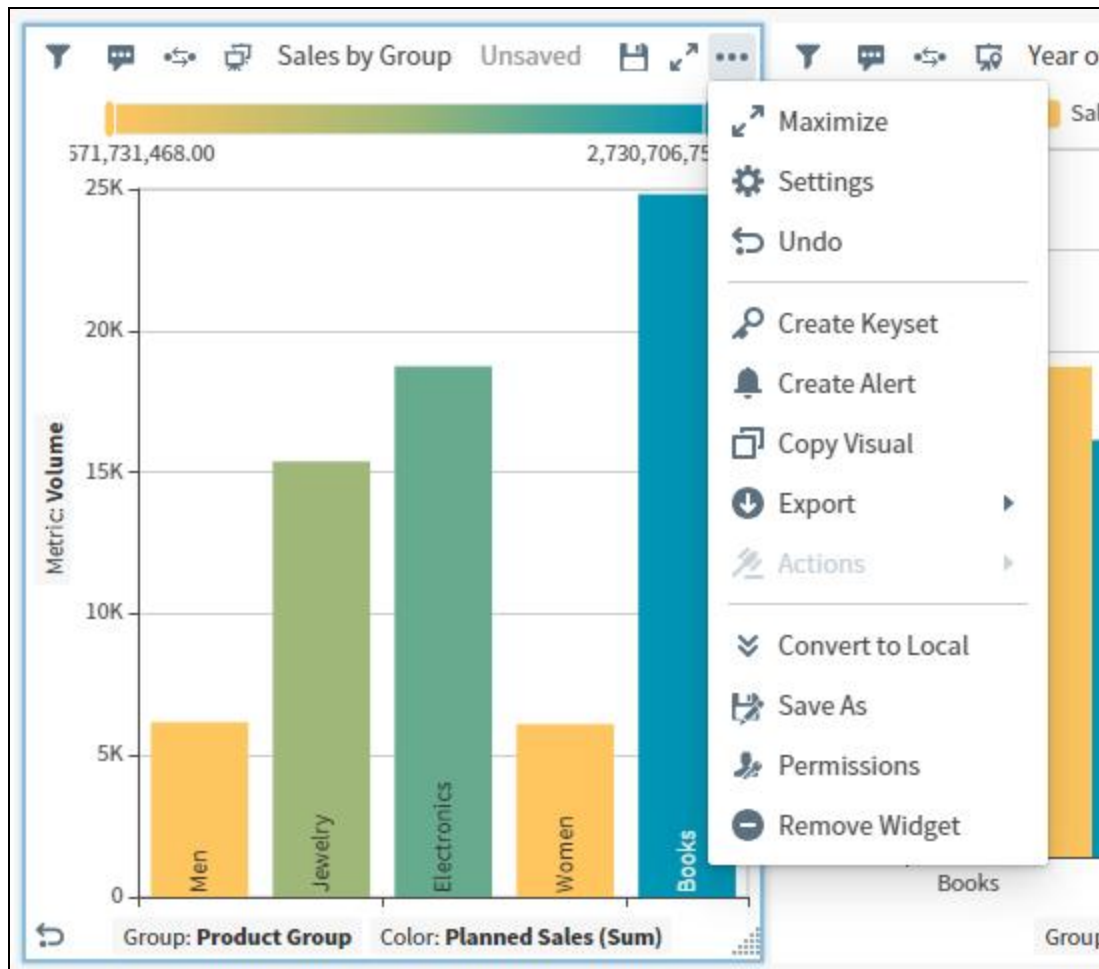
2. Select **Add to Visual Gallery**. A Save Options dialog opens.



The image shows a 'Save Options' dialog box with a close button (X) in the top right corner. It contains two text input fields: 'Visual Name' with the value 'Sales by Group' and 'Visual Description' with the value 'Sales by group for east coast data 2023 Q2'. Below these fields is a checkbox labeled 'Replace the visual on the dashboard' which is checked. At the bottom right are 'Cancel' and 'Save' buttons.

3. Enter a **Visual Name** and optionally, a **Visual Description**.
4. Leave **Replace the visual on the dashboard** option selected to add the visual to the gallery and replace the local visual on your dashboard. Deselect to add the visual to the gallery and leave the local visual in place.

If the saved visual name exists in the visual gallery, your visual saved with a number in parentheses (<n>) at the end of the name to make it unique to the gallery.
5. Save the dashboard to save your changes. If you change the visual, save the visual to retain your visual changes.



Note: If you deselect **Replace the visual on the dashboard**, your visual is added to the visual gallery, and a copy (the local visual) remains on your dashboard.

Visual Names and Display Names

This applies to: *Visual Data Discovery*

Visual names are the unique name of a visual in the Visual Gallery; you assign the name when you create it, are names you assign to a visual when you create it or add it to the visual gallery from a dashboard. The visual name is used by Symphony to track the visual throughout the environment and must be unique. Local visuals do not use visual names.

Display names are the unique name you assign to a visual in a dashboard when you create a local visual, or inherit when you add a visual gallery visual. This display name is shown in the header of the visual.

Note: The field Default Title is now Display Name. Visual Names are no longer editable in the visual information sidebar when you open a specific visual in a dashboard. Edit the visual name when you open the visual in the Visual Gallery.

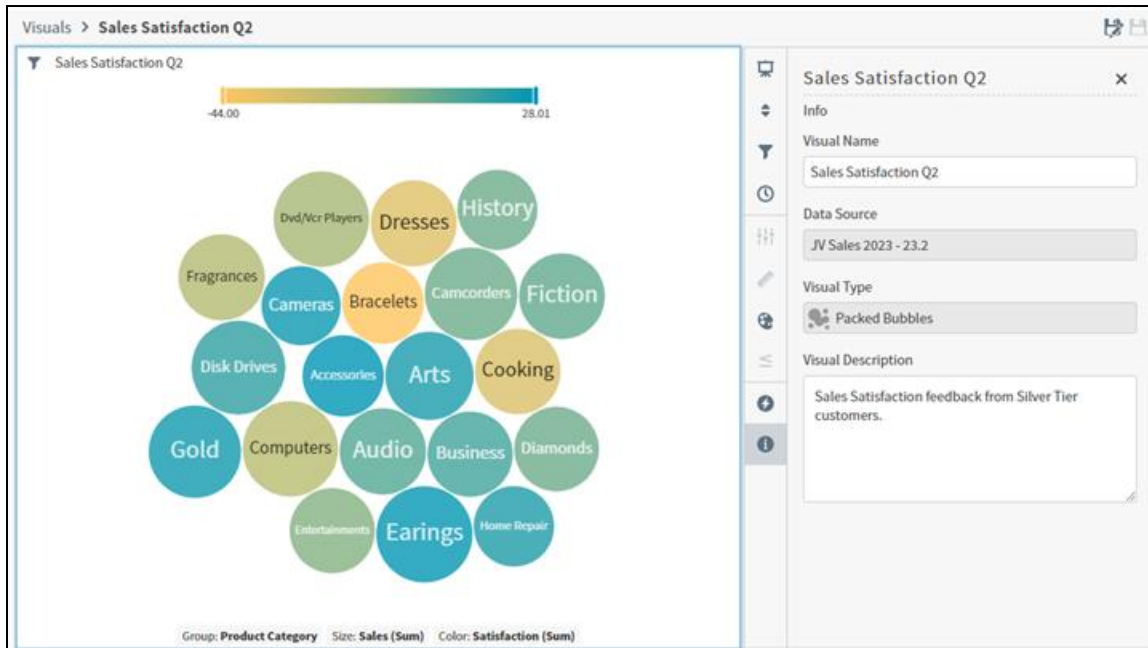
- When you change a visual name, this change is reflected throughout the environment in the Visual Name field. See this change in the [visual information sidebar](#).
- When you change a display name, this change is reflected in the dashboard where the visual is included. If you convert a local visual to a visual gallery visual, the display name is inherited by the visual name field. View the visual name or display name in the [visual information sidebar](#).

The minimum length of visual names and display names is one character; the maximum length is 255 characters. Names can start with and contain numbers, special characters, and uppercase and lowercase characters. Names can contain spaces, but cannot start with a space. Names can't be empty, contain only spaces, or include leading or trailing spaces.

If a display or visual name is not unique, Symphony generally saves your visual by adding a number in parentheses (<n>) at the end of the name to make it unique for that circumstance. If Symphony returns an error, change the name manually and save it.

Change the Visual Name for a Visual Gallery Visual

Change the Visual Name for a visual gallery visual in the Visual Gallery at any time. This does not affect the display name for visuals included in existing dashboards.

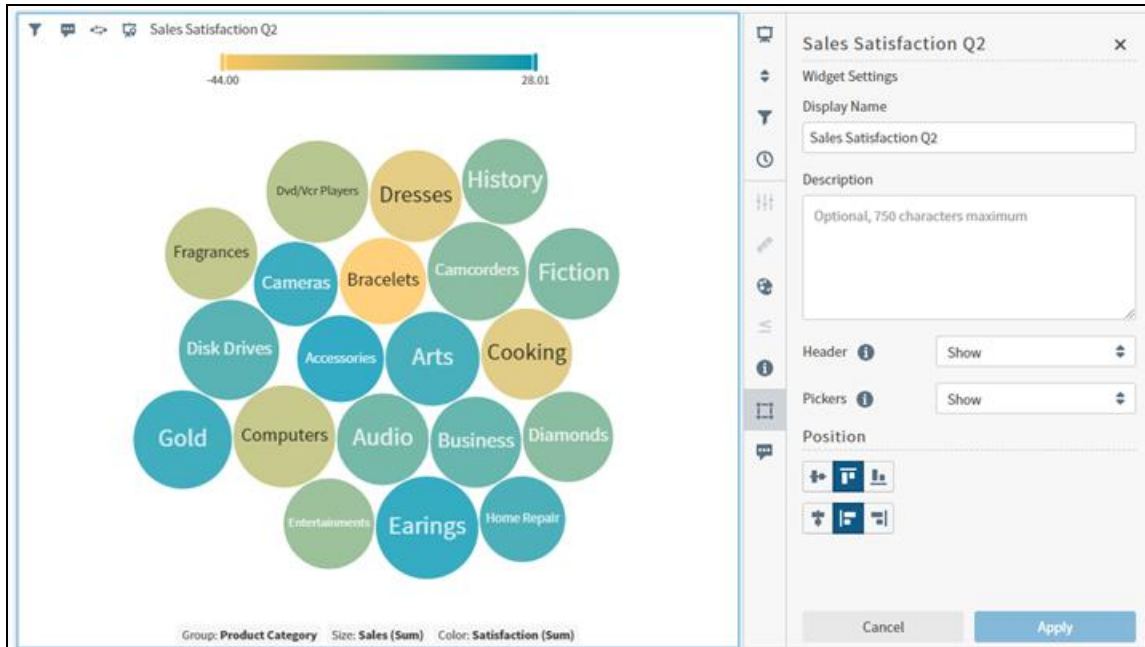


Visual names must be unique.

- If you try to save a visual in the Visual Gallery that has the same name as another visual, an error message appears and your visual is not saved. Rename the new visual to save it.
- If you try to add a visual to the Visual Gallery from a dashboard that has the same name as another visual, the visual is saved with an incremented number in parentheses (<n>) at the end of the name.

Change the Display Name for a Visual

Change the Display Name for a visual in a dashboard at any time, using [visual information sidebar](#), or by editing the name in the header of the visual. This only affects this specific instance of the visual in this dashboard, and does not affect the Visual Name field for visual gallery visuals.



The following table describes the behavior for specifying or changing a visual name or display name.

From the...	Action	Visual Name and Display Name Behavior
Visual Gallery	Create a visual	When you create a visual using the Visual Gallery, but do not assign a name, its visual name is Untitled Visual. The Display Name is also Untitled Visual. - Change the visual name directly on the visual or on the visual information sidebar. - The display name is inherited and cannot be changed here.
	Edit a visual	When you edit a visual using the Visual Gallery: - If you change the visual name, the visual name changes in the Visual Gallery and in the Visual Name field for every dashboard that includes the visual. - If you change the visual name, the Display Name for existing visual instances in dashboards remain unchanged, whether the Display Name is Untitled Visual or the same as the previous visual name. - New visual instances added to a dashboard after a visual name changes use the updated Visual Name as

From the...	Action	Visual Name and Display Name Behavior
		the Display Name when added to a dashboard, until you change the Display Name in the dashboard.
Dashboard	Create a visual	When you create a new local visual while creating or updating a dashboard, its initial Display Name is the same as the name of the data source used for the visual. ▪ Edit the Display Name directly on the visual or using the visual information sidebar. ▪ There is no Visual Name for local visuals. ▪ If you add a local visual to the visual gallery, define the Visual Name in the Save Options dialog.
	Edit a visual	When you edit a visual in a dashboard and change the Display Name, the change only affects that instance of the visual. No other occurrences of the visual on other dashboards are affected. You cannot change the Visual Name for visual gallery visuals using the dashboard. Edit the visual name in the Visual Gallery. View the visual name on the visual information sidebar.

Add Visuals to a Dashboard

This applies to: *Visual Data Discovery*

When you [create](#) or edit a dashboard, you can create and add a new local visual, or add an existing visual from the [Visual Gallery](#). Local visuals use the dashboard's permission set. See [Add Local Visuals To A Dashboard](#) and [Add Existing Visuals To A Dashboard](#).



Note: Local visuals exist only on the dashboard on which they were created. Convert to a Visual Gallery visual and add to the Visual Gallery at any time. Visual gallery visuals can be converted to a local visual at any time. See [Convert Visual Gallery Visuals And Local Visuals](#).

Add a local visual to a dashboard

1. [Create](#) or [edit](#) a dashboard.
 - i. Users with the [Administer Dashboards privilege](#) can create dashboards and add new local visuals to dashboards.
 - ii. Users with Owner and Editor access levels to a dashboard can add new local visuals to the dashboard.
2. Select the Add Visual icon  from the [dashboard icon bar](#). A drop-down menu appears with two options: Add New Visual and Add Existing Visual.
3. Select **Add New Visual** to add a local visual to the dashboard. The Select a Source dialog appears.
4. Select a data source on the **Step 1 of 2: Select a Source** dialog. The Select a Visual Type dialog appears.
5. Select a visual style on the **Step 2 of 2: Select Visual Type** dialog. The visual is created and added to the dashboard.



Note: If you [create a table visual](#), you are prompted to select one or more columns to include. Select your columns, then select **Create Visual** to generate the visual.



Important: Local visuals are unique to the dashboard, and are deleted when the dashboard is deleted. Changes to a local visual do not affect other dashboards.

6. Optionally, click on the display name and change it. See [Visual Names And Display Names](#).

The minimum length of visual names and display names is one character; the maximum length is 255 characters. Names can start with and contain numbers, special characters, and uppercase and lowercase characters. Names can contain spaces, but cannot start with a space. Names can't be empty, contain only spaces, or include leading or trailing spaces.



If you try to save a local visual in a dashboard that has the same name as another visual, the visual is saved with a number in parentheses (<n>) at the end of the name to make it unique to the dashboard.

7. [Modify](#) and make any other changes to the visual you need.
8. [Save](#) your dashboard. If you close the dashboard without saving it, the local visual is not saved.

Add an existing visual to a dashboard from the Visual Gallery

1. [Create](#) or [edit](#) a dashboard.
 - i. Users with the [Administer Dashboards privilege](#) can create dashboards and add visuals to dashboards.
 - ii. Users with Owner and Editor access levels to a dashboard can add visuals they can access to the dashboard.
2. Select Add Visual icon  from the [dashboard icon bar](#). A drop-down menu appears with two options: Add New Visual and Add Existing Visual.
3. Select **Add Existing Visual** to add an existing visual to the dashboard. The Select a Visual dialog appears.
4. Select a visual from the Visual Gallery in the **Select a Visual** work area. The visual is added to the dashboard in a widget.
5. [Modify](#) the visual as needed.
6. [Save](#) your dashboard.

Add Existing Visuals to a Dashboard

This applies to: *Visual Data Discovery*

When you create or edit a dashboard, you can add an existing visual from the [Visual Gallery](#). After you've added an existing visual, you can [convert it to a local visual](#), making a copy unique to the dashboard that you can manipulate without affecting other dashboards.

Add an existing visual to a dashboard from the Visual Gallery

1. [Create](#) or [edit](#) a dashboard.
 - i. Users with the [Administer Dashboards privilege](#) can create dashboards and add visuals to dashboards.
 - ii. Users with Owner and Editor access levels to a dashboard can add visuals they can access to the dashboard.
2. Select Add Visual icon  from the [dashboard icon bar](#). A drop-down menu appears with two options: Add New Visual and Add Existing Visual.
3. Select **Add Existing Visual** to add an existing visual to the dashboard. The Select a Visual dialog appears.
4. Select a visual from the Visual Gallery in the **Select a Visual** work area. The visual is added to the dashboard in a widget.
5. [Modify](#) the visual as needed.
6. [Save](#) your dashboard.

Add Local Visuals to a Dashboard

This applies to: *Visual Data Discovery*

Visuals take data from your data sources so you can present information in an easy to view, adjust, and update format.

Local visuals are visuals you create that are unique to a single dashboard. Experiment with data presentation and filtering techniques, or make local copies of existing visual gallery visuals to present alternatives without impacting visual gallery visuals.

Local visuals, using the permission set of the dashboard, allow your self service users to create visuals they need for a specific dashboard or scenario. If needed, they can be added to the Visual Gallery and shared.

To create local visuals, you need to be a user with Owner or Editor access to a dashboard, or a user with the [Administer Dashboards privilege](#).



Note: Local visuals exist only on the dashboard on which they were created. Convert to a Visual Gallery visual and add to the Visual Gallery at any time. Visual gallery visuals can be converted to a local visual at any time. See [Convert Visual Gallery Visuals And Local Visuals](#).

Add a local visual to a dashboard

1. [Create](#) or [edit](#) a dashboard.
 - i. Users with the [Administer Dashboards privilege](#) can create dashboards and add new local visuals to dashboards.
 - ii. Users with Owner and Editor access levels to a dashboard can add new local visuals to the dashboard.
2. Select the Add Visual icon  from the [dashboard icon bar](#). A drop-down menu appears with two options: Add New Visual and Add Existing Visual.
3. Select **Add New Visual** to add a local visual to the dashboard. The Select a Source dialog appears.
4. Select a data source on the **Step 1 of 2: Select a Source** dialog. The Select a Visual Type dialog appears.
5. Select a visual style on the **Step 2 of 2: Select Visual Type** dialog. The visual is created and added to the dashboard.



Note: If you [create a table visual](#), you are prompted to select one or more columns to include. Select your columns, then select **Create Visual** to generate the visual.



Important: Local visuals are unique to the dashboard, and are deleted when the dashboard is deleted. Changes to a local visual do not affect other dashboards.

6. Optionally, click on the display name and change it. See [Visual Names And Display Names](#).



The minimum length of visual names and display names is one character; the maximum length is 255 characters. Names can start with and contain numbers, special characters, and uppercase and lowercase characters. Names can contain spaces, but cannot start with a space. Names can't be empty, contain only spaces, or include leading or trailing spaces.

If you try to save a local visual in a dashboard that has the same name as another visual, the visual is saved with a number in parentheses (<n>) at the end of the name to make it unique to the dashboard.

7. [Modify](#) and make any other changes to the visual you need.
8. [Save](#) your dashboard. If you close the dashboard without saving it, the local visual is not saved.

Convert a local visual to a visual gallery visual to share it with other users. See [Convert Visual Gallery Visuals And Local Visuals](#).

Edit Visuals

This applies to: *Visual Data Discovery*

Edit visuals directly on a Symphony dashboard or in the Visual Gallery. When you modify a visual from the Visual Gallery and save your changes, the changes are made to the visual in the Visual Gallery and everywhere the visual is used on dashboards.

To edit a visual, you must be logged in as a user belonging to a group with the [privilege Administer Visuals](#) enabled.

Edit a visual

1. Select the visual on a dashboard or in the Visual Gallery. When selected on a dashboard, a blue border appears around the visual. If you select a visual with a streaming data source, the [time bar](#) (Data DVR) appears.
2. Depending on the edits you need to make, select an item on the visual drop-down menu () or one of the [sidebars](#) for the visual. You can also use the [axes labels](#) on the visual to change what is displayed and the [context menu](#) to visualize the data on your visual, adjust the settings, and more.

Some of the options described here can be performed in the Visual Gallery, some only when editing the visual in a dashboard, and some in both.

Edit Option	Procedure	Visual Gallery/ Dashboard/Both
Change the data shown	Depending on the style of the visual, select new data fields in the axes labels. See Change The Axes	Both
Modify the visual style	Select  on the sidebar menu . A corresponding sidebar appears. See Change The Visual Style .	Both
Modify the colors	Select  on the sidebar menu . A corresponding sidebar appears. See Change Color Schemes .	Both
Modify the rulers and reference lines	Select  on the sidebar menu . A corresponding sidebar appears. See Use Rulers and Use Reference Lines .	Both
Modify visual information	Select  or  on the sidebar menu . A corresponding sidebar appears. See Modify Visual Names, Display Names, And Descriptions .	Both
Modify visual settings	Select  on the sidebar menu . A corresponding sidebar appears. See Change Visual Settings .	Both

Edit Option	Procedure	Visual Gallery/ Dashboard/Both
Manage the visual time bar	Select  on the sidebar menu . A corresponding sidebar appears. See Use The Time Bar .	Both
Sort or otherwise limit the visual	Select  on the sidebar menu . See Sort And Limit Visual Data	Both
Apply new or saved filters to your visual	Select  to the left of the visual name or select  on the sidebar menu to display the Filters sidebar. Use the Filters sidebar to add and apply a new filter to your data or to select a saved filter to apply to your data. See Filter Data .	Both
Apply Conditional Formatting	Select  on the sidebar menu to display the Conditional Formatting sidebar. Apply color and text formats based on conditional rules. See Using The Conditional Formatting Sidebar .	Both
Adjust visual interactivity	Select  on the sidebar menu . See Control How Users Interact With A Visual .	Visual Gallery
Create a keyset	Select  and Create Keyset from the visual drop-down menu . See Create A Keyset .	Both
Invoke an action	Select  and Actions from the visual drop-down menu . See Invoke An Action .	Both
Export the visual	Select  and Export from the visual drop-down menu . See Export Visuals .	Both
Copy the visual	Select  and Copy Visual from the visual drop-down menu . See Copy Visuals .	Dashboard
Save the visual	Select  . Changes are saved in the dashboard and in the Visual Gallery.	Dashboard
Remove a visual from the dashboard	Select  and Remove Widget from the visual drop-down menu . See Delete and Remove Visuals .	Dashboard
Add or view widget comments	Select  from the sidebar menu . See Manage Widget Comments .	Dashboard

- Optionally, edit the number or date and time format for this visual. See [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).
- Make your changes.
- When you have finished making changes to your visual, be sure to save it. See [Save Visuals With Their Current Names](#).

Configure Number Formatting for Visuals

This applies to: *Visual Data Discovery*

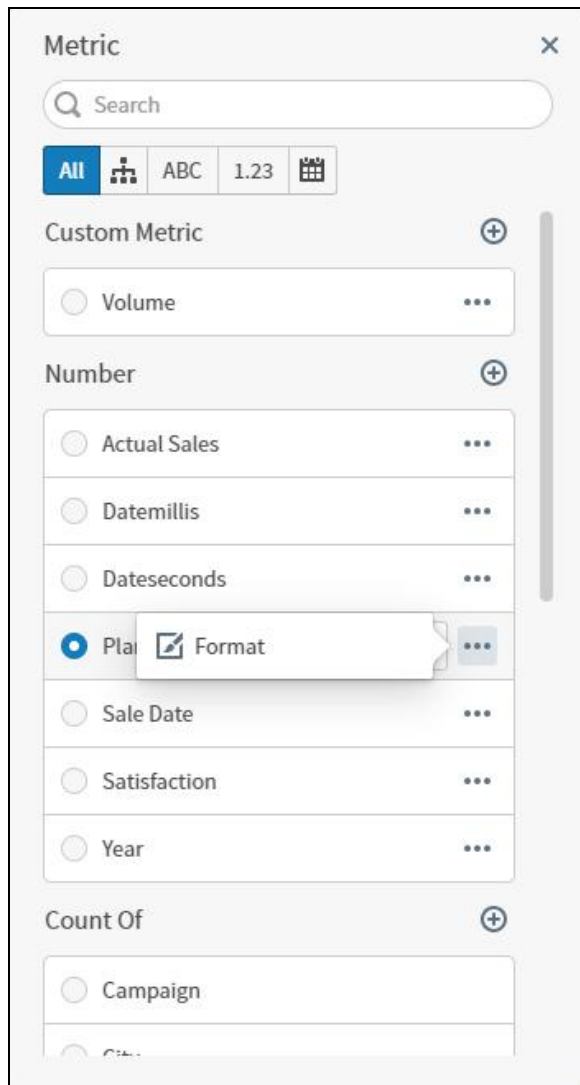
Formats for Number attributes [are set at the source](#). You can override source formats by changing a visual directly, without affecting the underlying source format. For information on other settings that may apply to Number attributes, see [Configure Number Formatting - Data Sources](#).



Note: You can also override formatting for the Time attribute at the visual level. See [Configure Date And Time Formatting For Visuals](#).

Configure Formatting for Visuals - Number Attributes

1. Select the visual with time attributes you want to format in a dashboard or the visual gallery.
2. Select a Metric, X or Y axis, Group, Color, Trend line, size, or other available measure. A dialog for your selection opens.



3. Locate your number field using **Search**, or navigate to the field or fields you want to format. Select the menu  for a field, then select Format. The **Format:** **<field>** work area opens.

Format: Planned Sales
×

Number Format

Plain Number

Unit Multiple

None

Decimal Place

2

^
v

Negative Display

-1,234.01

Use 1000 Separator

☒

Reset

Cancel

Apply

4. Define your format options, and select **Apply** to apply to this field.

5. Repeat for all fields you want to modify.



Note: To clear your applied changes to a field, open the formatting work area and select **Reset**.

Format Options Number Attribute for Visuals

Select one of the following number formats in the drop-down list in the Number Format box. The other fields on the Format dialog change based on the number format you select.



- **Plain Number:** Select this format to display the field as plain number values. Additional format information you can select includes:

Format Option	Description
Unit Multiple	Select the unit of measure you want to use for the field from the drop-down list. Valid values are None , Thousands (K) , Millions (M) , Billions (B) , and Trillions (T) . The unit multiple is used in visuals. For example, a value of 1,500,000 would show as 1.5M in visuals.
Decimal Place	Specify the number of decimal places used in the data.
Negative Display	Select the desired negative value format from the drop-down list. Valid values are the dash (-) in front of a negative value or parentheses surrounding negative values. For example, value of negative 30 could show as -30 or (30) in visuals.
Use 1000 Separator	If you want commas used to separate number values into thousands, millions, billions, and trillions, check the Use 1000 Separator box. For example, if this box is checked, 2500 appears as 2,500 in visuals.

- **Percentage:** Select this format to display the field as percentage values. Additional format information you can select includes:

Format Option	Description
Decimal Place	Specify the number of decimal places used in the data.
Negative Display	Select the desired negative value format from the drop-down list. Valid values are the dash (-) in front of a negative value or parentheses surrounding negative values. For example, value of negative 30.25 percent could show as -30.25% or (30.25%) in visuals.
Use 1000 Separator	If you want commas used to separate number values into thousands, millions, billions, and trillions, check the Use 1000 Separator box.

- **Money:** Select this format to display the field as currency values. Additional format information you can select includes:

Format Option	Description
Symbol	Select the currency symbol you want used for money values in visuals.
Unit Multiple	Select the unit of measure you want to use for the field from the drop-down list. Valid values are None , Thousands (K) , Millions (M) , Billions (B) , and Trillions (T) . The unit multiple is used in visuals. For example, a value of 1,500,000 would show as 1.5M in visuals.
Decimal Place	Specify the number of decimal places used in the data.
Negative Display	Select the desired negative value format from the drop-down list. Valid values are the dash (-) in front of a negative value or parentheses surrounding negative values. For example, value of negative 30 dollars and 25 cents could show as -\$30.25 or (\$30.25) in visuals.

Format Option	Description
Use 1000 Separator	If you want commas used to separate number values into thousands, millions, billions, and trillions, check the Use 1000 Separator box.

- **Storage:** Select this format to display the field as computer storage values. Additional format information you can select includes:

Format Option	Description
Unit Multiple	Select the unit of measure you want to use for the field from the drop-down list. Valid values are Bytes (B) , Kilobytes (KB) , Megabytes (MB) , Gigabytes (GB) , Terabytes (TB) , Petabytes (PB) , and Exabytes (EB) . The unit multiple is used in visuals. For example, a value of 950 kilobytes would show as 950KB in visuals.
Decimal Place	Specify the number of decimal places used in the data.

- **Scientific Notation:** Select this format to display the field as scientific decimals. Additional format information you can select includes:

Format Option	Description
Decimal Place	Specify the number of decimal places used in the data.

Configure Date and Time Formatting for Visuals

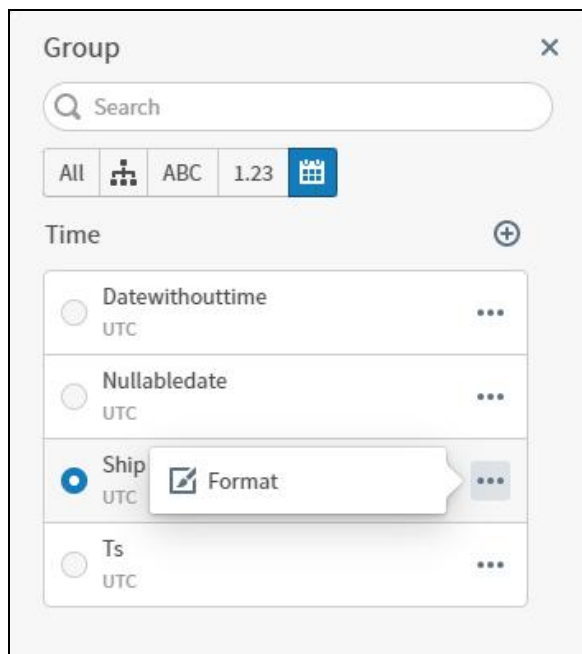
This applies to: *Visual Data Discovery*

Date and time formats for Time attributes [are set at the source](#). You can override source formats by changing a visual directly, without affecting the underlying source format. For information on other settings that may apply to Time attributes, see [Configure Date And Time Formatting - Data Sources](#).

Note: You can also override formatting for the Number attribute at the visual level. See [Configure Number Formatting For Visuals](#).

Configure Formatting for Visuals - Time Attributes

1. Select the visual with time attributes you want to format in a dashboard or the visual gallery.
2. Select a Metric, X or Y axis, Group, Color, Trend line, size, or other available measure. A dialog for your selection opens.



3. Locate your time field using **Search**, or navigate to the field or fields you want to format. Select the menu  for a field, then select Format. The **Format:** **<field>** work area opens.

Format: Ship Date

Year

Numeric

Month

Short

Weekday

None

Day

Numeric

Hour

2-Digit

Hour12

Auto

Reset

Cancel

Apply

4. Define your format options, and select **Apply** to apply to this field.

5. Repeat for all fields you want to modify.

 **Note:** To clear your applied changes to a field, open the formatting work area and select **Reset**.

Format Options Time Attribute for Visuals

When you configure formatting at the visual level, you may not see all the options listed below, depending on the visual you're updating and the available time segments included in the source data.

Format Option	Description
Second	Select Numeric (0-59) or 2-Digit (00-59).
Minute	Select Numeric (0-59) or 2-Digit (00-59).
Hour	Select Numeric (1-24) or 2-Digit (01-24).
Hour12	Select a 12 or 24 hour format option for Hour12. ▪ Auto displays the hour format defined in the source data.

Format Option	Description
	▪ True overrides the source format, displaying the hours in 12 hour format, with an appended AM or PM. ▪ False overrides the source format, displaying the hours in 24 hour format.
Day	Select Numeric (1-7) or 2-Digit (01-07).
Month	Select Numeric (1-12), 2-Digit (01-12), Long (January, March), Short (Jan, Mar), or Narrow (J, M).
Weekday	Select Long (Friday, Sunday), Short (Fri, Sun), Narrow (F, S), or None . The default is None , to show no day of the week.
Quarter	Select Range , Narrow , Numeric (1-4), or 2-Digit (01-04). Set Granularity to Quarter; you can define Quarter formatting after the visual reloads with Quarter granularity.
Year	Select Numeric (2022) or 2-Digit (22).

Copy Visuals

This applies to: *Visual Data Discovery*

Make a copy of visuals in your dashboard to try alternate visualization scenarios by adding a copy of a local or shared visual gallery visual. You can also add a copy of a shared visual to the visual gallery from the dashboard or in the visual gallery to share with other users.

To control whether a visual can be copied, use the interactivity sidebar. See [Control How Users Interact With A Visual](#).

Action	Description
Copy a local visual 	Select  Copy Visual from the visual drop-down menu . Symphony duplicates the visual on the dashboard as another local visual. The display name is incremented by 1.
Copy a visual gallery visual 	Select  Copy Visual from the visual drop-down menu . Symphony duplicates the visual on the dashboard as a local visual. The display name is incremented by 1.
Copy a visual gallery visual 	Select  Save As from the visual drop-down menu . Symphony duplicates the visual in the Visual Gallery. Unless you change the visual name, the existing visual name is incremented by 1. See Save Visuals With New Names .  Note: To copy visuals, you must be logged in as an administrator or as a user with the Create Visuals or Administer Visuals group privilege.



Note: Every stored setting for the visual is copied, including sort and limit options, filters, ruler properties and reference lines, colors, time bar options, and other visual information. View levels for maps are not copied.

Save Visuals With Their Current Names

This applies to: *Visual Data Discovery*

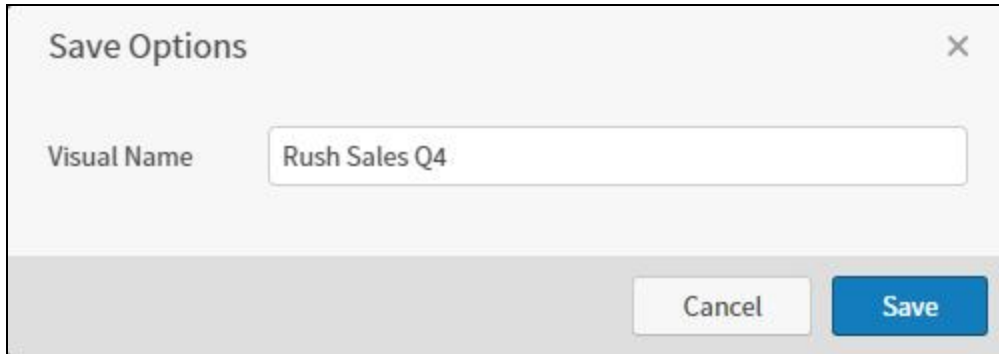
When you have finished making changes to a visual on a dashboard, you can save it with its original name. Changes you've made to the visual will appear on all dashboards that use the visual.

Note: If you are editing the visual in a dashboard, you can save the visual with its current name when you save the dashboard. However, the default is not to save them when you save the dashboard. You must explicitly elect to save them on the dashboard Save Options dialog. See [Save A Dashboard](#).

Note: To save visuals, you must be logged in a user with [write permissions](#) for the visual or with the **Administer Visuals** [group privilege](#).

Save a visual with its current name

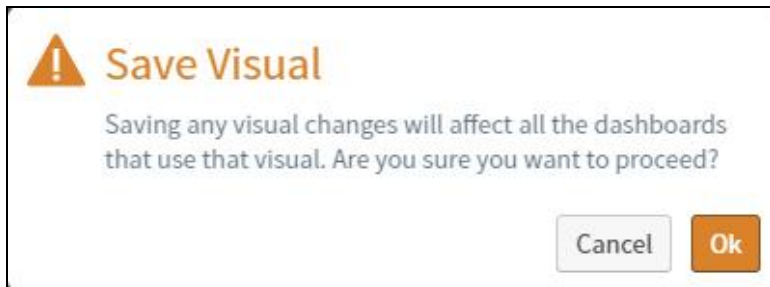
1. Select the visual on a dashboard or in the Visual Gallery. When selected on a dashboard, a blue border appears around the visual. If you select a visual with a streaming data source, the [time bar](#) (Data DVR) appears.
2. Select save () in the upper right corner of the visual.
- i. If you are editing the visual in the Visual Gallery, the Save Options dialog appears.



The image shows a 'Save Options' dialog box with a close button (X) in the top right corner. Inside the dialog, there is a label 'Visual Name' followed by a text input field containing the text 'Rush Sales Q4'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Save'.

Optionally, specify a new visual name in the **Visual Name** box and select **Save**. The visual is saved.

- ii. If you are editing the visual in a dashboard, a warning appears indicating that the visual changes will occur for all dashboards that use the visual.



Select **OK** on the warning dialog. The visual is saved.

Convert Visual Gallery Visuals and Local Visuals

This applies to: *Visual Data Discovery*

Visuals take data from your data sources so you can present information in an easy to view, adjust, and update format.

When you create visuals that are used in multiple dashboards, stored and shared among Symphony users, they are stored in the Visual Gallery. These visuals can be converted into local visuals, unique to that dashboard, allowing you to make changes that do not affect the original shared visual.

Local visuals are visuals you create that are unique to a single dashboard. Experiment with data presentation and filtering techniques.

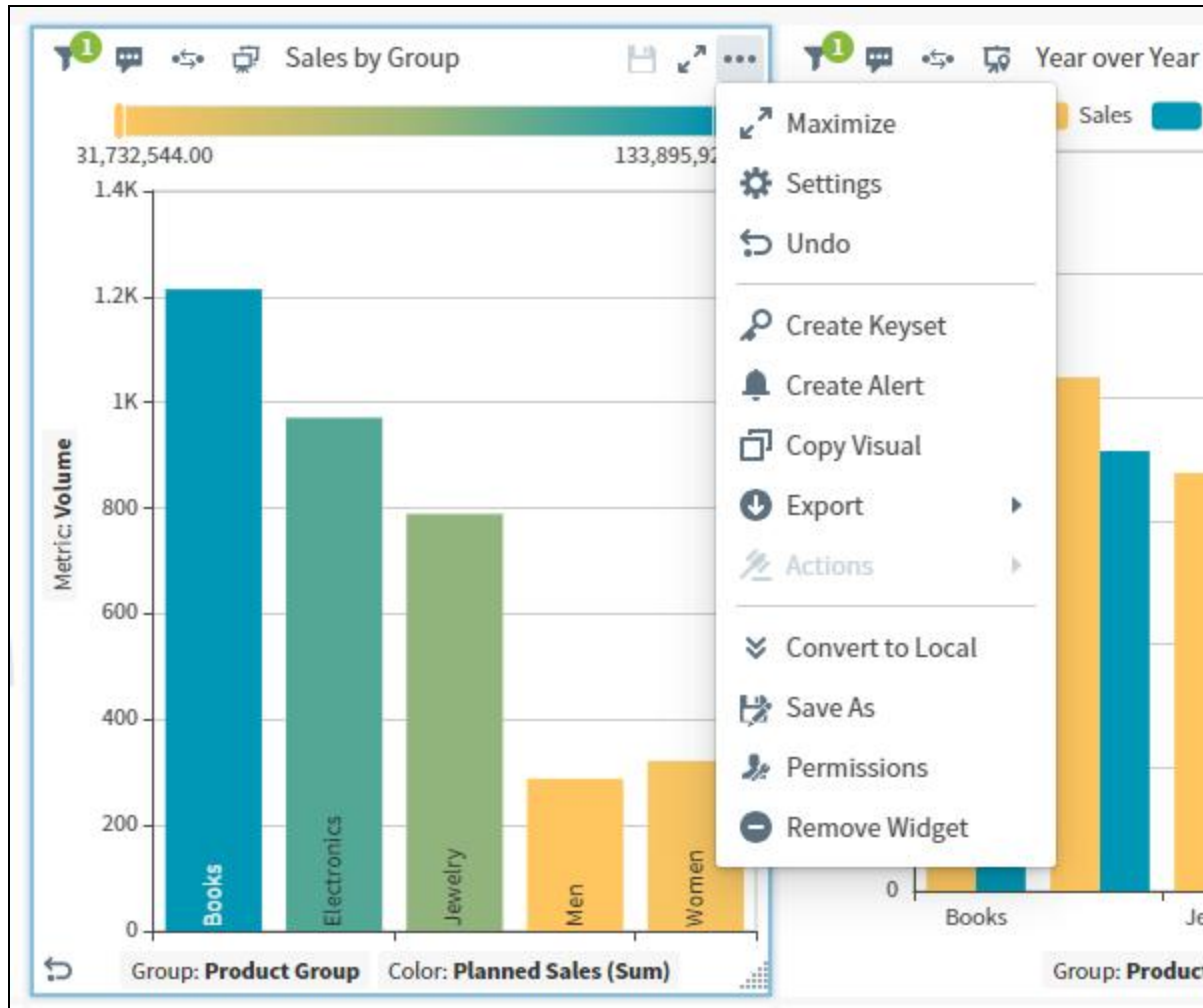
You can convert a visual from the visual gallery into a local visual, unique to that dashboard, and make changes to the local visual without affecting the data of primary visual you started from. As part of the conversion process, the interactivity settings for the visual are set to Symphony defaults.



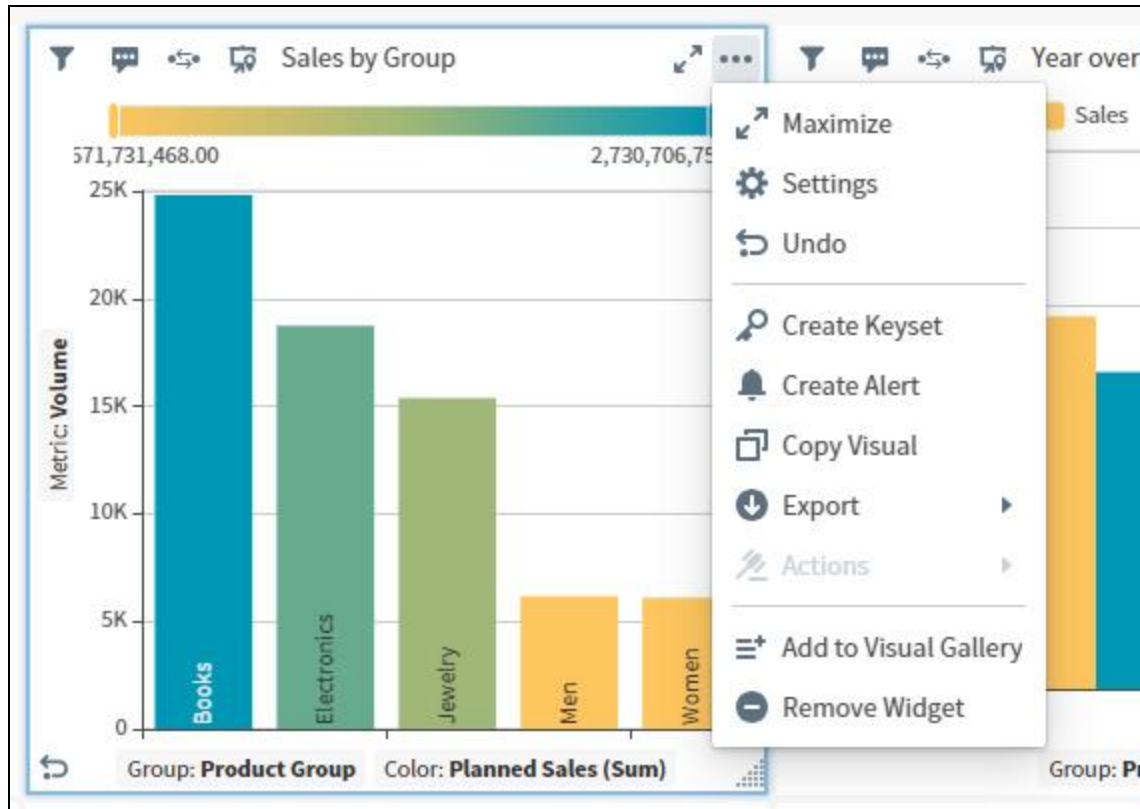
Note: To create local visuals, you need to be a user with Owner or Editor access to a dashboard, or a user with the [Administer Dashboards](#) privilege.

Convert a visual gallery visual to a local visual

1. Add a visual from the visual gallery to your dashboard, then select  to view available visual options.



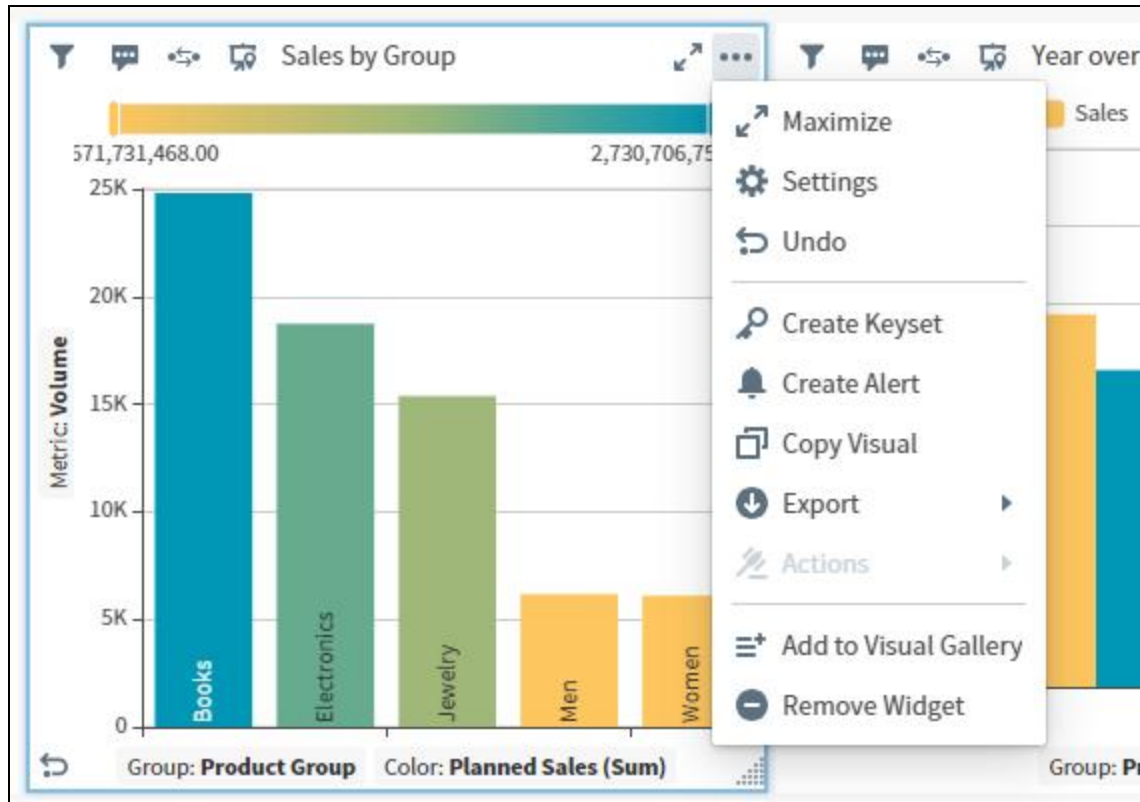
2. Select **Convert to Local**. Symphony adds a copy of the saved visual from the visual gallery to the dashboard as a local visual.
3. [Save](#) the dashboard to save your changes.



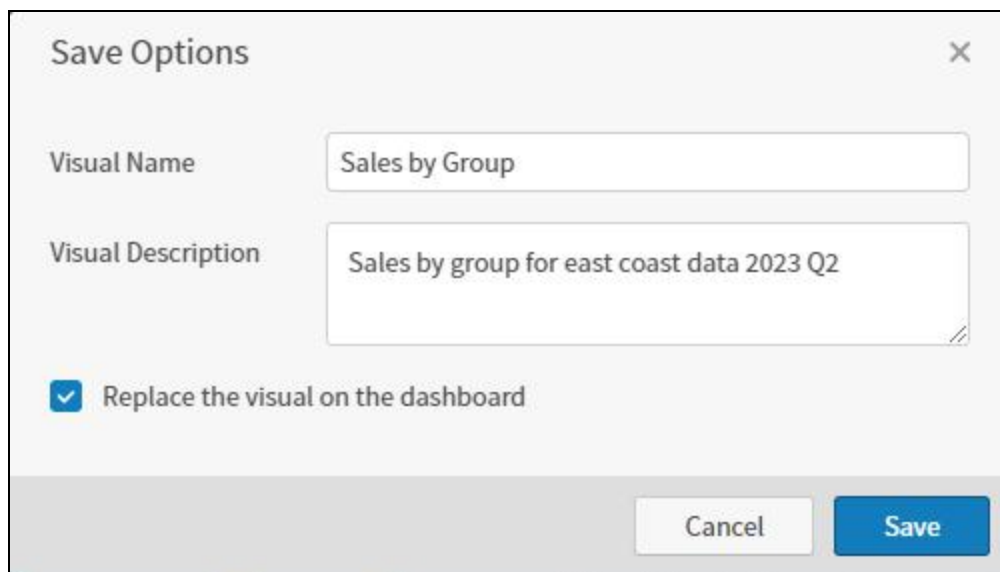
Note: If you add the visual gallery visual back to the dashboard, the visual name is incremented on the dashboard to differentiate it from the local visual of the same name.

Convert a local visual to a visual gallery visual

1. Create or select a local visual in your dashboard, then select  to view available visual options.



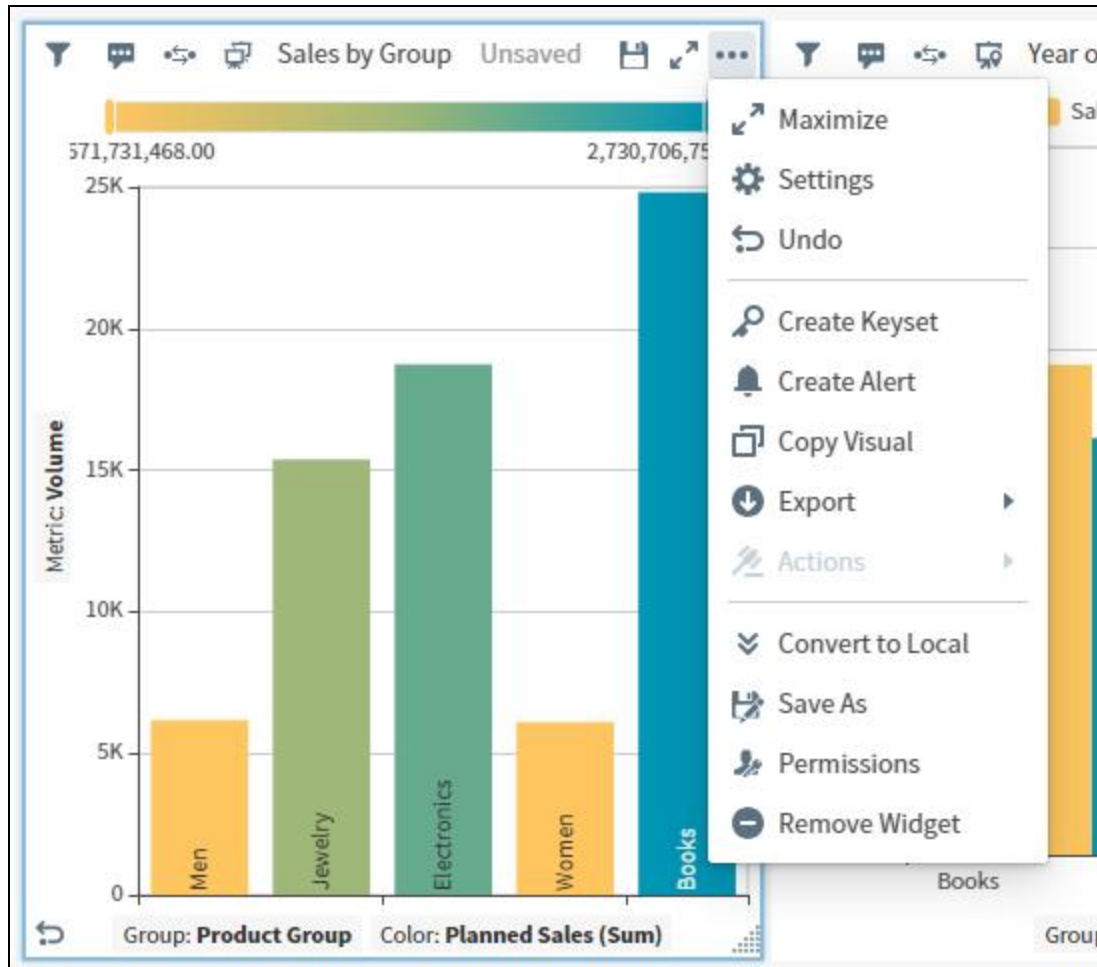
2. Select **Add to Visual Gallery**. A Save Options dialog opens.



The image shows a 'Save Options' dialog box with a close button (X) in the top right corner. It contains two text input fields: 'Visual Name' with the value 'Sales by Group' and 'Visual Description' with the value 'Sales by group for east coast data 2023 Q2'. Below these fields is a checkbox labeled 'Replace the visual on the dashboard' which is checked. At the bottom right are 'Cancel' and 'Save' buttons.

3. Enter a **Visual Name** and optionally, a **Visual Description**.
4. Leave **Replace the visual on the dashboard** option selected to add the visual to the gallery and replace the local visual on your dashboard. Deselect to add the visual to the gallery and leave the local visual in place.

If the saved visual name exists in the visual gallery, your visual saved with a number in parentheses (<n>) at the end of the name to make it unique to the gallery.
5. Save the dashboard to save your changes. If you change the visual, save the visual to retain your visual changes.



Note: If you deselect **Replace the visual on the dashboard**, your visual is added to the visual gallery, and a copy (the local visual) remains on your dashboard.

Save Visuals With New Names

This applies to: *Visual Data Discovery*

All visuals have a visual name and display name. When you use the Save As option for a shared visual gallery visual, you affect the visual name. Symphony makes a copy of the visual in the visual gallery. The original visual is replaced with the newly named visual if you save a visual with a new name while editing a dashboard.

Note: To change the display name of a visual, see [Visual Names And Display Names](#).

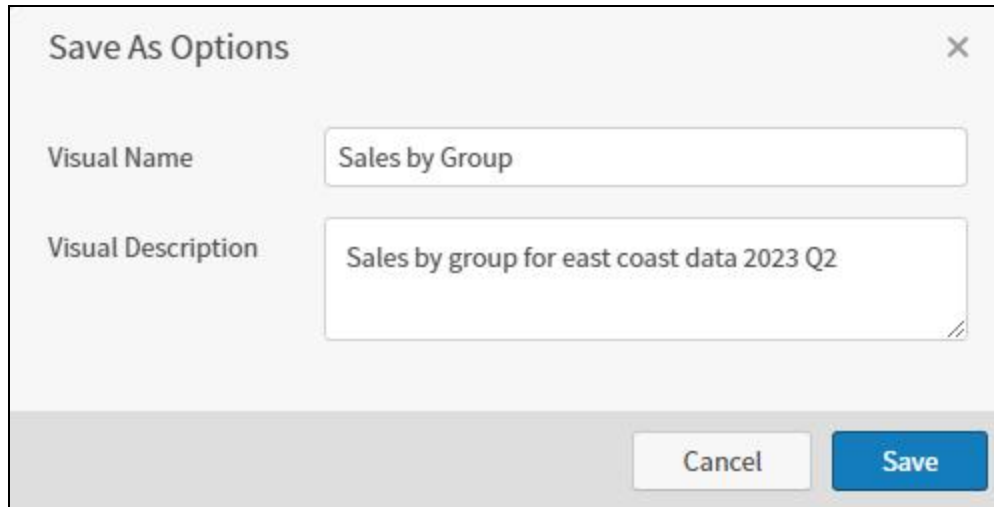
Action	Description
Save As in the Visual Gallery	Open a visual in the visual gallery, select Save As, provide a new name, and Save your changes. - If there are no changes in the visual from a previous save, Symphony adds a copy of the visual with the new name to the visual gallery. - If there are unsaved changes in the visual after a previous save, Symphony adds a copy of the visual with the new name and the changes to the visual gallery. Note: You can also add a searchable Visual Description for this visual.
Save As in a dashboard	Select a visual in the dashboard, select Save As from the visual drop-down menu, provide a new name, and Save your changes. Symphony adds a copy of the visual with the new name to the visual gallery. The visual in the dashboard is replaced by the new visual.

Note: You can create a local visual by selecting the **Copy** option for a shared visual using [visual drop-down menu](#). See [Copy Visuals](#).

Note: To save visuals with a new visual name in the Visual Gallery, you must be logged in as an administrator or as a user with the **Create Visuals** or **Administer Visuals** [group privilege](#).

Save a visual with a new name in the visual gallery

- Select the visual in the Visual Gallery.
- Select **Save As** in the () in upper right corner of the visual.



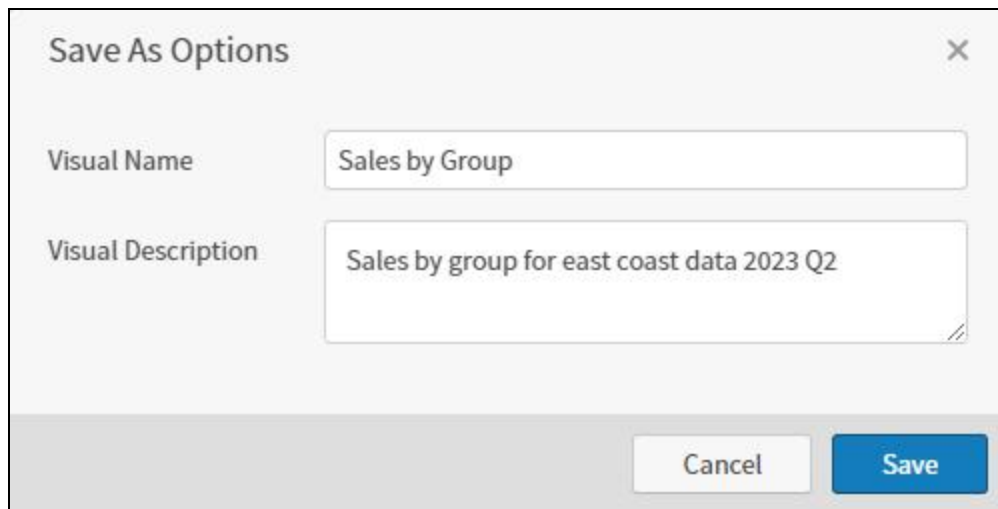
The image shows a 'Save As Options' dialog box with a close button (X) in the top right corner. It contains two text input fields: 'Visual Name' with the text 'Sales by Group' and 'Visual Description' with the text 'Sales by group for east coast data 2023 Q2'. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

3. Specify a new visual name in the **Visual Name** box and select **Save**. Symphony adds a copy of the visual with the new name to the visual gallery.

The original visual still exists with its original visual name in the system.

Save a visual with a new name while editing a dashboard

1. Select a visual in the dashboard.
2. Select **Save As** from the [visual drop-down menu](#).



The image shows a 'Save As Options' dialog box with a close button (X) in the top right corner. It contains two text input fields: 'Visual Name' with the value 'Sales by Group' and 'Visual Description' with the value 'Sales by group for east coast data 2023 Q2'. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

- 3.
4. Specify a new visual name in the **Visual Name** field, optionally add or edit the **Visual Description**, and select **Save**. Symphony adds a copy of the visual with the new name to the visual gallery.
The visual in the dashboard is replaced by the new visual.



Import Visual Gallery Visuals

This applies to: *Visual Data Discovery*

Import one or more visuals

1. Log in as a user with the **Manage Connections, Administer Sources, Administer Visuals** [privilege](#). If you are logged in as a tenant admin, verify you're in or switch to the appropriate tenant.
2. Select **Visual Gallery** on the [UI menu](#). The visual gallery work area opens.
3. Select **Import Visual**. The Import Visuals dialog opens.
4. Browse to and choose the `json` file for the visuals you want to import, then select **Open**.

The Import Visuals dialog populates with information about the objects that make up your visuals and the settings you can use to define how your software

inserts each object.

5. Add and remove tenants by selecting the **Tenants** field. Add or remove them from the list or field.

Note: Only system admins or members of the Content Distributors group (VDD Content Distributor) see the Tenants field. If this field is not shown, the content is imported into the tenant you are currently working in.

6. Optionally, enable or disable **Ignore Warnings**.

When you enable **Ignore Warnings**, a Tags field is added to the Import work area. Add or create tags to apply to objects that do not import cleanly.

- i. If errors occur during import, your software adds the tags you select to the affected objects.
- ii. Use the tags to find visuals or sources you need to fix.

Note: When you enable Ignore Warnings, items that can be imported with warnings are imported and tagged. Use these tags to find and fix the warnings in tagged objects. When disabled, no objects are imported, and errors are returned to aid in troubleshooting.

7. Select an **Insertion Strategy** for each group of objects.

- i. **Always create objects:** Select to create an object every time, even if an existing object exists with the same name or unique ID.
- ii. **Reuse existing objects:** Select to create an object if no object with the same name exists. If an object with the same name or unique ID exists, the original object is reused.
- iii. **Update existing objects:** Select to update (overwrite) an existing object with the same name or unique ID. If an object with the same name does not exist, an object is created.

8. Use the default **Matching Strategy** or select the appropriate strategies for your sources in the order you want the strategies to be processed. See [Matching Strategies](#).

9. Enable **Share Default Access With All Users** to immediately give your users access to the content you import.

10. After you've confirmed your choices, select **Import**. The visuals are imported and a success message is returned if objects import successfully or with accepted warnings. Any items imported with warnings have your selected tags applied.

Note: If you import an exported source that has an associated translation file, you must re-upload the translation for that source.

Visuals with a unique name are imported with that name. If the name is not unique, the newly imported visual is imported and the name appended with a date and time.



Important: Trying to import a visual that uses the same source name as an existing source but uses different connection details or credentials may cause issues. Change the name of the source before you export it from one instance and import it into another.

See [Export Visual Gallery Visuals](#).

Matching Strategies

When you import objects into Symphony, combine these matching strategies with your selected insertion strategies to meet your organization's needs. The strategies are applied in the order you select. When you create new objects, matching strategies are not used.

Visuals

Strategy	Notes
By Name	The default strategy used if no other strategies are selected.
By Origin ID	

Sources

Strategy	Notes
By Name	The default strategy used if no other strategies are selected.
By Origin ID	

Connections

Strategy	Notes
By Id, Type, and Parameters	A default strategy used if no other strategies are selected. Used with By Type and Parameters if it's not deselected.
By Type and Parameters	A default strategy used if no other strategies are selected. Used with By Id, Type, and Parameters .
By Name	
By Name and Type	



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Strategy	Notes
By Origin ID	
By Type and Parameter Keys	

Export Visuals

This applies to: *Visual Data Discovery*

Export your visuals in a variety of formats, as an image or data you can share with others. To export visuals for import into another instance of your software, see [Export Visual Gallery Visuals](#).

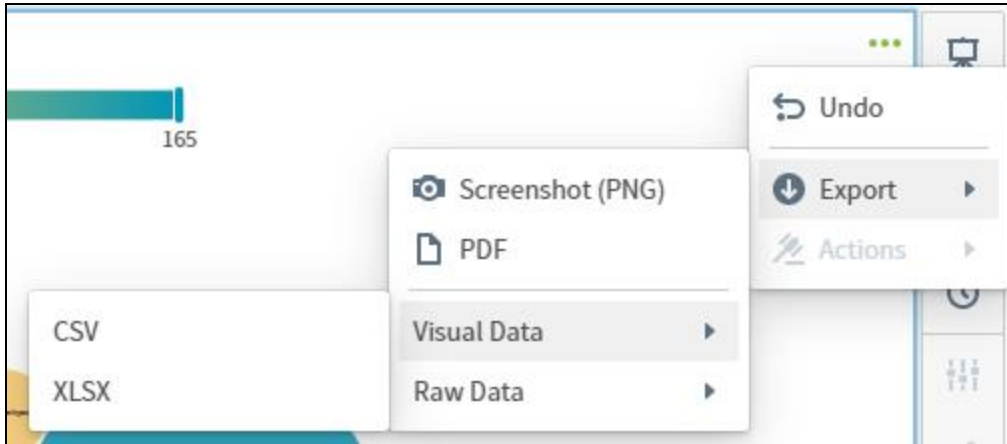


Note: Exports do not support special characters. If names associated with your visual, such as visual name, display name, or data source name contain special characters, update the name before export.

You can export your data from your visuals in several formats:

- Screenshot (PNG) - an image
- PDF - an image
- Visual Data
 - CSV - Comma separated values file
 - XLSX - Excel compatible file
- Raw Data
 - CSV - Comma separated values file

- XLSX - Excel compatible file



Note: Grouped table data can't be exported as raw or aggregate visual data.

Note: The number of records included is limited by the setting of the `zoomdata.export.data.max.rows` property in the `zoomdata.properties` file. See [Configuration Property Files](#).

Control whether a visual can be exported in your embedded Symphony environment using the interactivity sidebar. See [Control How Users Interact With a Visual](#).

For more information, see the following articles:

- [Export Visual Gallery Visuals](#)
- [Export a Visual as an Image](#)
- [Export Visual Data in CSV or XLSX Format](#)
- [Export Raw Data in CSV or XLSX Format](#)



Export Visual Gallery Visuals

This applies to: *Visual Data Discovery*

Export one or more visuals

1. Log in as a user with the [Export Visuals privilege](#). Open the Visual Gallery to view a list of the available visuals.
2. Select to export one or more visuals by selecting the checkbox for each visual to export. The **Export Selected Items** button becomes active.
3. Select **Export Selected Items**. You browser downloads the selected items in JSON format, placing them in the location you select or the default location for your browser downloads.

Visual gallery visuals exported using the export API can include source cache settings for the data and statistics caches in the payload.

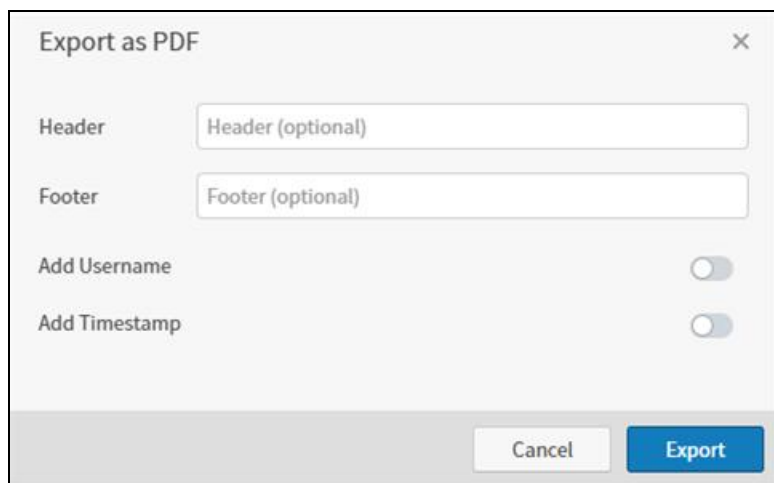
API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.

Export a Visual as an Image

This applies to: *Visual Data Discovery*

Export a visual as a screenshot or PDF

1. Select **Export** from the [visual drop-down menu](#). Select an export option for your visual.
2. Select an image format on the submenu, **Screenshot (PNG)** or **PDF**.
3. If you select **Screenshot (PNG)**, the screenshot is prepared, and automatically downloaded by your browser.
4. If you select **PDF**, the Export as PDF dialog opens.



The dialog box titled "Export as PDF" contains the following elements:

- Header:** A text input field with the placeholder text "Header (optional)".
- Footer:** A text input field with the placeholder text "Footer (optional)".
- Add Username:** A toggle switch currently turned off.
- Add Timestamp:** A toggle switch currently turned off.
- Buttons:** "Cancel" and "Export" buttons at the bottom right.

5. Use this work area to optionally:
 - a. Enter a header and footer for your PDF.
 - b. Enable **Add Username** to include your user name on the PDF.
 - c. Enable **Add Timestamp** to add a date and time stamp to the PDF.
6. Select **Export**. Symphony prepares a PDF downloaded by your browser.



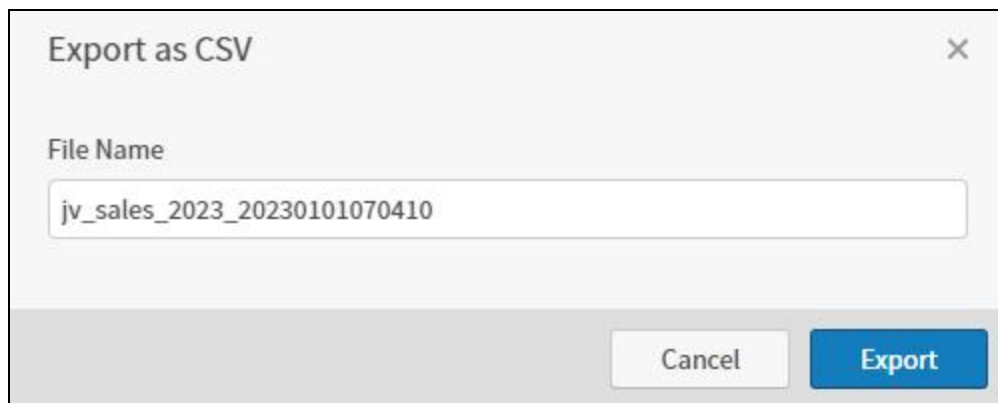
Note: The number of records included is limited by the setting of the `zoomdata.export.data.max.rows` property in the `zoomdata.properties` file. See [Configuration Property Files](#).

Export Visual Data in CSV or XLSX Format

This applies to: *Visual Data Discovery*

Export visual data in CSV or XLSX format

1. Select **Export** from the [visual drop-down menu](#). Select an export option for your visual.
2. Select a file format on the submenu, **Visual Data > CSV** or **Visual Data > XLSX**.
3. If you select **CSV**, the Export as CSV dialog opens.



The image shows a dialog box titled "Export as CSV" with a close button (X) in the top right corner. Inside the dialog, there is a label "File Name" above a text input field. The input field contains the text "jv_sales_2023_20230101070410". At the bottom of the dialog, there are two buttons: "Cancel" and "Export".

Accept or change the file name, then select **Export**. Symphony prepares a CSV file downloaded by your browser.

4. If you select **XLSX**, the Export as XLSX dialog opens.

Export as XLSX

File Name

jv_sales_2023_20230101070831

☐ Add Time Bar filter description to exported file

☐ Add Visual filter description to exported file

Cancel

Export

Accept or change the default settings:

- i. Accept or change the file name.
 - ii. Select **Add Time Bar filter description to exported file** to include in the export.
 - iii. Select **Add Visual filter description to exported file** to include in the export.
5. Select **Export**. Symphony prepares an XLSX file downloaded by your browser.



Note: The number of records included is limited by the setting of the `zoomdata.export.data.max.rows` property in the `zoomdata.properties` file. See [Configuration Property Files](#).

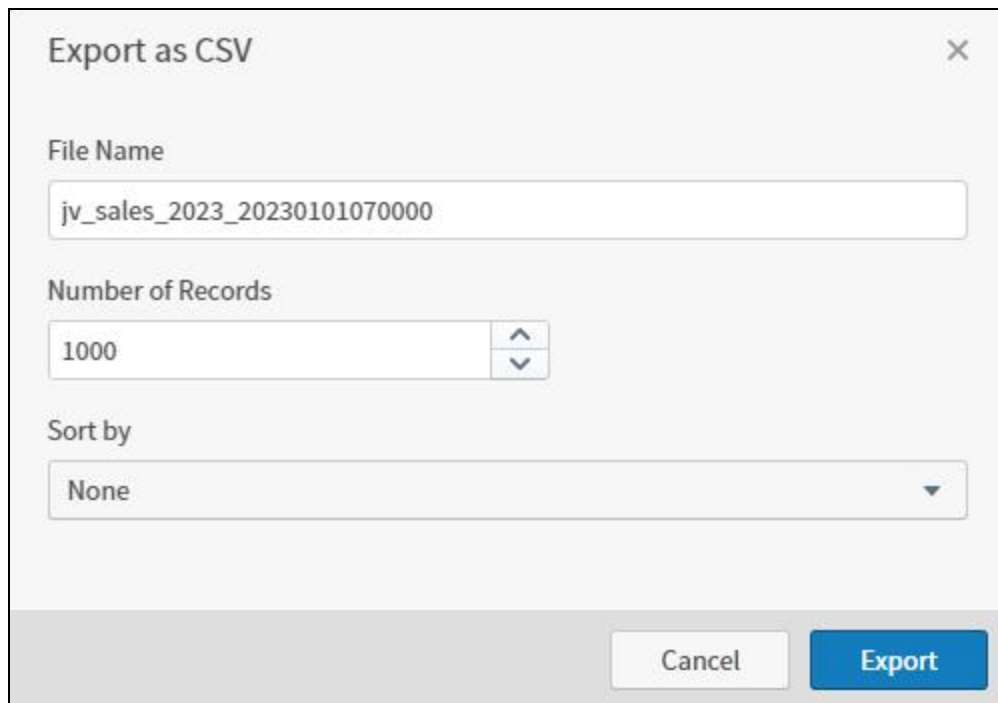
Export Raw Data in CSV or XLSX Format

This applies to: *Visual Data Discovery*

When you export raw data from your visuals to XLSX, numeric fields are exported as numbers. Dates are exported as dates in ISO 8601 format. When you export raw data to csv format, both numeric and date fields are exported as strings..

Export raw data in CSV format

1. Select **Export** from the [visual drop-down menu](#). Select an export option for your visual.
2. Select a file format on the submenu, **Raw Data > CSV**.
3. The Export as CSV dialog opens.



The image shows a dialog box titled "Export as CSV" with a close button (X) in the top right corner. Inside the dialog, there are three sections: "File Name" with a text input field containing "jv_sales_2023_20230101070000"; "Number of Records" with a numeric input field set to "1000" and up/down arrow buttons; and "Sort by" with a dropdown menu currently showing "None". At the bottom right of the dialog are two buttons: "Cancel" and "Export".

4. Accept or change the default settings:

- i. Accept or change the file name.
 - ii. Specify the **Number of Records** to include in the export. The default is 1,000.

 **Note:** The number of records you can specify is limited by the setting of the `zoomdata.export.data.max.rows` property in the `zoomdata.properties` file. See [Configuration Property Files](#).
 - iii. Select a field to sort the data included in the export. The default for **Sort by** field is none. Depending on the field type selected, you have sort order options you can use to organize your data.
5. Select **Export**. Symphony prepares a CSV file downloaded by your browser.

 **Note:** The number of records included is limited by the setting of the `zoomdata.export.data.max.rows` property in the `zoomdata.properties` file. See [Configuration Property Files](#).

Export raw data in XLSX format

1. Select **Export** from the [visual drop-down menu](#). Select an export option for your visual.
2. Select a file format on the submenu, **Raw Data > XLSX**.
3. The Export as XLSX dialog opens.

Export as XLSX

File Name

jv_sales_2023_20230101070000

Number of Records

1000

^

v

Sort by

None

☐ Add Time Bar filter description to exported file

☐ Add Visual filter description to exported file

Cancel

Export

4. Accept or change the default settings:

- i. Accept or change the file name.
- ii. Specify the **Number of Records** to include in the export. The default is 1,000.

Note: The number of records you can specify is limited by the setting of the `zoomdata.export.data.max.rows` property in the `zoomdata.properties` file. See [Configuration Property Files](#).

- iii. Select a field to sort the data included in the export. The default for **Sort by** field is none. Depending on the field type selected, you have sort order options you can use to organize your data.



iv. Select **Add Time Bar filter description to exported file** to include in the export.

v. Select **Add Visual filter description to exported file** to include in the export.

5. Select **Export**. Symphony prepares an XLSX file downloaded by your browser.



Note: The number of records included is limited by the setting of the `zoomdata.export.data.max.rows` property in the `zoomdata.properties` file. See [Configuration Property Files](#).

Delete and Remove Visuals

This applies to: *Visual Data Discovery*

You can remove visuals from dashboards and delete them from the Symphony instance in the Visual Gallery. You cannot delete a visual if it is used by any dashboard.



Note: If you try to delete a visual, filter snippet, dashboard, dashboard link, source, or source field, Symphony displays an error message naming any objects dependent on the item you're trying to delete. You can delete the item after you've removed the association from the dependent object. See [Fields Usage](#).

Remove a Visual From a Dashboard

Remove a visual from your dashboard

1. Edit the dashboard. See [Edit A Dashboard](#).
2. Select the visual to be removed.
3. Select **Remove Widget** on the [visual drop-down](#) () menu. A removal confirmation dialog opens.

To control whether a visual can be removed, use the interactivity sidebar. See [Control How Users Interact With A Visual](#).

4. Select **Delete** on the warning dialog to confirm the removal.

Delete a Visual from the Visual Gallery

A visual can only be deleted from the [Visual Gallery](#) when it is not used in any dashboard. If the **Usage** column for a visual in the Visual Gallery shows any number except zero, the option to delete the visual is disabled.

To delete visuals, you must be logged in as an administrator or as a user belonging to a group with the [privilege Administer Visuals](#) enabled.

Delete a visual from the Visual Gallery

1. Access the [Visual Gallery](#). See [Use The Visual Gallery](#).
2. Locate the visual in the Visual Gallery.



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3. Select the delete icon () in the **Actions** column associated with the visual. A pop-up dialog is shown, verifying the deletion.
4. Select **Delete** on the warning dialog to confirm the deletion.

Control How Users Interact With a Visual

This applies to: *Visual Data Discovery*

You can control how users can interact with a visual. You can control their ability to:

- Change metrics, rulers, colors, visual styles, or otherwise modify a visual
- Group, filter, or sort visual data
- Use context menu options
- Copy, export, or delete the visual
- Create keysets from visual data
- Export visual data
- Integrate a visual into external applications
- Change the defaults set for a visual in the data source configuration visual defaults

 **Important:** User attributes are not resolved when previewing interactivity settings, and default fallbacks will be used in the Preview mode.

You can control user interactivity using the interactivity sidebar of a visual from the Visual Gallery.

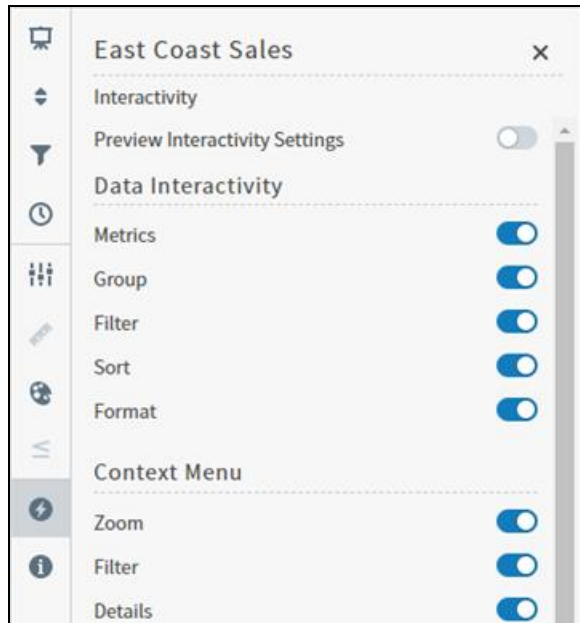
 **Note:** Individual visual interactivity settings can be overridden by [dashboard interactivity](#) settings. When a dashboard overrides the interactivity settings specified for an individual visual, the visual's interactivity settings are not changed, but they are ignored, and the visual interactivity settings specified by the dashboard are used.

 **Note:** You can include several controls for embedded visuals, allowing users to select and deselect favorite visuals, as well as filter the list of visuals in the embedded Visual Gallery by favorite status. See [Use The Visual Gallery](#).

Control user interactions with a visual

1. Select the visual in the Visual Gallery.

2. Select the interactivity option () on the [sidebar menu](#) for the visual. The interactivity sidebar opens.



By default, all interactivity settings are activated (on) for a visual. Each interaction is controlled by a switch. Slide the switches to the right to turn a setting on; slide them to the left to turn the setting off.

In addition, you can use the **Preview Interactivity Settings** option to test the visual interactivity settings. When this switch is turned on, the visual behaves as it will when it is embedded. The **Preview Interactivity Settings** switch is a temporary switch: by default it is off each time you access the visual. It is not saved with the visual; so if you turn it on and save the visual, it will still be off the next time you edit the visual.

Each visual interactivity setting is described in the following table.

Visual Feature Group	UI Setting	JavaScript Setting	Controls the ability to...
Data Interactivity	Metrics	METRICS	Change metric fields (other than a metric that might be in the Group field) on the axes for the visual. This setting also controls whether a user can control the aggregation method (SUM, AVG, MIN, MAX, etc.) used for metrics in a table.
	Group	GROUPING	Change the Group field on the x-axis of the visual. This setting also controls whether a user can group tables.
	Filter	FILTER	Filter data using the Filter option from the visual drop-down menu and to the left of the visual name on a visual, or a display name if viewed in a dashboard. (To fully remove filtering functionality for a visual, be sure to turn off the Filter switch in the Context Menu settings on the interactivity sidebar too.)

Visual Feature Group	UI Setting	JavaScript Setting	Controls the ability to...
	Sort	<code>SORT</code>	Sort and limit the data in a visual. The sort and limit () visual sidebar menu option is disabled when this switch is off and you cannot access the Sort & Limit sidebar.
	Format	<code>FORMAT</code>	Format specific data in a visual. These formatting options are disabled when the switch is off.
Context Menu	Zoom	<code>ZOOM_ACTION</code>	Drill Down to a selected data point on a visual using this option on the context menu .
	Filter	<code>FILTER_ACTION</code>	Filter data using the Filter option on the context menu . (To fully remove filtering functionality for a visual, be sure to turn off the Filter switch in the Data Interactivity settings on the interactivity sidebar too.)
	Details	<code>DETAILS_ACTION</code>	Display additional information about a specific visual data element using the Details option on the context menu .
	Trend	<code>TREND_ACTION</code>	View trends for a selected data point using the Trend option on the context menu .
	Keyset	<code>KEYSET_ACTION</code>	Create a keyset from a selected data point using the Keyset option on the context menu . (To fully remove keyset functionality for a visual, be sure to turn off the Create Keyset switch in the Visualization settings on the interactivity sidebar too.)
	Actions	<code>ACTIONS_ACTION</code>	Invoke an action using the Actions option on the context menu . (To fully remove actions functionality for a visual, be sure to turn off the Actions switch in the Visualization settings on the interactivity sidebar too.)
	Link	<code>LINK_ACTION</code>	Link to another dashboard using the Link option on the context menu .
Visualization	Settings	<code>SETTINGS</code>	Specify settings for the visual. The visual settings () visual sidebar menu option is disabled when this switch is off and you cannot access the visual settings sidebar.
	Rulers	<code>RULERS</code>	Add visual reference lines and customize the markers used on the metric axis. The ruler settings () sidebar menu option is disabled when this switch is off and you cannot access the ruler sidebar.
	Colors	<code>COLORS</code>	Change the color palette used by the visual. The color settings () visual sidebar menu option is disabled when this switch is off and you cannot access the color sidebar.

Visual Feature Group	UI Setting	JavaScript Setting	Controls the ability to...
	Conditional Formatting	CONDITIONAL_FORMATTING	Apply conditional formatting to data in the visual. The conditional formatting () visual sidebar menu option is disabled when disabled.
	Create Keyset	KEYSET	Create a keyset from the visual data using the Create Keyset option from the visual drop-down menu . (To fully remove keyset functionality for a visual, be sure to turn off the Keyset switch in the Context Menu settings on the interactivity sidebar too.)
	Save	SAVE	Save the visual.
	Save As	SAVE_AS	Save the visual using a new name.
	Copy	COPY	Copy a visual using the Copy Visual option from the visual drop-down menu .
	Actions	ACTIONS	Invoke an action using the Actions option from the visual drop-down menu . (To fully remove actions functionality for a visual, be sure to turn off the Actions switch in the Context Menu settings on the interactivity sidebar too.)
	Remove	REMOVE	Remove a visual using the Remove Visual option from the visual drop-down menu .
	Visual Style	VISUAL_STYLE	Change the style of a visual. The visual style settings () visual sidebar menu option is disabled when this switch is off and you cannot access the visual type sidebar.
	Select Time Bar Field	TIMEBAR_FIELD	Change the time field on the time bar .
	Maximize	MAXIMIZE	Maximize a visual for optimal viewing.
	Rename	RENAME	Rename a visual.
	Show Time Bar Panel	TIMEBAR_PANEL	Show the time bar for the visual.
	Info	INFO	Allow users to edit information in the Info sidebar menu.
Exporting	Export to PNG/PDF	EXPORT_PNG_PDF	Export a visual to PNG/PDF using the Export option from the visual drop-down menu .
	Export to CSV	EXPORT_CSV	Export a visual to a CSV file using the Export option from the visual drop-down menu .
	Export to XLSX	EXPORT_XLSX	Export a visual to an XLSX file using the Export option from the visual drop-down menu .

3. Slide the switches on or off for the interactivity settings you want to change.



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4. Optionally, preview the behavior with the interactivity settings applied. Slide the **Preview Interactivity Settings** switch on (to the right).
5. Select  to save the visual.

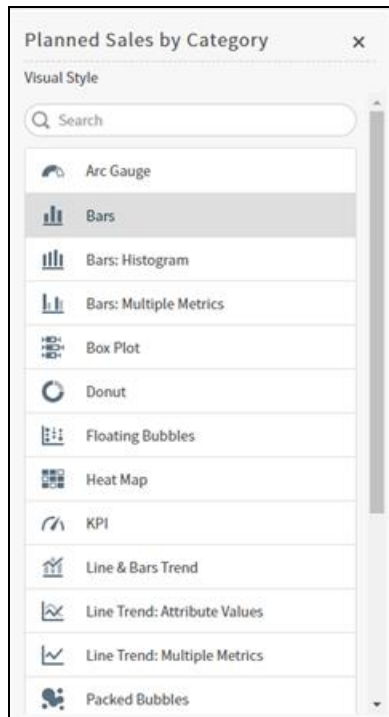
Change the Visual Style

This applies to: *Visual Data Discovery*

After creating a visual, you can change its visual style. Based on the data source you are using, certain visual styles may not be available.

Change the visual style

1. Select the visual in the dashboard or in the Visual Gallery.
2. Select the visual style icon () on the [sidebar menu](#) for the visual. The [Visual Style sidebar](#) opens.



3. In the Select Visual Type sidebar, select the visual style you want to use. Use the search bar at the top of the sidebar to quickly locate a style in the list. Type any letter in the search bar and sidebar is filtered to show only visual style names that include that letter.

Use the Visual Style Sidebar

This applies to: *Visual Data Discovery*

The Visual Style sidebar lets you quickly change the style of visual displayed in a dashboard visual or when you are editing a visual in the Visual Gallery. Controls for changing the style of a visual are provided using the interactivity sidebar. See [Control How Users Interact With A Visual](#).



Note: When you change the visual style of a visual, its [published and subscribed links](#) are removed. See [Control How Cross-Visual Filters Interact In A Dashboard](#).



Note: A list filter visual cannot be converted to a different style. Likewise, other visual styles cannot be converted to the list filter visual style.

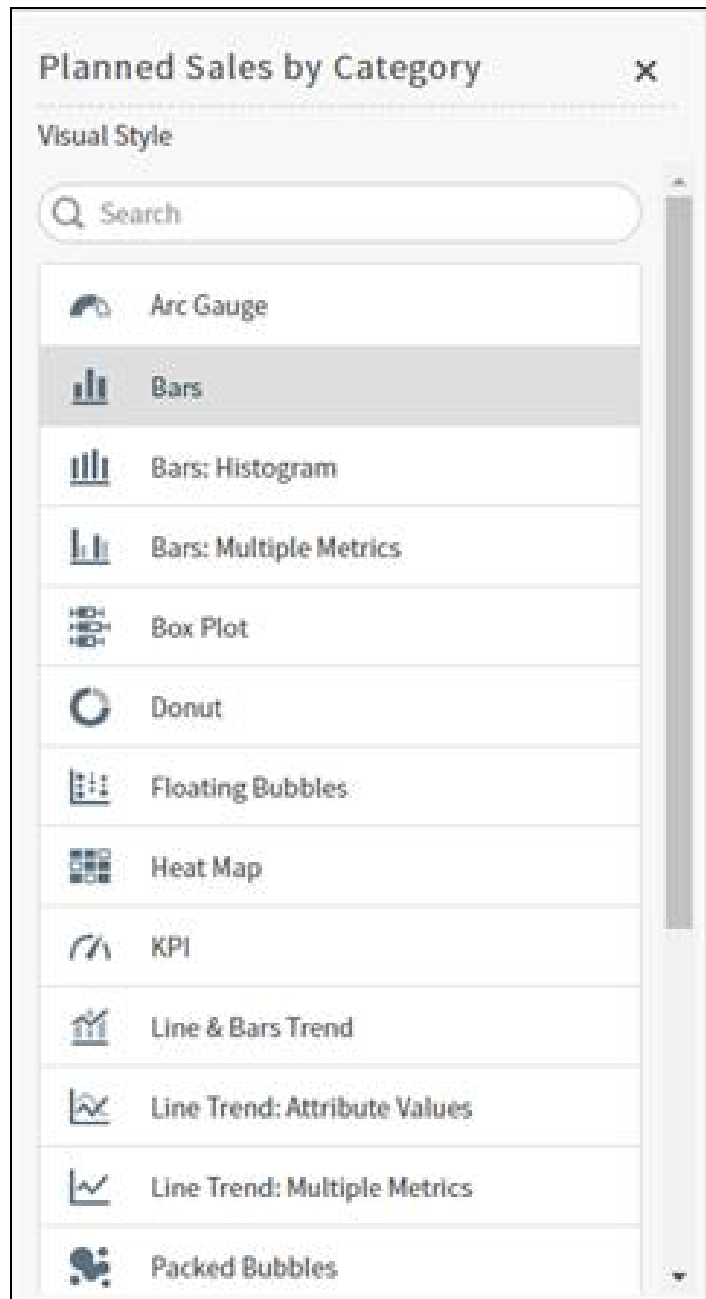
Access the Visual Style sidebar for a visual

1. Select the visual in the Visual Gallery or on a dashboard.
2. If you selected the visual on a dashboard, select **Settings** on the [visual drop-down menu](#) to access the [sidebar menu](#) for the visual.



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3. Select the visual style option () on the [sidebar menu](#) for the visual. The Visual Style sidebar opens.





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4. Select a visual style from the list.

Change Visual Settings

This applies to: *Visual Data Discovery*

You can change the settings for your visual using the Visual Settings sidebar. You can only change settings for some visual styles.

Access the Visual Settings sidebar

1. Select the visual in the dashboard for which the settings will be changed.



2. Select the visual settings icon () on the [sidebar menu](#) for the visual. If there are no settings to modify for a specific visual style, the visual settings icon is disabled.

An appropriate visual settings sidebar appears. The one below is for a bar chart.

Planned Sales by Category

Bar Chart Settings

Orientation

Horizontal

Vertical

Subgroup

Enable Subgroup

Labels

Show Labels

Absolute Values

Relative Values

Style

Bar Thickness

100

3. Adjust the settings as needed. See the description of the specific [visual style](#) for more information.

Sort and Limit Visual Data

This applies to: *Visual Data Discovery*

You can sort the data within a visual by the available metrics or attributes for most visuals. You can also limit the amount of data that is displayed to show a more detailed view of your data.

Some of the options and settings vary based on the **Sort by** field that is selected. In addition, these settings may appear multiple times on the Sort & Limit sidebar if more than one sort field can be specified for a visual style.

Sorting and limiting data is not available for all visual styles. The visual styles for which you cannot sort and limit data are arcs, histograms, KPI charts, pivot tables, tables of raw data, and maps. Pivot table and raw table data can be sorted, but not in the manner described here. See [Pivot Tables](#) and [Tables](#). For information on how this functionality works in visuals that use two attribute group-bys, such as floating bubble charts and heat maps, see [Sort & Limit Processing For Visuals With Two Attribute Group-By Fields](#).

Administrators and users with editing rights to data source configurations can also set the default sort order and limits in data source configurations. For additional information, see [Manage Visual Data Discovery Data Sources](#).

Sort or limit your visual data on a dashboard

1. Select the visual in the Visual Gallery or on a dashboard.
2. If you selected the visual on a dashboard, select **Settings** on the [visual drop-down menu](#) to access the [sidebar menu](#) for the visual.
3. Select the sort and limit option () on the [sidebar menu](#) for the visual. The Sort & Limit sidebar opens.

Planned Sales

×

Sort & Limit

Datenumbertpattern

Sort by

Datenumbertpattern

Aggregation

No Aggregation

Order

Alphabetical (A - Z)

Limit

50

Cancel

Apply

4. Select a field to sort by from the drop-down menu in the **Sort by** box. If more than one sort field is used for a visual style, more than one **Sort by** box appears on the sidebar.
5. For numeric **Sort by** fields:
 - i. Indicate how the data should be aggregated for the visual by selecting an **Aggregation** option. These include: SUM, AVG, MIN, MAX, or LAST VALUE, Count, and Distinct Count. For explanations, see [Metric Aggregation Functions](#).
 - ii. The option **No Aggregation** is available if you group and sort by the same field. When you use No Aggregation, you can select the sort Order of as Alphabetical (A-Z) or Reverse Alphabetical (Z-A).
6. For attribute **Sort by** fields:
 - i. If you're sorting by the same attribute field used in groups, you can select an **Aggregation** option of No Aggregation, Count, or Distinct Count.
 - ii. If you are sorting by a field not used in groups, you can select an **Aggregation** option of Count, or Distinct Count.



7. Select a sorting option from the drop-down menu in the **Order** box (for example, **Descending** or **Ascending**). Different sorting options are available, depending on the **Sort by** field you select. If the selected **Sort by** field is a metric, you can sort the data in ascending or descending order. If the selected **Sort by** field is an attribute, you can sort the data in alphabetical or reverse-alphabetical order. For time attribute-based visuals, you can sort in chronological or reverse-chronological order.
8. To limit the amount of data displayed in the visual, enter or specify a number in the **Limit** box. This number is the number of data points shown on the visual. (For example, for bar charts, this represents the number of bars.) Valid values range from 1 to 999999999. If this setting is set too large, browser performance may be affected and the visual may not be able to render the data effectively.
9. Select **Apply** to apply your changes to the visual.

Sort & Limit Processing for Visuals With Two Attribute Group-By Fields

This applies to: *Visual Data Discovery*

The logic used for sort and limit processing for visuals that use two attribute group-by fields (such as heat maps or floating bubble charts) requires additional explanation. The sort and limit logic used in Symphony are linked to each other and are not global. Thus, the unique entries available for group 2 sort and limit processing depend on the number of unique entries produced by group 1 sort and limit processing.

Limit Processing

In general, when two attribute group-by fields are used in a visual, the limit for group 1 affects the maximum number of elements available to be limited by group 2. So the limit for group 1 is applied first and the limit for group 2 is applied to the results of the limit for group 1. This limits the maximum number of subgroup elements within each group element.

Heat Map Examples

In heat maps, you can apply a limit for both group 1 and group 2. The limit for group 2 depends on the results of the group 1 limit. The results from a group 1 limit should always match the limit set, but the results from a group 2 limit might match, but also might be less than the limit set. For example, if the limit for group 1 is 10, there should be 10 rows and columns in the result passed to the group 2 limit processing. So, if the limit for group 2 is also 10, fewer than 10 rows and columns may result from the group 2 limit processing.

Here is another heat map example. Suppose your heat map has:

- A group 1 limit of 10 and a group 2 limit of 5.
- From an absolute perspective, there are 100 unique group 1 values and 10 unique group 2 values.

Based on the first 10 unique group 1 values shown on the heat map, there might only actually be 4 corresponding unique group 2 values and thus, 4 will show for group 2 even though it has a limit of 5.

Now assume that the group 1 limit is increased to 25, but the group 2 limit is still 5. The first 25 unique group 1 values might have 5 or more unique group 2 values, in which case only 5 will show for group 2 because that is its limit. However, if the first 25 unique group 1 values still only have 4 corresponding unique group 2 values, group 2 will only have 4 rows and columns on the heat map.

Now assume that the group 1 limit is increased to 100 and the group 2 limit is increased to 10. As all the group 1 values are shown (there are only 100 unique group 1 values), all 10 unique group 2 values should show on the heat map, unless there is not enough space to render the full heat map. If this happens, the number of rows and columns for group 1 and group 2 respectively might be smaller.

Sort Processing

In general, when two attribute group-by fields are used in a visual, the sort for group 1 sorts all the data and the sort applied by group 2 sorts the subgroup (group 2 elements) within each group 1 element. To verify that sorting has happened correctly, compare the aggregate results of each group 1 element using whatever metric function or calculation logic applied, but compare the group 2 subgroup elements within the same group 1 element to make sure group 2 sorting is correct. Do not rely on the individual results shown on the tooltip when hovering over a data point -- but look at the aggregate values for each group 1 element when verifying the sort logic.

For example, assume you have a heat map where group 1 refers to rows and group 2 refers to columns. In one row (we'll call it A) has one column with a really large value. However, if another row (B) has multiple columns that sum up to a larger value than the value in A, the B row will sort higher than the A row (assuming you are sorting in descending order by Sum). Here's an extreme heat map example. Suppose row A has a single column point with a value of 1,000,000 and row B has 12 column points (subgroup elements) with values of 100,000 each. If you are sorting in descending order by this same metric on group 1, row B will sort higher than row A. Thus there might be a data point in the middle of the heat map that appears with a much higher individual metric value, but the chart is still sorted correctly.

Floating Bubble Sort Processing

Floating bubble charts have two groups and two metrics. The first group-by attribute represents data along the X-axis and the second group-by attribute is reflected along the Y-axis. Symphony determines the correct place on a chart for a data point based on the first metric (on the Y axis). The second metric affects the size of the bubbles only. Consequently, when you sort by the first group-by attribute (X-axis), it affects the representation of data along the X-axis and when you sort by the second group-by attribute (Y-axis), it affects the representation along the Y-axis.



Note: Sort and limit processing in scatter plot visuals sort and limit the data returned to the scatter plot and *not* the way the scatter plot is rendered on the screen.

Change the Axes

This applies to: *Visual Data Discovery*

Many visual styles show data on a standard coordinate grid, with axes labels identifying the values depicted horizontally and vertically on the visual. Examples include [bar charts](#), [line charts](#), and [scatter charts](#).

Use the axes labels on these visuals to change the metric (y-axis) and attribute (x-axis) fields graphed in the visual. The number of labels displayed on a visual depend on the [number of metrics and attributes](#) on which the visual is based.



You can specify the default labels for visuals on the [Fields tab](#) of your data source configurations. Controls for these options are provided using the interactivity sidebar. See [Control How Users Interact With A Visual](#).

See the following topics:

- [Change A Group Attribute](#)
- [Change A Metric Field](#)

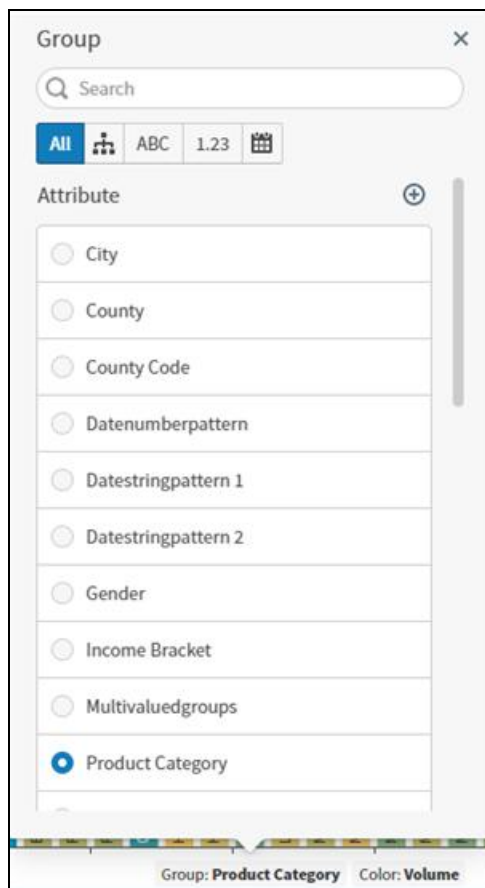
You can also change the metric used to determine the colors on the visual. See [Change The Visual Color Metric](#).

Change a Group Attribute

You can change the x-axis field, or group attribute, on a visual that plots data on a coordinated grid.

Change the visual group (x-axis) attribute

1. Select the group attribute (x-axis) label on your visual. A Group dialog appears.



2. Select a new field to be viewed on the x-axis of your visual.

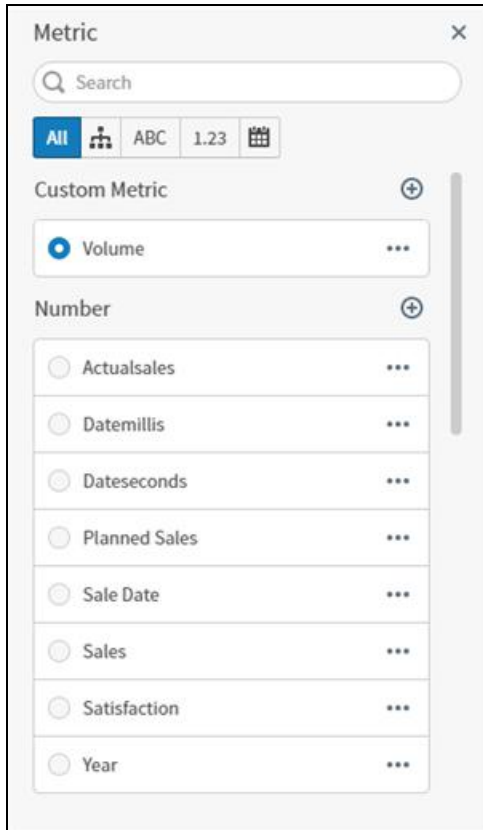
The visual renders the newly selected attribute.

Change a Metric Field

You can change the y-axis field, or metric, on a visual that plots data on a coordinated grid.

Change the visual metric (y-axis field)

1. Select the metric (y-axis) label on your visual. A Metric dialog appears.



Metric [X]

Search

All ABC 1.23 [Calendar Icon]

Custom Metric [Add Icon]

☒ Volume [More Icon]

Number [Add Icon]

- ☐ Actualsales [More Icon]
- ☐ Datemillis [More Icon]
- ☐ Datesseconds [More Icon]
- ☐ Planned Sales [More Icon]
- ☐ Sale Date [More Icon]
- ☐ Sales [More Icon]
- ☐ Satisfaction [More Icon]
- ☐ Year [More Icon]

2. Select a new metric to use as the y-axis of your visual and a metric function to use to aggregate the data on the visual. See [Metric Aggregation Functions](#).
The visual is updated and renders the newly selected metric. If you need to perform more complex analysis of your data set, you can [add custom metrics](#).

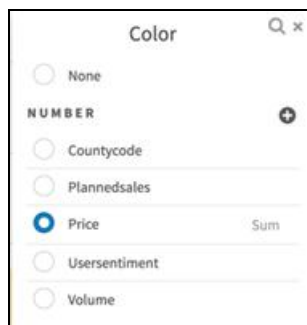
Change the Visual Color Metric

This applies to: *Visual Data Discovery*

You can change the metric used to determine the colors used on a visual while you are viewing it.

Change the color metric while you are viewing a visual

1. Select the color metric directly on your visual. A Color dialog appears.



2. Select a new metric to be used to determine the colors on your visual.
3. Select the aggregation function that should be used with the color metric: SUM, AVG, MAX, MIN, or (for some data sources) LAST VALUE. See [Metric Aggregation Functions](#).

The visual renders using colors determined by the select metric and its aggregated values.

Change Color Schemes

This applies to: *Visual Data Discovery*

Color schemes provide ways to identify and highlight metrics and attributes on a visual using color. Color schemes are specified for visuals in different ways, based on the visual type.

- The colors on [standard bar charts](#), [heat maps](#), [KPI charts](#), [US region maps](#), [world country maps](#), [packed bubble charts](#), [tree maps](#), and [word cloud charts](#) are based on the color metric selected for the visual. Colors can be changed using the Color sidebar.
- The color of [multiple metric bar](#) and [multiple-metric line](#) charts are based on the y-axis metric you have selected. Colors can be changed using the Color sidebar.
- Visual colors are not available for [map marker charts](#), [pivot tables](#), and [tables of raw data](#).
- For all other visuals ([box plots](#), [donut charts](#), [floating bubble charts](#), [line-trend attribute charts](#), [pie charts](#), and [scatter plot charts](#)), the visual colors are based on an x-axis Group field you have selected. Colors can be changed using the Color sidebar.

Color palettes for your Symphony environment are defined using themes. In addition, the default color palette used for visuals and for specific visual styles is defined using themes. See [Manage UI Themes](#).

Access the Color sidebar for a visual

1. Select the visual in the Visual Gallery or on a dashboard.
2. Select **Settings** on the [visual drop-down menu](#) to access the [sidebar menu](#) for the visual. Then select  on the [sidebar menu](#).
The **Color** sidebar for the selected visual opens.
3. Make changes as needed. For details about the color options, refer to the description of the specific [visual style](#) used by the visual.
4. If you want to use the palette specified by the theme defined for the environment, select the **Inherit from theme** checkbox. The colors specified in the theme activated for the Symphony environment and for this visual style will be used and will override other palette settings you might have specified on the Color sidebar. For more information about themes, see [Manage UI Themes](#).

The ability to control colors on a visual is provided using the interactivity sidebar. See [Control How Users Interact With A Visual](#).

Specify Colors

This applies to: *Visual Data Discovery*

Colors can be specified in Symphony using:

- The color name (for example "cornflowerblue" or "red"). For valid color names, see https://www.w3schools.com/cssref/css_colors.asp.
- RGB color encoding (for example, `rgb(255, 0, 0)`). For RGB color values, see https://www.rapidtables.com/web/color/RGB_Color.html.
- Hexadecimal color encoding (for example, `#0096b6`). For hexadecimal color values, see https://www.rapidtables.com/web/color/RGB_Color.html.

Modify Visual Names, Display Names, and Descriptions

This applies to: *Visual Data Discovery*

Update the information about your visuals in the Visual Gallery easily to organize and display extended information about these visuals. This includes:

- Visual Name - The name of the visual as saved in the visual gallery. View on the Info panel in the visual gallery.
- Visual Description - A short description of the visual. Searchable in the Visual Gallery. View on the Info panel.
- Display Name - The name of the visual as displayed in dashboards. View and edit in the Widget panel.
- Description - A short description of the widget. View and edit in the Widget panel.



Note: To modify Descriptions for other resources in your environment, see [Descriptions](#).

This information is included and used in your dashboards, but can be edited as needed.

Edit the Visual Name and Visual Description in Visual Gallery

1. Select the visual to edit in the Visual Gallery.
2. Select the info option () on the [sidebar menu](#) for the visual. The Info sidebar opens.

East Coast Sales Q2

×

Info

Visual Name

East Coast Sales Q2

Data Source

JV Sales 2023 - Q2

Visual Type

Line Trend: Multiple Metrics

Visual Description

East coast shipping information for Q2.

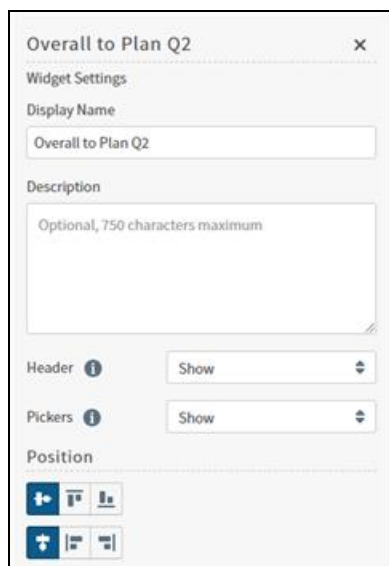
Save

The data source and visual type are shown here, but can't be changed here.

3. Change the visual name in the **Visual Name** field. You can also change the name of a visual by selecting the name in the visual itself. See [Visual Names And Display Names](#).
4. Optionally, add a visual description, or edit an existing one in the **Visual Description** field, up to 750 characters. You can search for the visual using this information in the Visual Gallery.
5. Select **Save** to save your changes in the sidebar menu, then the Save icon () for the visual to save all of your changes.

Edit the Display Name and Description in a dashboard

1. Select a local visual or a shared visual on a dashboard.
2. Select **Settings** on the [visual drop-down menu](#) to access the [sidebar menu](#) for the visual.
3. Select widget settings (). The Widget Settings sidebar opens. Edit Widget Settings or Position settings as needed.




Note: Change the display name in the **Display Name** field.

You can also change the display name by selecting the title in the dashboard. See [Visual Names And Display Names](#).

4. Change the description in the **Description** field, up to 750 characters. There is no description by default.
5. Select a header behavior. The default setting is **Show**; this displays the header at all times.
 - i. **Show** (default) displays the header at all times.
 - ii. **Show on Hover** hides the header in [Viewer mode](#) unless users perform a hover action over the widget where the header is temporarily hidden.
 - iii. **Hide** completely hides the header in [Viewer mode](#).
6. Customize the picker behavior, if applicable. The default setting is **Show**; this displays the picker at all times.



- i. **Show** (default) displays the picker at all times.
 - ii. **Hide** completely hides the header in [Viewer mode](#).
 - iii. **Custom** allows you to show or hide attributes such as colors, axis labels, and other available attributes or metrics. When disabled, an attribute or metric is hidden in [Viewer mode](#).
7. Adjust the **Position** of the content in the widget, if applicable. See [Position Resized Widgets](#) .
8. Select the **Save** button to save the changes you made in the sidebar menu for the instance of this visual, then the **Save** icon () for the dashboard to save your changes.

Use Rulers

This applies to: *Visual Data Discovery*

Rulers can be used to customize the markers used on the metric axis. You can change the (metric) axis range in a visual along with the markers along the axis. Customizing this range may help you focus your data exploration to specific data points. You can set minimum and maximum values for your axis, define the steps, enable the gridlines, and use a logarithmic scale.

Rulers functionality is available only for bar charts, line charts, and waterfall visuals. Controls for rulers are provided using the interactivity sidebar. See [Control How Users Interact With A Visual](#).

Rulers can be customized for a visual using the Rulers sidebar.

See the following topics:

- [The Rulers Sidebar](#)
- [Enable And Disable Ruler Grid Lines](#)
- [Configure The Ruler Y-Axis Range Settings](#)
- [Use The Ruler Log Scale Function](#)

 **Note:** Arc gauges use the Rulers sidebar to control some different settings than are used by most visuals. See [Arc Gauges](#).

The Rulers Sidebar

This applies to: *Visual Data Discovery*

The Rulers sidebar for a visual allows you to customize the rulers and reference lines used by the visual. When you save or export your visual, the settings configured on the Rulers sidebar are saved or exported respectively.

Access the Rulers sidebar

1. Select the visual in the [Visual Gallery](#) or on a dashboard.
2. Select **Settings** on the [visual drop-down menu](#) to access the [sidebar menu](#) for the visual. Then select  on the [sidebar menu](#). The Rulers sidebar opens.

The sidebar consists of two sections: the (metric) ruler settings and, possibly, reference lines. If the visual does not support reference lines, this section is not available. See [Enable And Disable Ruler Grid Lines](#) and [Use Reference Lines](#).

 **Note:** Arc gauges use the Rulers sidebar to control some different settings than are used by most visuals. See [Arc Gauges](#).

3. Select **Apply** to apply any changes you make.



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Enable and Disable Ruler Grid Lines

This applies to: *Visual Data Discovery*

Grid lines provide a visual cue between data elements and metric ranges in a visual. They are displayed as light gray lines on the visual canvas horizontally and vertically. When enabled, they extend from the tick marks on the axes.

Grid lines may help you to analyze and compare the data elements in your visual.

Note: Arc gauges use the Rulers sidebar to control some different settings than are used by most visuals. See [Arc Gauges](#).

Enable grid lines:

1. Access the Rulers sidebar for the visual. See [The Rulers Sidebar](#).
2. In the **X Gridlines** section of the sidebar, select (check) the **X Axis** checkbox to enable vertical rulers on the visual.
3. In the **Y Gridlines** section of the sidebar, select (check) the **Y Axis** checkbox to enable horizontal rulers on the visual. By default, the **Y Axis** checkbox is selected.

Note: On a [combo chart](#), four y-axis checkboxes are available: **Y1 Axis**, **Y2 Axis**, **Y3 Axis**, and **Y4 Axis**. By default only the **Y1 Axis** checkbox is selected.

4. You can specify the minimum (**Min**) and maximum (**Max**) values of the metrics that are plotted. Also specify the value used between grid lines (the **Step**) shown on the chart. In all cases, you can select the **Auto** checkbox to have Symphony automatically select the minimum, maximum, and step values automatically, based on the data.

Note: On a [combo chart](#), you can specify minimum, maximum, and step values for all four y-axes.

5. Select the **Log Scale** checkbox for any metric to change the axis based on orders of magnitude of the metric selected for that axis. See [Use The Ruler Log Scale Function](#).
6. Select **Apply** to apply the ruler settings to the visual.

Disable grid lines

1. Access the Rulers sidebar for the visual. See [The Rulers Sidebar](#).
2. In the **Rulers** section of the sidebar, clear the **X Axis** checkbox to disable vertical rulers on the visual. Clear the **Y Axis** checkbox to disable horizontal rulers on the visual.
 **Note:** On a [combo chart](#), four axis checkboxes are available: **Y1 Axis**, **Y2 Axis**, **Y3 Axis**, and **Y4 Axis**. Clear the appropriate checkboxes to disable horizontal rulers for the appropriate combo chart dependent variables.
3. Select **Apply** to apply the ruler settings to the visual.



Configure the Ruler Y-Axis Range Settings

This applies to: *Visual Data Discovery*

The y-axis range settings on the Ruler sidebar control the minimum and maximum values for the metric shown in the visual. You can configure the default values for Min, Max, and Step. When the Rulers sidebar is initially opened, these settings are set to **Auto**.

To customize the range, clear the **Auto** checkbox next to the **Min** and **Max** boxes and then enter your custom value ranges in the boxes. Customizing the axis in this way can create a view into your data that drills into specific information, explores anomalies, and otherwise explores more relevant information.

You can further this exploration by clearing the **Auto** checkbox next to **Step**, and specifying the interval for the tick marks along the y-axis. Steps can be specified down to the tenth place, or one decimal point. For example, you can step the tick marks by .5 tenths. If you specify a step that cannot be displayed on the axis, the default minimal step value is applied.

Use the Ruler Log Scale Function

This applies to: *Visual Data Discovery*

The log scale function changes the axis based on orders of magnitude of the metric selected for that axis. A log scale is nonlinear and best used when there is a large range in quantity. Log scales can only be used for positive values. In addition, when this option is selected, the **Auto** option is enabled for **Min**, **Max**, and **Step**.

The scale is built for whole the data range.

To enable the log scale function for the visual, select the **Log Scale** checkbox to enable. To disable, clear the checkbox.

 **Important:** If your dataset includes zero values or negative values, the log scale function will not work as expected.

 **Note:** The Log Scale function is not available for arc gauges. Arc gauges use the Rulers sidebar to control some different settings than are used by most visuals. See [Arc Gauges](#).

Use Reference Lines

This applies to: *Visual Data Discovery*

Reference lines on a visual can be used to mark limits, thresholds, and critical values. They can mark both positive and negative values on an axis. Multiple reference lines can be added in a visual.

Reference lines are available only for bar and line charts. Controls are provided using the Rulers interactivity sidebar. See [Control How Users Interact With A Visual](#).

Reference lines can be customized for a visual using the Rulers sidebar.

See the following topics:

- [The Rulers Sidebar](#)
- [Create A Reference Line](#)
- [Modify A Reference Line](#)
- [Delete A Reference Line](#)

Create a Reference Line

This applies to: *Visual Data Discovery*

You can add multiple reference lines to a visual.

Create a reference line on a visual

1. Access the Rulers sidebar for the visual. See [The Rulers Sidebar](#).
2. In the **Reference Lines** section of the sidebar, select the add icon  to start a new reference line definition.
3. Fill in the following fields for the reference line as needed:
 - i. **Title** - Specify the name for the line. The default name of the line is Reference line #.
 - ii. **Position** - By default, the reference line is added to the middle of the visible axis. You can specify a different position on the axis by either entering a specific number value. The reference line changes its position depending on your input.
 - iii. **Color** - Select the desired color for the line.
 - iv. **Width** - Specify the line's thickness: enter a specific value or use the slider.
 - v. **Line type** - Select from the following types: Solid, Dashed, or Dotted.
4. Select **Apply** to apply the reference line to the visual.

Delete a Reference Line

This applies to: *Visual Data Discovery*

Delete a reference line on a visual

1. Access the Rulers sidebar for the visual. See [The Rulers Sidebar](#).
2. In the **Reference Lines** section of the sidebar, locate the reference line you want to delete.
3. Select  to the right of the reference line definition on the Rulers sidebar.
4. Select **Apply** to delete the reference line on the visual.



Modify a Reference Line

This applies to: *Visual Data Discovery*

You can modify a visual's reference lines using the Rulers sidebar.

Modify a reference line on a visual

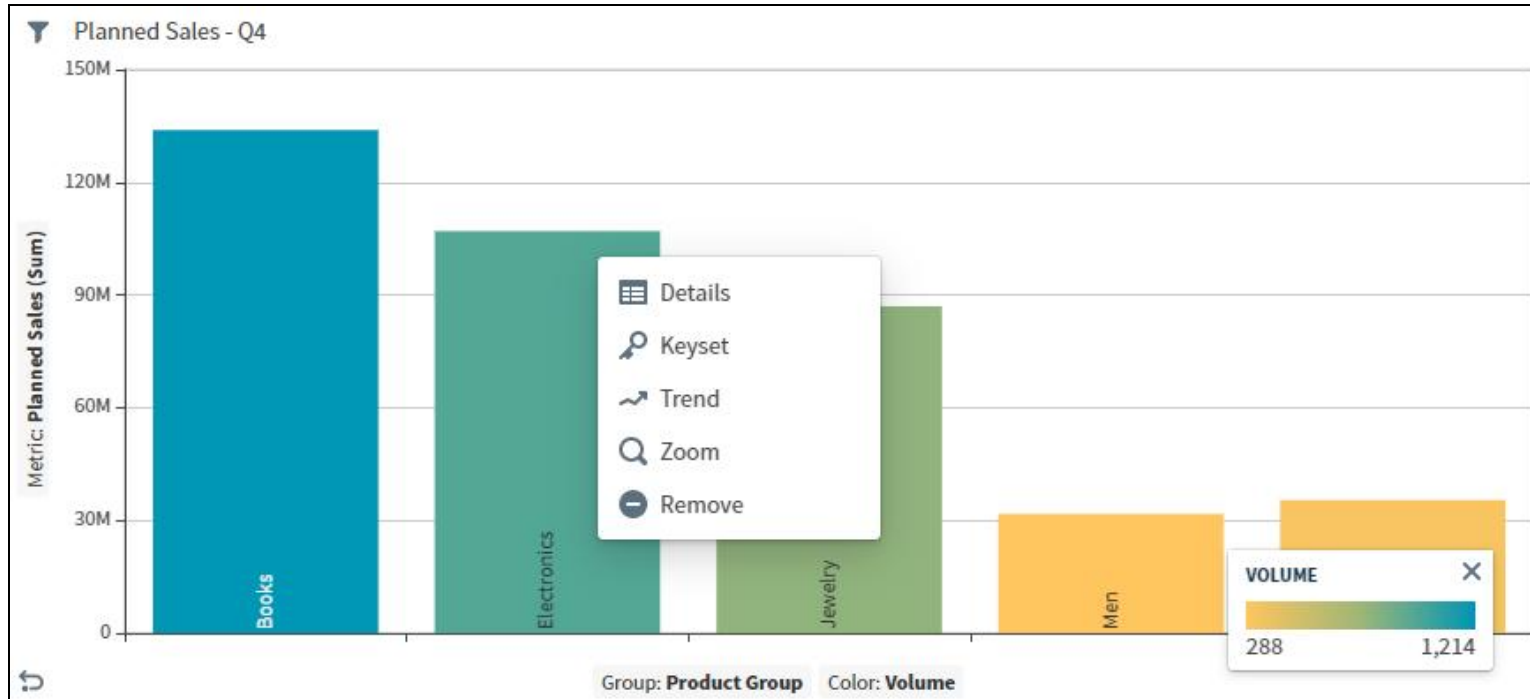
1. Access the Rulers sidebar for the visual. See [The Rulers Sidebar](#).
2. In the **Reference Lines** section of the sidebar, locate the reference line you want to modify.
3. Modify the fields for the reference line as needed:
 - i. **Title** - Specify the name for the line. The default name of the line is Reference line #.
 - ii. **Position** - By default, the reference line is added to the middle of the visible axis. You can specify a different position on the axis by either entering a specific number value. The reference line changes its position depending on your input.
 - iii. **Color** - Select the desired color for the line.
 - iv. **Width** - Specify the line's thickness: enter a specific value or use the slider.
 - v. **Line type** - Select from the following types: Solid, Dashed, or Dotted.
4. Select **Apply** to apply the reference line changes to the visual.

Use the Context Menu

This applies to: *Visual Data Discovery*

Users can use the context menu on all visuals to view more information about specific data points in visuals. This menu provides streamlined options for working with data.

To access the context menu, select any data point in the visual, grouped or ungrouped, to explore or drill down into that data element.



Define how to embed the context menu in your Symphony instance by specifying default options for right and left mouse selection. If needed, you can also add custom controls to the context menu for embedded visuals. See [Control How Users Interact With A Visual](#).

The following options are available in the context menu:

- [Details](#)
- [Create Alert](#)
- [Filter](#)

- [Keyset](#)
- [Trend](#)
- [Zoom](#)
- [Link](#)
- [Actions](#)
- [Remove](#)
- [Settings](#)

Details

To display additional information about specific data elements, select **Details**. The details for the element are displayed in a table.

Data Details

Summary

Open in Table

Export Raw Data

Product Group: Electronics, Planned Sales(Sum): 107,014,397.00, Volume: 971

Date: Sep 17, 2022, 11:21PM - Sep 18, 2022, 12:21AM

Source: Untitled Source

#	Date UTC	State	County C...	Income ...	Sale Date	Ship Date UTC	Sales	Zipcode	Product ...
1	Sep 17, 2013...	California	6081	\$0 to \$25000	1,379,486,70...	Sep 18, 2013...	101,065.00	94020	Memory
2	Sep 17, 2013...	Florida	12086	\$50000 to \$7...	1,379,486,10...	Sep 18, 2013...	112,218.00	33110	Wireless
3	Sep 17, 2013...	Florida	12103	\$0 to \$25000	1,379,496,93...	Sep 18, 2013...	133,625.00	33731	Camcorders
4	Sep 17, 2013...	Florida	12117	\$75000 to \$1...	1,379,494,51...	Sep 18, 2013...	133,109.00	32752	Camcorders
5	Sep 17, 2013...	Louisiana	22051	\$100000 or ...	1,379,488,84...	Sep 18, 2013...	116,291.00	70123	Wireless
6	Sep 17, 2013...	Maryland	24005	\$50000 to \$7...	1,379,486,48...	Sep 18, 2013...	140,310.00	21162	Wireless
7	Sep 17, 2013...	Maryland	24045	\$100000 or ...	1,379,487,33...	Sep 18, 2013...	158,910.00	21837	Camcorders
8	Sep 17, 2013...	Michigan	26163	\$0 to \$25000	1,379,490,35...	Sep 18, 2013...	104,214.00	48243	Portable
9	Sep 17, 2013...	North Carolina	37043	\$75000 to \$1...	1,379,494,80...	Sep 18, 2013...	110,792.00	28909	Televisions
10	Sep 17, 2013...	North Carolina	37045	\$25000 to \$5...	1,379,497,21...	Sep 18, 2013...	158,555.00	28114	Dvd/Vcr Play...
11	Sep 17, 2013...	Ohio	39137	\$25000 to \$5...	1,379,497,55...	Sep 18, 2013...	102,278.00	45830	Stereo
12	Sep 17, 2013...	Texas	48113	\$0 to \$25000	1,379,487,71...	Sep 18, 2013...	142,302.00	75253	Camcorders

The table header contains the following:

1. Attribute whose details you have selected to view
2. Metric
3. Volume metric
4. Time attribute and the selected time interval on the time bar
5. Data source

Select **Export Raw Data** to export your data set to a CSV file. If the **Table** visual style is enabled for your data source, you can select **Open in Table** to view your information.

You can also view the information in a pop-out window over your visual. Select the collapse icon to minimize the window.

Create Alert

Use **Create Alert** to create an alert for this visual and data element. See [Create An Alert Definition](#) .

Filter

Use **Filter** to filter other visuals in the dashboard that are subscribed to same-source or cross-source links by the data point you have selected. For more information, see [Apply A Filter To Dashboard Visuals Using The Context Menu](#).

The context menu can be used to apply cross-visual filters to all visuals in a dashboard. If a visual subscribes to a link field, a context menu filter for the field from a different visual in the same dashboard will also be applied to the first visual. For example, if Visuals A and B are both subscribed to a link for field Z, and you use the context menu to apply a filter for field Z on Visual B, the filter will also be applied to Visual A. For information about controlling the publish and subscribe link settings for a visual, see [Control How Cross-Visual Filters Interact In A Dashboard](#).

 **Note:** Unlike row-level filters, cross-visual filters are not saved with the visual.

In addition, **Filter** is only available in the context menu when the visual publishes a link for the field it is also using for its visual grouping. It is *not* available if the published cross-visual links for the visual are muted. See [Mute A Published Link](#).

Keyset

Use **Keyset** to create a keyset from the selected data point. See [Create A Keyset](#).

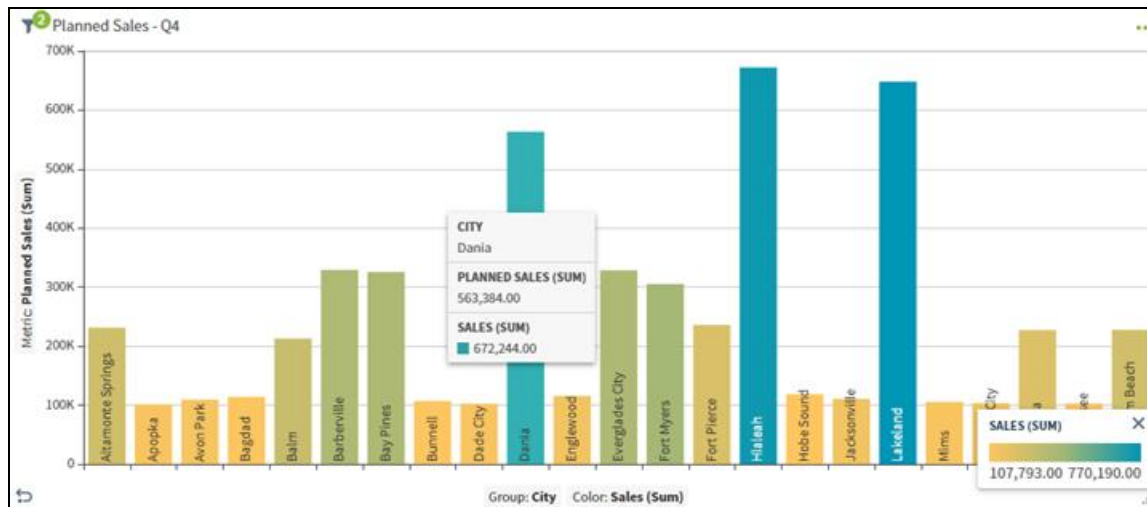
Trend

Use **Trend** to view trends for a selected data point. **Trend** is not available for: Line and Bars Trend, Line Trend: Attribute Values, and Line Trend: Multiple Metrics.

Zoom

Use **Zoom** to zoom into the selected data point and filter the data for that data point by another filter attribute in the data source. When you select **Zoom**, a menu appears from which you select the second filter attribute.

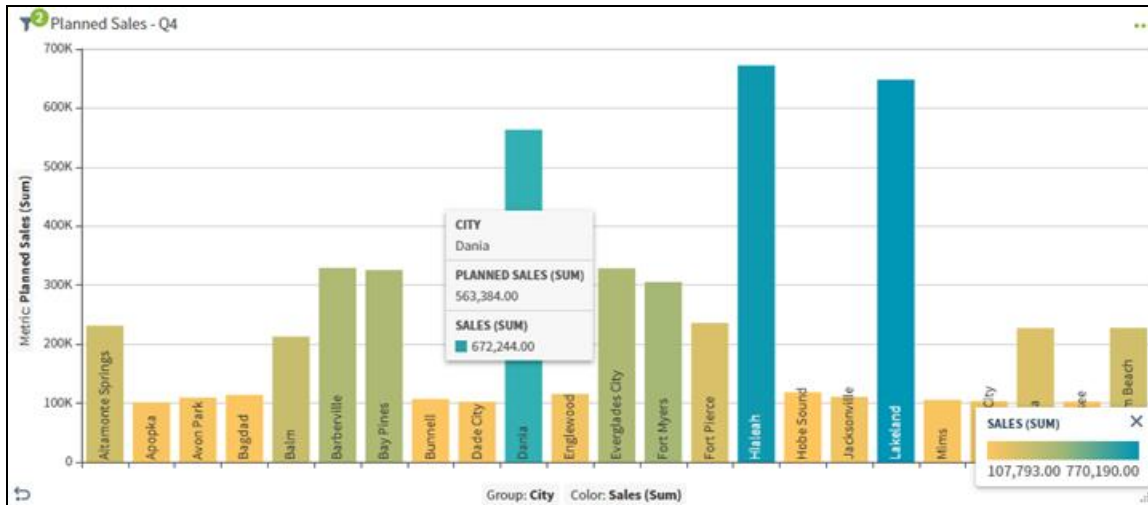
For example, if you wanted to see the real time sales for every city in Florida, select Florida in the bar chart to bring up the context menu, select **Zoom**, and then select the City attribute from the resulting menu. The result set in the bar chart might look like this:



Drill Down

Use **Drill Down** to drill down into the selected data point, and filter the data for that data point by another filter attribute in the data source. When you select **Drill Down**, a menu appears from which you select the second filter attribute.

For example, if you wanted to see the real time sales for every city in Florida, select Florida in the bar chart to bring up the context menu, select **Drill Down**, and then select the City attribute from the resulting menu. The result set in the bar chart might look like this:



Link

Use **Link** to quickly access a dashboard that has been linked to this visual. **Link** is only available if a dashboard link has been defined for a visual. See [Link A Dashboard](#).

Actions

Use **Actions** to invoke an action. If this menu option does not appear on the context menu, an action template is either not defined or is not enabled for the data source used by the visual.

The invoked action:

- Creates a query definition based on the filters applied to the visual and on the data and limit specifications in the associated action template.
- Sends the query definition to your application. Your application can use the Symphony API to run the query and display or use the data that it collects.



Note: You must be logged in as an administrator or as a user with the **Invoke Actions** privilege.

To invoke an action, see [Invoke An Action](#).

Remove

Select **Remove** to exclude the selected data element from your visual.



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Settings

Select **Settings** to open the [visual sidebar menu](#).

Undo a Visual Action

This applies to: *Visual Data Discovery*

The Undo option is available for visuals only. When you alter the query for a visual, the Undo option appears on the visual drop-down () menu and as an icon () in the bottom left corner of the visual. Selecting **Undo** removes the most recent action you have taken for a visual and returns it to its previous state.

Undo is only available if you alter the visual query. This can include adding filters for a visual, changing its attributes, sorting its data, changing the visual style or colors, and adjusting the time bar. The query is not altered if you export the visual, change its name or change its general information.

About Visual Permissions

This applies to: *Visual Data Discovery*

Visual permissions allow you to permit your entire tenant, groups within your tenant, or users within your tenant to read, write, or delete a visual. This allows you to share a visual with other users.

If a user belongs to a group that has the **Administer Visuals** [privilege](#) enabled, the user can read, add, modify, or remove any visual in Symphony. However, if the user does not belong to a group with this privilege enabled, the user can still be granted permission to read, write, or delete specific visuals using visual permissions. Visual permissions allow users in a tenant or group to read, write, or delete a visual, regardless of any group privilege settings that ordinarily limit their ability to do so.



Note: To manage permissions of a visual, your Symphony user must meet **one** of the following criteria:

- Must be an administrator, belonging to the [Administrators group](#)
- Must belong to a group with the **Administer Visuals** (ROLE_ADMINISTER_VISUALS) [privilege](#) enabled.
- Must belong to a group with the **Manage Visual Permissions** (ROLE_PERMISSION_VISUALS) [privilege](#) enabled. If your user has only this privilege (and *not* the **Administer Visuals** privilege), you will only be able to manage permissions for the visuals you can read.

In addition, you may be restricted in which permissions you can assign. You can only assign permissions equivalent to your own. For example, if your user account has read permission for a visual, you can grant and revoke the read option available on the Visual Permissions panel. If you have write permission for a visual, you can grant and revoke the write option on the Visual Permissions panel.



Note: If your user does not have read permission for a visual, you cannot view the visual in the Visual Gallery. If your user definition does not have write permission for a visual, you cannot save the visual.

Visual permissions are determined using a most permissive model. For more information, see [How Visual Permissions Are Determined](#).

Visual permission specifications can also be made using the API endpoints `GET /api/visuals?includePermissions=true`, `PATCH /api/visuals/<visualId>/acls/bulk`, `GET /api/visuals/<visualId>/acls`, and `/api/user/permissions/visuals/<visualId>`.

API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.

Permissions for imported objects

When you [import dashboards](#), associated resources such as visuals, sources, and connections are imported as well. You can quickly grant default access levels to all imported and associated objects in your tenants by enabling **Share Default Access With All Users** at import time. Users are granted Data Access to Sources and Read access to Visuals and Dashboards.



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For more information, see the following topics:

- [Grant Permissions For A Visual](#)
- [Modify Permissions For A Visual](#)
- [Revoke Permissions For A Visual](#)
- [How Visual Permissions Are Determined](#)

Modify Permissions for a Visual

This applies to: *Visual Data Discovery*

You can modify the visual permissions you granted to your tenant, to groups in your tenant, or to specific users in your tenant.

Modify permissions for a visual

1. Log into Symphony as an administrator or a user belonging to a group that includes the **Administer Visuals** or the **Manage Visual Permissions** [privilege](#).
2. Access the Visual Permissions dialog. Select the **Visual Gallery** option from the menu. The Visuals page appears.
3. Locate the row for the visual in the list and select the permissions icon in the **Permissions** column. The Visual Permissions dialog appears.
Initially, this dialog is populated with the permissions for the visual creator.
4. If you want to add permissions for all users in your tenant or for additional groups or users in your tenant, select **Add** on the Visual Permissions dialog and then select **Groups**, **Users**, or **Tenant** from the drop-down menu.
 - i. If you select **Groups**, the Add Groups dialog appears, listing all the groups available in your tenant. The [supplied groups](#) are not shown; permissions can not be changed for those groups.
 - ii. If you select **Users**, the Add Users dialog appears, listing all the users available in your tenant.
 - iii. If you select **Tenant**, Read permission is selected for your tenant on the Visual Permissions dialog.
- iv. Members of the Administrators group have read, write, and delete permissions for every visual in the tenant.
- v. The user who created the visual is automatically selected and has **Read**, **Write**, and **Delete** permissions unless you revoke these permissions.
5. Modify the **Read**, **Write**, or **Delete** checkbox selections for the tenants or any of the users or groups on the Visual Permissions dialog to indicate what users in them can do with the visual. **Read** permission is assumed and is always selected. If you clear (uncheck) the **Read** box (revoke **Read** permission), permission for the entire visual is revoked for the tenant , group, or user after you save.
6. Select **Save**. The Save Details dialog appears, listing the changes that you made.
7. Review the changes and select **OK**. The visual permissions are set.



Grant Permissions for a Visual

This applies to: *Visual Data Discovery*

You can grant read, write, or delete visual permissions for your tenant, groups in your tenant, or specific users in your tenant.

Grant permissions for a visual

1. Log into Symphony as an administrator or a user belonging to a group that includes the **Administer Visuals** or the **Manage Visual Permissions** [privilege](#).
2. Access the Visual Permissions dialog. Select the **Visual Gallery** option from the menu. The Visuals page appears.
3. Locate the row for the visual in the list and select the permissions icon in the **Permissions** column. The Visual Permissions dialog appears.
Initially, this dialog is populated with the permissions for the visual creator.
4. Select **Add** on the Visual Permissions dialog and then select **Groups**, **Users**, or **Tenant** from the drop-down menu.
 - i. If you select **Groups**, the Add Groups dialog appears, listing all the groups available in your tenant. The [supplied groups](#) are not shown; permissions can not be changed for those groups.
 - ii. If you select **Users**, the Add Users dialog appears, listing all the users available in your tenant.
 - iii. If you select **Tenant**, Read permission is selected for your tenant on the Visual Permissions dialog.
 - iv. Members of the Administrators group have read, write, and delete permissions for every visual in the tenant.
 - v. The user who created the visual is automatically selected and has **Read**, **Write**, and **Delete** permissions unless you revoke these permissions.
5. Select the tenant or any specific groups or users you want to permit to read, write, or delete the visual and select **Apply**. The Visual Permissions dialog lists your selections.
6. Select the **Read**, **Write**, or **Delete** checkboxes for the tenant, groups, or users to indicate what users in them can do with the visual. **Read** permission is assumed and is always selected. If you clear (uncheck) the **Read** box (revoke **Read** permission), permission for the entire visual is revoked for the tenant, group, or user after you save.
7. Select **Save**. The Save Details dialog appears, listing the changes that you made.
8. Review the changes and select **OK**. The visual permissions are set.



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Permissions for imported objects

When you [import dashboards](#), associated resources such as visuals, sources, and connections are imported as well. You can quickly grant default access levels to all imported and associated objects in your tenants by enabling **Share Default Access With All Users** at import time. Users are granted Data Access to Sources and Read access to Visuals and Dashboards.

Revoke Permissions for a Visual

This applies to: *Visual Data Discovery*

You can revoke the visual permissions you previously granted to your tenant, to groups in your tenant, or to specific users in your tenant.

Revoke permissions for a visual

1. Log into Symphony as an administrator or a user belonging to a group that includes the **Administer Visuals** or the **Manage Visual Permissions** [privilege](#).
2. Access the Visual Permissions dialog. Select the **Visual Gallery** option from the menu. The Visuals page appears.
3. Locate the row for the visual in the list and select the permissions icon in the **Permissions** column. The Visual Permissions dialog appears.
Initially, this dialog is populated with the permissions for the visual creator.
4. To completely revoke all visual permissions for the account or for a group or user, locate the row for the tenant, group or user on the Visual Permissions dialog and select the delete icon. The tenant, group, or user is removed from the dialog.

You can also revoke specific permissions by changing the checkbox selections for the tenant or group on the Visual Permissions dialog. If you clear (uncheck) the **Read** box (revoke **Read** permission), permission for the entire visual is revoked for the tenant, group, or user after you save. See [Modify Permissions For A Visual](#).
5. Select **Save**. The Save Details dialog appears, listing the changes that you made.
6. Review the changes and select **OK**. The visual permissions are set.



How Visual Permissions Are Determined

This applies to: *Visual Data Discovery*

The creator of a visual always has permission to read, write, and delete the visual. If the creating user is removed from the Symphonys environment, the visuals created by the user are retained and the [supplied supervisor user](#) becomes the creator of these orphaned visuals.

If conflicting visual permissions are specified for the account, the group within the account, and the user within the account, the permissions granted to the users in both are determined using a most permissive model. The users are granted the highest level of permission specified for the account, group, and user. For example, if the account is granted read and write permissions, but Group A is granted write and delete permissions, users in Group A will be able to read, write, and delete the visual. However, users in any other groups in the account will only be able to read and write the visual.

Here's another example. If the account is granted read, write, and delete permissions, but the groups are only granted read permissions, all users in the account will have read, write, and delete permissions.

How Data Source Permissions Affect Visual Use

Users must have access to the data sources used for the visual to see the data from the data sources.

For example, assume your account is granted read, write, and delete permissions for a visual. If Chris (a user in the account) does not have access to the data source used by the visual or if Chris is not assigned to any group at all, Chris will be able to see the visual in the Visual Gallery and will be able to open the visual, but no data will be shown.

Permissions for imported objects

When you [import dashboards](#), associated resources such as visuals, sources, and connections are imported as well. You can quickly grant default access levels to all imported and associated objects in your tenants by enabling **Share Default Access With All Users** at import time. Users are granted Data Access to Sources and Read access to Visuals and Dashboards.

Metric Aggregation Functions

This applies to: *Visual Data Discovery*

Symphony provides a set of metric functions that are used to group (aggregate) data. The following aggregation methods can be selected for metrics in your visuals. See also [Metrics](#).

Aggregation Function	What Is Returned
AVG	The average of the data values for the field. This function is available only for numeric fields.
DISTINCT COUNT	The total number of unique values for the field. This function is available only for attribute and numeric fields.
COUNT	The total number of values for the field. This function is available only for attribute and numeric fields.
MIN	The lowest value in all the data values for the field. This function is available only for numeric fields.
MAX	The highest value in all the data values for the field. This function is available only for numeric fields.
SUM	The total of all the data values for the field. This function is available only for numeric fields.
LAST VALUE	The last value in all the data values for the field, sorted by the time attribute selected for the time bar. If the latest date and time for the time attribute is exactly the same in multiple records, the last value for the field is the maximum value of the field in the records with the latest date and time. See LAST VALUE Examples . This function is available only for numeric fields.
NO AGGREGATION	No Aggregation is available if you group and sort by the same field. When you use No Aggregation, you can select the sort Order of as Alphabetical (A-Z) or Reverse Alphabetical (Z-A).

Suppose you have the following raw data:

Name	Gender	Age
Johnny	Male	10
Adam	Male	12
Mina	Female	11
Jenny	Female	13
Ann	Female	15

When this data is aggregated by gender, only two records (one for males and one for females) are returned and the aggregation must somehow determine what value to return for the age of the different genders. To do this, the aggregation requires input (using a metric function) about how the age should be returned. For example, if you elected to aggregate the data by gender and return the average age using the AVG metric function, the resulting data would be:

Gender	Age Returned	Aggregation Calculation	Aggregation Logic
Male	11	$10 + 12 = 22 / 2 = 11$	Johnny's and Adam's ages are summed and divided by 2 (two males).
Female	13	$11 + 13 + 15 = 39 / 3 = 13$	Mina's, Jenny's, and Ann's ages are summed and divided by 3 (three females).

If you elected to aggregate the data by gender and return the minimum age using the MIN metric function, the resulting data would be:

Gender	Age Returned	Aggregation Logic
Male	10	Johnny's and Adam's ages are evaluated and the lower of the two ages is returned.
Female	11	Mina's, Jenny's, and Ann's ages are evaluated and the lower of the three ages is returned.

LAST VALUE Examples

The LAST VALUE examples in this section use the following data:

Record #	Gender	Country	Price	Items	Sale_Date
1	Male	US	10	6	2019-01-03
2	Male	US	20	5	2019-01-02
3	Male	UK	30	4	2019-01-01
4	Male	UK	40	3	2019-01-01
5	Male	UA	50	2	2019-01-02
6	Male	UA	60	1	2019-01-03
7	Female	US	1	7	2019-01-04
8	Female	US	11	6	2019-01-03
9	Female	US	21	5	2019-01-02
10	Female	UK	31	4	2019-01-01
11	Female	UK	41	3	2019-01-01
12	Female	UA	51	2	2019-01-02
13	Female	UA	61	1	2019-01-03
14	Female	UA	71	0	2019-01-04

Examples: Grouping By One Field

Suppose you aggregate this data by Gender and request that the last value for Price be returned based on the Sale_Date. The results would be:

Gender	Price Returned	Aggregation Logic
Male	60	In all the records for males, two records have the latest date (2019-01-03) - records #1 and #6. Therefore, the prices in both records are compared and the maximum price is returned. The result is 60 from record #6.
Female	71	In all the records for females, two records have the latest date (2019-01-04) - records #7 and #14. Therefore, the prices in both records are compared and the maximum price is returned. The result is 71 from record #14.

Suppose you aggregate this data by Country and request that the last value for Price be returned based on the Sale_Date. The results would be:

Country	Price Returned	Aggregation Logic
US	1	In all the records for the US, the record with the latest date is for the female with a sale date of 2019-01-04 (record #7). The price in that record is 1.
UK	41	All the records for the UK are for 2019-01-01. Therefore, the prices in all records are compared and the maximum price is returned. The result is 41 from record #11.
UA	71	In all the records for the UA, the record with the latest date is for a female with a sale date of 2019-01-04 (record #14). The price in that record is 71.

Example: Grouping By Two Fields

Suppose you aggregate this data by Gender and then by Country and request that the last value for Price be returned based on the Sale_Date. The results would be:

Gender	Country	Price Returned	Aggregation Logic
Male	US	10	The two records for US males are compared and the latest record has a sale date of 2019-01-03 (record #1). The price in that record is 10.
Male	UK	40	The two records for UK males have the same sale dates (2019-01-01). Therefore, the prices in all UK male records are compared and the maximum price is returned. The result is 40 from record #4.
Male	UA	60	The two records for UA males are compared and the latest record has a sale date of 2019-01-03 (record #6). The price in that record is 60.
Female	US	1	The three records for US females are compared and the latest record has a sale date of 2019-01-04 (record #1). The price in that record is 1.
Female	UK	41	The two records for UK females have the same sale dates (2019-01-01). Therefore, the prices in all UK female records are compared and the maximum price is returned. The result is 41 from record #11.

Gender	Country	Price Returned	Aggregation Logic
Female	UA	71	The three records for UA females are compared and the latest record has a sale date of 2019-01-03 (record #1). The price in that record is 10.

Example: Grouping By Two LAST VALUE Metrics

Suppose you aggregate this data by Gender and request that the last value for Price and the last value for Items be returned based on the Sale_Date. The results would be:

Gender	Price Returned	Items Returned	Aggregation Logic
Male	60	6	In all the records for males, two records have the latest date (2019-01-03) - records #1 and #6. The prices and item counts in both records are compared and the maximum price and item count are returned. The returned results are a price of 60 from record #6 and 6 items from record #1.
Female	71	7	In all the records for females, two records have the latest date (2019-01-04) - records #7 and #14. The prices and item counts in both records are compared and the maximum price and item count are returned. The returned results are a price of 71 from record #14 and 7 items from record #7.

Symphony Data Discovery Visual Metrics and Attributes Reference

This applies to: *Visual Data Discovery*

Different visual styles can support different numbers of metrics and attributes and have different metric identifiers. The table below lists these for each visual style.

Icon	Style	Number of Metrics	Metric Identifiers	Number of Attributes
	Arc Gauges	at least 1	Arc color	none
	Standard Bar Charts	at least 1	Bar height, bar color, segment size, color	at least 1
	Bars: Histograms	1	Bar height, bar color	1
	Bars: Multiple Metric Charts	Multiple	Bar height, bar color	1
	Box Plots	2	Position and size	1
	Bullet Gauges	1	Bar length	1
	Combo Charts	2-4; at least 2	Bar or line color; additional y-axes on right	1
	Donut Charts	1	Segment size, color	1
	Floating Bubble Charts	2	Position and size	2
	Heat Maps	1	Segment color	2
	KPI Charts	1	Segment color	
	Edit Line & Bar Trend Charts	2	Bar color	time
	Line Trend: Attribute Value Charts	1	Point location	2 and time field
	Line Trend: Multiple Metric Charts	Multiple	Point location	1
	List Filter Visuals	Only one field can be selected for a list filter visual.		

Icon	Style	Number of Metrics	Metric Identifiers	Number of Attributes
	Marker Maps	2	Color	1
	US Region Maps	3	Color	1
	World Maps	1	Color	1
	Packed Bubble Charts	2	Bubble size, bubble color	1
	Pie Charts	1	Segment size, color	1
	Pivot Tables	Multiple		Multiple
	Tables	Multiple		Multiple
	Scatter Plots	3	Position and size	1
	Sunburst	3-4	Segment size, color	1
	Tree Maps	2	Segment size, color	1
	Waterfall	2 or more	Size, Color	at least 1
	Word Clouds	2	Font size, color	1

Manage Rich Text Snippets

This applies to: *Visual Data Discovery*

Add rich text snippets to your Symphony dashboards to round out your users' data experience.

Annotate your dashboard by:

- Describing the data on your dashboard in context
- Link external resources, such as user guides, or images
- Use Symphony to generate a visual summary for one or more visuals in a dashboard

Update your dashboards with rich text snippets any time using the Symphony UI, or the dashboard API. Each rich text snippet resides in its own widget; resize and adjust placement of snippets to complement your visuals.



Note: When you create a rich text snippet, it is linked to the dashboard you've added it to. If you delete a dashboard, the snippet is deleted as well.

For more information on creating and managing rich text snippets, see the following topics:

- [Add Rich Text Snippets To A Dashboard](#)
- [Format Rich Text Snippets](#)
- [Edit Rich Text Snippets](#)
- [Copy Rich Text Snippets](#)
- [Export Rich Text Snippets](#)
- [Delete Rich Text Snippets](#)
- [Use The Rich Text Snippet Menu](#)

Format Rich Text Snippets

This applies to: *Visual Data Discovery*

Use rich text snippets to enhance your users' dashboard experience by describing the data on your dashboard in context, linking external resources such as user guides, or adding images. Format rich text snippets to give your dashboard a smoothly integrated look and feel, using colors and images to complement your visual data.

As you add and update your text, use the undo and redo icons or keyboard shortcuts to undo and redo text changes. If you employ custom attributes in your Symphony environment, incorporate them into your snippets as needed.



Format options include:

Formatting Option	Description
Text Style (Paragraph Level Format)	Three text style options are available for formatting the text of your snippet at the paragraph level. After making a selection, you can apply additional format options as needed. ▪ Body: Default text format. ▪ Header 1: A bold text format, larger than Body and Header 2. ▪ Header 2: A bold text format, larger than Body and smaller than Header 1.
Text Color	Apply a color to selected text. There are five ways to select a color: ▪ Color Picker: Select a color; the Hex and RGB fields update to indicate color code information. ▪ Color Slider: Select a color; the Hex and RGB fields update to indicate color code information. ▪ Hex: Enter a color by hexadecimal color code number. ▪ RGB: Enter a color by R G B color code number. ▪ Color Presets: Select a preset color; the Hex and RGB fields update to indicate color code information.

Formatting Option	Description
Background Color	Apply a background color to selected text. There are five ways to select a background color: ▪ Color Picker: Select a color; the Hex and RGB fields update to indicate color code information. ▪ Color Slider: Select a color; the Hex and RGB fields update to indicate color code information. ▪ Hex: Enter a color by hexadecimal color code number. ▪ RGB: Enter a color by R G B color code number. ▪ Color Presets: Select a preset color; the Hex and RGB fields update to indicate color code information.
Align	Align your paragraphs. There are four alignment options: ▪ Align Left: Select to left align a paragraph. ▪ Align Center: Select to center align a paragraph. ▪ Align Right: Select to right align a paragraph. ▪ Align Justify: Select to fully justify the alignment of a paragraph.
Bold	Apply bold formatting to selected text, if the default text style is not bold.
Italic	Apply italic formatting to selected text.
Underline	Underline the selected text.
Bullet List	Select to start a bulleted list. Alternatively, selected text and convert it to a bulleted list of body text.
Numbered List	Select to start a numbered list. Alternatively, selected text and convert it to a numbered list of body text.
Add Link	Select to insert a link to an external website. Opens the Add Link work area. ▪ Enter Text and a Link to an external UR to create a link. ▪ If you're adding a link to selected text, that text is prefilled in the Text field.

Formatting Option	Description
	 Note: Formatting applied to link text is converted to the browser's default link and visited link colors. On hover, an underline is shown under the link text. To edit or remove the link, select the link while you are in edit mode and choose the Edit or Remove option.
Add Image	Select to insert an image. Opens the Add Image work area. - Provide an Image URL to include an image; Symphony imports the image into the rich text snippet. - If needed, provide Alternative Text for your image.
Clear Formatting	Select to clear color and font formatting (bold, italic, underline) from a paragraph.

Add Rich Text Snippets to a Dashboard

This applies to: *Visual Data Discovery*

When you create a dashboard or edit an existing dashboard, you can add rich text snippets to provide context to the visuals for your users.

You can fully author your own rich text snippet, or have Symphony generate visual description and add it to your dashboard in a rich text snippet.



Note: When you create a rich text snippet, it is linked to the dashboard you've added it to. If you delete a dashboard, the snippet is deleted as well.

Create a blank rich text snippet

1. [Create](#) or [edit](#) a dashboard.
- i. To add a snippet to an existing dashboard, log in as a user with `READ` and `WRITE` permissions for the dashboard.
- ii. If you are creating a new dashboard, log in as a user with the **Create Dashboards** or **Administer Dashboards** [group privilege](#).



2. Select  on the [dashboard icon bar](#). A blank, new rich text snippet is added in a widget on the dashboard, ready to edit.

3. Add text or other information in the snippet, using the [snippet format tools](#) to adjust the look and layout of your text, or add images and links.

As you add and update your text, use the undo and redo icons or keyboard shortcuts to undo and redo text changes. If you employ custom attributes in your Symphony environment, incorporate them into your snippets as needed.



4. When you've added the information you need, select the edit icon () to hide the format tools and put the snippet in view mode.

5. [Save](#) the dashboard.

Generate and insert a rich text snippet with a visual description

1. [Create](#) or [edit](#) a dashboard with one or more visuals.
- i. To add a snippet to an existing dashboard, log in as a user with `READ` and `WRITE` permissions for the dashboard.
- ii. If you are creating a new dashboard, log in as a user with the **Create Dashboards** or **Administer Dashboards** [group privilege](#).

2. Select the [visual drop-down menu](#), and choose **Describe Visual > Create Snippet and Insert**. A new rich text snippet is added in a widget on the dashboard with the text of the visual description, ready to edit.

Note: You can optionally select **Describe Visual > Copy Visual Summary**. This copies the summary to your clipboard. You can add it to an existing rich text snippet, or use it outside of the Symphony environment as needed.

3. Add more text or other information in the snippet, using the [snippet format tools](#) to adjust the look and layout of your text, or add images and links.

As you add and update your text, use the undo and redo icons or keyboard shortcuts to undo and redo text changes. If you employ custom attributes in your Symphony environment, incorporate them into your snippets as needed.

4. When you've added the information you need, select the edit icon () to hide the format tools and put the snippet in view mode.

5. [Save](#) the dashboard.

Note: Visual Description is [a menu option](#) available for most, but not all visuals.

Edit Rich Text Snippets

This applies to: *Visual Data Discovery*

Edit rich text snippets quickly and easily in a dashboard. Update links, reformat text, or add images as needed.

Edit a rich text snippet

1. Select the snippet on the dashboard. A blue border appears around the snippet widget.
2. Select the edit pencil () in the widget, or  **Edit** from the drop-down menu () . The rich text snippet opens for editing.
3. Make your content and **format** changes.
4. When you have finished making changes to the snippet, select the edit pencil () to hide the format tools and put the snippet in view mode.
5. **Save** the dashboard.

Use the Rich Text Snippet Menu

This applies to: *Visual Data Discovery*

The rich text snippet menu includes options that help you modify and use rich text snippets in your dashboard. Access it by selecting  in the upper right corner of a rich text snippet widget.

The menu options are described in the following table.

Option	Description
Copy	Select to make a copy of the saved version of the selected rich text snippet. See Copy Rich Text Snippets .
Edit	Select to open the selected rich text snippet for editing, or if it is open for editing, put it in view mode.
Export	Export the selected rich text snippet. See Export Rich Text Snippets .
Maximize	Select to maximize the selected rich text snippet on the dashboard for optimal viewing.
Minimize	Select to minimize the selected rich text snippet so you can see other visuals and rich text snippets on the dashboard.
Settings	Open the sidebar menu for the selected rich text snippet. Edit the display name, optional description, and to define header behavior. The default Header setting is Show ; this displays the header at all times. Show on Hover hides the header in Viewer mode unless users perform a hover action over the widget where the header is temporarily hidden. Hide completely hides the header from visibility in Viewer mode.
Remove Widget	Remove the selected rich text snippet from the dashboard. See Delete Rich Text Snippets .

Copy Rich Text Snippets

This applies to: *Visual Data Discovery*

Make a copy of a selected rich text snippet by selecting **Copy** on the [rich text snippet drop-down menu](#). This creates a copy of the last saved version of the snippet on your dashboard.

Copy a rich text snippet

1. Select the snippet on a dashboard. A blue border appears around the widget.
2. Select **Copy** on the [rich text snippet drop-down menu](#).

A copy of the rich text snippet appears on the dashboard in its own widget. Its initial name is the same as the original snippet, with an incremented number added to the end of the name. For example, if the original name was **Sales Data Parameters**, the initial name of the first copied snippet is **Sales Data Parameters (1)**.



Note: When you create a rich text snippet, it is linked to the dashboard you've added it to. If you delete a dashboard, the snippet is deleted as well.

Export Rich Text Snippets

This applies to: *Visual Data Discovery*

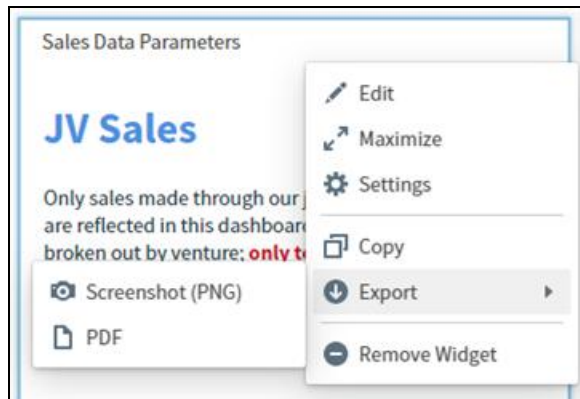
You can export your rich text snippet as a screenshot or as a PDF to share with others.

Rich Text Snippets can be exported in the following formats:

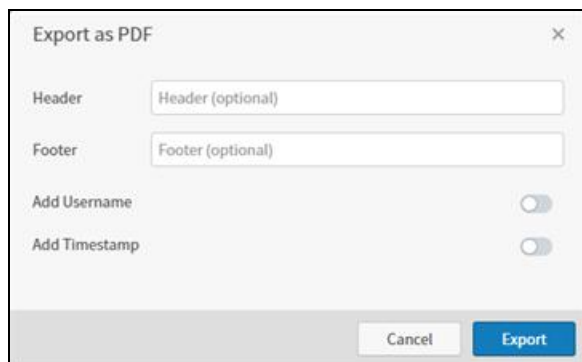
- PNG Screenshot (as an image)
- PDF file (as an image)

Export a rich text snippet

1. Select **Export** from the [rich text snippet drop-down menu](#). A submenu opens: select an export format.



2. Select a format on the submenu.
 - i. If you select **Screenshot (PNG)**, the screenshot is prepared and automatically downloaded.
 - ii. If you select **PDF**, the Export as PDF dialog opens.

A screenshot of a web-based dialog box titled "Export as PDF" with a close button (X) in the top right corner. The dialog contains two text input fields: "Header" with the placeholder text "Header (optional)" and "Footer" with the placeholder text "Footer (optional)". Below these are two toggle switches: "Add Username" and "Add Timestamp", both of which are currently turned off. At the bottom of the dialog are two buttons: a grey "Cancel" button and a blue "Export" button.

- Optionally, specify a header and footer for the PDF. Slide the **Add Username** switch on (to the right) to add a user name to the PDF. Slide the **Add Timestamp** switch on (to the right) to add a time stamp to the PDF. Then select **Export**. The PDF is prepared and automatically downloaded.

Delete Rich Text Snippets

This applies to: *Visual Data Discovery*

You can remove rich text snippets from dashboards if you no longer need it.

Remove a rich text snippet from your dashboard

1. Edit the dashboard. See [Edit A Dashboard](#).
2. Select the rich text snippet to be removed.
3. Select **Remove Widget** on the [rich text snippet drop-down menu](#). A removal confirmation dialog opens.
4. Select **Delete** on the warning dialog to confirm the deletion.

Manage Filter Snippets

This applies to: *Visual Data Discovery*

Add filter snippets to your dashboards to filter data for multiple visuals quickly and easily. Filter your data using input from one or more resources: values from sources used in your dashboard, or a [custom value](#) to further refine visual data. Adjust and save filter selections using Attribute, Number, Time, or Hierarchy data types and highlight data across multiple visuals. Link multiple filter snippets to more flexibly filter your visuals.

Update your dashboards with filter snippets any time using the Symphony UI or the dashboard API. Each filter snippet resides in its own widget; resize and adjust placement of snippets to complement your visuals.



Note: When you create a filter snippet, it is linked to the dashboard you've added it to. If you delete a dashboard, the snippet is deleted as well.

For more information on creating and managing filter snippets, see the following topics:

- [Add Filter Snippets To A Dashboard](#)
- [Connect Visuals To A Filter Snippet](#)
- [Link Filter Snippets](#)
- [Custom Values For Filter Snippets](#)
- [Use The Filter Snippet Menu](#)
- [Use The Filter Snippet Sidebar Menu](#)
- [Edit Or Delete Filter Snippets](#)

Filter Data With Masked Fields

This applies to: *Visual Data Discovery*

Filter snippets allow your users to view and highlight data pulled from one or more sources in multiple visuals. In some cases, however, you may want to allow your users to filter information using sensitive data without exposing that data.

To do this, disable Filtering for one or more fields in a data source, create a new filter snippet that uses one or more of those fields, and connect your visuals as needed.

Users then can view filtered data based on those fields, but the values and name of the fields are masked. If users export this information, it is presented in a masked format. If the values are included as data fields or auto-generated descriptions, they are represented by asterisks * * * * *.



Important: Applied filter values that later have **Filtering** disabled to not automatically mask or hide those fields. You must recreate the filter that uses these values.

Disable Filtering for a field's data column

1. Navigate to the Fields tab of your data source, then select **Bulk Field Capabilities**. The Bulk Field Capabilities work area opens.
2. Find your fields by scrolling, searching, or filtering.
3. Select the toggle in the **Filtering** column to disable (slide left) each field as needed.
4. **Save** your changes. A success message is returned.

Next, create a filter snippet that uses this field.

Create a new filter snippet

1. Open and [edit](#) a dashboard.
2. Select  on the [dashboard icon bar](#). A new filter snippet is added in a widget on the dashboard, ready to edit.
3. Select **Settings** from the more menu () to open the filter snippet sidebar menu. See [Use The Filter Snippet Sidebar Menu](#).
4. Open  **Data Settings** in the filter sidebar menu, then select your **Source**. A Value Column field appears, but you can't add your Filtered field to it.
5. Disable **Use Value Column as Display Column**. With this disabled, you can select your **Filtered** field as the **Value Column**.



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6. Select a different field to use as the value for the **Display Column**.
7. Continue creating the filter snippet by connecting widgets as needed. Select **Apply** to apply your changes.
8. [Save](#) the dashboard.

Users can now use the filter snippet to change how data is presented, but not see or export the values you've disabled filtering for.

Add Filter Snippets to a Dashboard

This applies to: *Visual Data Discovery*

When you create a dashboard or edit an existing dashboard, add filter snippets to allow your users to view and highlight data pulled from one or more sources in multiple visuals. Filter by three data types: Attribute, Number, or Time. Link multiple filter snippets to provide secondary and tertiary filtering on your visual data.



Note: When you create a filter snippet, it is linked to the dashboard you've added it to. If you delete a dashboard, the snippet is deleted as well.

Create a New Filter Snippet

1. [Create](#) or [edit](#) a dashboard that includes one or more visuals.
 - i. To add a snippet to an existing dashboard, log in as a user with `READ` and `WRITE` permissions for the dashboard.
 - ii. If you are creating a new dashboard, log in as a user with the **Create Dashboards** or **Administer Dashboards** [group privilege](#).
2. Select the Add Filter Snippet icon  in the [dashboard icon bar](#). A new filter snippet is added in a widget on the dashboard, ready to edit.
3. Select the Settings icon  from the Show More menu  to open the filter snippet sidebar menu. See [Use The Filter Snippet Sidebar Menu](#).
4. Define the **Data Settings** for this filter snippet by selecting a **Data Type** of [Attribute](#), [Number](#), [Time](#), or [Hierarchy](#).
5. Select an **Operator** for your Data Type. Available operators are dependent on the data type selected.
6. Select an available **Source**. Any visuals in this dashboard that use this source can be affected by this filter snippet.
7. Select an available **Value Column**. After you've made this selection, other options may be available that allow you to define how the data is presented. After making these choices, select **Apply**.
8. Optionally, select the [Filters sidebar menu](#) to add more filters to the snippet that utilize the same or different sources.
9. Select **Connect Widgets** from the Show More menu  to add visuals or to link existing filter snippets you want filtered to this filter snippet. The Connect Widgets work area opens.



10. Select **Add Widget**. Select a **Widget Name** and an available **Field**. Repeat to add as many widgets as desired.
 - i. Select the remove icon  to remove a widget from the filter.
 - ii. Select the connect icon to connect all widgets present in the dashboard for the data source.
11. Select **Apply** to use the selected widgets to this filter snippet. If you have added all available widgets, the work area closes and links the widgets automatically.
12. [Save](#) the dashboard.

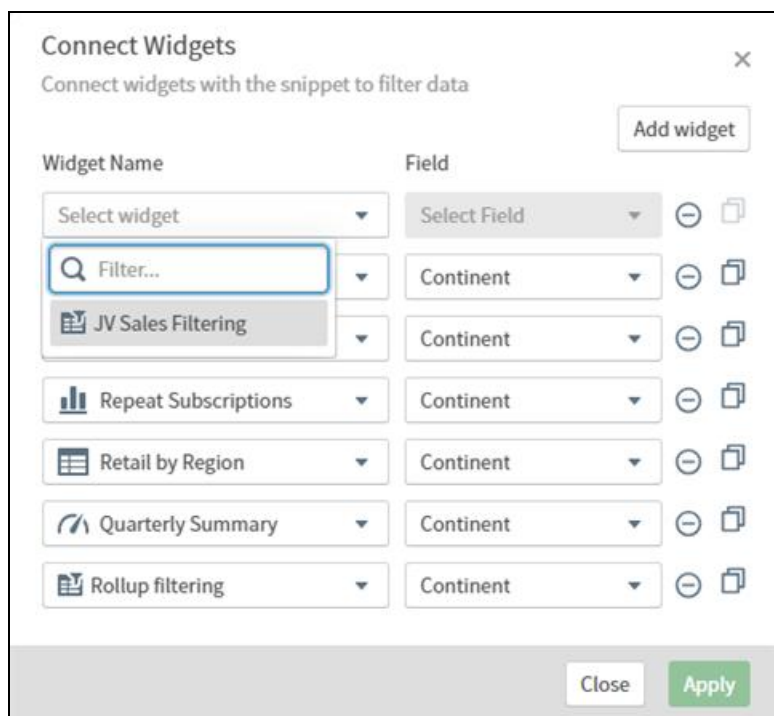
Link Filter Snippets

This applies to: *Visual Data Discovery*

You can connect multiple filter snippets to one another to further refine the data you highlight in your dashboard.

Link filter snippets

1. Select the snippet on the dashboard. A blue border appears around the snippet widget.
2. Select  **Connect Widgets** from the menu (). The Connect Widgets work area opens.



3. Select **Add Widget**. Select a **Widget Name** to filter and an available **Field**.

 **Note:** Filters you link must use a data source associated with the dashboard.

4. Repeat to add as many filters as desired. Select the copy icon to quickly add all visuals and filter snippets from the dashboard that share the same data source.



5. Optionally, remove widgets by selecting the delete icon next to each widget.
6. Select **Apply** to connect the filters.
7. Your filters are linked and you can filter the data shown in connected visuals using both filters.



Note: When you create a filter snippet, it is linked to the dashboard you've added it to. If you delete a dashboard, the snippet is deleted as well.

Connect Visuals to a Filter Snippet

This applies to: *Visual Data Discovery*

Build and use filter snippets to filter and highlight data on your dashboard. To apply filters to visuals, connect a filter snippet to one or more visuals using a corresponding field from the visual's underlying source. You can also filter a filter snippet by another filter snippet.

Connect visuals

1. Select the snippet on the dashboard. A blue border appears around the snippet widget.
2. Select  **Connect Widgets** from the menu (). The Connect Widgets work area opens.

Connect Widgets

×

Connect widgets with the snippet to filter data

Add widget

Widget Name	Field		
 Sales by promotion ▼	Continent ▼	⊖	📄
 New Customers ▼	Continent ▼	⊖	📄
 Repeat Subscriptions ▼	Continent ▼	⊖	📄
 Retail by Region ▼	Continent ▼	⊖	📄
 Quarterly Summary ▼	Continent ▼	⊖	📄
 Rollup filtering ▼	Continent ▼	⊖	📄

Close

Apply

3. Select **Add Widget**. Select a **Widget Name** and an available **Field**.
4. Repeat to add as many visuals or filter snippets as desired. Select the copy icon to quickly add all visuals and filter snippets from the dashboard that share the same data source.



5. Optionally, remove widgets by selecting the delete icon next to each widget.
6. Select **Apply** to connect the visuals.



Note: When you create a filter snippet, it is linked to the dashboard you've added it to. If you delete a dashboard, the snippet is deleted as well.

To link filter snippets for further data refinement, see [Link Filter Snippets](#).

Custom Values for Filter Snippets

This applies to: *Visual Data Discovery*

All users with access to a dashboard can add custom values to a [filter snippet](#) to filter [connected visuals](#).

- Users with Viewer access can add custom values to the snippet to filter connected visuals.
- Owners and editors can add custom values and remove custom values any user has added.

Add custom values to a filter snippet

1. Enter a value in the **Search** field of a filter snippet. If the value isn't part of the filter, add the value by selecting **Add** or the add  icon.
2. If applicable, select the Submit button to apply your changes to the connected visuals.

 **Note:** Users with Viewer access can delete custom values by selecting delete icon  before saving the dashboard under a new name.

3. When you have finished making changes to the snippet, [save](#) the dashboard.
 - a. Owners and editors can save the dashboard as is, or save it using a new name.
 - b. Users with Viewer access can save the dashboard using a new name. Changes to the existing dashboard are not retained.

Remove custom value from a filter snippet

1. Select the snippet on the dashboard. A blue border appears around the snippet widget.
2. Select the edit icon  to edit the list of custom values.
3. All custom values you can remove have a delete icon . Select to delete the value.
4. When you have finished making changes to the snippet, [save](#) the dashboard.

Use the Filter Snippet Menu

This applies to: *Visual Data Discovery*

The filter snippet menu includes options that help you modify and use these snippets in your dashboard. Access it by selecting  in the upper right corner of a snippet widget.

The menu options are described in the following table.

Option	Description
Edit	Select to edit the custom values of a filter snippet by removing them, or if it is open for editing, put it in view mode. Select  to remove a custom value. You can additionally access this option by selecting the edit icon () in the snippet header.
Settings	Open the sidebar menu. Use to ▪ Define data settings for the filter snippet ▪ Define filter snippet settings ▪ Apply filters and hierarchical filters (if available) to the filter snippet ▪ Adjust widget settings for the filter snippet ▪ Manage comments for the filter snippet
Connect Widgets	Select to connect visuals or filters to the filter snippet. See Connect Visuals To A Filter Snippet and Link Filter Snippets .
Remove Widget	Remove the selected filter snippet from the dashboard. See Edit or Delete Filter Snippets .

Use The Filter Snippet Sidebar Menu

This applies to: *Visual Data Discovery*

Use the filter snippet sidebar menu to:

- Define data settings for the filter snippet
- Define filter snippet settings
- Apply filters and hierarchical filters (if available) to the filter snippet
- Adjust widget settings for the filter snippet
- Manage comments for the filter snippet

To access the filter snippet sidebar menu, select **Settings** from the show more menu . The filter snippet sidebar opens.

Filter Snippet Sidebar Menus

Sales per county by state

Data Settings

Data Type
Attribute

Operator
Include

Source
JV Sales 2024

Value Column
State

Use Value Column as Display Column

Display Column
County

Sort
County

Order
Alphabetical (A - Z)

Cancel
Apply

Sales per county by state

Filter Snippet Setting

General

Display Style
Fixed List
Dropdown List
Hide "Add" Button

Selection Behavior
Number of Selections
Single
Multiple
Filter Values On
Change
Submit

Sales per county by state

Filters
Add Filter
Save Filters

Row Level Filters

Nest Filters
Product Category: Include
Cooking, Diamonds, Disk Drives, Loose Stones, ...
AND
Date (UTC): Between
Max Available Range
AND
State: Include
Alabama, Alaska, Arizona, Arkansas, California, ...

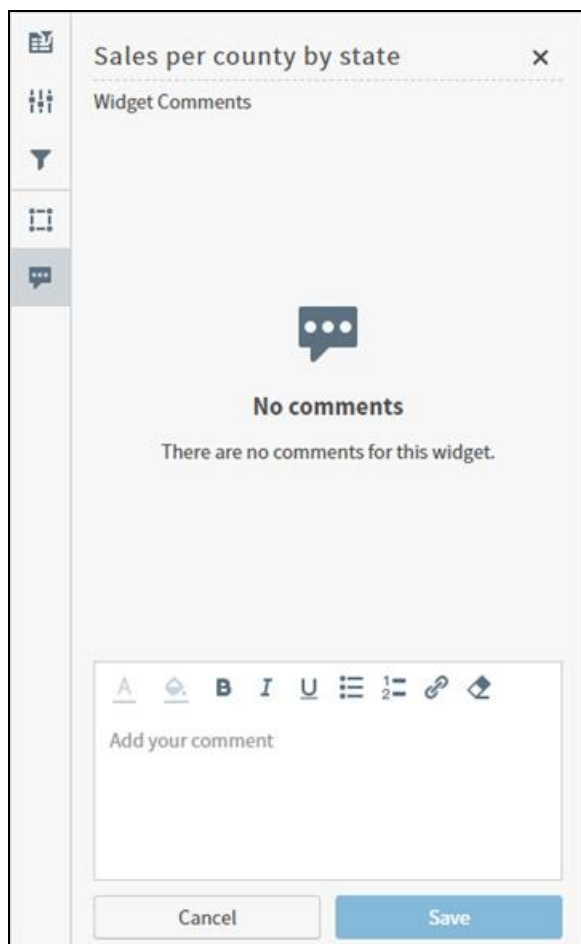
Cancel
Apply

Sales per county by state

Widget Settings

Display Name
Sales per county by state

Description
Optional, 750 characters maximum



If this is a new filter snippet, default settings are shown. If this is an existing filter snippet, current settings are shown.



Note: If you are editing a filter snippet that references unavailable sources or fields, an **Unavailable** message is shown in the affected drop-down. Select a new source or fields as needed.

Data Settings

Adjust the data settings for this filter snippet, then select **Apply** as needed to apply your changes to the filter snippet.

Setting	Description
Data Type	Select a data type to filter: Attribute , Time , Number or Hierarchy . If you select Time, you can set conditions for the time spans Between or Not Between in the widget itself if the display style is Range .
Operator	Select an operator to use: ▪ Attribute: Select Include or Exclude to include or exclude a value from the data. Select Contains to return only data that contains a specified value. Select Does Not Contain to return only data that does not return a specified value. ▪ Number: Select Include or Exclude to include or exclude a value from the data. Select Contains to return only data that contains a specified value. ▪ Time: Select Between or Not Between, then define the conditions for time spans in the widget itself. ▪ Hierarchy: Select Equals or Descendants Of or Includes, then select a value column.
Source	Select an available source to use. After you select a source, you can select an available field from that source to use as a Value Column for the filter, and a different Display Column if needed.
Value Column	Select an available field for the Value Column. Your users can filter the data in attached widgets using these values. If you prefer to use a different column as a Display Column, disable Use Value Column as Display Column. Note: If you have Filtered a field to prevent users from seeing or exporting this data, you must disable Use Value Column as Display Column to select the column, then select a Display Column. See Filter Data With Masked Fields.
Display Column	Select a different field than the Value Column to use as a display column for your users. Only visible when you disable Use Value Column as Display Column. Note: If you have Filtered a field to prevent users from seeing or exporting this data, you must disable Use Value Column as Display Column to select the column, then select a Display Column. See Filter Data With Masked Fields.
Granularity	Available for Time data types. Select an available option based on the granularity of the data provided.
Sort	Select an order to sort the filter values by. Available options depend on the selected data type. The column data used to sort is listed below the Sort heading. ▪ Attribute, Number, Hierarchy: Options include Alphabetical (A - Z) and Reverse Alphabetical (Z - A) ▪ Time: Options include Chronological and Reverse Chronological.

Filter Snippet Settings

Adjust the filter snippet settings in this work area. Save the dashboard to save your changes.

Setting	Description
Display Style	Select Fixed List to display all available selection items in a selection list. - If you select Fixed List along with Single Number of Selections, users see a list of items and can select one. - If you select Fixed List along with Multiple Number of Selections, users see a list of items and can select multiple. Select Dropdown List to display all available selection items in a drop-down list. - If you select Dropdown List along with Single Number of Selections, users can filter or scroll through a list of items and can select one. - If you select Dropdown List along with Multiple Number of Selections, users can filter, select, and scroll through a list of items and can select multiple values. Enable or disable the Hide "Add" Button toggle to control if users can add their own items.
Number of Selections	Specify whether only one or multiple data values can be selected in the filter snippet. Select Single to allow users to select only one data value; select Multiple to allow users to select more than one value. - If you select Fixed List along with Single, users see a list of items and can select one value. - If you select Dropdown List along with Single, users can filter or scroll through a list of items and can select one value. - If you select Fixed List along with Multiple, users see a list of items and can select multiple values. - If you select Dropdown List along with Multiple, users can filter, select, and scroll through a list of items and can select multiple values.
"No Selection" Label	Visible when the Single option for Number of Selections is selected. Enter text to display when no values have been selected. Default text is None.
Placeholder Text	Visible when both the Dropdown List and Multiple options are selected. Enter text to display in the Search field when no values have been selected. Default text is Search.

Setting	Description
Filter Values On	Visible when the Multiple option for Number of Selections is selected. - Select Change to apply the filter snippet to connected visuals as selections are made. - Select Submit to apply the filter snippet to connected visuals when a user selects Submit.
Submit Button Text	Visible when the Submit option for Filter Values On is selected. Enter text to display for users to apply the filter snippet to connected visuals. Default text is Submit.

Filters

Apply or create filters in this work area. Save the dashboard to save your changes.

Setting	Description
Add Filter	Select to add a row level filter , group filter , hierarchical filter , or saved filter to this filter snippet.
Save Filters	After you've created one or more filters, select Save Filters to save and reuse in your environment.

Widget Settings

Adjust the widget settings for this filter snippet, then select **Apply** as needed to apply your changes to the filter snippet. Save the dashboard to save your changes.

Setting	Description
Display Name	The display name for this filter snippet. Change here or edit directly in the widget.
Description	An optional description for this filter snippet. Blank by default. Maximum 750 characters.
Header	Adjust the header behavior. The default setting is Show: display the header at all times. Default setting. Show on Hover: hide the header in Viewer mode unless users perform a hover action over the widget. Hide: completely hide the header from visibility in Viewer mode.
Position	Adjust the position of the widget content in the cell (widget footprint in the dashboard) to align vertically and horizontally as appropriate within the space. Select center, top, or bottom as needed.



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Comments

If you have access to comments, manage them on this tab. See [Manage Widget Comments](#).

Edit or Delete Filter Snippets

This applies to: *Visual Data Discovery*

As the owner or editor of a dashboard, you can make several changes to the filter snippet:

- Add, remove, or change sources
- [Connect visuals](#) to the filter snippet
- Remove the filter snippet
- Adjust the settings for the filter snippet using the [filter snippet sidebar](#)



Note: Users with Viewer access can add custom values to the snippet to filter connected visuals.

Edit a Filter Snippet

1. Select the snippet on the dashboard. A blue border appears around the snippet widget.
2. Select  **Settings** from the Show More menu () to open the filter snippet sidebar menu.
3. Use the [sidebar menu](#) to update data settings, filter snippet settings, or widget settings.
4. When you have finished making changes to the snippet, [save](#) the dashboard.

Delete a Filter Snippet

1. Edit the dashboard. See [Edit A Dashboard](#).
2. Select the filter snippet to be removed.
3. Select **Remove Widget** in the [snippet drop-down menu](#). A removal confirmation dialog opens.
4. Select **Delete** on the warning dialog to confirm the deletion.

Arc Gauges

This applies to: *Visual Data Discovery*

Arc gauges are based on a single metric. They are supported by all Symphony [data connectors](#).

This topic describes:

- [Display Arc Gauge Label Description](#)
- [Adjust The Arc Gauge Value Range](#)
- [Adjust Arc Gauge Color Metric Value Range](#)
- [Display Arc Gauge Values As Percentages](#)
- [Configure Colors For A Specific Arc Gauge](#)

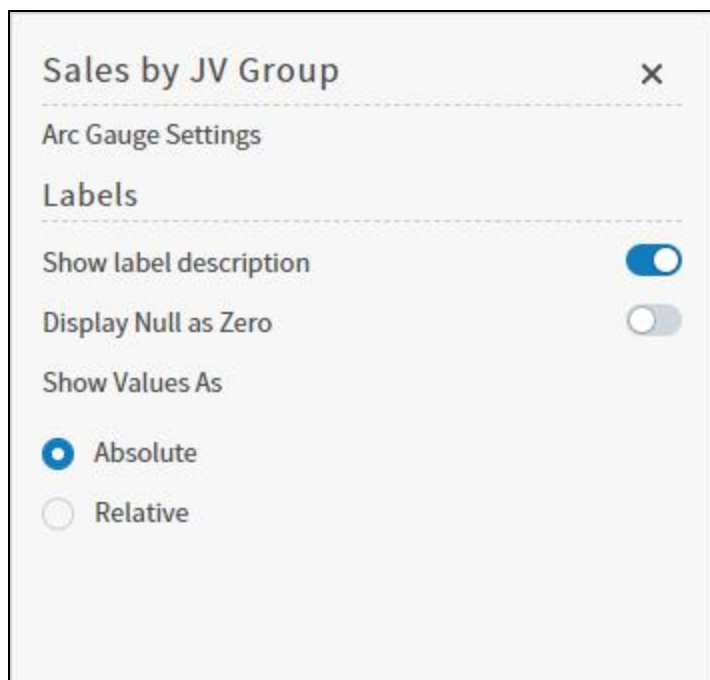
Display Arc Gauge Label Description

You can show a description of the arc gauge label. The label shows the value that is plotted, but the label description shows the calculation for the plotted value in the format `<actual value>/<maximum value>`. By default, the label description is not shown.

To display the arc gauge label description:

1. Edit the visual you want to modify. See [Edit Visuals](#).

2. Select  on the [visual sidebar](#). The Settings sidebar for the visual appears.



3. Slide the **Show label description** switch on (to the right).

The changes are made to the arc gauge and the label description is shown.

4. Optionally, enable **Display Null as Zero** by sliding the switch on (to the right).

5. Select  to save the visual.

Adjust the Arc Gauge Value Range

Configure minimum and maximum arc gauge values for a specific arc gauge

1. Edit the visual you want to modify. See [Edit Visuals](#).

2. Select  on the [visual sidebar](#). The Rulers sidebar for the visual appears.

Realtime Sales Arc Gauge

×

Rulers

Metric: Volume

Min

0

☒ Auto

Max

116607640

☒ Auto

Static maximum value

☒

Color Metric: Plannedsales

Min

0

☒ Auto

Max

37625090660.56607

☒ Auto

Static maximum value

☒

Cancel

Apply

- In the **Metric** section of the sidebar, configure the settings as described below.

Setting	Description
Min	Specify the minimum value for the gauge. Select the Auto checkbox to have Symphony automatically determine the minimum value from the data for the arc gauge metric.
Min	If the Static maximum value switch is on, specify the maximum value for the gauge. Select the Auto checkbox to have Symphony automatically determine the maximum value from the data for the arc gauge metric. If the Static maximum value switch is off, select a second metric to use for the maximum value of the gauge. For example, if the arc metric was the number of apples, you might select a second metric representing the total number of fruit. In this way, the arc gauge would plot the total number of apples as it relates to the total number of fruit.
Static maximum value	This switch allows you to plot the arc gauge metric as it relates to a second metric. By default, this switch is on. When it is on, the maximum value of the arc gauge is determined by the Max setting for the arc metric or the maximum value of the data for the selected arc metric. Only the values of the selected arc metric are used. You can select and format the numeric attribute used for this field. See Configure Number Formatting For Visuals. Slide the Static maximum value switch off (to the left) to select a second metric to use for the maximum value of the gauge.

4. Select **Apply**. The changes are made to the arc gauge.

5. Select  to save the visual.

Adjust Arc Gauge Color Metric Value Range

The color metric determines the color used by the arc gauge. Color settings are mostly specified on the Color sidebar for the arc gauge, but you can adjust the range for the color metric of an arc gauge using the Rulers sidebar.

Configure minimum and maximum values for the color metric selected for a specific arc gauge

1. Edit the visual you want to modify. See [Edit Visuals](#).

2. Select  on the [visual sidebar](#). The Rulers sidebar for the visual appears.

3. In the **Color Metric** section of the sidebar, configure the settings as described below.

Setting	Description
Min	Specify the minimum value for the color metric. Select the Auto checkbox to have Symphony automatically determine the minimum value from the data for the color metric.

Setting	Description
Max	If the Static maximum value switch is on, specify the maximum value of the color metric used for the arc gauge. Select the Auto checkbox to have Symphony automatically determine the maximum value from the color metric. If the Static maximum value switch is off, select a second metric to use for the maximum value of the color metric used for the arc gauge.
Static maximum value	This switch allows you to set the color of the arc gauge as it relates to a second metric. By default, this switch is on. When it is on, the color range of the arc gauge is determined by the Max setting for the color metric or the maximum value of the data for the selected color metric. Only the values of the selected color metric are used. Slide the Static maximum value switch off (to the left) to select a different metric to use for the color of the gauge.

4. Select **Apply**. The changes are made to the arc gauge.

5. Select the save () icon to save the visual.

Display Arc Gauge Values as Percentages

When you first create an arc gauge visual, the values shown on the gauge are the raw values of the plotted metric. You can alter this to show the values as a percentage of the maximum value of the gauge.

Display arc gauge values as percentages in an a specific arc gauge

1. Edit the visual you want to modify. See [Edit Visuals](#).

2. Select  on the [visual sidebar](#). The Settings sidebar for the visual appears. The arc gauge shows raw values by default.

3. Under **Show Values As**, select **Relative**. The arc gauge values are shown as percentages.

To show raw values again, select **Absolute**. This is the default setting.

4. After making your display choice, select the save () icon to save the visual.

Adjust the percentage to round it to an appropriate number of decimal places (or none) by adjusting [the format](#) for the value.

Configure Colors for a Specific Arc Gauge

Specify the color settings for a specific arc gauge using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).

2. Select  on the [visual sidebar](#). The Color sidebar for the visual appears.

Sales by JV Group
×

Color

Legend

Color Settings

Label Color

#000000

Inherit from theme

Label Description Color

#777777

Inherit from theme

Color Metric

Planned Sales (Sum)

Color Palette

DefaultSequential

Inherit from theme

Conditional Formatting

Color Mode

Gradient

Threshold Mode

Auto

Number of Colors

3

Color Rules

Color 1

#ffc65f

Color 2

#9eb778

3. Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual. - For gradient color styles, use the legend's gradient slider to show and hide your data. If available, enable or disable a static legend for this visual.
Label Color	Select a label color. Select the Inherit from theme checkbox to use the color palette specified by the theme .
Label Description Color	Select a color for the label description. Select the Inherit from theme checkbox to use the color palette specified by the theme .
Color Metric	Select the metric that affects the segment color in the visual. You can also define the default aggregation function used for the metric values: SUM, AVG, MAX, MIN, or (for some data sources) LAST VALUE. See Metric Aggregation Functions .
Color Palette	If a color palette is specified for this visual type in the data source defaults, select the color palette for this specific visual. If a color range is selected for KPI visuals in the data source defaults, this setting is not available. Select the Inherit from theme checkbox to use the color palette specified by the theme .
Color Mode	Select Distinct Colors or Gradient to identify the way colors are used on the screen. Either specific distinct colors will be used or a gradient of colors will be used.
Threshold Mode	If you selected the Gradient color mode, this setting cannot be changed. If you selected the Distinct Colors color mode, select either Auto or Manual from the drop-down list. Auto will automatically assign thresholds and colors for the visual. Manual allows you to change the thresholds and colors used on the visual.
Number of colors	Specify the number of colors to use for the visual.
Color Rules	Color rules allow you to change the colors for each color used for the visual. In addition, if you specified a Manual threshold mode, you can select the thresholds used for color settings in the visual. See Understand Visual Color Condition Thresholds
Thresholds in Percentage	This switch allows you to set the color thresholds for the arc gauge in percentages. Slide the Thresholds in percentage switch on (to the right) to specify color thresholds in percentages. By default, this switch is off and color threshold settings must be raw values. This setting is only available if Threshold Mode is set to Manual.

4. Close the Color sidebar and the color settings are dynamically applied to the visual.
5. Select the save () icon to save the dashboard and the visual with its updated settings.

Understand Visual Color Condition Thresholds

You can set threshold color conditions for metric-based visuals. At least two color settings are required. In addition, thresholds are specified between each color setting. (So three color settings require two threshold settings; four color settings require three threshold settings, etc.)

- The color for Color 1 is used when the value of the color metric is less than the first threshold value.
- The color for Color 2 is used when the value of the color metric falls between the first and second threshold values.
- If only three colors are used for the visual, the color for Color 3 is used when the value of the color metric is greater than or equal to the second threshold value.
If more than three colors are used, the color for Color 3 is used when the value of the color metric falls between the second and third threshold values.
When more than three colors are used, the colors continue to be applied in this pattern for all threshold settings; any color metric values greater than the last threshold setting have the final color applied.

You can have Symphony automatically set the thresholds or you can manually set them.

For information about the color encoding supported by Symphony, see [Specify Colors](#).



Bar Chart Styles

This applies to: *Visual Data Discovery*

Supported bar chart styles include standard bar charts, histograms, and multiple metric bar charts. You can configure the defaults for all bar chart styles for a data source configuration.

For more information, select one of the following links:

- [Standard Bar Charts](#)
- [Bars: Histograms](#)
- [Bars: Multiple Metric Charts](#)
- [Modify Bar Charts](#)

Standard Bar Charts

This applies to: *Visual Data Discovery*

Standard bar charts are based on one metric and one or two attributes, as follows:

- **Plain:** Based on 1 metric and 1 attribute
- **Clustered:** Based on 1 metric and 2 attributes
- **Stacked:** Based on 1 metric and 2 attributes
- **100% Stacked:** Based on 1 metric and 2 attributes

Standard bar charts are supported by all Symphony [data connectors](#).

This topic describes:

- [Configure Settings For A Specific Bar Chart](#)
- [Configure Colors For A Specific Bar Chart](#)
- [Understand Visual Color Condition Thresholds](#)

Configure Settings for a Specific Bar Chart

Change the settings for a specific bar chart

1. Edit the bar chart you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [chart drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



3. Select the settings icon () on the [sidebar menu](#). The Bar Chart Settings sidebar for the visual appears.












JV Sales Special Events ×

Bar Chart Settings

General

Orientation

☐ Horizontal
 ☒ Vertical

Cumulative Sum i
☐

Subgroup

Enable Subgroup
 ☐

Labels

Show Group Labels ☒

Absolute Values ☐

Relative Values ☐

Group Labels Position

Inside

Style

Bar Thickness

100

^
v

4. Alter the settings as needed:

Setting	Description
Orientation	Select Horizontal or Vertical orientation for the bars.
Cumulative Sum	When enabled, Symphony updates the visual to add the previous value to the next value, and both the original and cumulative value for selected items are displayed as a tool tip. In Bar visuals, this feature is only available when data is grouped by a Time field, and when the Enable Subgroup setting is disabled.
Subgroup	Slide on (to the right) the Enable Subgroup slider to enable a subgroup style. After enabling a subgroup style, select the style for the chart: Clustered Bar Chart , Stacked Bar Chart , or 100% Stacked Bar Chart . If Subgroups are enabled, you can define the visibility and position of their labels.
Show Group Labels	Enable to display labels for group values.
Absolute Values	Enable to display the data in absolute values.
Relative Values	Enable to display the data in relative values.
Group Labels Position or Subgroup Labels Position	Select a position option for the group or subgroup labels: Outside horizontal , Outside diagonal , or Outside vertical .
Style	Specify the bar thickness for the chart.

- Optionally, edit the number or date and time format for this visual. See [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

- Select the save icon () to save the dashboard and the visual with its updated settings.

Configure Colors for a Specific Bar Chart

Specify the color settings for a specific bar chart using the Color sidebar

- Edit the visual you want to modify. See [Edit Visuals](#).
- If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

- Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual when Sub-Group is enabled. - For gradient color styles, use the legend's gradient slider to show and hide your data.
Color Metric	Select the metric that affects the segment color in the visual.
<type> Color Palette	If Inherit from Theme is selected, the color palette is determined by the theme selected for the Symphony UI. To override the palette selected by the theme, clear the Inherit from Theme checkbox and select a different color palette.
Color Mode	Select Distinct Colors or Gradient to identify the way colors are used on the screen. Either specific distinct colors will be used or a gradient of colors will be used.
Threshold Mode	If you selected the Gradient color mode, this setting cannot be changed. If you selected the Distinct Colors color mode, select either Auto or Manual from the drop-down list. Auto will automatically assign thresholds and colors for the visual. Manual enables you to change the thresholds and colors used on the visual.
Number of colors	Specify the number of colors to use for the visual.
Color Rules	Color rules allow you to change the colors for each color used for the visual. In addition, if you specified a Manual threshold mode, you can select the thresholds used for color settings in the visual.

4. Close the Color sidebar and the color settings are dynamically applied to the visual.

5. Select  to save the dashboard and the visual with its updated settings.

Understand Visual Color Condition Thresholds

You can set threshold color conditions for metric-based visuals. At least two color settings are required. In addition, thresholds are specified between each color setting. (So three color settings require two threshold settings; four color settings require three threshold settings, etc.)

- The color for Color 1 is used when the value of the color metric is less than the first threshold value.
- The color for Color 2 is used when the value of the color metric falls between the first and second threshold values.
- If only three colors are used for the visual, the color for Color 3 is used when the value of the color metric is greater than or equal to the second threshold value.



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If more than three colors are used, the color for Color 3 is used when the value of the color metric falls between the second and third threshold values.

When more than three colors are used, the colors continue to be applied in this pattern for all threshold settings; any color metric values greater than the last threshold setting have the final color applied.

You can have Symphony automatically set the thresholds or you can manually set them.

For information about the color encoding supported by Symphony, see [Specify Colors](#).

Bars: Histograms

This applies to: *Visual Data Discovery*

Histograms require only one metric (number). The metric data range is divided into intervals and the metric values that fall within each interval are counted. The histogram plots the value counts (Volume) against the metric intervals.

Histograms are supported only by data sources that use [connectors](#) that support the calculations necessary for histogram visuals with integer values.

Support for this feature by connector is shown in the following table.

Key:Y - Supported; N - Not Supported; N/A - not applicable

Connector	Supported?
Amazon Redshift	Y
Amazon S3	Y
Apache Drill	Y
Apache Phoenix	Y
Apache Phoenix Query Server (QS)	Y
Apache Solr	Y
BigQuery	Y
Business Central Jet	Y
Cloudera Impala	Y
Cloudera Search	N
Couchbase	Y
Dremio	Y
Elasticsearch 7.0	Y
Elasticsearch 8.0	Y
File Upload	Y
HDFS	Y
Hive	Y
Jira	Y
MemSQL	Y
Microsoft SQL Server	Y

Connector	Supported?
MongoDB	N
MySQL	Y
Oracle	Y
PostgreSQL	Y
Python	Y
Real Time Sales	Y
Salesforce	Y
SAP Hana	Y
SAP S/4HANA	Y
SAP IQ	Y
Spark SQL	Y
Snowflake	Y
Teradata	Y
TIBCO DV	Y
Trino	Y
File Upload (Upload API)	Y
Vertica	Y

Data from Fusion data sources can be used in histograms.

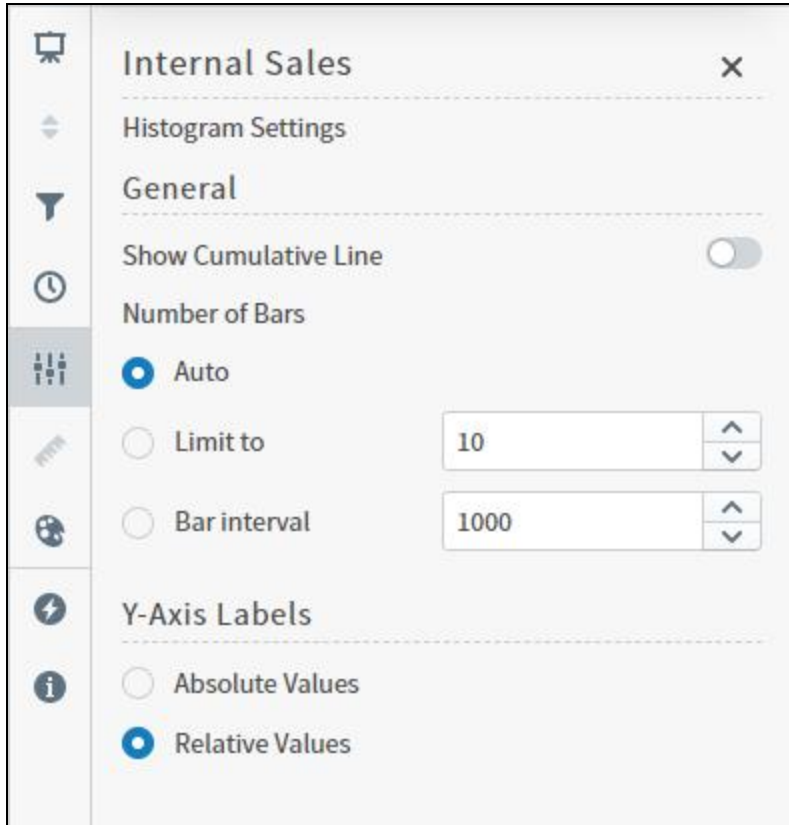
- [Configure Settings For A Specific Histogram](#)
- [Configure Colors For A Specific Histogram](#)

Configure Settings for a Specific Histogram

Change the settings for a specific histogram

1. Edit the histogram you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select  on the [sidebar menu](#). The Histogram Settings sidebar for the visual appears.



The screenshot shows the 'Internal Sales' sidebar with a close button (X) in the top right. The sidebar is divided into sections: 'Histogram Settings', 'General', and 'Y-Axis Labels'. Under 'General', there is a 'Show Cumulative Line' toggle switch (currently off) and a 'Number of Bars' section. The 'Number of Bars' section has two options: 'Auto' (selected with a blue radio button) and 'Limit to' (with a text input field containing '10' and up/down arrows). Below 'Limit to' is a 'Bar interval' option (radio button) with a text input field containing '1000' and up/down arrows. Under 'Y-Axis Labels', there are two options: 'Absolute Values' (radio button) and 'Relative Values' (selected with a blue radio button).

4. Alter the settings as needed:

Setting	Description
Show Cumulative Line	Select to enable the cumulative line to be displayed on your visual.
Number of Bars	Specify the number of bars: ▪ Auto - if you select this option, the bins for all your data set will be built and corresponding bars will be displayed.

Setting	Description
	▪ Limit to - specify the maximum number of bars to be displayed on your visual. ▪ Bar interval - specify the bar interval for your visual.
Y-Axis Labels	Select Absolute Values , or Relative Values to use absolute or relative values.

5. Optionally, edit the number format for this visual. See [Configure Number Formatting For Visuals](#).

6. Select  to save the dashboard and the visual with its updated settings.

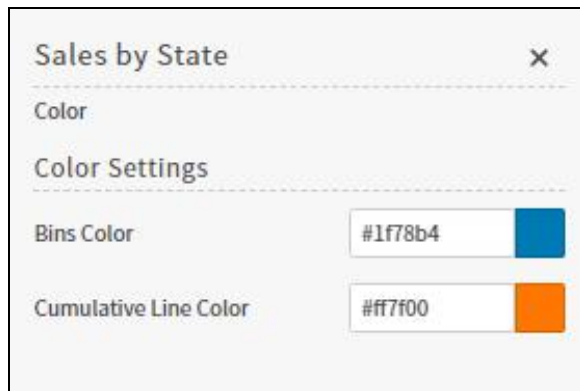
Configure Colors for a Specific Histogram

Specify the color settings for a specific histogram using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).

2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

Select  on the [sidebar menu](#). The Color sidebar for the visual appears.



3. Configure the color settings as described below. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Bins Color	Select the color for the bins on the visual.
Cumulative Line Color	Select the color for the cumulative line on your visual.

4. Close the Color sidebar and the color settings are dynamically applied to the visual.

5. Select  to save the dashboard and the visual with its updated settings.

Bars: Multiple Metric Charts

This applies to: *Visual Data Discovery*

Multiple metric bar charts are based on multiple metrics and one attribute. They are supported by all Symphony [data connectors](#).

This topic describes:

- [Configure Settings For A Specific Multiple Metric Bar Chart](#)
- [Configure Colors For A Specific Multiple Metric Bar Chart](#)

Configure Settings for a Specific Multiple Metric Bar Chart

Change the settings for a specific multiple metric bar chart

1. Edit the multiple metric bar chart you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [chart drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select  on the [sidebar menu](#). The Bar: Multiple Metrics Settings sidebar for the visual appears.

Sales by JV Group

×

Bar: Multiple Metrics Settings

General

Orientation

☐ Horizontal
 ☒ Vertical

Labels

Show Metric Labels

☒

Absolute Values

☐

Relative Values

☐

Group Labels Position

Outside diagonal

↑

↓

Style

Bar Thickness

100

↑

↓

4. Alter the settings as needed:

Setting	Description
Orientation	Select Horizontal or Vertical orientation for the bars.
Show Metric Labels	Enable to display labels for metric values.
Absolute Values	Enable to display the data in absolute values.
Relative Values	Enable to display the data in relative values.
Group Labels Position	Select a position option for the metric labels: Outside horizontal , Outside diagonal , or Outside vertical .

Setting	Description
Style	Specify the bar thickness for the chart.

- Optionally, edit the number or date and time format for this visual. See [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).
- Select  to save the dashboard and the visual with its updated settings.

Configure Colors for a Specific Multiple Metric Bar Chart

Specify the color settings for a specific multiple metric bar chart using the Color sidebar

- Edit the visual you want to modify. See [Edit Visuals](#).
- If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

- Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual. - Use the color selector to manually assign colors for legend items. If available, enable or disable a static legend for this visual.
Color	Manually select the color for each metric using the color selector.
<type> Color Palette	Select a color palette for this specific visual. Select the Inherit from theme checkbox to use the color palette specified by the theme.



- Archive of documentation for Logi Symphony v24

4. Close the Color sidebar and the color settings are dynamically applied to the visual.

5. Select  to save the dashboard and the visual with its updated settings.

Modify Bar Charts

This applies to: *Visual Data Discovery*

When you first create a standard bar chart or a multiple metric bar chart, the default settings specified in the data source configuration are used to create the visuals.

Use the Settings sidebar to further refine your selected bar chart.


JV Sales Special Events
×

Bar Chart Settings

General

Orientation

☐ Horizontal
☒ Vertical

Cumulative Sum ⓘ
☐

Subgroup

Enable Subgroup
☐

Labels

Show Group Labels
☒

Absolute Values
☐

Relative Values
☐

Group Labels Position

Inside

Style

Bar Thickness

100

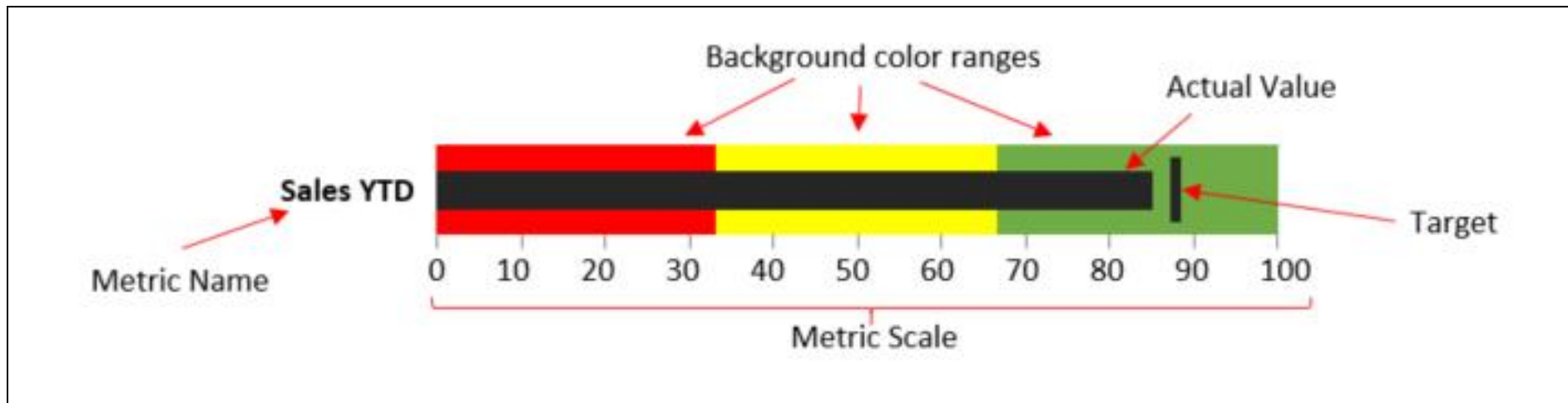
Setting	Description
Orientation	Select Horizontal or Vertical orientation for the bars.
Cumulative Sum	When enabled, Symphony updates the visual to add the previous value to the next value, and both the original and cumulative value for selected items are displayed as a tool tip. In Bar visuals, this feature is only available when data is grouped by a Time field, and when the Enable Subgroup setting is disabled.

Setting	Description
Subgroup	Slide on (to the right) the Enable Subgroup slider to enable a subgroup style. After enabling a subgroup style, select the style for the chart: Clustered Bar Chart , Stacked Bar Chart , or 100% Stacked Bar Chart . If Subgroups are enabled, you can define the visibility and position of their labels.
Show Group Labels	Enable to display labels for group values.
Absolute Values	Enable to display the data in absolute values.
Relative Values	Enable to display the data in relative values.
Group Labels Position or Subgroup Labels Position	Select a position option for the group or subgroup labels: Outside horizontal , Outside diagonal , or Outside vertical .
Style	Specify the bar thickness for the chart.

Bullet Gauges

This applies to: *Visual Data Discovery*

Bullet gauges are based on a single metric. The metric is mapped against a background bar that shows value ranges using color. A metric scale is also shown. Finally, a small vertical bar represents a marker for the target value of the metric. Bullet gauges are supported by all Symphony [data connectors](#).



This topic describes:

- [Configure Settings For A Specific Bullet Gauge](#)
- [Adjust The Bullet Gauge Value Range](#)
- [Configure Colors For A Specific Bullet Gauge](#)
- [Understand Visual Color Condition Thresholds](#)

Configure Settings for a Specific Bullet Gauge

Change the settings for a specific bullet gauge

1. Edit the bullet gauge you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select  on the [sidebar menu](#). The Bullet Gauge Settings sidebar for the visual appears.

Realtime Sales Planned Sales

×

Bullet Gauge Settings

General

Orientation

☒ Horizontal
 ☐ Vertical

Target Value ☒

Labels

Show label description ☐

Show Values As

☒ Absolute
 ☐ Relative

4. Alter the settings as needed:

Setting	Description
Orientation	Select an orientation (horizontal or vertical) for the bullet gauge.
Target Value	Slide the Target Value slider on (to the right) to show the target value bar on the gauge.
Show label description	Slide the Show label description slider on (to the right) to show label description on the gauge. The label description includes the metric value and maximum value in addition to the metric name. For example, when this slider is on, if the Planned Sales metric value is 15,000 and its maximum value is 32,000, the label description would read "Planned Sales 15,000 of 32,000". When this slider is off, only "Planned Sales" would show.  Note: When Show Values As is set to Relative and Show label description is on, the percentage of the metric value in relation to the maximum value is also shown.
Show Values As	Select how values should be shown on the gauge. Select Absolute to show raw data values. Select Relative to show percentages.

5. Select  to save the dashboard and the visual with its updated settings.

Adjust the Bullet Gauge Value Range

Configure minimum and maximum values for a specific bullet gauge

- Edit the visual you want to modify. See [Edit Visuals](#).
- Select  on the [visual sidebar](#). The Rulers sidebar for the visual appears.

Realtime Sales Planned Sales

×

Rulers

Metric: Plannedsales

Min

0

☒ Auto

Max

37625090660.56763

☒ Auto

Static maximum value

☒

Set Target As

☒ Value

☐ Percent of Maximum

Target Value

30000000000

Cancel

Apply

- In the **Metric** section of the sidebar, configure the settings as described below.

Setting	Description
Min	Specify the minimum value for the gauge. Select the Auto checkbox to have Symphony automatically determine the minimum value from the data for the bullet gauge metric.
Max	If the Static maximum value switch is on, specify the maximum value for the gauge. Select the Auto checkbox to have

Setting	Description
	Symphony automatically determine the maximum value from the data for the bullet gauge metric. If the Static maximum value switch is off, select a second metric to use for the maximum value of the gauge. For example, if the bullet gauge metric was the number of apples, you might select a second metric representing the total number of fruit. In this way, the bullet gauge would plot the total number of apples as it relates to the total number of fruit.
Static maximum value	This switch allows you to plot the bullet gauge metric as it relates to a second metric. By default, this switch is on. When it is on, the maximum value of the bullet gauge is determined by the Max setting for the bullet gauge metric or the maximum value of the data for the selected bullet gauge metric. Only the values of the selected bullet gauge metric are used. You can select and format the numeric attribute used for this field. See Configure Number Formatting For Visuals. Slide the Static maximum value switch off (to the left) to select a second metric to use for the maximum value of the gauge.
Set Target As	Select how the target value for the bullet gauge metric is set. Select Value if a raw data value should be used. Select Percent of Maximum if a percentage of the maximum value should be used.
Target Value	Specify a target value for the bullet gauge metric. If Set Target As is set to Percent of Maximum, this field name changes to Target Value (%). In this case, remember to specify the target value as a percentage of the maximum value for the gauge.

4. Select **Apply**. The changes are made to the bullet gauge.

5. Select the Save icon () to save the visual.

Configure Colors for a Specific Bullet Gauge

Specify the color settings for a specific bullet gauge using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [chart drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

Realtime Sales Planned Sales

Color

Legend

PLANNEDSALES (SUM)

0.0037,625,090,660.57

Color Settings

Bar Color

#4a4a4a

☒ Inherit from theme

Target Color

#4a4a4a

☒ Inherit from theme

Color Metric

Plannedsales (Sum)

Color Palette

DefaultSequential

☒ Inherit from theme

Conditional Formatting

Color Mode

Gradient

Threshold Mode

Auto

Number of Colors

3

Color Rules

Color 1

#ffc65f

Color 2

#9eb778

Color 3

#0096b6

- Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual. - For gradient color styles, use the legend's gradient slider to show and hide your data. If available, enable or disable a static legend for this visual.
Bar Color	Select the bar color for the gauge. If Inherit from Theme is selected, the color palette is determined by the theme selected for the Symphony UI. You cannot select the color in this field to access the color dialog.
Target Color	Select the color for the target bar. If Inherit from Theme is selected, the color palette is determined by the theme selected for the Symphony UI. You cannot select the color in this field to access the color dialog.
Color Metric	Select the metric that affects the segment color in the visual. You can also define the default aggregation function used for the metric values: SUM, AVG, MAX, MIN, or (for some data sources) LAST VALUE. See Metric Aggregation Functions.
Color Palette	If Inherit from Theme is selected, the color palette is determined by the theme selected for the Symphonys UI. To override the palette selected by the theme, clear the Inherit from Theme checkbox and select a different color palette.
Color Mode	Select Distinct Colors or Gradient to identify the way colors are used on the screen. Either specific distinct colors will be used or a gradient of colors will be used.
Threshold Mode	If you selected the Gradient color mode, this setting cannot be changed. If you selected the Distinct Colors color mode, select either Auto or Manual from the drop-down list. Auto will automatically assign thresholds and colors for the visual. Manual allows you to change the thresholds and colors used on the visual.
Number of colors	Specify the number of colors to use for the visual.
Color Rules	Color rules allow you to change the colors for each color used for the visual. In addition, if you specified a Manual threshold mode, you can select the thresholds used for color settings in the visual. See Understand Visual Color Condition Thresholds.

4. Close the Color sidebar and the color settings are dynamically applied to the visual.

5. Select  to save the dashboard and the visual with its updated settings.

Understand Visual Color Condition Thresholds

You can set threshold color conditions for metric-based visuals. At least two color settings are required. In addition, thresholds are specified between each color setting. (So three color settings require two threshold settings; four color settings require three threshold settings, etc.)

- The color for Color 1 is used when the value of the color metric is less than the first threshold value.
- The color for Color 2 is used when the value of the color metric falls between the first and second threshold values.
- If only three colors are used for the visual, the color for Color 3 is used when the value of the color metric is greater than or equal to the second threshold value.

If more than three colors are used, the color for Color 3 is used when the value of the color metric falls between the second and third threshold values.

When more than three colors are used, the colors continue to be applied in this pattern for all threshold settings; any color metric values greater than the last threshold setting have the final color applied.

You can have Symphony automatically set the thresholds or you can manually set them.

For information about the color encoding supported by Symphony, see [Specify Colors](#).

Box Plots

This applies to: *Visual Data Discovery*

Box plots are based on one metric and one or more attributes. Groups and subgroups to expand the depth of the information you provide in this visual type. Box plot visuals can be used only with data sources that use [connectors](#) that support percentile calculations necessary for box plots.



Note: To edit the number or date and time format for this visual, see [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

Support for this feature by connector is shown in the following table.

Key:Y - Supported; N - Not Supported; N/A - not applicable

Connector	Supported?	Notes
Amazon Redshift	Y	
Amazon S3	Y	
Apache Drill	Y	
Apache Phoenix	N	
Apache Phoenix Query Server (QS)	N	
Apache Solr	Y	
BigQuery	Y	If you need to access a BigQuery partition, explicitly include an alias for the built in partition column in your select clause, such as <code>select *, _PARTITIONTIME as pt from projectId.datasetId.tableId.</code>
Business Central Jet	Y	
Cloudera Impala	Y	
Cloudera Search	N	The Apache Solr versions prior to 5.3 used by Cloudera Search do not have the percentile aggregations required for box plots built in.
Couchbase	N	
Dremio	Y	
Elasticsearch 7.0	Y	
Elasticsearch 8.0	Y	
File Upload	Y	
HDFS	Y	

Connector	Supported?	Notes
Hive	Y	
Jira	Y	
MemSQL	Y	
Microsoft SQL Server	Y	
MongoDB	N	Mongo DB data stores do not support the kind of aggregation needed for box plots out of the box.
MySQL	N	
Oracle	Y	
PostgreSQL	Y	
Python	Y	
Real Time Sales	Y	
Salesforce	Y	
SAP Hana	Y	
SAP S/4HANA	N	
SAP IQ	Y	
Spark SQL	Y	
Snowflake	Y	
Teradata	Y	
TIBCO DV	Y	
Trino	Y	
File Upload (Upload API)	Y	
Vertica	Y	

Data from Fusion data sources can be used in box plots.

This topic describes:

- [Configure Colors For A Specific Box Plot](#)

Configure Colors for a Specific Box Plot

If you share your data in groups and subgroups, you can apply color attributes as needed.

Specify the color settings for a specific box plot using the Color sidebar



- Archive of documentation for Logi Symphony v24

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

Airports

Color

Legend

AIRPORT

Key West International Airport

San Antonio International Airport

Gulfport-Biloxi International Airport

Blue Grass Airport

Sioux Gateway Airport

Stewart International Airport

Wiley Post-Will Rogers Memorial Airport

Charlottesville-Albemarle Airport

General Mitchell International Airport

Elmira/Corning Regional Airport

Dallas/Fort Worth International Airport

Santa Fe Municipal Airport

Kahului Airport

Santa Maria Public Airport (Capt G. Allan Hancock Field)

Erie International Airport

Luis Muoz Marín International Airport

Devils Lake Regional Airport

Grand Forks International Airport

El Paso International Airport

Color Settings

Color Attribute

Airport

Group By Color Palette

DefaultSequential

☒ Inherit from theme

3. Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. ■ For distinct color styles, select a data point in the legend to turn it off and on in the visual. ■ Use the color selector to manually assign colors for legend items. If available, enable or disable a static legend for this visual.
Color Attribute	Select the attribute that affects the segment color in the visual.
Group By Color Palette	Select a color palette for this specific visual. Select the Inherit from theme checkbox to use the color palette specified by the theme.

4. Close the Color sidebar and the color settings are dynamically applied to the visual.
5. Select  to save the dashboard and the visual with its updated settings.

Combo Charts

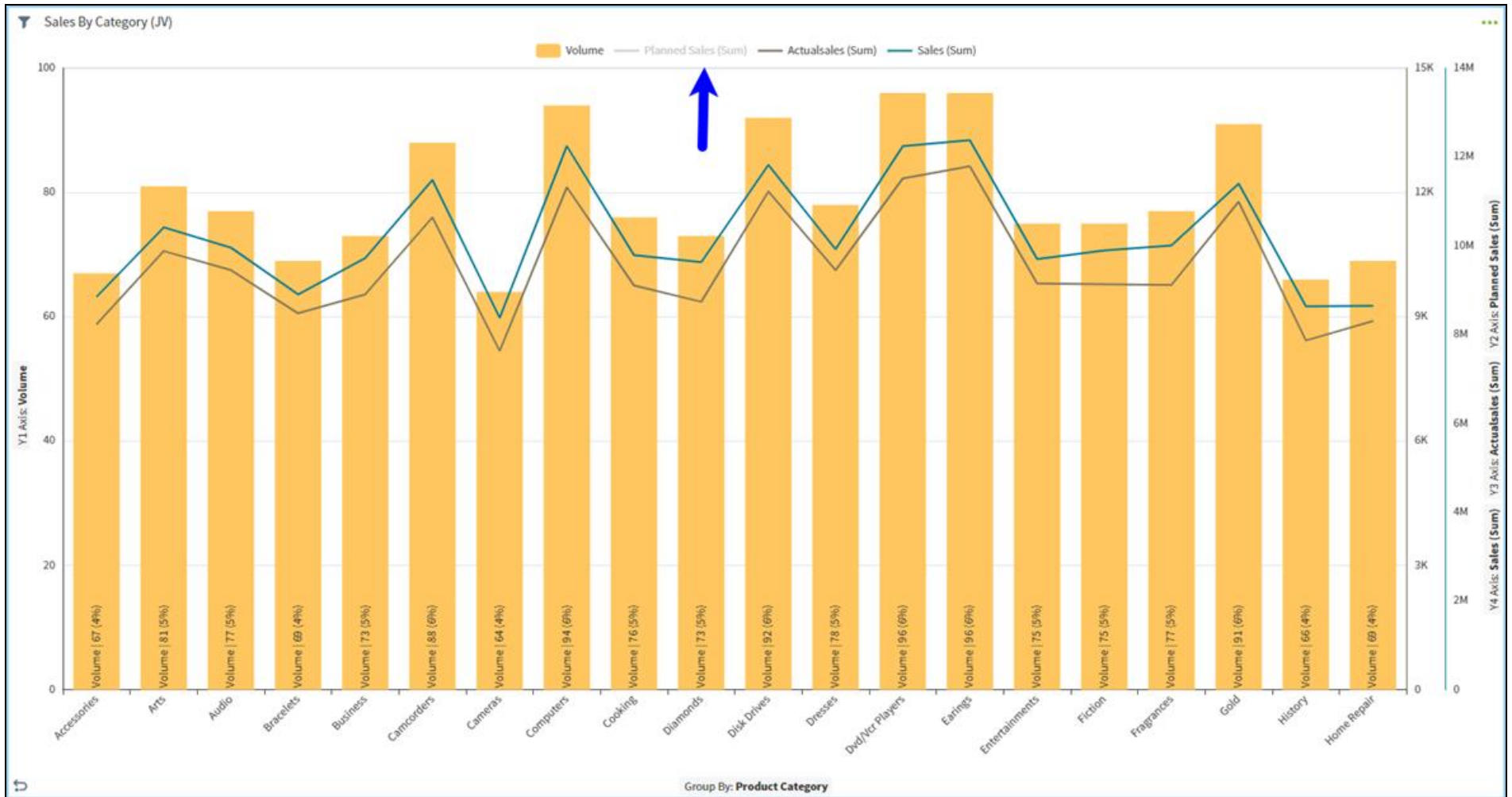
This applies to: *Visual Data Discovery*

Combo charts are based on a single independent variable (usually the x-axis) and up to four dependent variables (usually the y-axes). The dependent variables can be plotted using either bar or line visual styles. The independent variable (x-axis) can be any attribute or metric in the data; the dependent variables (y-axes) must be a metric (numeric field). A single attribute (independent variable) and two metrics (dependent variables) are required.



Note: To edit the number or date and time format for this visual, see [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

The legend on a combo chart is interactive. It allows you to show or hide different plots on the chart. By default, the plots for all of the metrics on the combo chart are shown. If you select one of the metrics in the legend, its name is grayed out and its plot is removed from the chart. To see its plot again, select the metric in the legend again. In the following example, the plot for the `Planned Sales (Sum)` metric is not shown on the chart and its name is grayed out in the legend. Adjust metric label visibility, values displayed, and positioning as needed.



Combo charts are supported by all Symphony [data connectors](#).

This topic describes:

- [Configure Settings For A Specific Combo Chart](#)
- [Configure Colors For A Specific Combo Chart](#)



Configure Settings for a Specific Combo Chart

Change the settings for a specific combo chart

1. Edit the combo chart you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [chart drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select  on the [sidebar menu](#). The Combo Chart Settings sidebar for the visual appears.

JV Sales
×

Combo Chart Settings

Y Axes

Enable Y3
☒

Enable Y4
☒

Style

Y1 Axis

Visual Style
Bar

Use Percentage Axis
☒

Y2 Axis

Visual Style
Line

Use Percentage Axis
☐

Y3 Axis

Visual Style
Line

Use Percentage Axis
☐

Y4 Axis

Visual Style
Line

Use Percentage Axis
☐

Labels

Show Metric Labels
☒

Absolute Values
☒

4. Alter settings as needed:

Setting	Description
Enable Y3	Use this switch to enable or disable the third dependent variable (on the Y3 axis) on the combo chart. When disabled, the Y3 variable is not plotted.
Enable Y4	Use this switch to enable or disable the fourth dependent variable (on the Y4 axis) on the combo chart. When disabled, the Y4 variable is not plotted.
Y1 Axis Visual Style	Use the drop-down list to select a visual style for the Y1 axis variable. Select Bar , Line , or Cumulative Line . Enable Use Percentage Axis to display as a percentage.
Y2 Axis Visual Style	Use the drop-down list to select a visual style for the Y2 axis variable. Select Bar , Line , or Cumulative Line . Enable Use Percentage Axis to display as a percentage.
Y3 Axis Visual Style	Use the drop-down list to select a visual style for the Y3 axis variable. Select Bar , Line , or Cumulative Line . Enable Use Percentage Axis to display as a percentage.
Y4 Axis Visual Style	Use the drop-down list to select a visual style for the Y4 axis variable. Select Bar , Line , or Cumulative Line . Enable Use Percentage Axis to display as a percentage.
Show Metric Labels	Enable to display labels for metric values.
Absolute Values	Enable to display the data in absolute values.
Relative Values	Enable to display the data in relative values.
Group Labels Position	Select a position option for the metric labels: Outside horizontal , Outside diagonal , or Outside vertical .

5. Select  to save the dashboard and the visual with its updated settings.

Configure Colors for a Specific Combo Chart

Specify the color settings for a specific combo chart using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

- Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. For distinct color styles, select a data point in the legend to turn it off and on in the visual. If available, enable or disable a static legend for this visual.
Color Settings	Select colors for the Y2, Y3, and Y4 dependent variables plotted on the combo chart.
Y1 Axis Color Palette	Select the color palette for the Y1 axis for this specific combo chart.
Inherit from theme	Select this checkbox to use the color palette specified by the theme .

- Close the Color sidebar and the color settings are dynamically applied to the visual.
- Select  to save the dashboard and the visual with its updated settings.



- Archive of documentation for Logi Symphony v24

Donut Charts

This applies to: *Visual Data Discovery*

Donut charts are based on one metric and one attribute. They are supported by all Symphony [data connectors](#).

This topic describes:

- [Configure Settings For A Specific Donut Chart](#)
- [Configure Colors For A Specific Donut Chart](#)

Configure Settings for a Specific Donut Chart

Change the settings for a specific donut chart

1. Edit the donut chart you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select  on the [sidebar menu](#). The Donut Chart Settings sidebar for the visual appears.

Realtime Sales

×

Donut Chart Settings

Labels

Show Labels

☒

Absolute Values

☒

Relative Values

☒

4. Alter the settings as needed:

Setting	Description
Labels	Slide the Show Labels , Absolute Values , and Relative Values sliders on (to the right) to enable these label options.

5. Optionally, edit the number or date and time format for this visual. See [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).
6. Select  to save the dashboard and the visual with its updated settings.

Configure Colors for a Specific Donut Chart

Specify the color settings for a specific donut chart using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

- Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual. - Use the color selector to manually assign colors for legend items. If available, enable or disable a static legend for this visual.
Color Attribute	Select the attribute that affects the segment color in the visual.
Group By Color Palette	Select a color palette for this specific visual. Select the Inherit from theme checkbox to use the color palette specified by the theme.

- Close the Color sidebar and the color settings are dynamically applied to the visual.
- Select  to save the dashboard and the visual with its updated settings.



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Heat Maps

This applies to: *Visual Data Discovery*

Heat maps are based on one metric and two attributes. Heat maps are supported by all Symphony [data connectors](#) except Cloudera Search.

This topic describes:

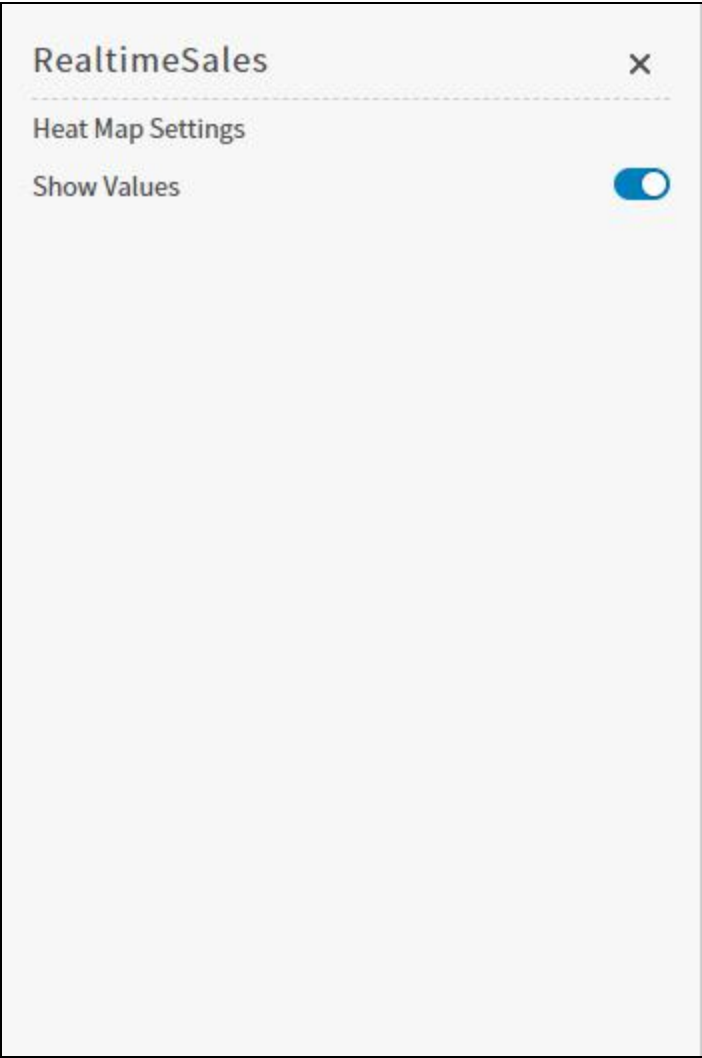
- [Configure Settings For A Specific Heat Map](#)
- [Configure Colors For A Specific Heat Map](#)
- [Understand Visual Color Condition Thresholds](#)

Configure Settings for a Specific Heat Map

Change the settings for a specific heat map

1. Edit the heat map you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select  on the [sidebar menu](#). The Heat Map Settings sidebar for the visual appears.



4. Alter the settings as needed:

Setting	Description
Show Values	Slide the Show Values slider on (to the right) to show the number of records (volume) in heat map cells.

5. Optionally, edit the number or date and time format for this visual. See [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

6. Select  to save the dashboard and the visual with its updated settings.

Configure Colors for a Specific Heat Map

Specify the color settings for a specific heat map using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).

2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

3. Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual. - For gradient color styles, use the legend's gradient slider to show and hide your data. If available, enable or disable a static legend for this visual.
Color Metric	Select the metric that affects the segment color in the visual.
<type> Color Palette	If Inherit from Theme is selected, the color palette is determined by the theme selected for the Symphony UI. To override the palette selected by the theme, clear the Inherit from Theme checkbox and select a different color palette.
Color Mode	Select Distinct Colors or Gradient to identify the way colors are used on the screen. Either specific distinct colors will be used or a gradient of colors will be used.
Threshold Mode	If you selected the Gradient color mode, this setting cannot be changed. If you selected the Distinct Colors color mode, select either Auto or Manual from the drop-down list.

Setting	Description
	Auto will automatically assign thresholds and colors for the visual. Manual enables you to change the thresholds and colors used on the visual.
Number of colors	Specify the number of colors to use for the visual.
Color Rules	Color rules allow you to change the colors for each color used for the visual. In addition, if you specified a Manual threshold mode, you can select the thresholds used for color settings in the visual.

4. Close the Color sidebar and the color settings are dynamically applied to the visual.

5. Select  to save the dashboard and the visual with its updated settings.

Understand Visual Color Condition Thresholds

You can set threshold color conditions for metric-based visuals. At least two color settings are required. In addition, thresholds are specified between each color setting. (So three color settings require two threshold settings; four color settings require three threshold settings, etc.)

- The color for Color 1 is used when the value of the color metric is less than the first threshold value.
- The color for Color 2 is used when the value of the color metric falls between the first and second threshold values.
- If only three colors are used for the visual, the color for Color 3 is used when the value of the color metric is greater than or equal to the second threshold value.

If more than three colors are used, the color for Color 3 is used when the value of the color metric falls between the second and third threshold values.

When more than three colors are used, the colors continue to be applied in this pattern for all threshold settings; any color metric values greater than the last threshold setting have the final color applied.

You can have Symphony automatically set the thresholds or you can manually set them.

For information about the color encoding supported by Symphony, see [Specify Colors](#).

KPI Charts

This applies to: *Visual Data Discovery*

KPI charts are based on two metrics: a primary metric and a comparison metric. They allow you to visualize the results of comparing the metrics and show positive or negative dynamics. KPI charts are supported by all Symphony [data connectors](#).

This topic describes:

- [Configure Settings For A Specific KPI Chart](#)
- [Configure Colors For A Specific KPI Chart](#)
- [KPI Charts](#)

Configure Settings for a Specific KPI Chart

Change the settings for a specific KPI chart

1. Edit the KPI chart you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select settings  on the [sidebar menu](#). The KPI Chart Settings sidebar for the visual appears.

Sales by Group

×

KPI Chart Settings

General

Display Null as Zero

Comparison Mode

Show Comparison

Show Variance

Show Arrow Indicators

Comparison Format

Value

Percentage

Labels

Metric Label

Sales (sum)

Comparison Metric Label

Product Group (count)

VS Label

Sales (sum) vs. Product Group (count)

Position

- Alter the settings as needed:

General

Setting	Description
Display Null as Zero	Enable Display Null as Zero to show null values as zeros.

Comparison Mode

Setting	Description
Show Comparison	Enable Show Comparison to show comparison data.
Show Variance	Enable Show Variance to see variance data.
Show Arrow Indicators	Enable Show Arrow Indicator to show up and down arrows that indicate whether the change is positive or negative.
Show Comparison	Enable Show Comparison to show comparison data.
Comparison Format	If the Show Comparison option is enabled, select an option to show variance data as raw data or as percentages. Select Value to see raw data differences; select Percentage to see percentages.

Labels

Setting	Description
Metric Label	The label of the metric used for this visual and aggregation function in parentheses.
Comparison Metric Label	The label of the comparison metric used for this visual and aggregation function in parentheses.
VS Label	The label of the metric vs comparison metric used for this visual and aggregations function in parentheses.

Position

Select options for vertical and horizontal positioning of the data for this visual within the widget as needed.

- Optionally, edit the number format for this visual. See [Configure Number Formatting For Visuals](#).
- Select the **Save** icon  to save the visual and dashboard or the visual with its updated settings.

Configure Colors for a Specific KPI Chart

Define the look and feel of your KPI using the Color sidebar to define a Color Palette and Color Rules.

You can apply a color palette to the Color Metric of the visual, and color rules to one or more parts of the visual. Optionally, add conditions to color rules to change the appearance of your visual when specific conditions are met.

Rules are applied in the order they are listed in the Color Rules work area. If two rules are applied to the same Target, the first rule is applied, and may be overwritten by the second rule. Select and drag a rule to reorder as needed.

Specify a Color Palette for the Color Metric

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



Select colors  on the [sidebar menu](#). The Color sidebar for the visual appears.

Sales by Group Q2
×

Color

Add Palette
Add Rule

Color Rules

...		Volume Metric	⊖
...		Always Background	⊖
...		Always Label text	⊖
...		Always Comparison data	⊖
...		Always Up arrow color	⊖
...		Always Down arrow color	⊖

Cancel
Apply

3. Select the color rule for the Color Metric. In this example, the top rule, Volume Metric, which displays the gradient color indicator. The Color Metric work area opens.

Group Sales Q2
×

← Edit Color Rule

Color Metric

Volume (Calc)
→

Select Where To Apply Formatting

Target

Metric

Formatting

Color Palette

DefaultSequential
→

☒ Inherit from theme
Reset Palette

Color Mode
Gradient

Threshold Mode
Auto

Number of Colors
3

Color Rules

Color 1
#ffc65f

Color 2
#9eb778

Color 3
#0096b6

4. Configure the color settings as described below. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Color Metric	Select to open the Choose a Field work area. Select a field to use as the Color Metric for this visual, then select Continue to return to the Color Metric work area. The metric you select affects the segment color in the visual. You can also define the default aggregation function used for the metric values: SUM, AVG, MAX, MIN, or (for some data sources) LAST VALUE. See Metric Aggregation Functions.
Select Where To Apply Formatting	Select an element of the visual to use the color palette. Target options include: Background, Metric, Label text, Comparison data, Up arrow color, or Down arrow color.
Formatting	Change or define the Color Palette, enable or disable Inherit from Theme, Reset Palette, define a Color Mode, Threshold Mode, and Number of Colors available in Color Rules.
Inherit from Theme	If Inherit from Theme is selected, the color palette is determined by the theme selected for the Symphony UI. To override the palette selected by the theme, clear the Inherit from Theme checkbox. You can then either: ■ Select a different color palette from predefined color palettes ■ Change the colors defined in the next work area, Color Rules
Reset Palette	Select to reset the color palette if you've made changes to any individual colors in the next work area, Color Rules.
Color Mode	Select Distinct Colors or Gradient to identify the way colors are used on the screen. Either specific distinct colors will be used or a gradient of colors will be used.
Threshold Mode	If you selected the Gradient color mode, this setting cannot be changed. If you selected the Distinct Colors color mode, select either Auto or Manual from the drop-down list. Auto will automatically assign thresholds and colors for the visual. Manual allows you to change the thresholds and colors used on the visual.
Number of Colors	Select the number of colors to use in the next work area, Color Rules.
Color Rules	These Color Rules allow you to change the colors for each color used for the visual. In addition, if you specified a Manual threshold mode, you can select the thresholds used for color settings in the visual. See KPI Charts.

5. Select Apply to apply your changes to the visual.

 **Note:** If you delete the Color Metric rule, create a new one by selecting **Add Palette**.

Specify the color rules and conditional formatting for a specific KPI chart using the Color sidebar



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1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

Select colors  on the [sidebar menu](#). The Color sidebar for the visual appears.

Sales by Group Q2

×

Color

Add Palette

Add Rule

Color Rules

⋮

⋮

⋮

⋮

Volume
Metric

⊖

⋮

⋮

⋮

⋮

Always
Background

⊖

⋮

⋮

⋮

⋮

Always
Label text

⊖

⋮

⋮

⋮

⋮

Always
Comparison data

⊖

⋮

⋮

⋮

⋮

Always
Up arrow color

⊖

⋮

⋮

⋮

⋮

Always
Down arrow color

⊖

Cancel

Apply

3. Select Add Rule to add a new color rule, or select a Color Rule to edit. The Color Rule work area opens.

Group Sales Q2
×

← Edit Color Rule

Select When To Apply Formatting
⊕

Always apply this rule
☒

Select Where To Apply Formatting

Target

Background

Formatting
⊕

Background Color

#585858

☒ Inherit from theme
⊖

Cancel

Continue



Note: Select the delete icon  to delete a color rule or formatting definition.

- Configure the color settings as described below. If a target is not assigned a rule, its color settings are inherited from the Symphony theme, regardless of other settings. Supported color specifications are described in [Specify Colors](#).

Setting		Description
Select When to Apply Formatting		If Always apply this rule is disabled, you can select the add icon  to define the conditions to apply your formatting for the selected Target. See Configure Conditional Formatting Rules.
Always apply this rule		Enable to always apply the formatting to the selected Target. Disable to define conditions for applying this rule.
Select Where To Apply Formatting		Select an element of the visual to use the color rules. Target options include: Background , Metric , Label text , Comparison data , Up arrow color , or Down arrow color .
Formatting		Select the add icon  to define the conditions to apply your formatting for the selected Target. If all format definitions have been defined for the target, this option is not available. The format definitions you can apply to a target vary depending on the target selected.
	Text Color	The text color for the selected target. Clear the Inherit from Theme checkbox to select a different color. Select to enable the Optimize contrast option. This defines the color as Auto, and is black or white, depending on the color defined for the Background target.
	Background Color	Define the background color for the selected target. For the Metric, Label text, and Comparison data targets, this color acts as a highlight color behind the text or numbers. For the Background target, this defines the background color of the visual. This color is used to select the Auto color for Text Color definitions that use the Optimize contrast option.
	Text Size	Adjust the size of the selected target's text.
	Bold, Italic, Underline	Adjust the formatting of the selected target's text.

5. Select **Apply** to apply your changes to the visual.

Configure Conditional Formatting Rules

Select a group attribute to define the values for applying the formatting rule. Optionally, select the add icon  to add a derived field or custom metric.

Q2 Sales

< Select When To Apply Formatting

Group

Q Search

All

ABC

1.23

Custom Metric

Volume

Number

fx Add Derived Field

Add Custom Metric

Number

Actualsales

Datemillis

Dataseconds

Planned Sales

Sale Date

Sales

Metric

Selection	Description
Operator	Select an operator to use. Options may include Between , Equal , Not Equal , Greater Than , Greater Than or Equal , Less Than , and Less than or Equal . Depending on the Operator you select, different definition fields are available to use.
From, To	Define a value range for Between .
Value	Define a value for Equal , Not Equal , Greater Than , Greater Than or Equal , Less Than , and Less than or Equal .

Numbers, Number Attribute Custom Metrics, Count Of

Selection	Description
Range	Displays the range for this value.
Aggregation	Select the aggregation method you want to use. Available aggregation methods may include Avg , Min , Max , Sum , Last Value , Count , and Distinct Count . For information about aggregation methods, see Metric Aggregation Functions .
Operator	Select an operator to use. Options may include Between , Equal , Not Equal , Greater Than , Greater Than or Equal , Less Than , and Less than or Equal . Depending on the Operator you select, different definition fields are available to use.
From, To	Define a value range for Between and Not Between .
Value	Define a value for Equal , Not Equal , Greater Than , Greater Than or Equal , Less Than , and Less than or Equal .

Line Charts

This applies to: *Visual Data Discovery*

Line charts include line-bar charts, attribute trend charts, and multiple metric trend charts. These visual styles are supported by almost all data sources. To configure line charts, see:

- [Edit Line & Bar Trend Charts](#)
- [Line Trend: Attribute Value Charts](#)
- [Line Trend: Multiple Metric Charts](#)

Edit Line & Bar Trend Charts

This applies to: *Visual Data Discovery*

Line and bar trend charts are based on two metrics and a time attribute. They are supported by all Symphony [data connectors](#), except Cloudera Search, and by Symphony Apache Solr connectors for version 5.2 or later.



Note: To edit the number or date and time format for this visual, see [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

This topic describes:

- [Configure Colors For A Specific Line & Bar Trend Chart](#)

For information on setting even time intervals, see [Even Time Intervals](#).

Configure Colors for a Specific Line & Bar Trend Chart

Specify the color settings for a specific line & bar trend chart using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [chart drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

Sales by State

×

Color

Color Settings

Y1 Color

#43a2ca

Y2 Color

#FF7F0E

3. Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Y2 Color	Select a color for the Y2 line on your visual.
Y1 Color	Select a color for the Y1 bars on your visual.

4. Close the Color sidebar and the color settings are dynamically applied to the visual.
5. Select  to save the dashboard and the visual with its updated settings.

Line Trend: Attribute Value Charts

This applies to: *Visual Data Discovery*

Attribute value line charts are based on one metric, one attribute and one time attribute. Attribute value line charts are supported by all Symphony [data connectors](#) except Cloudera Search. They are supported by Symphony Apache Solr connectors for version 5.2 or later.

This topic describes:

- [Configure Settings For A Specific Attribute Value Line Chart](#)
- [Configure Colors For A Specific Attribute Value Line Chart](#)

For information on setting even time intervals, see [Even Time Intervals](#).

Configure Settings for a Specific Attribute Value Line Chart

Change the settings for a specific attribute value line chart

1. Edit the attribute value line chart you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select  on the [sidebar menu](#). The Line Chart Settings sidebar for the visual appears.

Stacked Jewelry Categories

×

Line Chart Settings

General

Display Style

☒ Line Chart
 ☐ Area Chart

Display as stacked
 ☒

Stacking Style

☒ Stacked
 ☐ 100% Stacked

Style

Line Thickness

↑

↓

4. Alter the settings as needed:

Setting	Description
Display Style	Select Line Chart or Area Chart to indicate the type of chart you want to see. Line Chart is selected by default. The Area Chart setting turns on the fill option for the line chart (fills the visual with appropriate colors between the lines). The Line Chart setting turns off the fill option (so only lines appear).
Display as stacked	Slide this switch on (to the right) to display the visual as a stacked area chart. When turned on, the Stacking Style options become available.
Stacking Style	Select one of the stacking styles: Stacked or 100% Stacked. These options are only available if the Display as stacked switch is on. ▪ The Stacked setting is the default and displays the plotted lines in a stacked format. Stacked charts are best used to show how individual values in the data relate to all of the other values for the same data. ▪ The 100% Stacked option displays the plotted lines in a stacked format but as they relate to a cumulative whole. The y-axis cumulative total is always represented as 100% in a 100% stacked format and all individual values are presented as percentages of the whole.
Line Thickness	Increase or decrease the thickness of the lines in the visual using the up and down arrows in this box.

- Optionally, edit the number or date and time format for this visual. See [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).
- Select  to save the dashboard and the visual with its updated settings.

Configure Colors for a Specific Attribute Value Line Chart

Specify the color settings for a specific attribute value line chart using the Color sidebar

- Edit the visual you want to modify. See [Edit Visuals](#).
- If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

- Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual. - Use the color selector to manually assign colors for legend items. If available, enable or disable a static legend for this visual.
Color Attribute	Select the attribute that affects the segment color in the visual.
Group By Color Palette	Select a color palette for this specific visual. Select the Inherit from theme checkbox to use the color palette specified by the theme.

- Close the Color sidebar and the color settings are dynamically applied to the visual.

- Select  to save the dashboard and the visual with its updated settings.



- Archive of documentation for Logi Symphony v24

Line Trend: Multiple Metric Charts

This applies to: *Visual Data Discovery*

Multiple metric line charts are based on multiple metrics and one time attribute. Multiple metric line charts are supported by all Symphony [data connectors](#) except Cloudera Search. They are supported by Symphony Apache Solr connectors for version 5.2 or later.

This topic describes:

- [Configure Settings For A Specific Multiple Metric Line Chart](#)
- [Configure Colors For A Specific Multiple Metric Line Chart](#)

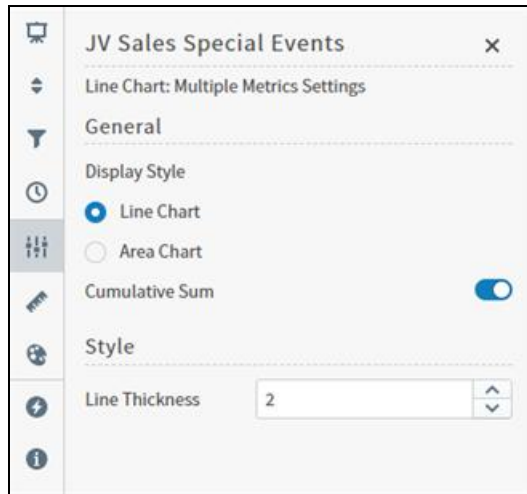
For information on setting even time intervals, see [Even Time Intervals](#).

Configure Settings for a Specific Multiple Metric Line Chart

Change the settings for a specific multiple metric line chart

1. Edit the multiple metric line chart you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select the settings icon () on the [sidebar menu](#). The Line Chart Settings sidebar for the visual appears.



4. Alter the settings as needed:

Setting	Description
Display Style	Select Line Chart or Area Chart to indicate the type of chart you want to see. Line Chart is selected by default. The Area Chart setting turns on the fill option for the line chart (fills the visual with appropriate colors between the lines). The Line Chart setting turns off the fill option (so only lines appear).
Cumulative Sum	When enabled, Symphony updates the visual to add the previous value to the next value, and both the original and cumulative value for selected items are displayed as a tool tip.
Line Thickness	Increase or decrease the thickness of the lines in the visual using the up and down arrows in this box.

5. Optionally, edit the number or date and time format for this visual. See [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

6. Select the save icon () to save the dashboard and the visual with its updated settings.

Configure Colors for a Specific Multiple Metric Line Chart

Specify the color settings for a specific multiple metric line chart using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

3. Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. For distinct color styles, select a data point in the legend to turn it off and on in the visual.
Color	Manually select the color for each metric using the color selector.
<type> Color Palette	Select a color palette for this specific visual. Select the Inherit from theme checkbox to use the color palette specified by the theme.

4. Close the Color sidebar and the color settings are dynamically applied to the visual.
5. Select  to save the dashboard and the visual with its updated settings.

List Filter Visuals

This applies to: *Visual Data Discovery*

List filter visuals are based on a single attribute, metric, or time field in a data source. These visuals list the values of the selected data source field. They are supported by all Symphony [data connectors](#).

You can select one or more of the field values in the list filter visual to quickly apply a filter to other visuals in the dashboard that subscribe to a [cross-visual filter](#) for the field. Regular visual filters can also be applied to a list filter visual itself. Filters applied to the list filter visual are saved when the visual or dashboard are saved. However, any filtering performed using the list filter visual is not saved when the dashboard is saved and any data selections made on the list filter visual are not saved.



Note: A list filter visual cannot be converted to a different style, as other visual styles can using the [visual sidebar menu](#). Likewise, other visual styles cannot be converted to the list filter visual style.

This topic describes:

- [Configure Settings For A Specific List Filter Visual](#)

For information on setting even time intervals, see [Even Time Intervals](#).

Configure Settings for a Specific List Filter Visual

Change the settings for a specific list filter visual

1. Edit the list filter visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



3. Select the settings icon () on the [sidebar menu](#). The List Filter Settings sidebar for the visual appears.
4. Alter the settings as needed:

Setting	Description
Display Style	Select Fixed List to display all available selection items in a selection list.

Setting	Description
	▪ If you select Fixed List along with Single Number of Selections, users see a list of items and can select one. ▪ If you select Fixed List along with Multiple Number of Selections, users see a list of items and can select multiple. Select Dropdown List to display all available selection items in adrop-downlist. ▪ If you select Dropdown List along with Single Number of Selections, users can filter or scroll through a list of items and can select one. ▪ If you select Dropdown List along with Multiple Number of Selections, users can filter, select, and scroll through a list of items and can select multiple values. ▪ An additional option to Filter Values On is available when you select Dropdown List and Multiple Number of Selections.
Display Column	Select  to select a different data source field for the list filter visual.
Use Display Column as Value Column	Enable to use the information provided in the display column as selections for your users. Disable to select a different field to provide selections to your users.
Value Column	When Use Display Column as Value Column is disabled, you can select a different field to provide users selection items.
Number of Selections	Specify whether only one or multiple data values can be selected in the visual. Select Single to allow users to select only one data value; select Multiple to allow users to select more than one value. Multiple is not allowed for time fields. The default is Single. ▪ If you select Fixed List along with Single, users see a list of items and can select one value. ▪ If you select Dropdown List along with Single, users can filter or scroll through a list of items and can select one value. ▪ If you select Fixed List along with Multiple, users see a list of items and can select multiple values. ▪ If you select Dropdown List along with Multiple, users can filter, select, and scroll through a list of items and can select multiple values.
"No Selection" Label	Supply a label for the visual option when no data is selected. The default is None . This label is only available when Number of Selections is set to Single .

Setting	Description
Placeholder Text	Supply a label for the search field when no data is selected. The default is Search . This label is only available when Number of Selections is set to Multiple .
Filter Values On	This option is available only when Number of Selections is set to Multiple . ▪ Enable Change to filter values when the user makes a selection. ▪ Enable Submit to filter values when the user selects the Submit button. The text of the Submit button can be changed.
Submit Button Text	Only visible if Submit is enabled in Filter Values On. You can change the Submit Button Text to meet your users' needs. The default value is Change . When a user selects the Submit button, their selected values are published and used by other visuals on the dashboard that use this list.

5. Select the save icon () to save the dashboard and the visual with its updated settings.

Maps

This applies to: *Visual Data Discovery*

Map visuals you can use with your data include marker maps, US region maps, and world country maps. Most data sources can support the maps available in Symphony.

Elements map visuals support include:

- **Start Zoom** and **Max Zoom** settings.
- Support for the ISO-3166 standard.
- An initial map center definition: Include **Start Latitude** and **Start Longitude** coordinates. When used in combination with **Start Zoom**, you can specifically define your initial view for a visual.

For more information, see:

- [Marker Maps](#)
- [US Region Maps](#)
- [World Maps](#)
- [Configure Colors for a US Region or World Map](#)

Marker Maps

Marker maps are supported by most Symphony [data connectors](#). To include your data, the data for marker maps must contain latitude and longitude fields.

Symphony supports a variety of tile providers which offer an overlay design for the map visual styles available in the program. These include: OpenStreetMap, MapQuest, and MapBox. MapQuest and MapBox require an API key.

 **Note:** If you select OpenStreetMap as your tile provider, you can optionally set a custom URL. See the [Global Settings tab](#).

Coordinates for this visual are shown by default as a tooltip when a user hovers over a marker point. You can disable this by toggling off the setting `Show Coordinates Int Tooltip`.

You can disable the **Limit** property to allow processing of all available data instead of limiting the rows processed to a user-defined number.



Note: To edit the number format for this visual, edit Tooltip Fields in the Settings sidebar menu. See [Configure Number Formatting For Visuals](#).

US Region Maps

US region maps are based on up to three attributes (state name, county, and zip code) and one metric. They are supported by all Symphony [data connectors](#), however the data must include state names to see results.

- The state name must be spelled out with the first letter capitalized. For example, **California** is an accepted format, not **CA**. For a list of valid state names, see [State Name Reference](#).
- County names and zip codes can also be used to display results at the county and zip code level. These fields are not required: hide these values by selecting **None** for these fields in the Settings sidebar menu.

Symphony supports a variety of tile providers which offer an overlay design for the map visual styles available in the program. These include: OpenStreetMap, MapQuest, and MapBox. MapQuest, CloudMade and MapBox require an API key.

If you select OpenStreetMap as your tile provider, you can optionally set a custom URL. See the [Global Settings tab](#).



Note: To edit the number format for this visual, see [Configure Number Formatting For Visuals](#).

Use the Drill Down Function

If your US region map includes county and zip codes in your data, you can use the drill down function to display county and zip code-level results within a state.

Drill down in to a county or zip code

1. On your US region map, select a state. Select **Drill Down** in the context menu. The map reorients to center the selected state to the level of state counties.
2. On the state, select a county within the state. Select **Drill Down** in the context menu. The map reorients to center the selected county to the level of zip codes within that county.

World Maps

World maps are based on one attribute (country name) and two metrics. They are supported by all Symphony [data connectors](#), however the data must include country names to see results.



Note: To edit the number format for this visual, see [Configure Number Formatting For Visuals](#).

Configure Colors for a US Region or World Map

Specify the color settings for a specific map using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



Select the colors icon on the [sidebar menu](#). The Color sidebar for the visual appears.

3. Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Slide the bar to the right if you want the legend to be displayed on the visual or to the left to hide the legend.
Color Metric	Select the metric that affects the segment color in the visual.
<type> Color Palette	If Inherit from Theme is selected, the color palette is determined by the theme selected for the Symphony UI. To override the palette selected by the theme, clear the Inherit from Theme checkbox and select a different color palette.
Color Mode	Select Distinct Colors or Gradient to identify the way colors are used on the screen. Either specific distinct colors will be used or a gradient of colors will be used.
Threshold Mode	If you selected the Gradient color mode, this setting cannot be changed. If you selected the Distinct Colors color mode, select either Auto or Manual from the drop-down list. Auto will automatically assign thresholds and colors for the visual. Manual enables you to change the thresholds and colors used on the visual.
Number of colors	Specify the number of colors to use for the visual.
Color Rules	Color rules allow you to change the colors for each color used for the visual. Additionally, if you specified a Manual threshold mode, you can select the thresholds used for color settings in the visual.

4. Close the Color sidebar and the color settings are dynamically applied to the visual.
5. Select the save icon  to save the dashboard and the visual with its updated settings.

Understand Visual Color Condition Thresholds

You can set threshold color conditions for metric-based visuals. At least two color settings are required. In addition, thresholds are specified between each color setting. (So three color settings require two threshold settings; four color settings require three threshold settings, etc.)

- The color for Color 1 is used when the value of the color metric is less than the first threshold value.
- The color for Color 2 is used when the value of the color metric falls between the first and second threshold values.
- If only three colors are used for the visual, the color for Color 3 is used when the value of the color metric is greater than or equal to the second threshold value.
If more than three colors are used, the color for Color 3 is used when the value of the color metric falls between the second and third threshold values.
When more than three colors are used, the colors continue to be applied in this pattern for all threshold settings; any color metric values greater than the last threshold setting have the final color applied.

You can have Symphony automatically set the thresholds or you can manually set them.

For information about the color encoding supported by Symphony, see [Specify Colors](#).

Pie Charts

This applies to: *Visual Data Discovery*

Pie charts are based on one metric and one attribute. They are supported by all Symphony [data connectors](#).

This topic describes:

- [Configure Settings For A Specific Pie Chart](#)
- [Configure Colors For A Specific Pie Chart](#)

Configure Settings for a Specific Pie Chart

Change the settings for a specific pie charts

1. Edit the pie chart you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select  on the [sidebar menu](#). The Pie Chart Settings sidebar for the visual appears.

Realtime Sales Pie Chart

×

Pie Chart Settings

Labels

Show Labels

☒

Absolute Values

☒

Relative Values

☒

4. Alter the settings as needed:

Setting	Description
Labels	Slide the Show Labels , Absolute Values , and Relative Values sliders on (to the right) to enable these label options.

- Optionally, edit the number or date and time format for this visual. See [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).
- Select  to save the dashboard and the visual with its updated settings.

Configure Colors for a Specific Pie Chart

Specify the color settings for a specific pie chart using the Color sidebar

- Edit the visual you want to modify. See [Edit Visuals](#).
- If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

- Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual. - Use the color selector to manually assign colors for legend items. If available, enable or disable a static legend for this visual.
Color Attribute	Select the attribute that affects the segment color in the visual.
Group By Color Palette	Select a color palette for this specific visual. Select the Inherit from theme checkbox to use the color palette specified by the theme.

- Close the Color sidebar and the color settings are dynamically applied to the visual.
- Select  to save the dashboard and the visual with its updated settings.



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Pivot Tables

This applies to: *Visual Data Discovery*

Pivot tables are tables of summarized statistics. They are useful for finding unique values for a field. If needed, you can [add custom metrics](#) to your pivot table metrics.

Pivot tables are supported by all Symphony [data connectors](#) except Cloudera Search. They are supported by Symphony Apache Solr connectors for version 5.2 or later.

When you select a table metric, the context menu appears. See [Use The Context Menu](#).

When you select the More menu () in column header, you can [sort your data](#), autosize your columns, and collapse or expand all rows for hierarchies.

After you create a pivot table, you can alter the rows, columns, metrics and metric layouts, and horizontal scroll bar used in a pivot table. In addition, you can sort the data in the table and rearrange the table fields. See the following topics:

- [Configure Settings For A Specific Pivot Table](#)
- [Modify Pivot Table Rows](#)
- [Modify Pivot Table Columns And Column Widths](#)
- [Modify Pivot Table Metrics And Metric Layout](#)
- [Rearrange Pivot Table Fields](#)
- [Sort Data In A Pivot Table](#)



Note: You can use [Keyboard Controls](#) on the Pivot Table sidebar instead of a mouse.

Configure Settings for a Specific Pivot Table

This applies to: *Visual Data Discovery*

You can configure the settings for a specific pivot table while you are viewing it.

Change the settings for a specific pivot table

1. Edit the pivot table you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select the settings icon () on the [sidebar menu](#). The Pivot Table Settings sidebar for the visual appears.

Pivot Table

Pivot Table Settings

Row Groups

Freeze Rows

Span Duplicate Rows

Edit Row Groups

County

Attribute

State

Attribute

Column Groups

Freeze Column Totals

Edit Column Groups

Product Group

Attribute

Metrics

Show metrics as

Columns

Show Metric Subtotals

Edit Metrics

Volume

Custom Metric

Totals

Show Totals Row

Show Totals Column

Display Settings

Rows to Display

200

Values between 1 and 100000

Cell Limit

1000000

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4. Alter the settings as needed. See the following topics:
 - i. [Modify Pivot Table Rows](#)
 - ii. [Modify Pivot Table Columns And Column Widths](#)
 - iii. [Modify Pivot Table Metrics And Metric Layout](#)
5. Adjust the **Display Settings** to expand or limit your pivot table visual as needed.
 - Leave all options disabled to include all data in your pivot table.
 - Enable and adjust any of these options to limit the data included in your pivot table.
 - Options include: **Define Rows to Display**, **Cell Limit**, and **Column Limit**.
6. Optionally, edit the number or date and time format for this visual. See [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).
7. Select the save icon () to save the dashboard and the visual with its updated settings.



Modify Pivot Table Rows

This applies to: *Visual Data Discovery*

Modify pivot table rows

1. Edit the pivot table you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select  on the [sidebar menu](#). The Pivot Table Settings sidebar for the visual appears.

Pivot Table

Pivot Table Settings

Row Groups

Freeze Rows

Span Duplicate Rows

Edit Row Groups

County

Attribute

State

Attribute

Column Groups

Freeze Column Totals

Edit Column Groups

Product Group

Attribute

Metrics

Show metrics as

Columns

Show Metric Subtotals

Edit Metrics

Volume

Custom Metric

Totals

Show Totals Row

Show Totals Column

Display Settings

Rows to Display

200

Values between 1 and 100000

Cell Limit

1000000

4. To modify the rows in the pivot table:

- i. Select  in the Rows area of the Pivot Table Settings sidebar. The sidebar changes to show all the possible rows for the table.
- ii. Select the rows you want to add and clear the ones you want to remove. If you want to select all the rows, select **Select All**.
Use the search bar to search for a field in the table. Use the buttons under the search bar to limit the fields you see in the list.



Select	To
	See all available fields.
	Limit the field list to the available attributes.
	Limit the field list to the available numeric metrics.
	Limit the field list to the available date and time fields.

- iii. After all row fields are selected, select **Apply**.

 **Note:** If the field you select is a time field, you can modify its granularity and indicate whether or not blanks (even time intervals) should be included in the time field values.

5. If your pivot table displays a lot of data horizontally, you may need to unfreeze the horizontal scroll bar. By default, this scroll bar is frozen. To unfreeze the horizontal scroll bar, slide the **Freeze Rows** slider in the Rows section of the Pivot Table Settings sidebar to the left (off). The horizontal scroll bar will appear and be useable.
6. Enable or disable **Span Duplicate Rows** to group repeating row groups.
7. Select **Apply** to apply your changes to the pivot table.
8. [Save](#) the dashboard.

Modify Pivot Table Columns and Column Widths

This applies to: *Visual Data Discovery*

You can modify the columns used for a pivot table.

Adjust pivot table columns

1. Edit the pivot table you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select  on the [sidebar menu](#). The Pivot Table Settings sidebar for the visual appears.

Pivot Table

Pivot Table Settings

Row Groups

Freeze Rows

Span Duplicate Rows

Edit Row Groups

County

Attribute

State

Attribute

Column Groups

Freeze Column Totals

Edit Column Groups

Product Group

Attribute

Metrics

Show metrics as

Columns

Show Metric Subtotals

Edit Metrics

Volume

Custom Metric

Totals

Show Totals Row

Show Totals Column

Display Settings

Rows to Display

200

Values between 1 and 100000

Cell Limit

1000000

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4. To modify the columns in the pivot table:

- i. Select  in the Columns area of the Pivot Table Settings sidebar. The sidebar changes to show all the possible rows for the table.
- ii. Select the rows you want to add and clear the ones you want to remove. If you want to select all the rows, select **Select All**.
Use the search bar to search for a field in the table. Use the buttons under the search bar to limit the fields you see in the list.



Select	To
	See all available fields.
	Limit the field list to the available attributes.
	Limit the field list to the available numeric metrics.
	Limit the field list to the available date and time fields.

- iii. After all column fields are selected, select **Apply**.

 **Note:** If the field you select is a time field, you can modify its granularity and indicate whether or not blanks (even time intervals) should be included in the time field values.

 **Note:** For hierarchical columns, you can show or hide rollup options by enabling or disabling **Show Rollup Labels**.

5. Select **Apply** to apply your changes to the pivot table.

6. Optionally enlarge or decrease the size of pivot table columns while the table is open for viewing.

To change the column widths of a pivot table, drag the separator between two columns in the appropriate direction, or select **Autosize All Columns** from the menu in any header.



After you save the dashboard or visual, your customized column widths are saved.

7. You may want to control whether the Totals column appearing in the rightmost column of the table is frozen on the page (not affected by horizontal scrolling) or unfrozen (only visible when you have scrolled all way to the right).

By default, the Totals column is frozen on the pivot table (it appears regardless of scrolling actions). To unfreeze the Totals column, slide the **Freeze Rows** slider in the Columns section of the Pivot Table Settings sidebar to the left (off The Totals column will no longer be visible unless you scroll the table all the way to the right).

8. [Save](#) the dashboard.

Modify Pivot Table Metrics and Metric Layout

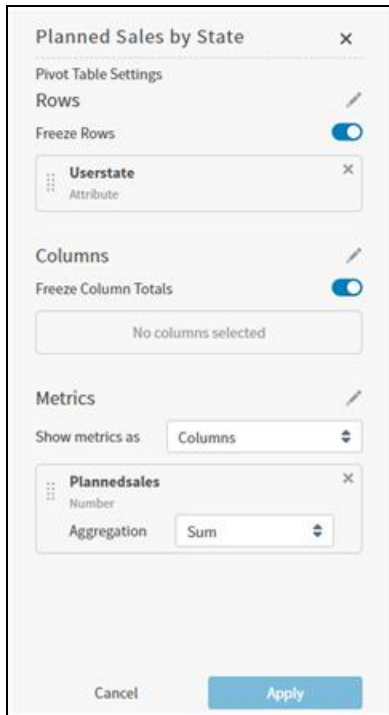
This applies to: *Visual Data Discovery*

The metric layout can be rows or columns. It identifies the direction in which you want the metric heading (as rows or as columns). It changes how the data is presented in the table in the user interface.

Modify the layout of metric used for the table

1. Edit the pivot table you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select the settings icon () on the [sidebar menu](#). The Pivot Table Settings sidebar for the visual appears.



The screenshot shows the 'Pivot Table Settings' sidebar for a visual titled 'Planned Sales by State'. The sidebar is divided into three main sections: Rows, Columns, and Metrics. In the Rows section, 'Userstate' is selected as the attribute, and the 'Freeze Rows' toggle is turned on. In the Columns section, 'No columns selected' is displayed, and the 'Freeze Column Totals' toggle is turned on. In the Metrics section, 'Plannedsales' is selected as the metric, and the aggregation is set to 'Sum'. The 'Show metrics as' dropdown is set to 'Columns'. At the bottom of the sidebar are 'Cancel' and 'Apply' buttons.

4. Select the metric layout you want in the **Show metrics as** drop-down menu. Use the option **Columns** or **Rows** to select which is shown in the user interface.

 **Note:** When you export a visual that includes this metric, the column option is used.

5. Optionally modify the metrics in the pivot table:

- i. Select the edit icon () in the Metrics area of the Configure Pivot sidebar. The sidebar changes to show all the possible metrics for the table.
- ii. Select the metrics you want to add and clear the ones you want to remove. If you want to select all the columns, select **Select All**. Use the search bar at the top of the sidebar to search for a field. When you select  on the search bar, a filter drop-down menu appears so you can list only fields of a specific type (Number, Attribute, or Time).
- iii. Select **OK**.

You can modify the method by which the metric is aggregated (AVG, MIN, MAX, SUM, or LAST VALUE). See [Metric Aggregation Functions](#).

6. Select **Apply** to apply your changes to the pivot table.

7. [Save](#) the dashboard.

Rearrange Pivot Table Fields

This applies to: *Visual Data Discovery*

You can rearrange the fields in a pivot table. After you save the dashboard or visual, the field rearrangement is retained when you close the dashboard. It is also retained when you share or export the dashboard or visual.

Rearrange the fields in a pivot table

1. Edit the pivot table you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.
3. To move a field, select its name and then drag it up or down in the list, as appropriate. You can drag fields between the Row and Column lists on the sidebar, in addition to rearranging fields within their own lists. You cannot drag fields in or out of the Metrics list to the other lists; you can only rearrange fields within the Metrics list.
4. Select **Apply** to apply your changes to the pivot table.
5. [Save](#) the dashboard.

Sort Data in a Pivot Table

This applies to: *Visual Data Discovery*

The data in the table can be sorted. After you save the dashboard or visual, the sort settings are retained when you close it. The sort settings are also retained when you export and share the table.

Sort the rows in a table by the data in a single column:

- Select a column to sort the data in ascending order. An up arrow is shown in the heading.
- Select the column again to sort the data in descending order. A down arrow is shown in the heading.
- Select the column again to clear the sort. No arrows are shown in the heading.
- Alternatively, hover over the header and select the More menu () then select **Reset [name]** to clear all sorting options.

Save the visual when the data is sorted to your satisfaction.

Sort the columns in a table:

- Select a column to sort the data in ascending order. An up arrow is shown in the heading.
- Select the column again to sort the data in descending order. A down arrow is shown in the heading.
- Select the column again to clear the sort. No arrows are shown in the heading.
- Alternatively, hover over the header and select the More menu () then select **Reset [name] sorting** to clear all sorting options.

Sort the data in a table by the data by one or more column or row groups:

Sort Column groups:

- Select a column group to sort the group from ascending to descending.
- Select the column group again to reverse the sort order, or a third time to cancel sorting.
- To sort by multiple groups, select the next column group to include.

Sort Row groups:



- Select a row group to sort the group from ascending to descending.
- Select the row group again to reverse the sort order, or a third time to cancel sorting.
- To sort by multiple groups, select the next row group to include.

To clear sorting, hover over a column or row label, select the More menu () and select one of the following options:

- **Reset [name] sorting** to clear all sorting options for that row or column.
- **Reset other column (or rows) sorting** to clear sorting options for all column or row groups except the one you have selected.
- **Reset all columns (or rows) sorting** to clear all sorting options for all column or row groups.

[Save](#) the dashboard or visual when the data is sorted to your satisfaction.



Scatter (Bubble) Charts

This applies to: *Visual Data Discovery*

Scatter charts include floating bubbles, packed bubbles, and scatter plot styles. For more information, select one of the following scatter chart styles:

- [Floating Bubble Charts](#)
- [Packed Bubble Charts](#)
- [Scatter Plots](#)

Floating Bubble Charts

This applies to: *Visual Data Discovery*

Floating bubble charts are based on two metrics and two attributes. Floating bubble charts are supported by all Symphony [data connectors](#) except Cloudera Search. They are supported by Symphony Apache Solr connectors for version 5.2 or later.



Note: To edit the number or date and time format for this visual, see [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

The default settings used for floating bubble charts vary, based on the data source selected for the chart.

This topic describes:

- [Configure Colors For A Specific Floating Bubbles Chart](#)

Configure Colors for a Specific Floating Bubbles Chart

Specify the color settings for a specific floating bubbles chart using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

- Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual. - Use the color selector to manually assign colors for legend items. If available, enable or disable a static legend for this visual.
Color Attribute	Select the attribute that affects the segment color in the visual.
Group By Color Palette	Select a color palette for this specific visual. Select the Inherit from theme checkbox to use the color palette specified by the theme.

- Close the Color sidebar and the color settings are dynamically applied to the visual.

- Select  to save the dashboard and the visual with its updated settings.



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Packed Bubble Charts

This applies to: *Visual Data Discovery*

Packed bubble charts are based on two metrics and one attribute. They are supported by all Symphony [data connectors](#).



Note: To edit the number or date and time format for this visual, see [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

This topic describes:

- [Configure Colors For A Specific Packed Bubble Chart](#)

Configure Colors for a Specific Packed Bubble Chart

Specify the color settings for a specific packed bubble chart using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

3. Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. ■ For distinct color styles, select a data point in the legend to turn it off and on in the visual. ■ For gradient color styles, use the legend's gradient slider to show and hide your data. If available, enable or disable a static legend for this visual.
Color Metric	Select the metric that affects the segment color in the visual.

Setting	Description
<type> Color Palette	If Inherit from Theme is selected, the color palette is determined by the theme selected for the Symphony UI. To override the palette selected by the theme, clear the Inherit from Theme checkbox and select a different color palette.
Color Mode	Select Distinct Colors or Gradient to identify the way colors are used on the screen. Either specific distinct colors will be used or a gradient of colors will be used.
Threshold Mode	If you selected the Gradient color mode, this setting cannot be changed. If you selected the Distinct Colors color mode, select either Auto or Manual from the drop-down list. Auto will automatically assign thresholds and colors for the visual. Manual enables you to change the thresholds and colors used on the visual.
Number of colors	Specify the number of colors to use for the visual.
Color Rules	Color rules allow you to change the colors for each color used for the visual. In addition, if you specified a Manual threshold mode, you can select the thresholds used for color settings in the visual.

4. Close the Color sidebar and the color settings are dynamically applied to the visual.

5. Select  to save the dashboard and the visual with its updated settings.

Understand Visual Color Condition Thresholds

You can set threshold color conditions for metric-based visuals. At least two color settings are required. In addition, thresholds are specified between each color setting. (So three color settings require two threshold settings; four color settings require three threshold settings, etc.)

- The color for Color 1 is used when the value of the color metric is less than the first threshold value.
- The color for Color 2 is used when the value of the color metric falls between the first and second threshold values.
- If only three colors are used for the visual, the color for Color 3 is used when the value of the color metric is greater than or equal to the second threshold value.

If more than three colors are used, the color for Color 3 is used when the value of the color metric falls between the second and third threshold values.

When more than three colors are used, the colors continue to be applied in this pattern for all threshold settings; any color metric values greater than the last threshold setting have the final color applied.

You can have Symphony automatically set the thresholds or you can manually set them.



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For information about the color encoding supported by Symphony, see [Specify Colors](#).

Scatter Plots

This applies to: *Visual Data Discovery*

Scatter plots are based on three metrics and one attribute. They are supported by all Symphony [data connectors](#).



Note: To edit the number or date and time format for this visual, see [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

Configuring Colors for a Specific Scatter Plot

Specify the color settings for a specific scatter plot using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

- Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual. - Use the color selector to manually assign colors for legend items. If available, enable or disable a static legend for this visual.
Color Attribute	Select the attribute that affects the segment color in the visual.
Group By Color Palette	Select a color palette for this specific visual. Select the Inherit from theme checkbox to use the color palette specified by the theme.

- Close the Color sidebar and the color settings are dynamically applied to the visual.
- Select  to save the dashboard and the visual with its updated settings.



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Sunburst

This applies to: *Visual Data Discovery*

Use sunburst visuals to display up to three levels of hierarchical data in a circle format.

The topmost hierarchical data is shown in the center of the sunburst, and the secondary levels are shown in levels further out from the center. You can include a third level of hierarchical data by enabling **Enable Level 3 Group** in the settings sidebar menu of the visual.



Note: To edit the number or date and time format for this visual, see [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

Support for this feature by connector is shown in the following table.

Key: Y - Supported; N - Not Supported; N/A - not applicable

Connector	Supported?	Notes
Amazon Redshift	Y	
Amazon S3	Y	
Apache Drill	Y	
Apache Phoenix	Y	
Apache Phoenix Query Server (QS)	Y	
Apache Solr	Y	
BigQuery	Y	If you need to access a BigQuery partition, explicitly include an alias for the built in partition column in your select clause, such as <code>select *, _PARTITIONTIME as pt from projectId.datasetId.tableId</code> .
Cloudera Impala	Y	
Cloudera Search	Y	
Couchbase	Y	
Dremio	Y	
Elasticsearch 7.0	Y	
Elasticsearch 8.0	Y	
File Upload	Y	
HDFS	Y	
Hive	Y	



Connector	Supported?	Notes
Jira	Y	
MemSQL	Y	
Microsoft SQL Server	Y	
MongoDB	Y	
MySQL	Y	
Oracle	Y	
PostgreSQL	Y	
Python	Y	
Real Time Sales	Y	
Salesforce	Y	
SAP Hana	Y	
SAP IQ	Y	
SAP S/4HANA	Y	
Spark SQL	Y	
Snowflake	Y	
Teradata	Y	
TIBCO DV	Y	
Trino	Y	
File Upload (Upload API)	Y	
Vertica	Y	

This topic describes:

- [Configure Colors for a Specific Sunburst](#)
- [Sort Data in a Sunburst Visual](#)

Sort Data in a Sunburst Visual

Data in your visual is sorted Top of the Top if only two groups are included in the visual.

When you add a third group by enabling **Enable Level 3 Group**, simple sort is used instead.



Configure Colors for a Specific Sunburst

Specify the color settings for a specific sunburst using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

- Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual. - Use the color selector to manually assign colors for legend items.
Color Metric	Select the metric that affects the segment color in the visual. You can also define the default aggregation function used for the metric values: SUM, AVG, MAX, MIN, or (for some data sources) LAST VALUE. See Metric Aggregation Functions .
Color Palette	If a color palette is specified for this visual type in the data source defaults, select the color palette for this specific visual. If a color range is selected for KPI visuals in the data source defaults, this setting is not available. Select the Inherit from theme checkbox to use the color palette specified by the theme .
Color Mode	Select Distinct Colors or Gradient to identify the way colors are used on the screen. Either specific distinct colors will be used or a gradient of colors will be used.
Threshold Mode	If you selected the Gradient color mode, this setting cannot be changed. If you selected the Distinct Colors color mode, select either Auto or Manual from the drop-down list. Auto will automatically assign thresholds and colors for the visual. Manual allows you to change the thresholds and colors used on the visual.
Number of colors	Specify the number of colors to use for the visual.
Color Rules	Color rules allow you to change the colors for each color used for the visual. In addition, if you specified a Manual threshold mode, you can select the thresholds used for color settings in the visual.

- Close the Color sidebar and the color settings are dynamically applied to the visual.
- Select  to save the dashboard and the visual with its updated settings.



- Archive of documentation for Logi Symphony v24

Tables

This applies to: *Visual Data Discovery*

Tables are based on at least one metric and one attribute. They contain a table of the raw data from the data source selected for the visual. Tables are supported by all Symphony [data connectors](#).

In addition to tables from raw data, Symphony supports pivot tables. See [Pivot Tables](#).

Data from Fusion data sources can be used in tables. However, Symphony recommends that you initially use a subset of fields from Fusion data sources on tables of raw data to limit the load on Symphony's query engine and improve its performance. You can change the subset in data source configurations and add additional fields, later, as needed while working on a dashboard.

Number field formatting in tables is based on the formatting specified for the numeric field in a data source configuration. You can edit the formatting for specific fields in a table by [editing the numeric format](#). Time field formatting in aggregated tables is based on the granularity specified for the time field in the data source configuration.

If you want tables for a data source to support live mode and data playback, be sure that the data source includes a time field and that it meets the requirements for live mode and playback. See [Live Mode And Historical Playback](#).



Note: Live mode and historical playback do not work for tables when the table is grouped.

After you create a table, you can modify the table fields, enlarge or decrease the size of the columns, rearrange the table columns, change the formatting of numeric fields, sort the data by the column headings, and add custom metrics and derived fields.

Create a New Table Visual

You can create a new table visual in the [visual gallery](#) or add a [new visual to a dashboard](#). Generally, you'll select a source for your visual, then select a [visual type](#).

When you select a table visual, Symphony prompts you to include one or more columns in the initial table. Select the columns you want to include, then create the visual. If you select no columns, all columns are included by default.

You can add, remove, or rearrange the columns as needed at any time. See [Add or Remove Table Columns](#) and [Move Table Columns](#).

Work with Tables

- [Configure Settings For A Specific Table](#)
- [Add Or Remove Table Columns](#)

- [Move Table Columns](#)
- [Change Column Widths](#)
- [Group And Ungroup Table Data](#)
- [Apply Even Time Intervals On Tables](#)
- [Change Time Field Granularity In Tables](#)
- [Change Metric Aggregation In Tables](#)
- [Change Table Pagination](#)
- [Sort Data In A Table](#)
- [Format Numeric Table Data Using The Table Context Menu](#)
- [Format Time Table Data Using The Table Context Menu](#)
- [Table Context Menu](#)
- [Maintain Custom Metrics](#)
- [Maintain Derived Fields](#)



Note: You can use [Keyboard Controls](#) on the Table Settings sidebar instead of a mouse.



Configure Settings for a Specific Table

This applies to: *Visual Data Discovery*

You can configure the settings for a specific table while you are viewing it using the Table Settings sidebar or the [table context menu](#).

See the following topics:

- [Add Or Remove Table Columns](#)
- [Move Table Columns](#)
- [Change Column Widths](#)
- [Group And Ungroup Table Data](#)
- [Apply Even Time Intervals On Tables](#)
- [Change Time Field Granularity In Tables](#)
- [Change Metric Aggregation In Tables](#)
- [Change Table Pagination](#)
- [Sort Data In A Table](#)
- [Format Numeric Table Data Using The Table Context Menu](#)

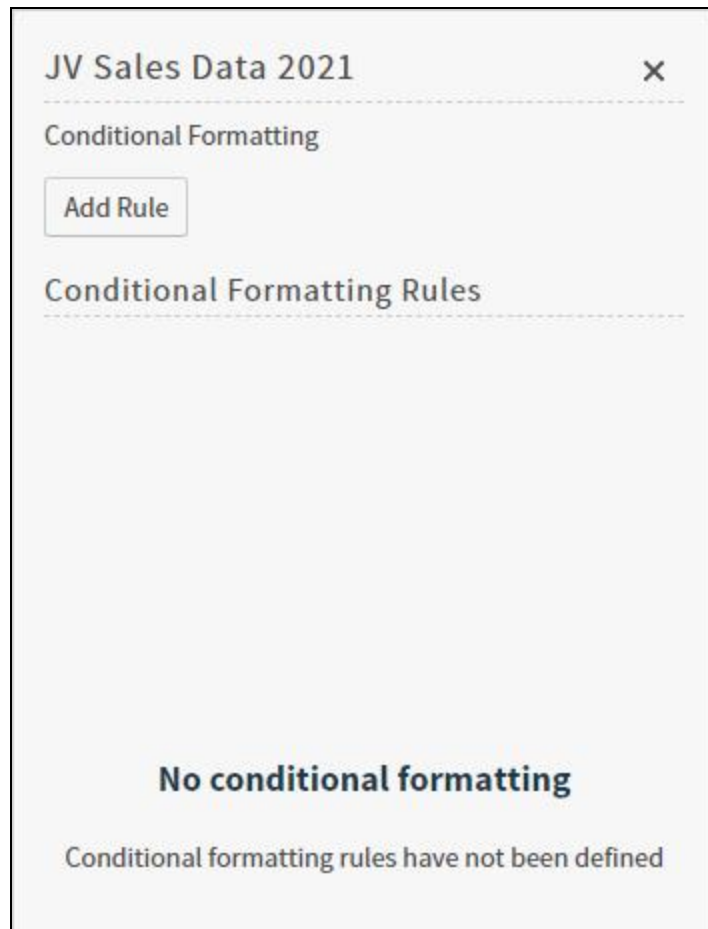
Configure Conditional Formatting

This applies to: *Visual Data Discovery*

Format your visuals by adding color and text formats based on the conditions you define. The [Conditional Formatting sidebar](#) allows you to set formatting based on conditions to apply to your data.

Define Conditional for Table Visuals

1. Select a table visual in a dashboard or in the Visual Gallery.
2. Select the conditional formatting icon  in the sidebar menu. The Conditional Formatting sidebar opens.



3. Select **Add** to open the add rule work area. Use this work area to define a condition and the formatting to apply.

JV Sales Data 2021
×

← Add Conditional Formatting Rule

Select When To Apply Formatting
⊕

No condition defined

Select Where To Apply Formatting

Format entire row
☑

Formatting
⊕

No formatting defined

4. Select the add icon  in **Select When To Apply Formatting** to define the conditions to apply your formatting. See [Using The Conditional Formatting Sidebar - Tables](#).

JV Sales Data 2021

< Select When To Apply Formatting

Row

Group

Q Search

All

ABC

123

Attribute

+

City

County

County Code

Datenumbertpattern

Datestringpattern 1

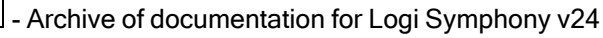
Datestringpattern 2

Gender

Income Bracket

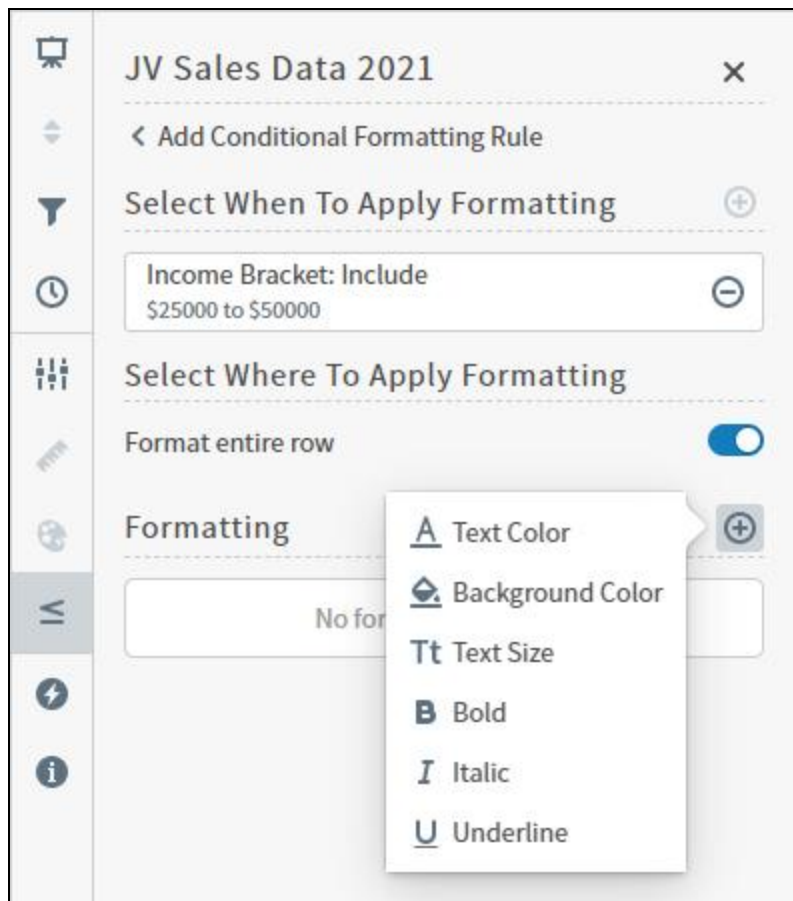
Multivaluedgroups

Select a row or group attribute. The Value work area opens. Define the values for this condition. See [Using The Conditional Formatting Sidebar](#).

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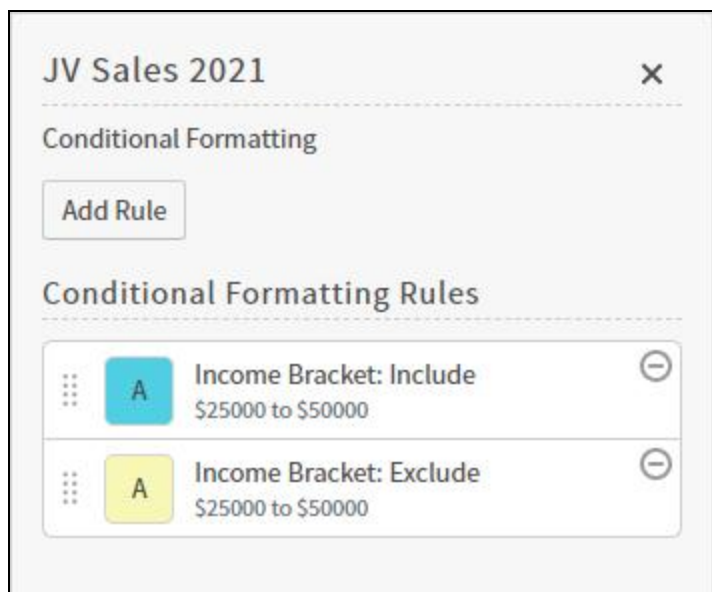
Select **Continue** to save your changes and define the formatting options.

- Optionally, enable **Format entire row** in **Select Where To Apply Formatting** to format the entire row. Disable to format only the applicable cell.
- Select the add icon  for **Formatting** to define the formatting to apply to data that matches the condition you set. See [Using The Conditional Formatting Sidebar](#).



Select a formatting option and define the look you need. See [Using The Conditional Formatting Sidebar](#).

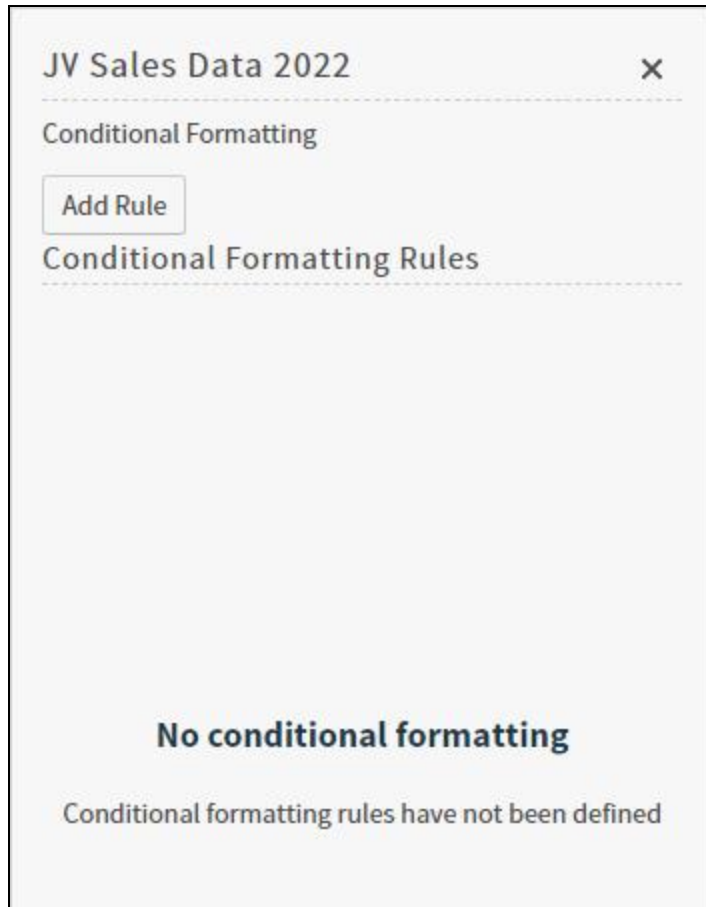
7. Optionally, add as many formatting options as you need. Formats are applied sequentially: see [How Symphony Applies Formatting Rules](#). Select the delete icon  to remove any unneeded options. Select **Continue** to save your changes.
8. Optionally, add more conditional formatting rules. Drag and drop the rules change their order. In a case where multiple formatting rules apply to results of overlapping conditions, formats are applied sequentially. See [Using The Conditional Formatting Sidebar](#).



9. Select **Apply** to apply your changes to the visual.

Define Conditional Formatting for a Pivot Table Visual

1. Select a table visual in a dashboard or in the Visual Gallery.
2. Select the conditional formatting icon  in the sidebar menu. The Conditional Formatting sidebar opens.



3. Select **Add** to open the add rule work area. Use this work area to define a condition and the formatting to apply.

JV Sales Data 2022
×

← Add Conditional Formatting Rule

Select When To Apply Formatting
⊕

No condition defined

Select Where To Apply Formatting

i This section automatically updates after you select when to apply formatting.

Formatting
⊕

No formatting defined

4. Select the add icon  in **Select When To Apply Formatting** to define the conditions to apply your formatting. See [Using The Conditional Formatting Sidebar - Pivot Tables](#).

JV Sales Data 2022
×

← Select When To Apply Formatting

Group

All

ABC

1.23

Custom Metric
+

☐ Volume
...

Number
+

☐ Actualsales

☐ Datemillis

☐ Datesseconds

☐ Planned Sales

☐ Sale Date

Select a group attribute. The Value work area opens. Define the values for this condition. See [Using The Conditional Formatting Sidebar](#).

JV Sales Data 2022

×

← Select Values Actualsales

Range

MinN/A

MaxN/A

Values

Cell value

Aggregation

Sum

Operator

Less Than

Value

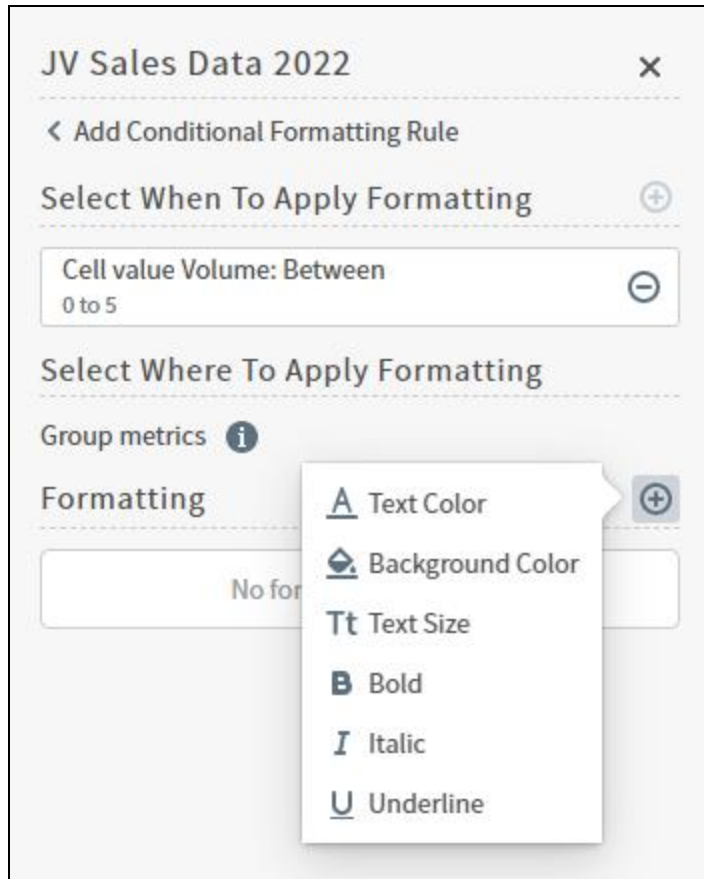
200.00

Cancel

Continue

Select **Continue** to save your changes and define the formatting options.

5. Select the add icon  for **Formatting** to define the formatting to apply to data that matches the condition you set. See [Using The Conditional Formatting Sidebar](#).



JV Sales Data 2022 [Close]

< Add Conditional Formatting Rule

Select When To Apply Formatting [Add]

Cell value Volume: Between 0 to 5 [Remove]

Select Where To Apply Formatting

Group metrics [Info]

Formatting [Add]

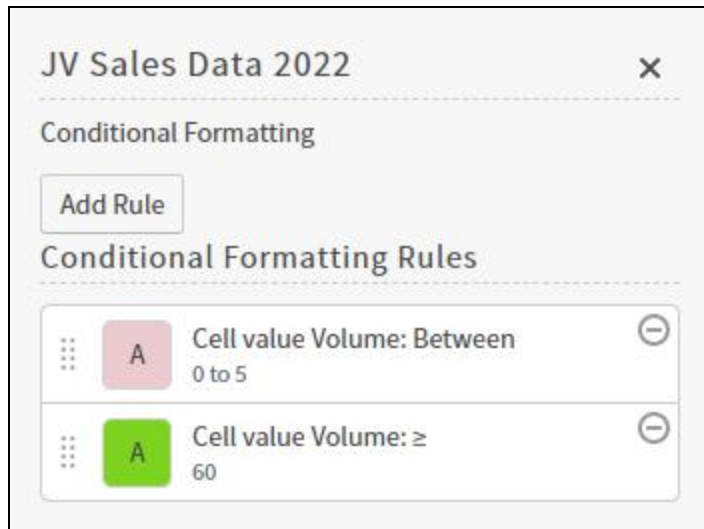
- Text Color
- Background Color
- Text Size
- Bold
- Italic
- Underline

No formatting applied

Select a formatting option and define the look you need. See [Using The Conditional Formatting Sidebar](#).

6. Optionally, add as many formatting options as you need. Formats are applied sequentially: see [Using The Conditional Formatting Sidebar](#). Select the delete icon  to remove any unneeded options. Select **Continue** to save your changes.

7. Optionally, add more conditional formatting rules. Drag and drop the rules change their order. In a case where multiple formatting rules apply to results of overlapping conditions, formats are applied sequentially. See [Using The Conditional Formatting Sidebar](#).



8. Select **Apply** to apply your changes to the visual.

Using the Conditional Formatting Sidebar

This applies to: *Visual Data Discovery*

Format your visuals by adding color and text formats based on the conditions you define. A sidebar menu work area, Conditional Formatting, allows you to set format conditions to apply to your data. Control user access to Conditional Formatting by enabling or disabling the Conditional Formatting on the interactivity panel for a visual or a visual in a dashboard.



Note: Symphony displays a warning icon if you try to create a conditional formatting rule for tables that include a field or group not present in the visual. The resulting rule will not include the missing field or group.

For more information about conditional formatting, see the following topics:

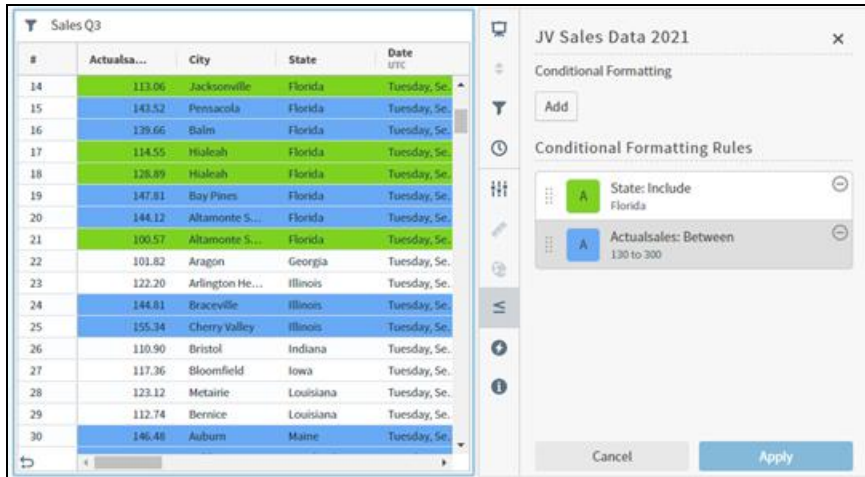
- [Configure Conditional Formatting](#)
- [Using The Conditional Formatting Sidebar - Tables](#)
- [Using The Conditional Formatting Sidebar - Pivot Tables](#)
- [How Symphony Applies Formatting Rules](#)

How Symphony Applies Formatting Rules

This applies to: *Visual Data Discovery*

You can apply formatting rules to data affected by multiple conditions. The formatting rules are applied sequentially, and can cancel out a previously applied rule.

For example, if you define the background row color for orders from Florida to appear green, but define the background row color for orders that fall within a certain threshold to appear blue, the final result will depend on the order in which you organize your format rules.



#	Actualsa...	City	State	Date UTC
14	113.06	Jacksonville	Florida	Tuesday, Se
15	143.52	Pensacola	Florida	Tuesday, Se
16	139.66	Balm	Florida	Tuesday, Se
17	114.55	Hialeah	Florida	Tuesday, Se
18	128.89	Hialeah	Florida	Tuesday, Se
19	147.81	Bay Pines	Florida	Tuesday, Se
20	144.12	Altamonte S...	Florida	Tuesday, Se
21	100.57	Altamonte S...	Florida	Tuesday, Se
22	101.82	Aragon	Georgia	Tuesday, Se
23	122.20	Arlington He...	Illinois	Tuesday, Se
24	144.81	Braceville	Illinois	Tuesday, Se
25	155.34	Cherry Valley	Illinois	Tuesday, Se
26	110.90	Bristol	Indiana	Tuesday, Se
27	117.36	Bloomfield	Iowa	Tuesday, Se
28	123.12	Metairie	Louisiana	Tuesday, Se
29	112.74	Bernice	Louisiana	Tuesday, Se
30	146.48	Auburn	Maine	Tuesday, Se

JV Sales Data 2021

Conditional Formatting

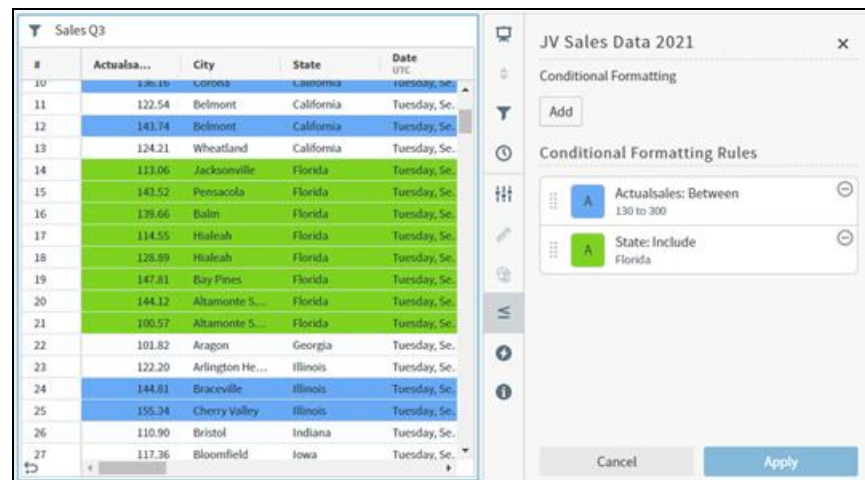
Add

Conditional Formatting Rules

- A State: Include Florida
- A Actualsales: Between 130 to 300

Cancel Apply

In the above example, formatting based on the **State** condition is applied first, then formatting based on the **Actualsales** condition overrides that rule.



#	Actualsa...	City	State	Date UTC
10	136.16	Corona	California	Tuesday, Se
11	122.54	Belmont	California	Tuesday, Se
12	143.74	Belmont	California	Tuesday, Se
13	124.21	Wheatland	California	Tuesday, Se
14	113.06	Jacksonville	Florida	Tuesday, Se
15	143.52	Pensacola	Florida	Tuesday, Se
16	139.66	Balm	Florida	Tuesday, Se
17	114.55	Hialeah	Florida	Tuesday, Se
18	128.89	Hialeah	Florida	Tuesday, Se
19	147.81	Bay Pines	Florida	Tuesday, Se
20	144.12	Altamonte S...	Florida	Tuesday, Se
21	100.57	Altamonte S...	Florida	Tuesday, Se
22	101.82	Aragon	Georgia	Tuesday, Se
23	122.20	Arlington He...	Illinois	Tuesday, Se
24	144.81	Braceville	Illinois	Tuesday, Se
25	155.34	Cherry Valley	Illinois	Tuesday, Se
26	110.90	Bristol	Indiana	Tuesday, Se
27	117.36	Bloomfield	Iowa	Tuesday, Se

JV Sales Data 2021

Conditional Formatting

Add

Conditional Formatting Rules

- A Actualsales: Between 130 to 300
- A State: Include Florida

Cancel Apply



- Archive of documentation for Logi Symphony v24

In the above example, formatting based on the **Actualsales** condition is applied first, then formatting based on the **State** condition overrides that rule.

Mix and match rules as needed to achieve the look and feel you want.

Using the Conditional Formatting Sidebar - Tables

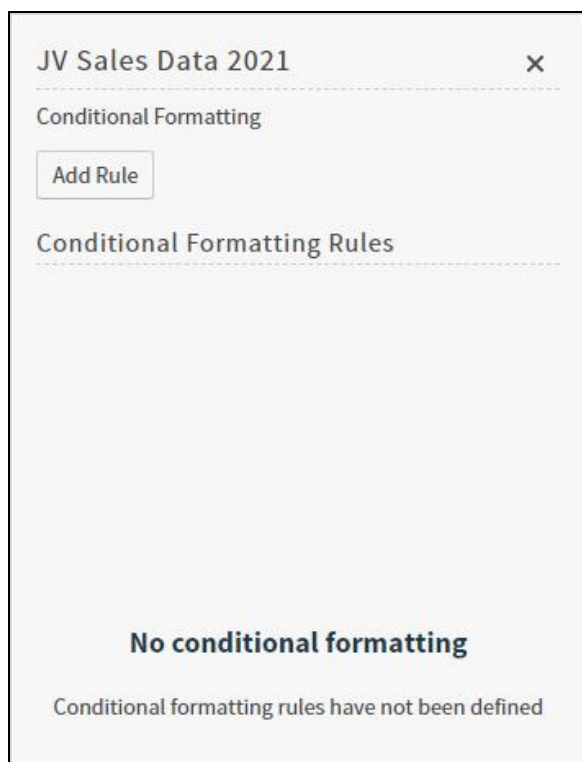
This applies to: *Visual Data Discovery*

Format your visuals by adding color and text formats based on the conditions you define. A sidebar menu work area, Conditional Formatting, allows you to set format conditions to apply to your data.



Note: Symphony displays a warning icon if you try to create a conditional formatting rule for tables that include a field or group not present in the visual. The resulting rule will not include the missing field or group.

1. Select the visual in the Visual Gallery or on a dashboard.
2. If you selected the visual on a dashboard, select **Settings** on the [visual drop-down menu](#) to access the [sidebar menu](#) for the visual.
3. Select the conditional formatting option  on the [sidebar menu](#) for the visual. The Conditional Formatting sidebar opens.

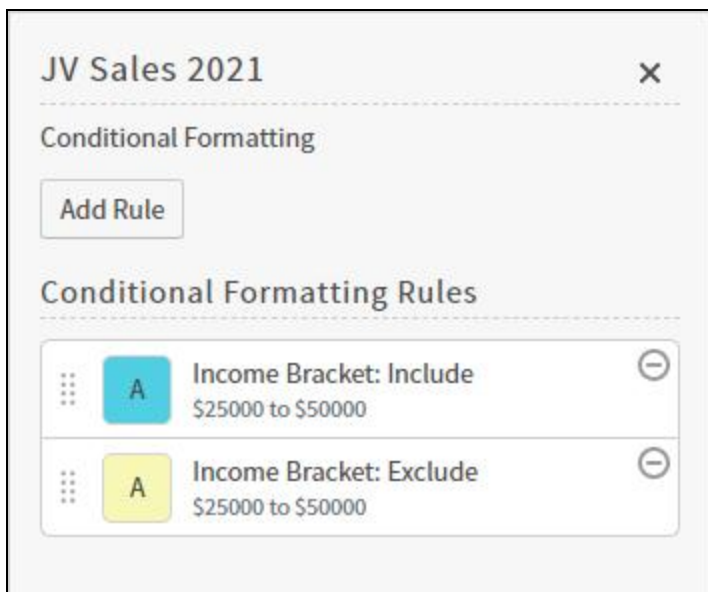


4. Use the Conditional Formatting sidebar to configure formatting options for your table visuals. See [Configure Conditional Formatting](#).
5. After making changes, select **Apply** to apply the conditional formatting rules you have specified.
6. Save the visual or dashboard to save your changes.

Conditional Format Options

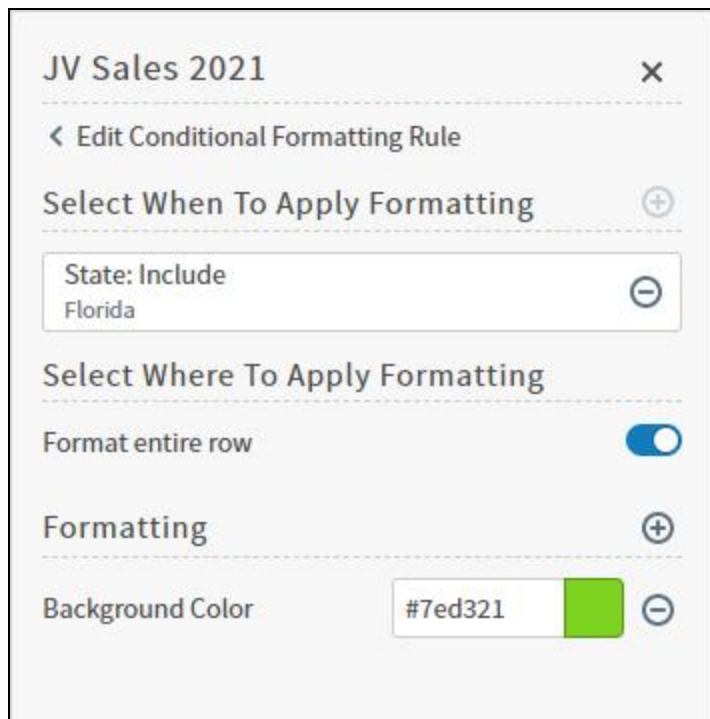
The available options for rules and formatting change to reflect your selections.

Conditional Formatting Sidebar



- Select **Add Rule** to add a conditional formatting rule. See [Configure Conditional Formatting](#).
- Select an existing rule to edit the rule, or the delete icon  to delete the rule.
- Select and drag rules to change their order.

Add or Edit Conditional Formatting Rule



Select When To Apply Formatting

Select the add icon  in **Select When To Apply Formatting** to define the conditions to apply your formatting.

Select Where To Apply Formatting

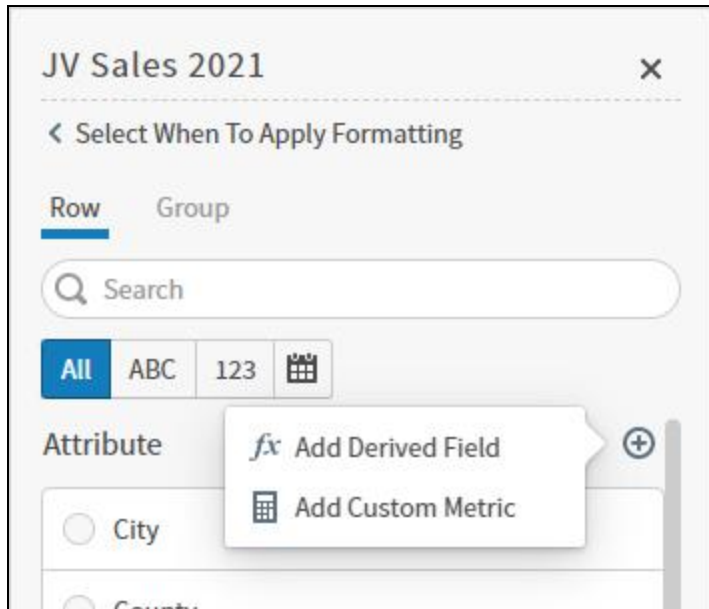
Enable **Format entire row** in **Select Where To Apply Formatting** to format the entire row. Disable to format only the applicable cell.

Select the add icon  for **Formatting** to define the formatting for your condition.

Select the delete icon  to delete a formatting option.

Select When To Apply Formatting

- **Row attribute:** Select a row attribute to define the values for formatting by this data. Optionally, select the add icon  to add a derived field or custom metric.



Example: Apply a background color to a specific **State** condition.

▼ Sales Data Q3

#	Actualsa...	City	State
10	136.16	Corona	Califorr
11	122.54	Belmont	Califorr
12	143.74	Belmont	Califorr
13	124.21	Wheatland	Califorr
14	113.06	Jacksonville	Florida
15	143.52	Pensacola	Florida
16	139.66	Balm	Florida
17	114.55	Hialeah	Florida
18	128.89	Hialeah	Florida
19	147.81	Bay Pines	Florida
20	144.12	Altamonte S...	Florida
21	100.57	Altamonte S...	Florida
22	101.82	Aragon	Georgia
23	122.20	Arlington He...	Illinois
24	144.81	Braceville	Illinois
25	155.34	Cherry Valley	Illinois
26	110.90	Bristol	Indiana

JV Sales 2021

Conditional Formatting

Add

Conditional Formatting Rules

A

State: Include Florida

Cancel Apply

- Group attribute:** Select an attribute that you've grouped your data by to define values for that aggregated data. Optionally, select the add icon  to add a derived field or custom metric.

JV Sales 2021
×

← Select When To Apply Formatting

Row
Group

Search

All
ABC
123


Custom Metric
+

☐ Volume
...

Number
+

☐ Actualsales

☐ Datemillis

☐ Datesseconds

☐ Planned Sales

☐ Sale Date

☐ Sales

☐ Satisfaction

☐ Year

Count Of
+

fx Add Derived Field
 Add Custom Metric

Example: Format Group attributes that meet the condition: the Sum of **Actualsales** grouped by **Product** Between a defined range of values.

Sales Data Q3

Prod... ↑	Actualsa... SUM	State	Cit
> Access...	8,816.15		
> Arts	10,585.95		
> Audio	10,126.22		
> Bracel...	9,083.13		
> Business	9,541.33		
> Camco...	11,401.61		
> Cameras	8,176.58		
> Comp...	12,125.36		
> Cooking	9,753.68		
> Diamo...	9,362.91		
> Disk D...	12,024.70		
> Dresses	10,122.11		
> Dvd/V...	12,340.31		
> Earrings	12,632.18		
> Entert...	9,806.13		
> Fiction	9,782.76		
> Fragra...	9,768.33		

JV Sales 2021

Conditional Formatting

Add Rule

Conditional Formatting Rules

A State: Include Florida

A All Group L... Actualsa... : Between 9,495 to 10,495

Cancel

Apply

Select Values for an Attribute

Selection	Description
Operator	Select Include to include the selected values for this attribute. Select Exclude to exclude the selected values for this attribute.
Customize	Enter a custom value and select Add to add it to the values list.

Selection	Description
	Select the delete icon  to remove it from the values list.
Search	Search for specific values in your list.
Select All	Select the checkbox to include all listed values. Clear the checkbox to remove all selected values.

JV Sales 2021

×

< Select Values State

Value

Operator

Include

⬆️⬆️

Customize

Enter a custom value

Add

Search

🔍

F

☐ Select All

✓ FL

⊖

☐ California

☐ District of Columbia

✓ Florida

Select Values for a Number

Selection	Description
Range	Displays the range for this value.
Operator	Select an operator to use. Options may include Between, Not Between, Equal, Not Equal, Greater Than, Greater Than or Equal, Less Than, Less than or Equal, Include, and Exclude. Depending on the Operator you select, different definition fields are available to use.
From, To	Define a value range for Between and Not Between .
Value	Define a value for Equal , Not Equal , Greater Than , Greater Than or Equal , Less Than , and Less than or Equal .
Customize	Optionally define for Include, and Exclude. Enter a custom value and select Add to add it to the values list. Select the delete icon  to remove it from the values list.
Search	For Include , and Exclude . Search for specific values in your list.
Select All	Define for Include, and Exclude. Select the checkbox to include all listed values. Clear the checkbox to remove all selected values.

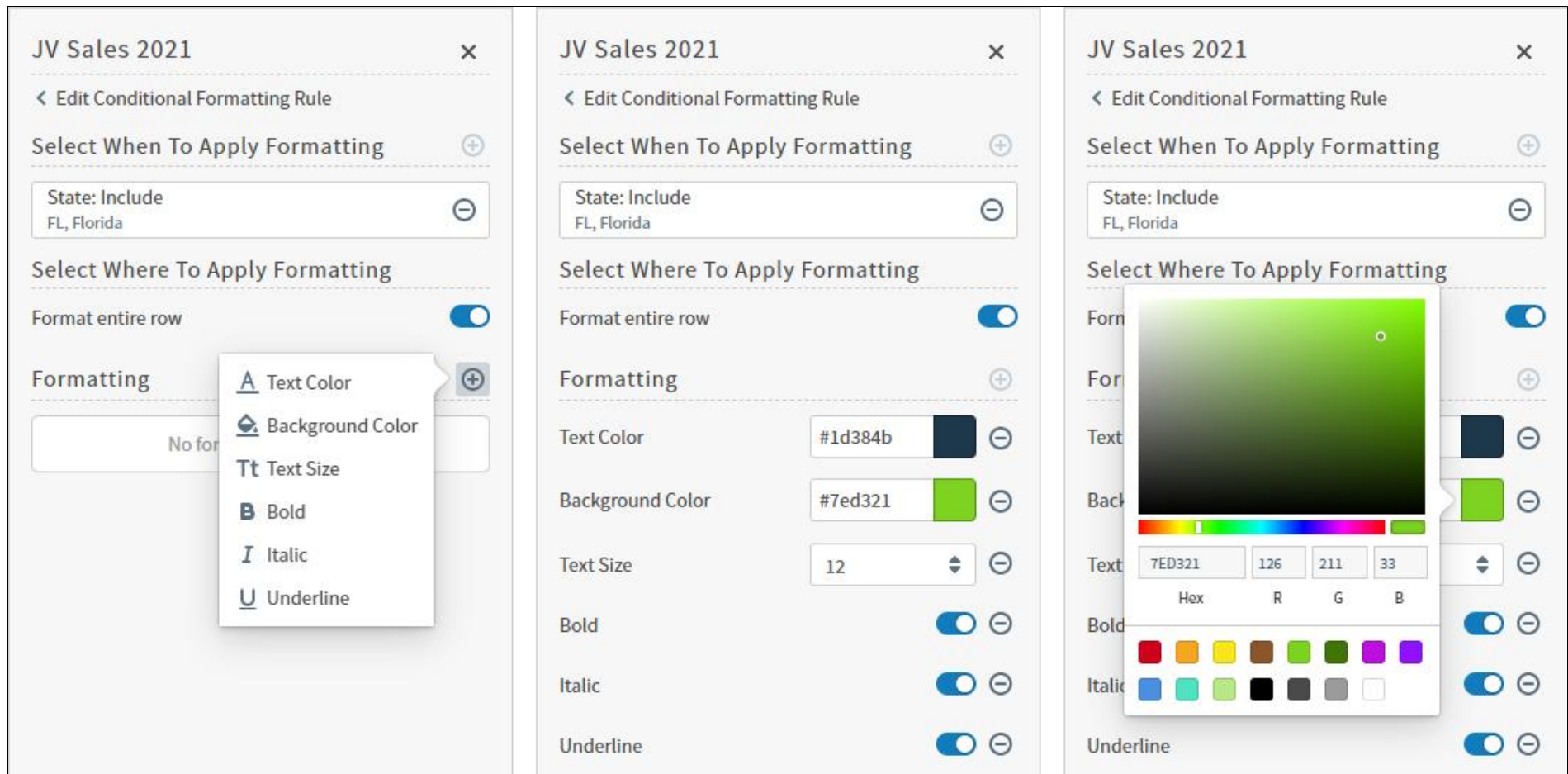
Select Values for a Date

Selection	Description
Range	Displays the range for this value.
Operator	Select an operator to use. Options may include Between, Is NULL, and Is not NULL. Depending on the Operator you select, different definition fields are available to use.
From, To	Define a value range for Between , using Static Time or Dynamic Time . See Set A Time Field Filter .
Presets ...	Select an available Preset... for Between. See Set A Time Field Filter.

Formatting

Select the add icon  to add a formatting option you'll apply to your condition. Select the delete icon  to remove the formatting option.

Format Option	Description
Text Color	Select to define the text color format to apply to your condition. Enter the color number in hexadecimal, or use the color picker to enter RGB values or pick your color visually.
Background Color	Select to define the background color to apply to your condition. Enter the color number in hexadecimal, or use the color picker to enter RGB values or pick your color visually.
Bold	Select to enable or disable bold formatting to apply to your condition.
Italic	Select to enable or disable italic formatting to apply to your condition.
Underline	Select to enable or disable underline formatting to apply to your condition.



The image displays three panels of the Logi Symphony 'Edit Conditional Formatting Rule' interface for 'JV Sales 2021'. Each panel shows the 'Select When To Apply Formatting' section with 'State: Include FL, Florida' and the 'Format entire row' toggle. The second panel shows the 'Formatting' section with 'Text Color' set to #1d384b, 'Background Color' set to #7ed321, and 'Text Size' set to 12. The third panel shows a color picker overlay for the 'Background Color' field, displaying a gradient from black to green and a color palette with various colors.

In the above example, formatting based on the **Actualsales** condition is applied first, then formatting based on the **State** condition overrides that rule.

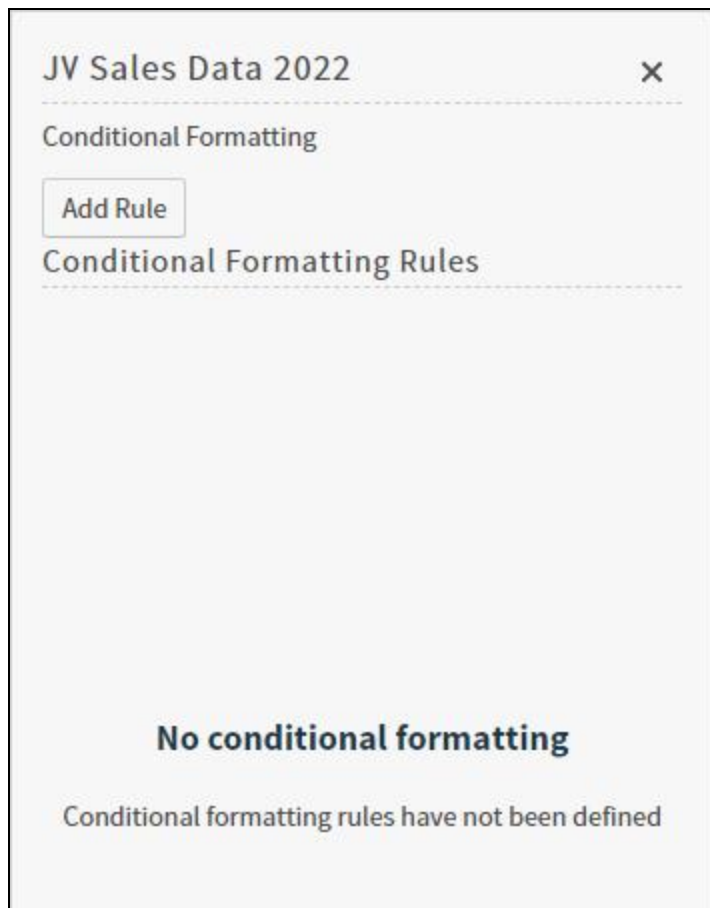
Mix and match rules as needed to achieve the look and feel you want.

Using the Conditional Formatting Sidebar - Pivot Tables

This applies to: *Visual Data Discovery*

Format your visuals by adding color and text formats based on the conditions you define. A sidebar menu work area, Conditional Formatting, allows you to set format conditions to apply to your data. You're not limited to formatting information based on data represented in the table, you can create conditional formatting rules based on any data available in the source that is the basis of the pivot table.

1. Select the pivot table visual in the Visual Gallery or on a dashboard.
2. If you selected the visual on a dashboard, select **Settings** on the [visual drop-down menu](#) to access the [sidebar menu](#) for the visual.
3. Select the conditional formatting option  on the [sidebar menu](#) for the visual. The Conditional Formatting sidebar opens.

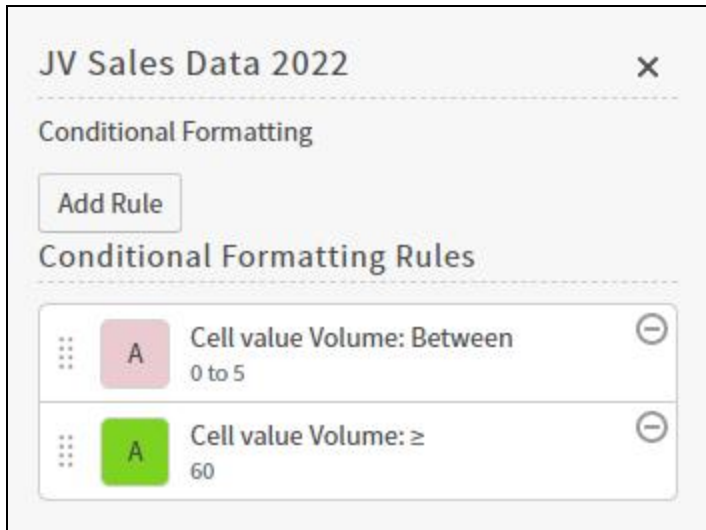


4. Using the Conditional Formatting sidebar, you can configure formatting options for your pivot table visuals. See [Configure Conditional Formatting](#).
5. After making changes, select **Apply** to apply the conditional formatting rules you have specified.
6. Save the visual or dashboard to save your changes.

Conditional Format Options

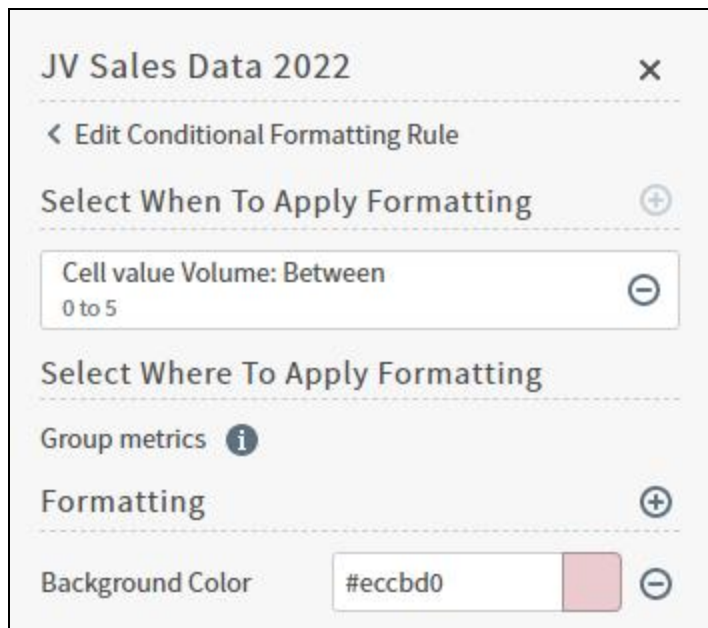
The available options for rules and formatting change to reflect your selections.

Conditional Formatting Sidebar



- Select **Add Rule** to add a conditional formatting rule. See [Configure Conditional Formatting](#).
- Select an existing rule to edit the rule, or the delete icon  to delete the rule.
- Select and drag rules to change their order.

Add or Edit Conditional Formatting Rule



Select When To Apply Formatting

Select the add icon  in **Select When To Apply Formatting** to define the conditions to apply your formatting.

Select Where To Apply Formatting

Select the add icon  for **Formatting** to define the formatting for your condition.

Select the delete icon  to delete a formatting option.

Select When To Apply Formatting

Group attribute: Select a group of data to define values for that aggregated data. Optionally, select the add icon  to add a derived field or custom metric.

JV Sales Data 2022
×

< Select When To Apply Formatting

Group

Search

All ABC 1.23 

Custom Metric +

☐ Volume ...

☐ Actualsales

☐ Datemillis

☐ Datesseconds

☐ Planned Sales

☐ Sale Date

☐ Sales

☐ Satisfaction

☐ Year

Number +

☐ City

Count Of +

Example: Format Group attributes that meet the condition: the Range of **Volume** grouped by **Income Bracket** is **Between** a defined range of values.

JV Sales Data 2022

Income Bra...	\$50000 to \$75000		\$0 to \$25000		\$75000 to \$100000
State ↑	Volume	Actualsales SUM	Volume	Actualsales SUM	Volume
Alabama	12	1,520.08	21	2,694.52	
Alaska	3	400.31	3	431.80	
Arizona	14	1,870.61	24	3,007.91	
Arkansas	7	876.89	9	1,188.47	
California	95	12,273.64	140	18,475.47	
Colorado	9	1,112.96	11	1,394.09	
Connecticut	8	1,088.74	16	2,066.96	
Delaware	3	358.94	4	512.57	
District of Co...	4	521.80	3	396.24	
Florida	46	6,052.20	62	8,265.71	
Georgia	16	2,025.23	38	4,973.98	
Hawaii	2	275.61	3	401.02	
Idaho	4	473.87	7	884.70	
Illinois	25	3,291.85	46	5,916.63	

JV Sales Data 2022

Conditional Formatting

Add Rule

Conditional Formatting Rules

- Cell value Volume: Between 0 to 5
- Cell value Volume: ≥ 60

Cancel Apply

Select Values for a Custom Metric

Selection	Description
Values	Select a range of values to format. Options include: Cell Value - format the data based on the value of the cell. Row Total - format the data based on the value of the row total.

Selection	Description
	▪ Column Total - format the data based on the value of the column total.
Operator	Select an operator to use. Options may include Between , Equal , Not Equal , Greater Than , Greater Than or Equal , Less Than , and Less than or Equal . Depending on the Operator you select, different definition fields are available to use.
From, To	Define a value range for Between .
Value	Define a value for Equal , Not Equal , Greater Than , Greater Than or Equal , Less Than , and Less than or Equal .

Select Values for a Number

Selection	Description
Range	Displays the range for this value.
Values	Select a range of values to format. Options include: ▪ Cell Value - format the data based on the value of the cell. ▪ Row Total - format the data based on the value of the row total. ▪ Column Total - format the data based on the value of the column total.
Aggregation	Select an aggregation option for Values. Options include Avg , Min , Max , Sum , Count , Distinct Count , and Last Value .
Operator	Select an operator to use. Options may include Between , Equal , Not Equal , Greater Than , Greater Than or Equal , Less Than , and Less than or Equal . Depending on the Operator you select, different definition fields are available to use.
From, To	Define a value range for Between .
Value	Define a value for Equal , Not Equal , Greater Than , Greater Than or Equal , Less Than , and Less than or Equal .

Select Values for Count Of

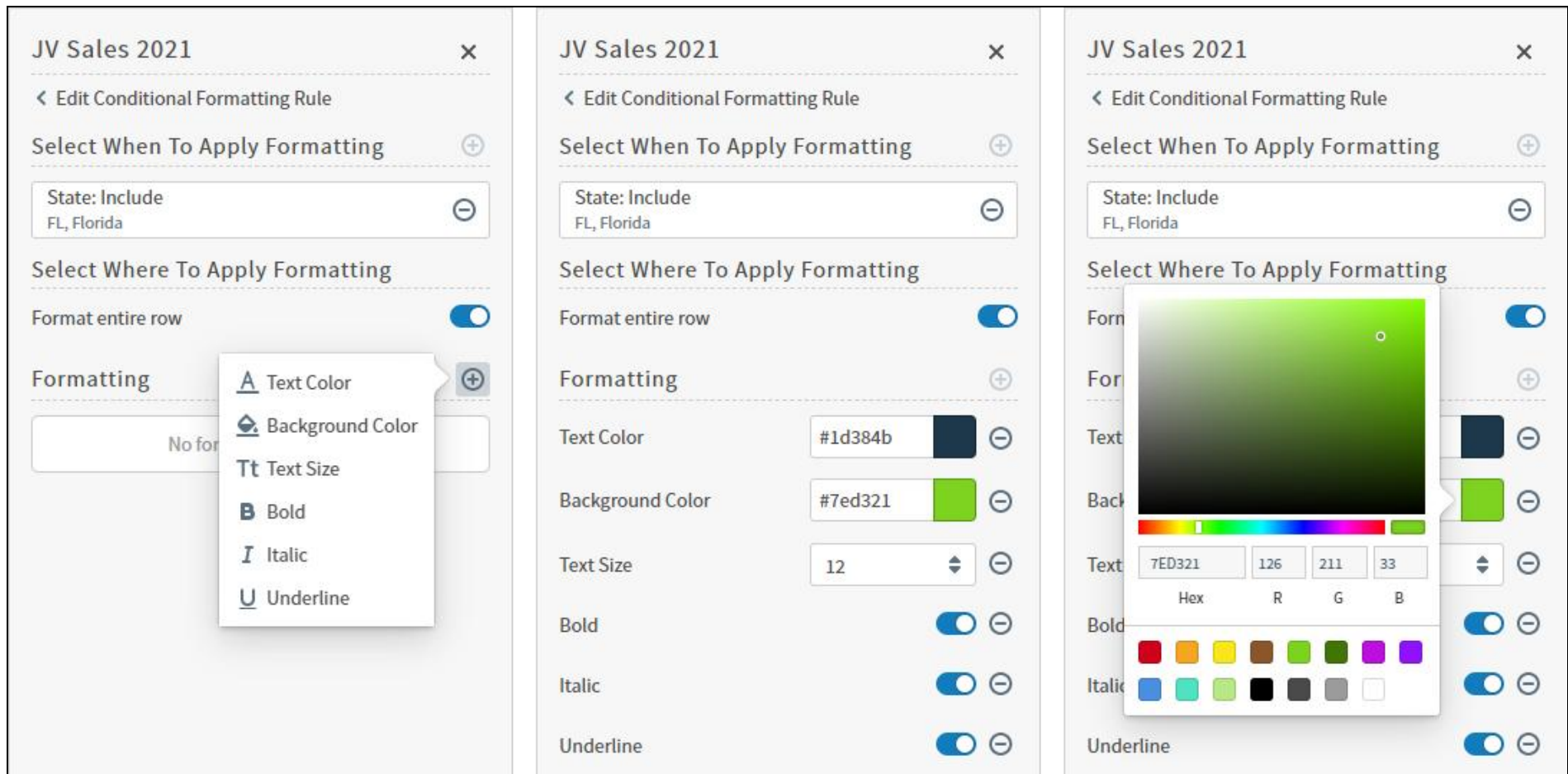
Selection	Description
Values	Select a range of values to format. Options include: ▪ Cell Value - format the data based on the value of the cell.

Selection	Description
	▪ Row Total - format the data based on the value of the row total. ▪ Column Total - format the data based on the value of the column total.
Aggregation	Select an aggregation option for Values. Options include Count and Distinct Count .
Operator	Select an operator to use. Options may include Between , Equal , Not Equal , Greater Than , Greater Than or Equal , Less Than , and Less than or Equal . Depending on the Operator you select, different definition fields are available to use.
From, To	Define a value range for Between .
Value	Define a value for Equal , Not Equal , Greater Than , Greater Than or Equal , Less Than , and Less than or Equal .

Formatting

Select the add icon  to add a formatting option you'll apply to your condition. Select the delete icon  to remove the formatting option.

Format Option	Description
Text Color	Select to define the text color format to apply to your condition. Enter the color number in hexadecimal, or use the color picker to enter RGB values or pick your color visually.
Background Color	Select to define the background color to apply to your condition. Enter the color number in hexadecimal, or use the color picker to enter RGB values or pick your color visually.
Bold	Select to enable or disable bold formatting to apply to your condition.
Italic	Select to enable or disable italic formatting to apply to your condition.
Underline	Select to enable or disable underline formatting to apply to your condition.



The image displays three sequential panels of the 'Edit Conditional Formatting Rule' interface for 'JV Sales 2021'. Each panel shows the 'Select When To Apply Formatting' section with the condition 'State: Include FL, Florida'. The 'Select Where To Apply Formatting' section has 'Format entire row' enabled. The 'Formatting' section is expanded, showing options for Text Color, Background Color, Text Size, Bold, Italic, and Underline. In the second panel, the Text Color is set to #1d384b and the Background Color is set to #7ed321. In the third panel, a color picker is shown for the Background Color, displaying the hex code #7ED321 and RGB values 126, 211, 33.

In the above example, formatting based on the **Actualsales** condition is applied first, then formatting based on the **State** condition overrides that rule.

Mix and match rules as needed to achieve the look and feel you want.



Add or Remove Table Columns

This applies to: *Visual Data Discovery*

You can change the columns (fields) that are shown in the raw data table. After you save the dashboard or visual, the columns are retained when you close the dashboard. They are also retained when you share, embed, or export the dashboard or visual.

You can add and remove table columns using the Table Settings sidebar and directly on the table itself, using the table context menu. See the following topics:

- [Select Columns Using The Table Settings Sidebar](#)
- [Select Columns Using The Table Context Menu](#)
- [Hide Columns Using The Table Settings Sidebar](#)
- [Hide Columns Using The Table Context Menu](#)



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Select Columns Using the Table Settings Sidebar

This applies to: *Visual Data Discovery*

Select fields for table columns using the Table Settings sidebar

1. If you are viewing the table in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are viewing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



- Archive of documentation for Logi Symphony v24

2. Select settings  on the [sidebar menu](#). The Table Settings sidebar for the visual appears.

Sales Q2 2023
×

Table Settings

^ Groups

Edit Groups

Planned Sales
−

Number

Actualsales
−

Number

Aggregation
Sum

^ Columns

Edit Columns

State
−

Attribute

Aggregation
None

City
−

Attribute

Aggregation
None

Income Bracket
−

Attribute

Aggregation
None

Product Category
−

Attribute

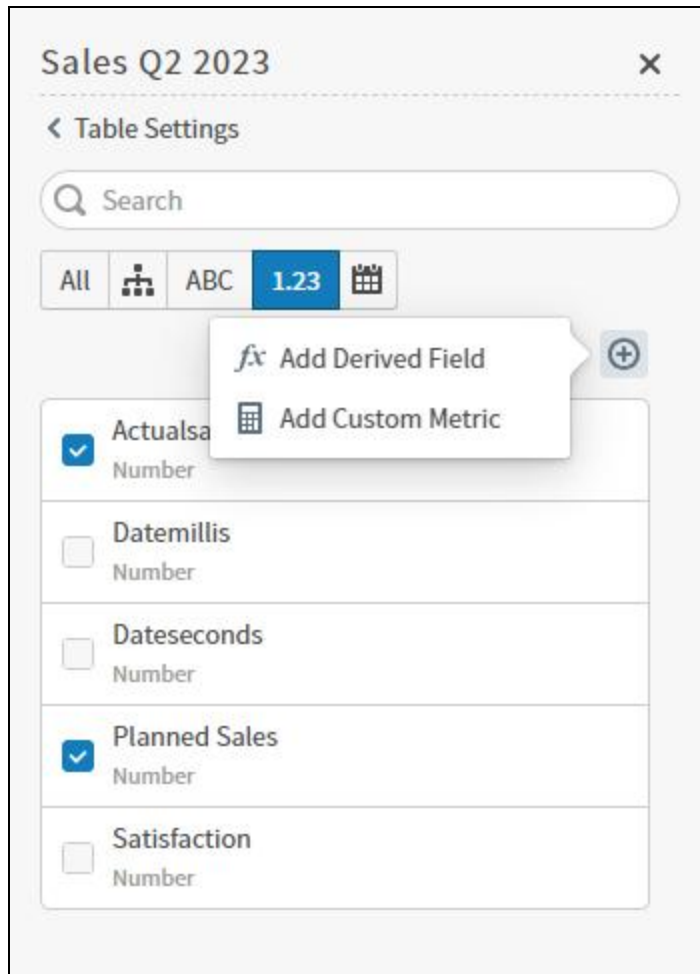
Aggregation
Count

Zipcode
−

Attribute

Aggregation
None

3. Select the edit icon  next to **Edit Columns** on the sidebar. The Table Settings sidebar changes and only the fields available in the data source are listed.



Select the add icon  to access the [Custom Metrics Editor](#) or [Derived Field Editor](#).

4. Select the fields you want to view as columns in the table.

Use the search bar to search for a field in the table. Use the buttons under the search bar to limit the fields you see in the list.

All

ABC

123



Select	To
All	See all available fields.
ABC	Limit the field list to the available attributes.
123	Limit the field list to the available numeric metrics.
	Limit the field list to the available date and time fields.

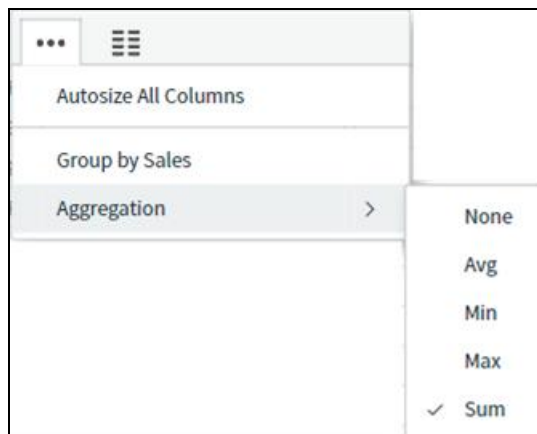
- When you are finished hiding your fields, select **Continue** and examine your updates. If they are correct, select **Apply**.
- Save the dashboard and visual.

Select Columns Using the Table Context Menu

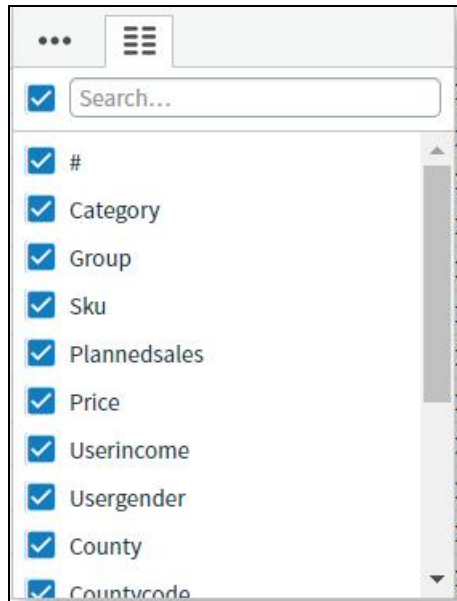
This applies to: *Visual Data Discovery*

Select fields for table columns using the table context menu

1. View the table visual in a dashboard or from the Visual Gallery.
2. Select  next to the column heading name to access the table context menu.



3. Select the  tab on the context menu. A list of all the fields in the data source appears.



4. Select the fields you want to view as columns in the table. To select all the fields, select the checkbox to the left of the search bar.

Use the search bar to search for a field in the table.

Fields you select appear in the table.

5. Save the dashboard and visual.

Hide Columns Using the Table Settings Sidebar

This applies to: *Visual Data Discovery*

Hide table columns using the Table Settings sidebar

1. If you are viewing the table in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are viewing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

2. Select settings  on the [sidebar menu](#). The Table Settings sidebar for the visual appears.

Sales Q2 2023
×

Table Settings

^ Groups

Edit Groups

Planned Sales
⊖

Number

Actualsales
⊖

Number

Aggregation
Sum

^ Columns

Edit Columns

State
⊖

Attribute

Aggregation
None

City
⊖

Attribute

Aggregation
None

Income Bracket
⊖

Attribute

Aggregation
None

Product Category
⊖

Attribute

Aggregation
Count

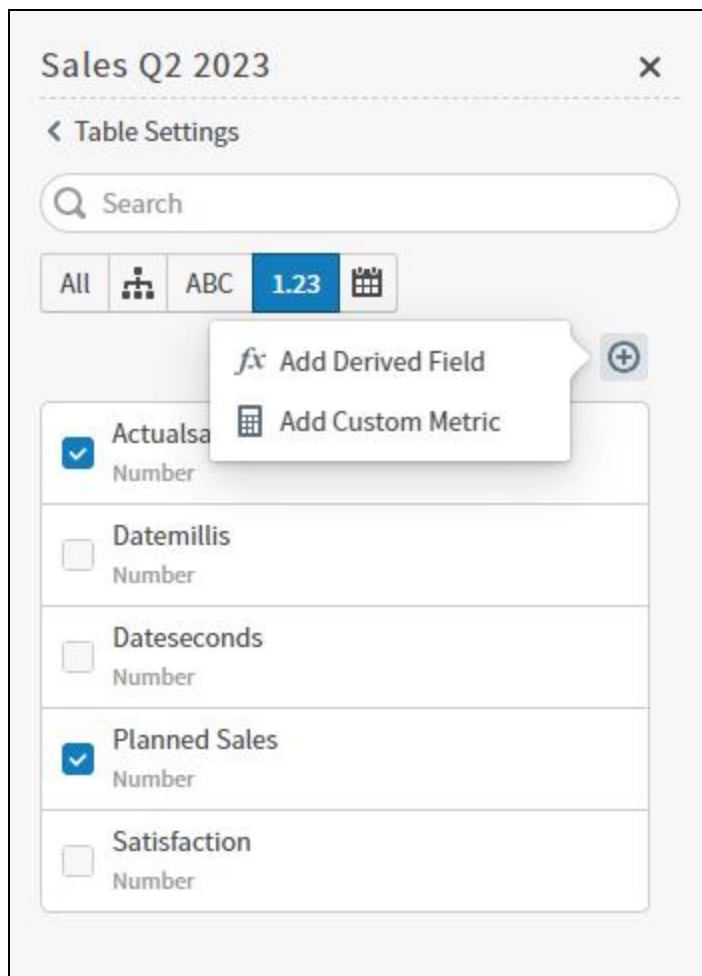
Zipcode
⊖

Attribute

Aggregation
None

Select the add icon  to access [Custom Metrics Editor](#) or [Derived Field Editor](#).

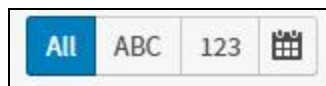
3. Select the edit icon  next to **Edit Columns** on the sidebar. The Table Settings sidebar changes and only the fields available in the data source are listed.



4. Clear (uncheck) the fields you want to hide from the table.

 **Note:** There is an alternate, quicker, method for hiding columns in a table.

Use the search bar to search for a field in the table. Use the buttons under the search bar to limit the fields you see in the list.



Select	To
All	See all available fields.
ABC	Limit the field list to the available attributes.
123	Limit the field list to the available numeric metrics.
	Limit the field list to the available date and time fields.

- When you are finished hiding your fields, select **Continue** and examine your updates. If they are correct, select **Apply**.
- Save the dashboard and visual.

Hide Table Columns Using the Table Settings Sidebar (Alternate Method)

Quickly hide columns in a table

- If you are viewing the table in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are viewing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



- Select settings  on the [sidebar menu](#). The Table Settings sidebar for the visual appears.

Airports Raw Data

Table Settings

^ Groups

Edit Groups

No groups selected

^ Columns

Edit Columns

⋮

Airport

Attribute

⊖

⋮

City

Attribute

⊖

⋮

Country

Attribute

⊖

⋮

Iata Code

Attribute

⊖

⋮

Latitude

Number

⊖

⋮

Longitude

Number

⊖

⋮

State

Attribute

⊖

^ Pagination

Mode

☒ Infinite Scroll

☐ Pagination

Rows per Fetch

250

⬆️⬇️⬆️

- In the **Columns** section of the sidebar, select the delete icon  corresponding to the columns you want hidden from the table. (You can add them back if needed later.)
- Select **Apply** to apply your changes to the table.

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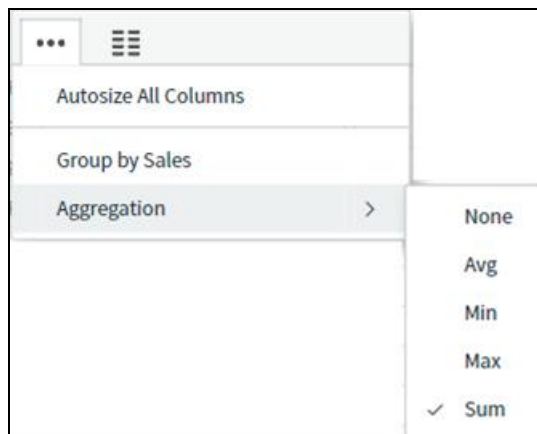
5. Save the dashboard and visual.

Hide Columns Using the Table Context Menu

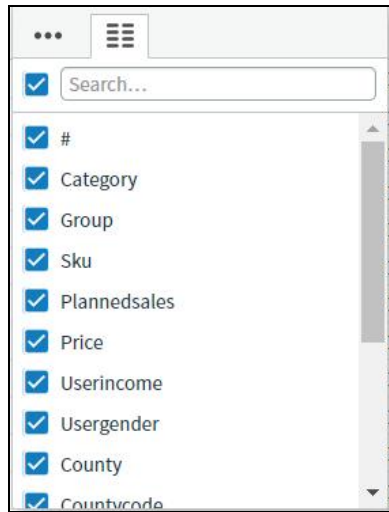
This applies to: *Visual Data Discovery*

Hide table columns using the table context menu

1. View the table visual in a dashboard or from the Visual Gallery.
2. Select  next to the column heading name to access the table context menu.



3. Select the  tab on the context menu. A list of all the fields in the data source appears.



4. Clear (uncheck) the fields you want to hide in the table.

Use the search bar to search for a field in the table.

Fields you hide disappear from the table.

5. Save the dashboard and visual.



Move Table Columns

This applies to: *Visual Data Discovery*

You can rearrange (move) the columns in a table while you are viewing the table. After you save the dashboard or visual, the column rearrangement is retained after you close the dashboard. It is also retained when you share or export the dashboard or visual.

Select the columns in a table

1. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.

If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

2. Select  on the [sidebar menu](#). The Table Settings sidebar for the visual appears.

Airports Raw Data

×

Table Settings

^ Groups

Edit Groups

✎

No groups selected

^ Columns

Edit Columns

✎

⋮

Airport

Attribute

⊖

⋮

City

Attribute

⊖

⋮

Country

Attribute

⊖

⋮

Iata Code

Attribute

⊖

⋮

Latitude

Number

⊖

⋮

Longitude

Number

⊖

⋮

State

Attribute

⊖

^ Pagination

Mode

☒ Infinite Scroll

☐ Pagination

Rows per Fetch

250

^

⌵

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3. To move a column, select its name and then drag it up or down in the **Columns** list, as appropriate. The first column in the list will appear on the left side of the table.
4. Select **Apply** to apply your changes to the table.
5. Save the dashboard and visual.

Change Column Widths

This applies to: *Visual Data Discovery*

By default, the columns of a table are 100 pixels wide. You cannot change this default. However, you can enlarge or decrease the size of the table columns by moving the separator delineating each column while the table is open for viewing. After you save the dashboard, your customized column widths are saved when you close the table and when you share or embed it.

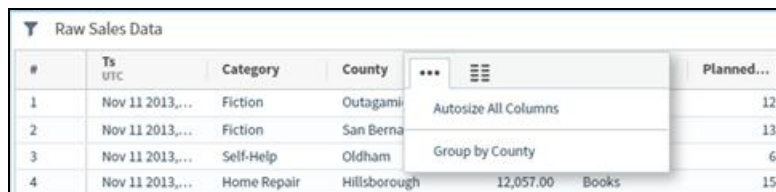
You can also request that Symphonys autosize all the columns in the table.

Manually change column widths

1. To change the widths of the columns in the table, drag the separator between two columns in the appropriate direction.
2. [Save](#) the dashboard.

Autosize all table columns

1. Select **Autosize All Columns** in the [context menu](#) of any column in the table.



#	Ts UTC	Category	County	Planned...
1	Nov 11 2013,...	Fiction	Outagamie	12
2	Nov 11 2013,...	Fiction	San Berna	13
3	Nov 11 2013,...	Self-Help	Oldham	6
4	Nov 11 2013,...	Home Repair	Hillsborough	15

The table columns are autosized.

2. Save the dashboard and visual.

Group and Ungroup Table Data

This applies to: *Visual Data Discovery*

You can group and ungroup table data by one or more fields while you are viewing the table. Summarized totals are provided for numeric fields in each group. The fields used for grouping are automatically moved to the leftmost columns of the table.

Grouping can be set on the table itself using the column heading context menus and using the Table Settings sidebar (a new Group area has been added). In addition, group default settings can be specified for tables in data source configurations.



Note: End users will only be able to group table data if the **Group** interactivity setting is enabled. See [Control How Users Interact With A Visual](#).



Note: Live mode and historical playback do not work for tables when the table is grouped.



Note: If a table has been grouped, you cannot [export](#) its raw or visual data.

See the following topics:

- [Group Table Data Using The Table Context Menu](#)
- [Group Table Data Using The Table Settings Sidebar](#)
- [Ungroup Table Data Using The Table Context Menu](#)
- [Ungroup Table Data Using The Table Settings Sidebar](#)

Group Table Data Using the Table Context Menu

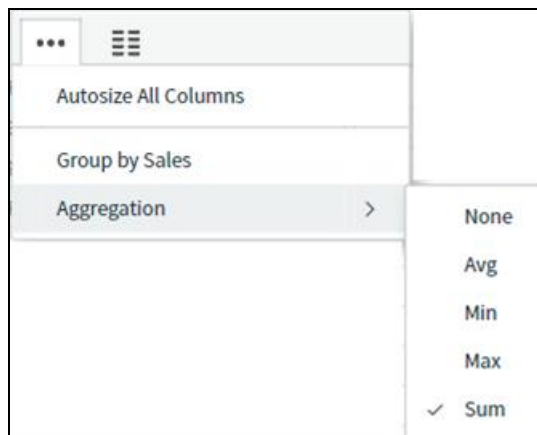
This applies to: *Visual Data Discovery*

If a field is selected for grouping, it is automatically selected for the table and cannot be specifically selected as a table column.

When you group table data, summarized totals are provided for numeric fields in each group. The fields used for grouping are automatically moved to the leftmost columns of the table.

Group table data using the table context menu

1. View the table visual in a dashboard or from the Visual Gallery. Determine which field you want to use to group the data. For example, you might want to group sales data by state.
2. Locate the field in the table and select  next to its column heading to access the table context menu.



3. Select **Group by <field>** on the context menu.
The table is grouped by that field.
4. Optionally, select an aggregation level for the group field from the **Aggregation** list. The **Aggregation** list is only available for fields that have aggregation enabled in the data source and if the group field is not the first group field for the table.
5. You might want to group the table data by more than one field. For example you might want the sales data that has already been grouped by state to also be grouped by city.
If you want to group by an additional field, locate the field in the table and select **Group by <field>** on its context menu.



The table is grouped by that field within the grouping of any previously selected groups.

6. Save the dashboard and visual.

Group Table Data Using the Table Settings Sidebar

This applies to: *Visual Data Discovery*

If a field is selected for grouping, it is automatically selected for the table and cannot be specifically selected as a table column.

When you group table data, summarized totals are provided for numeric fields in each group. The fields used for grouping are automatically moved to the leftmost columns of the table.

Group table data using the Table Settings sidebar

1. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.

If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

2. Select  on the [sidebar menu](#). The Table Settings sidebar for the visual appears.

3. Select and drag the field by which you want the table grouped from the **Columns** section of the Table Settings sidebar to the **Groups** section.

The **Groups** section of the Table Settings sidebar lists the columns by which the table is grouped, in order of that grouping. In the following example, the sales



data is grouped first by state, then by city within the state, and then by product category.

4. Optionally, select an aggregation level for the group field from the **Aggregation** list. The **Aggregation** list is only available for fields that have aggregation enabled in the data source and only if the group field is not the first group field for the table.
5. Select **Apply** to apply your changes to the table. The grouping selections are applied to the table.
6. Save the dashboard and visual.



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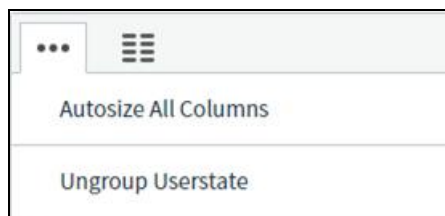
Ungroup Table Data Using the Table Context Menu

This applies to: *Visual Data Discovery*

You can ungroup table data using the table context menu.

Ungroup table data using the table context menu

1. View the table visual in a dashboard or from the Visual Gallery. Determine which field you want to remove from grouping.
2. Locate the field in the table and select  next to its column heading to access the table context menu.



3. Select **Ungroup by <field>** on the context menu.
The table is ungrouped by that field.
4. Save the dashboard and visual.

Ungroup Table Data Using the Table Settings Sidebar

This applies to: *Visual Data Discovery*

You can ungroup table data using the Table Settings sidebar.

Ungroup table data using the Table Settings sidebar

1. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.

If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

2. Select  on the [sidebar menu](#). The Table Settings sidebar for the visual appears.

Sales Q2 2023
×

Table Settings

^ Groups

Edit Groups

Planned Sales
−

Number

Actualsales
−

Number

Aggregation
Sum

^ Columns

Edit Columns

State
−

Attribute

Aggregation
None

City
−

Attribute

Aggregation
None

Income Bracket
−

Attribute

Aggregation
None

Product Category
−

Attribute

Aggregation
Count

Zipcode
−

Attribute

Aggregation
None

3. You can remove a field from grouping in several ways:
 - a. Select and drag the field from the **Groups** section of the Table Settings sidebar to the **Columns** section.
 - b. In the **Groups** section of the sidebar, select  corresponding to the field you want removed from grouping.
 - c. Select the edit icon () for **Edit Groups** on the sidebar menu. The Table Settings sidebar changes and only the fields included are listed. Clear the checkbox of the field you want to remove from grouping. Note that this also removes the field from the table and you must manually add it back if you want its column shown in the table. Select **Continue** when you've completed your changes.
4. Select **Apply** to apply your changes to the table.
5. Save the dashboard and visual.

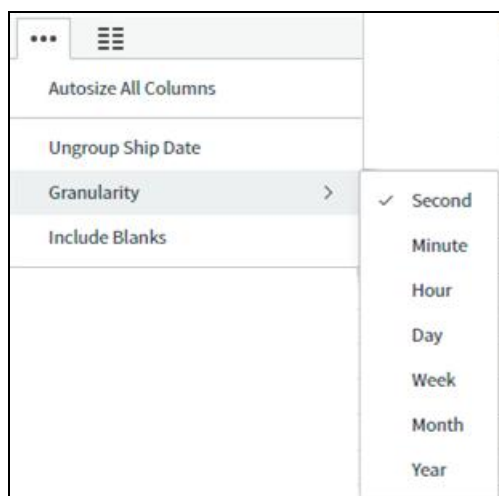
Change Time Field Granularity in Tables

This applies to: *Visual Data Discovery*

You can change the granularity of a time field in a table using the table context menu if you group the table by the time field.

Change the granularity of a time field on a table

1. [Edit](#) a dashboard with a table that uses a data source containing date or time fields.
2. Group the table by a time field in the data. See [Group And Ungroup Table Data](#).
3. Select  next to the time field column heading to access the table context menu.



4. Select **Granularity** on the context menu and then select the granularity you want on the submenu that appears. Valid granularity options include **Millisecond**, **Second**, **Minute**, **Hour**, **Day**, **Week**, **Month**, **Quarter** and **Year**. Options vary based on the [granularity you define](#) at the source level.

The selected granularity is applied to the time field.

5. Save the dashboard and visual.

Change Metric Aggregation in Tables

This applies to: *Visual Data Discovery*

You can change the aggregation of metrics in a table after the table has been grouped. Aggregation settings can be changed on the Table Settings sidebar and using the table context menu. Note that you cannot change the aggregation setting for a metric that is used in grouping the table. When a metric is used to group a table, the sum of that field is used for grouping.



Note: End users will only be able to change aggregation of numeric and metric fields in a table if the **Metrics** interactivity setting is enabled. See [Control How Users Interact With A Visual](#).

See the following topics:

- [Change Aggregation Using The Table Context Menu](#)
- [Change Aggregation Using The Table Settings Sidebar](#)

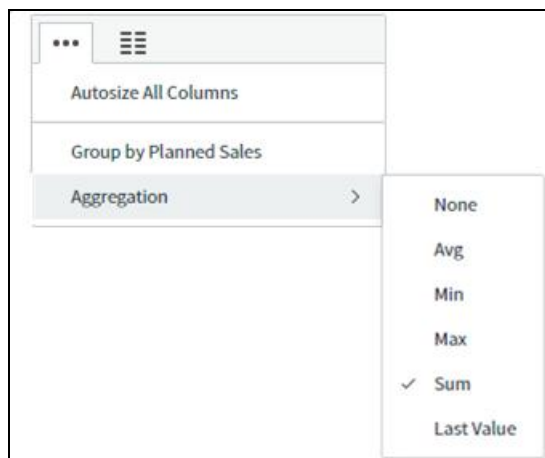
For information about aggregation values, see [Metric Aggregation Functions](#).

Change Aggregation Using the Table Context Menu

This applies to: *Visual Data Discovery*

Change the aggregation metrics in a table using the table context menu

1. [Edit](#) a dashboard with a table that uses a data source containing metric fields.
2. Group the table. See [Group And Ungroup Table Data](#).
3. Select  next to the column heading name of any metric field in the table to access the table context menu.



4. In any of the metric fields in the **Columns** section of the sidebar, select the aggregation method you want. Possible aggregation methods include **None**, **Avg**, **Min**, **Max**, **Sum**, **Last Value**, **Count**, and **Distinct Count**. For information about aggregation methods, see [Metric Aggregation Functions](#).
The selected aggregation method is applied to the metric.
5. Save the dashboard and visual.



Change Aggregation Using the Table Settings Sidebar

This applies to: *Visual Data Discovery*

Change the aggregation of metrics in a table using the Table Settings sidebar

1. [Edit](#) a dashboard with a table that uses a data source containing metric fields.
2. Group the table. See [Group And Ungroup Table Data](#).
3. If you are viewing the table in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are viewing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

4. Select  on the [sidebar menu](#). The Table Settings sidebar for the visual appears.

Sales Q2 2023
×

Table Settings

^ Groups

Edit Groups

Planned Sales
⊖

Number

Actualsales
⊖

Number

Aggregation
Sum

^ Columns

Edit Columns

State
⊖

Attribute

Aggregation
None

City
⊖

Attribute

Aggregation
None

Income Bracket
⊖

Attribute

Aggregation
None

Product Category
⊖

Attribute

Aggregation
Count

Zipcode
⊖

Attribute

Aggregation
None



5. In any of the metric fields in the **Columns** section of the sidebar, select the aggregation method you want. Possible aggregation methods include **None**, **Avg**, **Min**, **Max**, **Sum**, **Last Value**, **Count**, and **Distinct Count**. For information about aggregation methods, see [Metric Aggregation Functions](#).

The selected aggregation method is applied to the metric.

6. Select **Apply** to apply your changes to the table.
7. Save the dashboard and visual.

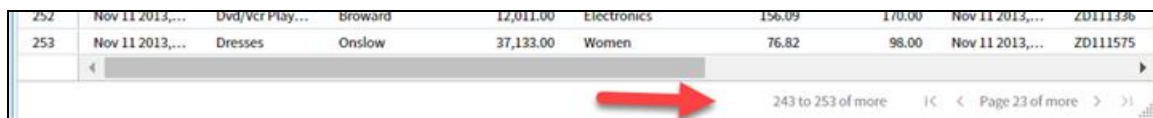
Change Table Pagination

This applies to: *Visual Data Discovery*

Data is fetched from the data store for a table and cached for viewing in a table visual on a dashboard. Up to 10 times the number of rows specified by **Rows per Fetch** can be cached before Symphony purges the earliest data from the cache to make room for more data at the end. For example, if **Rows per Fetch** is set to 250, up to 2500 rows of data are cached at any time.

Control how the data is viewed in a table visual on a dashboard by selecting infinite scroll or pagination for table visuals.

- Select **Infinite Scrolling** to display all the data that has been fetched; view using the scroll bar. When you scroll to the bottom of the fetched data, Symphony automatically fetches another block of data (based on the **Rows per Fetch** setting) and the additional data is also available for viewing on the visual (using the scroll bar). For example, if your **Rows per Fetch** setting is 250 rows, the table will initially show all 250 rows of data. When you scroll to the bottom of the data, another 250 rows of data is fetched from the data source and the table will show all 500 rows of data.
- Select **Pagination** to display only the data that will fit in the visual widget for the table. A pagination bar at the bottom of the widget allows you to page forward and backward through the data. Specify the **Rows per Fetch** as needed.



252	Nov 11 2013,...	Dvd/Vcr Play...	Broward	12,011.00	Electronics	156.09	170.00	Nov 11 2013,...	ZD111336
253	Nov 11 2013,...	Dresses	Onslow	37,133.00	Women	76.82	98.00	Nov 11 2013,...	ZD111575



Note: If you use pagination, the number of pages of data available to display before more data is fetched from the data store is determined by the size of the visual widget on the dashboard. For example, if your **Rows per Fetch** setting is 250 rows, but your visual widget can only display 30 rows of data, only 30 rows of data are ever shown in the visual. This means that 8.33 pages (250/30) of data are available for viewing. When you page forward (using the forward arrows in the pagination bar) to the end of the fetched data, Symphony automatically fetches another block of data (based on the **Rows per Fetch** setting) and fills out any partial page of data with newly fetched data to fill the 30 rows. Additional pages of data are added so you can view the rest of the newly fetched data.

By default, infinite scrolling is selected.

Change the pagination mode for a table

1. Edit the table you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select  on the [sidebar menu](#). The Table Settings sidebar for the visual appears.

Airports Raw Data

×

Table Settings

^ Groups

Edit Groups

No groups selected

^ Columns

Edit Columns

⋮ Airport
Attribute

⋮ City
Attribute

⋮ Country
Attribute

⋮ Iata Code
Attribute

⋮ Latitude
Number

⋮ Longitude
Number

⋮ State
Attribute

^ Pagination

Mode

☒ Infinite Scroll

☐ Pagination

Rows per Fetch

250

⬆

⬇

4. To modify the pagination mode, expand the Pagination options and select one.
 - i. Select **Infinite Scroll** to view the data using infinite scrolling. Data is fetched for the next page when the user has scrolled to the bottom of the data shown in the table.



- ii. Select **Pagination** to view the data using pagination and the forward and back arrows on the pagination bar.
- iii. Specify **Rows per Fetch** for the table. The default is 250 rows.
- 5. Select **Apply** to apply your changes to the table.
- 6. Save the dashboard and visual.

Sort Data in a Table

This applies to: *Visual Data Discovery*

The data in the table can be sorted by one or more columns of data. After you save the dashboard or visual, the sort settings are retained when you close it. The sort settings are also retained when you export and share the table.

Sort the rows in a table by the data in a single column

- To sort the data in ascending order, select the column heading once.
- To sort the data in descending order, select the column heading two times.
- To return the data to its original sort order, select the column heading three times.

Remember to [save](#) the dashboard to retain the sort order.

Sort the data rows in a table by the data in multiple columns

1. Sort the data in ascending or descending order by your first column, as described above.
2. Sort the data in ascending or descending order by your next column as described above. The number 2 appears in the column heading and the data is sorted first by the first column selected, then by the second column selected.
3. Continue adding additional columns to the sort. The numbers in the column headings will continue to increment.
4. Change the order of a multicolumn sort by selecting the column header again.
 - i. When you select a column that is part of a multicolumn sort again, it becomes the last column of data in sequence for sorting.
 - ii. When you move a column to the end of the sort sequence, Symphony rennumbers the other columns to reflect the new sort sequence.
5. To clear sorting, hover over a column label, select the More menu () and select one of the following options:
 - i. **Reset [name] sorting** to clear all sorting options for that column.
 - ii. **Reset other sorting** to clear sorting options for all columns except the one you have selected.



- Archive of documentation for Logi Symphony v24

iii. **Reset all sorting** to clear all sorting options for all columns.

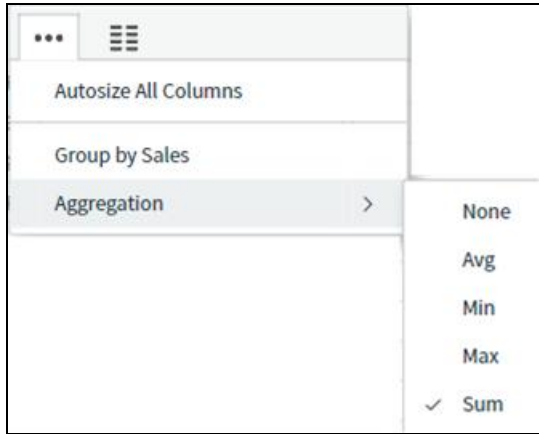
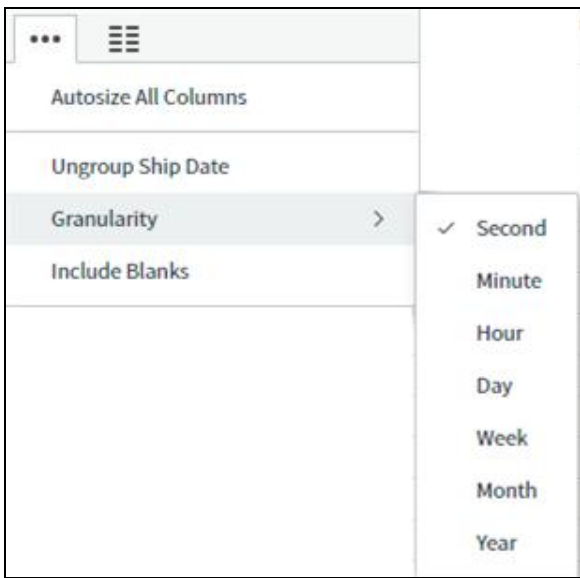
6. Save the dashboard or visual to save the sort order.

Table Context Menu

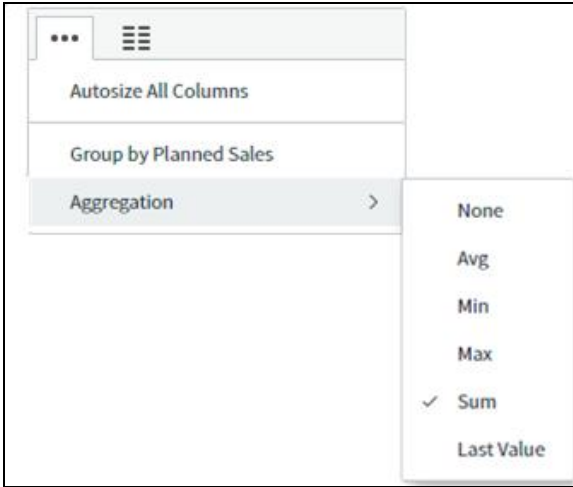
This applies to: *Visual Data Discovery*

The column headings of a table include a context menu you can use to perform various functions on the table, as described below. Select  next to the column heading name to access the table context menu. The context menu has two tabs:

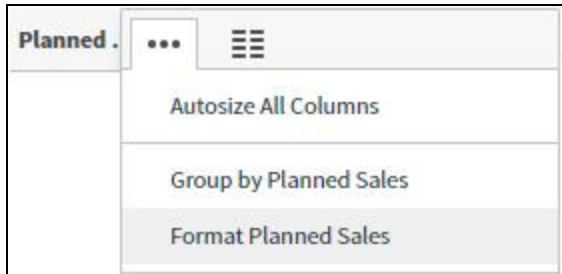
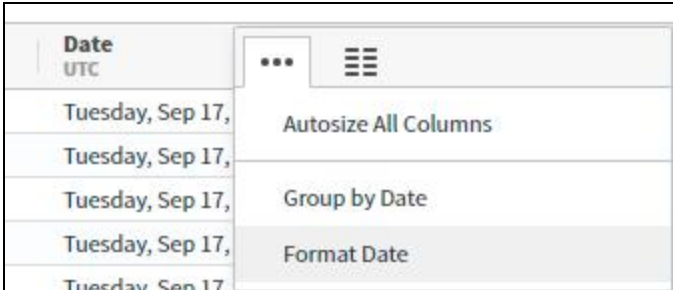
- The  tab lists the functions you can perform.
- The  tab lists all the available fields in the data source.

or



or

Each possible menu option on the  tab is described below.

Menu Option	Description
Aggregation	Shown only for numeric fields or metrics, this option allows you to change the aggregation method for the field. Valid options are AVG, MIN, MAX, SUM, NONE, or LAST VALUE. See Change Metric Aggregation In Tables .
Autosize all columns	This option causes Symphony to autosize all the column widths in the table. See Change Column Widths .
Format <field>	Use this option to modify the formatting of numeric and time fields for Table visuals. See Format Numeric Table Data Using The Table Context Menu or Format Time Table Data Using The Table Context Menu .
Format <field> as URL	Format the data in this column as a URL or image. See Format Images or a URL Using the Table Context Menu .
Group by <field>	This option allows you to group the table by the field represented by the table column. See Group And Ungroup Table Data .
Granularity	Shown only for time fields used to group the table, this option allows you to change the granularity of the grouped time field. Options vary based on the granularity you define at the source level. See Change Time Field Granularity In Tables .
Include Blanks	Shown only for time fields used to group the table, this option allows you apply even time intervals for the grouped time field. Select this option once to apply even time intervals. Select it a second time to remove even time intervals. See Even Time Intervals .
Ungroup <field>	This option removes grouping by the table column. See Group And Ungroup Table Data .
Wrap Cell Value	Select to wrap the text or data in a column to improve readability.

You can also select and hide a column from a table using the  tab on the table context menu. See [Select Columns Using The Table Context Menu](#) and [Hide Columns Using the Table Context Menu](#).

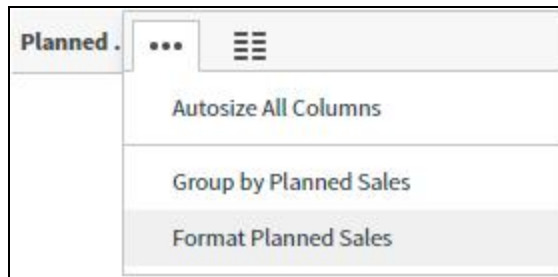
Format Numeric Table Data Using the Table Context Menu

This applies to: *Visual Data Discovery*

Numeric data and date formats [are set at the source](#). You can change them directly in a table using the table context menu. Your format changes apply directly to that visual, and affects every instance of that visual in your dashboards, without affecting the underlying source formatting. See [Format Time Table Data Using The Table Context Menu](#). To edit number for other visuals, see [Configure Number Formatting For Visuals](#).

Format numeric table data using the table context menu

1. Select a table visual in a dashboard or in the Visual Gallery.
2. Locate the field in the table and select  next to its column heading to access the table context menu.



3. Select **Format <field>** on the context menu. A Format work area opens.

Format: Planned Sales

Number Format

Plain Number

Unit Multiple

None

Decimal Place

2

Negative Display

-1,234.01

Use 1000 Separator

☒

Reset

Cancel

Apply

Note: Select a Number Format, then select other options for this field. Select **Apply** to apply your changes to the data in the table column, or **Reset** to reapply the source formatting.

The other fields on the Format dialog change based on the Number Format you select. See [Number Format Options](#).

- Optionally, repeat for other fields in the table.
- Save the visual, or the dashboard and visual.

Format aggregated data using the table context menu

- Select a table visual in a dashboard or in the Visual Gallery.
- Locate the field that includes aggregated in the table and select  next to its column heading to access the table context menu.

Sales By City

City	Actualsales SUM	
▼ Bristol...	47	⋮
	1	
	1	
	1	
	1	
	1	
> Glenoma	12	

Autosize All Columns
Group by Actualsales
Aggregation >
Format Actualsales

- Select **Format <field>** on the context menu. A Format work area opens.

Format: Actualsales
×

Actualsales (Sum)
Actualsales (Raw data)

Number Format

Plain Number

Unit Multiple

None

Decimal Place

2

Negative Display

-1,234.01

Use 1000 Separator

☒

Reset
Cancel
Apply

- Select the tab of the data you want to format: the aggregate data, shown here as **Actualsales (Sum)**, or the raw data, shown here as **Actualsales (Raw data)**.

Note: You can apply different formatting options to your raw and aggregate data.

Sales By City	
City	Actualsales SUM
▼ Bristol...	\$475.77
	123.76
	108.55
	105.92
	137.55
> Glenoma	\$128.53

5. Select a Number Format, then select other options for this field. select **Apply** to apply your changes to the data in the table column, or **Reset** reapply the source formatting.

Note: The other fields on the Format dialog change based on the Number Format you select. See [Number Format Options](#).

6. Optionally, repeat for other fields in the table.
7. Save the visual, or the dashboard and visual.

Number Format Options

The available fields for each number format change to reflect the options available for your selected format:



- **Plain Number:** Select this format to display the field as plain number values. Additional format information you can select includes:

Format Option	Description
Unit Multiple	Select the unit of measure you want to use for the field from the drop-down list. Valid values are None , Thousands (K) , Millions (M) , Billions (B) , and Trillions (T) . The unit multiple is used in visuals. For example, a value of 1,500,000 would show as 1.5M in visuals.
Decimal Place	Specify the number of decimal places used in the data.
Negative Display	Select the desired negative value format from the drop-down list. Valid values are the dash (-) in front of a negative value or parentheses surrounding negative values. For example, value of negative 30 could show as -30 or (30) in visuals.
Use 1000 Separator	If you want commas used to separate number values into thousands, millions, billions, and trillions, check the Use 1000 Separator box. For example, if this box is checked, 2500 appears as 2,500 in visuals.

- **Percentage:** Select this format to display the field as percentage values. Additional format information you can select includes:

Format Option	Description
Decimal Place	Specify the number of decimal places used in the data.
Negative Display	Select the desired negative value format from the drop-down list. Valid values are the dash (-) in front of a negative value or parentheses surrounding negative values. For example, value of negative 30.25 percent could show as -30.25% or (30.25%) in visuals.
Use 1000 Separator	If you want commas used to separate number values into thousands, millions, billions, and trillions, check the Use 1000 Separator box.

- **Money:** Select this format to display the field as currency values. Additional format information you can select includes:

Format Option	Description
Symbol	Select the currency symbol you want used for money values in visuals.
Unit Multiple	Select the unit of measure you want to use for the field from the drop-down list. Valid values are None , Thousands (K) , Millions (M) , Billions (B) , and Trillions (T) . The unit multiple is used in visuals. For example, a value of 1,500,000 would show as 1.5M in visuals.
Decimal Place	Specify the number of decimal places used in the data.
Negative Display	Select the desired negative value format from the drop-down list. Valid values are the dash (-) in front of a negative value or parentheses surrounding negative values. For example, value of negative 30 dollars and 25 cents could show as -\$30.25 or (\$30.25) in visuals.

Format Option	Description
Use 1000 Separator	If you want commas used to separate number values into thousands, millions, billions, and trillions, check the Use 1000 Separator box.

- **Storage:** Select this format to display the field as computer storage values. Additional format information you can select includes:

Format Option	Description
Unit Multiple	Select the unit of measure you want to use for the field from the drop-down list. Valid values are Bytes (B) , Kilobytes (KB) , Megabytes (MB) , Gigabytes (GB) , Terabytes (TB) , Petabytes (PB) , and Exabytes (EB) . The unit multiple is used in visuals. For example, a value of 950 kilobytes would show as 950KB in visuals.
Decimal Place	Specify the number of decimal places used in the data.

- **Scientific Notation:** Select this format to display the field as scientific decimals. Additional format information you can select includes:

Format Option	Description
Decimal Place	Specify the number of decimal places used in the data.

Format Time Table Data Using the Table Context Menu

This applies to: *Visual Data Discovery*

Numeric data and time formats [are set at the source](#). You can change them directly in a table using the table context menu. Your format changes apply directly to that visual, and affects every instance of that visual in your dashboards, without affecting the underlying source formatting. See [Format Numeric Table Data Using The Table Context Menu](#). To edit date and time formatting for other visuals, see [Configure Date And Time Formatting For Visuals](#).

Format time table data using the table context menu

1. Select a table visual in a dashboard or in the Visual Gallery.
2. Locate the field in the table and select  next to its column heading to access the table context menu.

Date UTC	...	☰
Tuesday, Sep 17,		
Tuesday, Sep 17,		
Tuesday, Sep 17,		
Tuesday, Sep 17,		
Tuesday, Sep 17,		

Autosize All Columns
Group by Date
Format Date

3. Select **Format <field>** on the context menu. A Format work area opens.

Format: Date
×

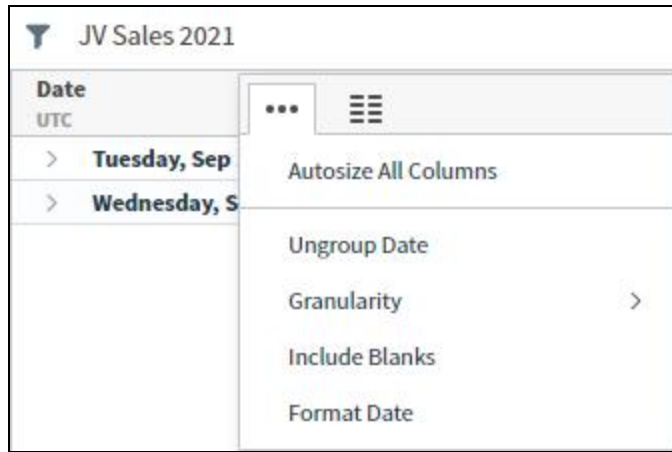
Year	Numeric
Month	Short
Weekday	Long
Day	Numeric
Hour	2-Digit
Hour12	Auto
Minute	2-Digit

Reset
Cancel
Apply

4. Select the appropriate date formats from available options. Options vary based on the [granularity you define](#) at the source level. See [Date Time Format Options](#). Select **Apply** to apply your changes to the data in the table column, or **Reset** reapply the source formatting.
5. Optionally, repeat for other fields in the table.
6. Save the visual, or the dashboard and visual.

Format aggregated data using the table context menu

1. Select a table visual in a dashboard or in the Visual Gallery.
2. Locate the field that includes aggregated in the table and select  next to its column heading to access the table context menu.



3. Select **Format <field>** on the context menu. A Format work area opens.

Format: Date
×

Year	Numeric
Month	Short
Weekday	Long
Day	Numeric
Hour	2-Digit
Hour12	Auto
Minute	2-Digit

Reset
Cancel
Apply

4. Select the appropriate date formats from available options. Options vary based on the [granularity you define](#) at the source level. See [Date Time Format Options](#). Select **Apply** to apply your changes to the data in the table column, or **Reset** reapply the source formatting.
5. Optionally, repeat for other fields in the table.
6. Save the visual, or the dashboard and visual.

Date Time Format Options

The available fields vary based on the data available in the field.

Not all fields may be available for all time formats.

Format Option	Description
Year	Select None , Numeric (2024), 2-Digit (24), Narrow , or Short .
Day Of Year	Select None or Short .
Quarter	Select None , Range , Narrow , Numeric (1-4), or 2-Digit (01-04). Selections for Quarter are applied only if the time granularity is set to Quarter. Not all options may be available for all time fields.
Month	Select None , Numeric (1-12), 2-Digit (01-12), Long (January, March), Short (Jan, Mar), or Narrow (J, M).
Week	Select None , WeekStart , WeekEnd , Range , Narrow (w1-w53), Numeric (1-53), or 2-Digit (01-53).
Weekday	Select Long (Friday, Sunday), Short (Fri, Sun), Narrow (F, S), or None . The default is None , to show no day of the week.
Day	Select None , Numeric (1-7), 2-Digit (01-07), Narrow , or Short .
Hour	Select Numeric (1-24) or 2-Digit (01-24).
Hour12	Select a 12 or 24 hour format option for Hour12. ▪ Auto displays the hour format defined in the source data. ▪ True overrides the source format, displaying the hours in 12 hour format, with an appended AM or PM. ▪ False overrides the source format, displaying the hours in 24 hour format.
Minute	Select Numeric (0-59) or 2-Digit (00-59).
Second	Select Numeric (0-59) or 2-Digit (00-59).

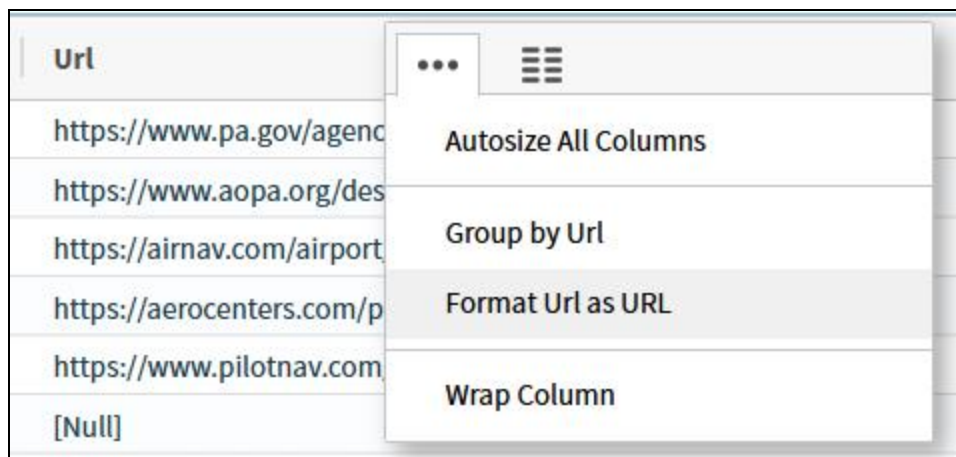
Format Images or a URL Using the Table Context Menu

This applies to: *Visual Data Discovery*

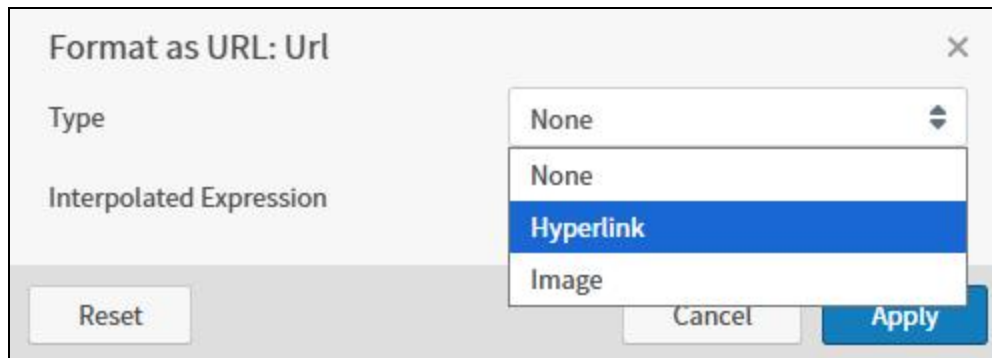
You can include images or URLs included with your data source in a table to allow users to select and navigate to the hyperlink, or view images associated with the data. Use the table context menu to define the size of images

Format a hyperlink (URL) using the table context menu

1. Select a table visual in a dashboard or in the Visual Gallery.
2. Locate the field in the table and select  next to its column heading to access the table context menu.



3. Select **Format <field> as URL** on the context menu. A Format as URL work area opens.



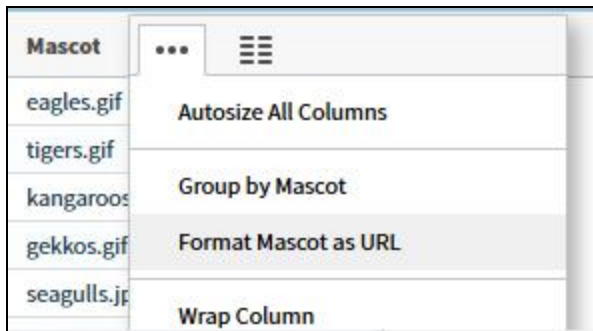
4. Select **Hyperlink**, then **Apply**. The URL is formatted in the table as a hyperlink users can select to navigate to the referenced site.
5. You can optionally apply an **Interpolated Expression** to the end of the hyperlink, such as a referrer or other access information.



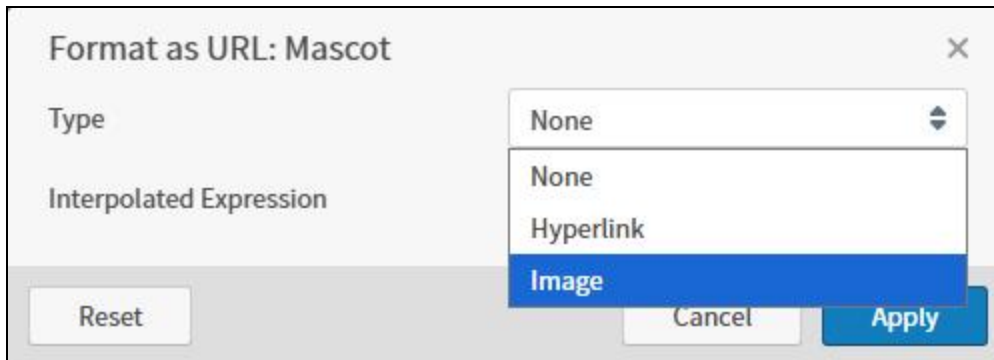
Note: Remove the hyperlink by selecting again, then None from the Type. Select **Apply** to apply your changes.

Format an image using the table context menu

1. Select a table visual in a dashboard or in the Visual Gallery.
2. Locate the field in the table and select  next to its column heading to access the table context menu.



3. Select **Format <field> as URL** on the context menu. A Format as URL work area opens.



4. Select **Image**. The work area expands to allow you to add more information.

Format as URL: Mascot
×

Type

Image

Width

^

↓

Height

^

↓

Interpolated Expression

+

Reset

Cancel

Apply

5. Add the **Width** and **Height** of your image as you want it to display in pixels. Select **Apply** to apply your changes.

Tree Maps

This applies to: *Visual Data Discovery*

Tree maps are based on two metrics and one attribute. They are supported by all Symphony [data connectors](#).



Note: To edit the number or date and time format for this visual, see [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

Configure Colors for a Specific Tree Map

Specify the color settings for a specific tree map using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

3. Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual. - For gradient color styles, use the legend's gradient slider to show and hide your data. If available, enable or disable a static legend for this visual.
Color Metric	Select the metric that affects the segment color in the visual.
<type> Color Palette	If Inherit from Theme is selected, the color palette is determined by the theme selected for the Symphony UI. To override the palette selected by the theme, clear the Inherit from Theme checkbox and select a different color palette.
Color Mode	Select Distinct Colors or Gradient to identify the way colors are used on the screen.

Setting	Description
	Either specific distinct colors will be used or a gradient of colors will be used.
Threshold Mode	If you selected the Gradient color mode, this setting cannot be changed. If you selected the Distinct Colors color mode, select either Auto or Manual from the drop-down list. Auto will automatically assign thresholds and colors for the visual. Manual enables you to change the thresholds and colors used on the visual.
Number of colors	Specify the number of colors to use for the visual.
Color Rules	Color rules allow you to change the colors for each color used for the visual. In addition, if you specified a Manual threshold mode, you can select the thresholds used for color settings in the visual.

4. Close the Color sidebar and the color settings are dynamically applied to the visual.

5. Select  to save the dashboard and the visual with its updated settings.

Understand Visual Color Condition Thresholds

You can set threshold color conditions for metric-based visuals. At least two color settings are required. In addition, thresholds are specified between each color setting. (So three color settings require two threshold settings; four color settings require three threshold settings, etc.)

- The color for Color 1 is used when the value of the color metric is less than the first threshold value.
- The color for Color 2 is used when the value of the color metric falls between the first and second threshold values.
- If only three colors are used for the visual, the color for Color 3 is used when the value of the color metric is greater than or equal to the second threshold value.
If more than three colors are used, the color for Color 3 is used when the value of the color metric falls between the second and third threshold values.
When more than three colors are used, the colors continue to be applied in this pattern for all threshold settings; any color metric values greater than the last threshold setting have the final color applied.

You can have Symphony automatically set the thresholds or you can manually set them.

For information about the color encoding supported by Symphony, see [Specify Colors](#).

Waterfall

This applies to: *Visual Data Discovery*

Waterfall visuals are based on at least one time attribute and one or multiple metrics, and can incorporate positive and negative values. You can include a [reference line](#), [grid lines](#), and a Totals bar. Waterfall visuals with multiple metrics are supported by all Symphony [data connectors](#).

This topic describes:

- [Configure Settings For A Waterfall Visual](#)
- [Configure Colors For A Waterfall Visual](#)
- [Multiple Metrics In A Waterfall Visual](#)

For information on setting even time intervals, see [Even Time Intervals](#).

Configure Settings for a Waterfall Visual

Change the settings for a waterfall visual

1. Edit the waterfall visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select the settings icon () on the [sidebar menu](#). The Waterfall Settings sidebar for the visual appears.

East Coast Sales Link

×

Waterfall Settings

Labels

Show Labels

Absolute Values

Total

Show Total

Label

Total

Style

Bar Thickness

100

↑

↓

- Alter the settings as needed:

Setting	Description
Show Labels	Enable to show the field names as labels in the visual. Disable to hide the field names.
Absolute Value	Enable to show the absolute value represented by each waterfall bar. Disable to hide the absolute value.
Show Total	Enable to show a total representation of all information included in the waterfall bars.
Label	By default, the Label for total is Total; change as needed.
Bar Thickness	Adjust the thickness of the bars in your visual as needed.

- Optionally, edit the number or date and time format for this visual. See [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

6. Select the save icon () to save the visual, or dashboard and the visual with updated settings.

Configure Colors for a Waterfall Visual

Specify the color settings for a Waterfall Visual using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

3. Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. ■ For distinct color styles, select a data point in the legend to turn it off and on in the visual. ■ For gradient color styles, use the legend's gradient slider to show and hide your data. ■ Use the color selector to manually assign colors for legend items. If available, enable or disable a static legend for this visual.
Color	Manually select the colors for each metric using the color selector. Visuals that incorporate positive and negative values displays color options paired as <field> and <field> (Negative). Options include ■ Select individual colors to choose a custom color for any or all metrics. Custom colors are listed by metric in the Assigned Colors work area. ■ Select Reset Colors in the Assigned Colors work area to revert your colors to their previous saved state.
Total Color	Manually select a color for the Total using the color selector, or select the Inherit from theme checkbox to use the color palette specified by the theme .
<type> Color Palette	Select a color palette for this specific visual.

Setting	Description
	Select the Inherit from theme checkbox to use the color palette specified by the theme .

4. Close the Color sidebar and the color settings are dynamically applied to the visual.
5. Select  to save the dashboard and the visual with its updated settings.

Multiple Metrics in a Waterfall Visual

If you use multiple metrics in your waterfall visual, you can control the order in which the metrics appear in the waterfall. Add one or more metrics to the Y axis in the order you'd like them to appear. The first one you add will be the left most metric, and subsequent metrics will appear to the right of existing metrics.

Word Clouds

This applies to: *Visual Data Discovery*

Word clouds are based on two metrics and one attribute. They are supported by all Symphonys [data connectors](#).



Note: To edit the number or date and time format for this visual, see [Configure Number Formatting For Visuals](#) and [Configure Date And Time Formatting For Visuals](#).

Configure Colors for a Specific Word Cloud

Specify the color settings for a specific word cloud using the Color sidebar

1. Edit the visual you want to modify. See [Edit Visuals](#).
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears. If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.



Select  on the [sidebar menu](#). The Color sidebar for the visual appears.

3. Configure the color settings as described below. As you change the color settings, the legend at the top of the Color sidebar shows how the legend will appear on the visual. Supported color specifications are described in [Specify Colors](#).

Setting	Description
Legend	Enable or disable to display a dynamic legend in this visual. Dynamic legends allow you to temporarily add or remove data shown in the visual. - For distinct color styles, select a data point in the legend to turn it off and on in the visual. - For gradient color styles, use the legend's gradient slider to show and hide your data. If available, enable or disable a static legend for this visual.
Color Metric	Select the metric that affects the segment color in the visual.
<type> Color Palette	If Inherit from Theme is selected, the color palette is determined by the theme selected for the Symphony UI. To override the palette selected by the theme, clear the Inherit from Theme checkbox and select a different color palette.
Color Mode	Select Distinct Colors or Gradient to identify the way colors are used on the screen.

Setting	Description
	Either specific distinct colors will be used or a gradient of colors will be used.
Threshold Mode	If you selected the Gradient color mode, this setting cannot be changed. If you selected the Distinct Colors color mode, select either Auto or Manual from the drop-down list. Auto will automatically assign thresholds and colors for the visual. Manual enables you to change the thresholds and colors used on the visual.
Number of colors	Specify the number of colors to use for the visual.
Color Rules	Color rules allow you to change the colors for each color used for the visual. In addition, if you specified a Manual threshold mode, you can select the thresholds used for color settings in the visual.

4. Close the Color sidebar and the color settings are dynamically applied to the visual.

5. Select  to save the dashboard and the visual with its updated settings.

Understand Visual Color Condition Thresholds

You can set threshold color conditions for metric-based visuals. At least two color settings are required. In addition, thresholds are specified between each color setting. (So three color settings require two threshold settings; four color settings require three threshold settings, etc.)

- The color for Color 1 is used when the value of the color metric is less than the first threshold value.
- The color for Color 2 is used when the value of the color metric falls between the first and second threshold values.
- If only three colors are used for the visual, the color for Color 3 is used when the value of the color metric is greater than or equal to the second threshold value.
If more than three colors are used, the color for Color 3 is used when the value of the color metric falls between the second and third threshold values.
When more than three colors are used, the colors continue to be applied in this pattern for all threshold settings; any color metric values greater than the last threshold setting have the final color applied.

You can have Symphony automatically set the thresholds or you can manually set them.

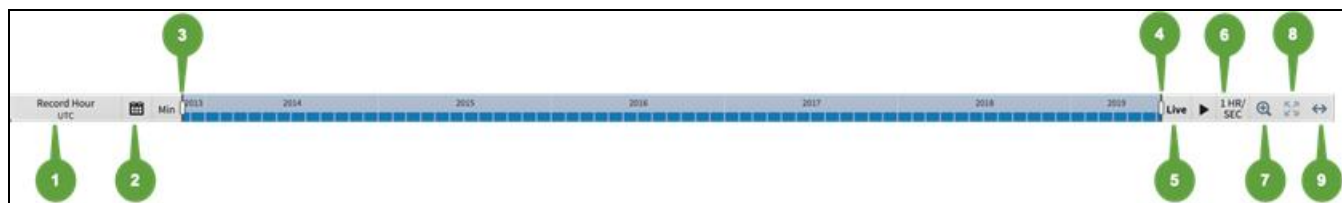
For information about the color encoding supported by Symphony, see [Specify Colors](#).

Use the Time Bar

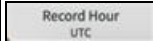
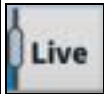
This applies to: *Visual Data Discovery*

Symphony supports time-based attributes for both live streaming sources (like sources created using upload API) and historical data sets (like SQL-based tables). When time-based attributes are available for a data source, the time bar can be used on a dashboard.

Use the time bar to filter your data discovery visuals using a time attribute. It appears at the bottom of your dashboard. The time bar that is shown depends on the visual on the dashboard that you have selected. The following diagram depicts a sample time bar, with its parts identified:



Each section is described in the following table:

Number	Image	Description
1		Shows the time field selected for the time bar. Use this to change the time field. See Change the Time Bar Field .
2		Allows you to select a static or dynamic time range for the time bar. See Adjust the Time Bar Range Using the Time Range Dialog .
3		The From slider. Slide this to the right to change the minimum static time range. See Adjust the Time Bar Range Using Time Bar Sliders .
4		The To slider. Slide this to the left to change the maximum static time range. See Adjust the Time Bar Range Using Time Bar Sliders .
5		Indicates whether or not live data is enabled for the visual's data source. If Live appears here, it is live data is enabled. If Max appears here, live data is not enabled.

Number	Image	Description
6		Allows you to control data playback, if it is enabled for the visual's data source.
7		When you select this, the time bar zooms to view only the specified range. All other times are not visible. See Zoom Into a Time Bar Range .
8		When you select this, the time bar expands to show the available range of times in the data.
9		When you select this, the maximum range of data is selected. The data shown expands to include all dates and times in the data. See Select the Maximum Time Range .

You can set time bar settings in data source configurations that will be used, by default, for each new visual created using the data source. See [Configure Time Bar Defaults](#).

In addition, see the following related topics:

- [Enable the Time Bar for a Visual](#)
- [Disable the Time Bar for a Visual](#)
- [Filters and Time Bar Interaction](#)
- [Work with Unified Time Bars](#)
- [Live Mode and Historical Playback](#)
- [Even Time Intervals](#)

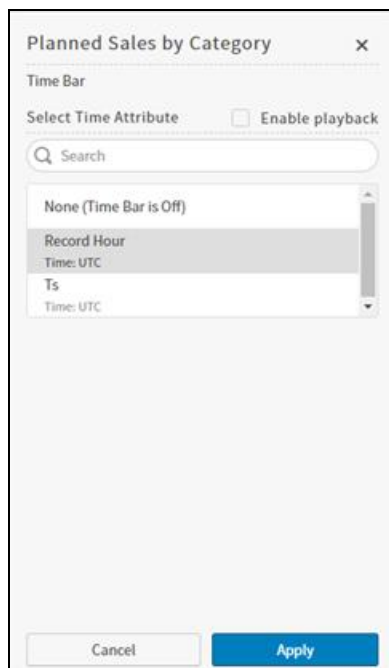
Use the Time Bar Sidebar

This applies to: *Visual Data Discovery*

The Time Bar sidebar lets you control some of the time bar settings for a visual. Controls for changing the time bar settings are provided using the interactivity sidebar. See [Control How Users Interact With A Visual](#).

Access the Time Bar sidebar for a visual

1. Select the visual in the Visual Gallery or on a dashboard.
2. If you selected the visual on a dashboard, select **Settings** on the [visual drop-down menu](#) to access the [sidebar menu](#) for the visual.
3. Select the visual style option () on the [sidebar menu](#) for the visual. The Time Bar sidebar opens.



4. Using the Time Bar sidebar, you can:

- i. Enable the time bar. See [Enable The Time Bar For A Visual](#).
- ii. Disable the time bar. See [Disable The Time Bar For A Visual](#).
- iii. Select or change the time bar field. See [Change The Time Bar Field](#).
- iv. Enable playback, if the selected time bar field supports it. See [Live Mode And Historical Playback](#).



Note: If you are using a field that has time zone information disabled (select **Not Specified**), only the time-related information is shown in the user interface and exported with your data. Time zone labels are not included.

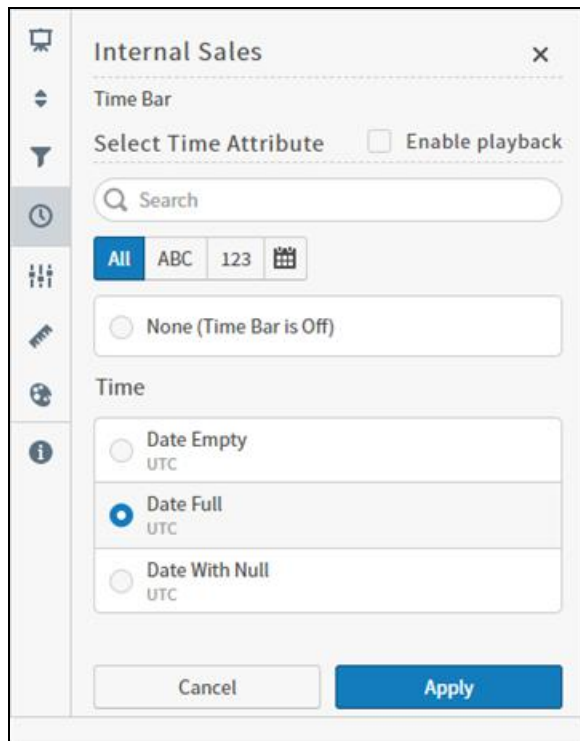
5. After making changes, select **Apply** to apply the time bar changes you have specified.
6. Save the visual or dashboard to save your changes.

Enable the Time Bar for a Visual

This applies to: *Visual Data Discovery*

Enable the time bar for a visual

1. Select the visual in the dashboard or in the Visual Gallery.
2. If you selected the visual on a dashboard, select **Settings** on the [visual drop-down menu](#) to access the [sidebar menu](#) for the visual.
3. Select the visual time bar icon () on the [sidebar menu](#) for the visual. The [Time Bar sidebar](#) opens.



4. Select a time attribute on the **Time Bar** sidebar. The **None (Time Bar is Off)** option is not available for the **Line** charts.
5. Optionally, select the **Enable playback** checkbox to enable the **Play/Pause** button (the Data DVR functionality) on the **Time Bar**. You can enable or disable this option in the **Global Default Settings** section for your data source. For more information about the requirements for playback, see [Live Mode And](#)



[Historical Playback](#).

6. Select **Apply**.
7. [Save](#) the visual or dashboard.

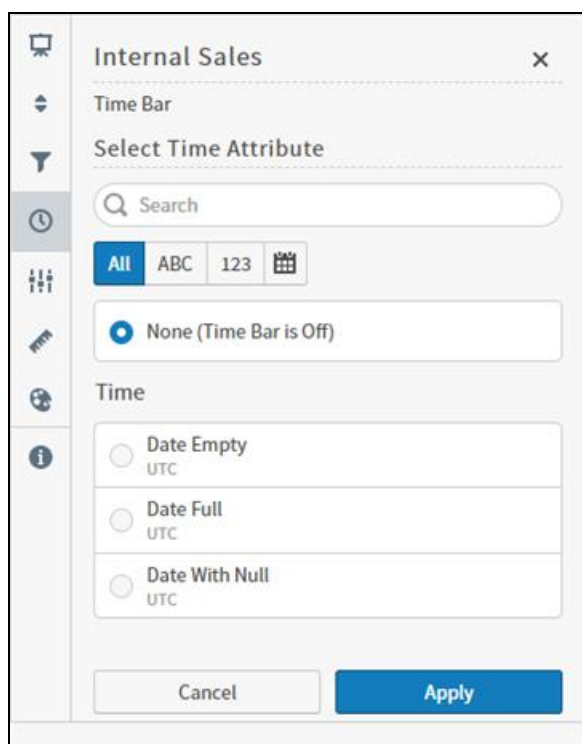
After the time bar is enabled, you can use it for the visual. If the time zone label is disabled (select [Not Specified](#)), time is shown in the local user's time with no time zone information. If additional visuals on the dashboard are create from the same data source, you can use a unified time bar. See [Work With Unified Time Bars](#).

Disable the Time Bar for a Visual

This applies to: *Visual Data Discovery*

Disable the time bar for a visual

1. Select the visual in the dashboard or in the Visual Gallery.
2. If you selected the visual on a dashboard, select **Settings** on the [visual drop-down menu](#) to access the [sidebar menu](#) for the visual.
3. Select the visual time bar icon () on the [sidebar menu](#) for the visual. The [Time Bar sidebar](#) opens.



4. Select the **None (Time Bar is Off)** option. This option is not available for the **Line** charts.
5. Select **Apply**.
6. [Save](#) the dashboard.



- Archive of documentation for Logi Symphony v24

The time bar is disabled for the visual.

Change the Time Bar Field

This applies to: *Visual Data Discovery*

You can change the time bar field for a visual in the [visual time bar settings](#) or [on the time bar](#) itself.

While you are working on a dashboard or visual, the time range and playback configuration you have selected for different time fields are retained. So when you switch between different time fields, the time range and playback settings may change. For example, you might have analyzed your data using the following time fields:

Field	Range	Playback
Date	January 2024-March 2024	On (enabled)
Ts	April 2024	Off (disabled)

When you switch between these fields on the time bar, the ranges and playback settings also switch, as appropriate for each field.

Change the Time Bar Field Using Visual Settings

Change the time bar field for a visual using the visual time bar settings

1. Select the visual in the dashboard or in the Visual Gallery.
2. If you selected the visual on a dashboard, select **Settings** on the [visual drop-down menu](#) to access the [sidebar menu](#) for the visual.
3. Select the visual time bar icon () on the [sidebar menu](#) for the visual. The [Time Bar sidebar](#) opens.
4. Select a new time field on the **Time Bar** sidebar. The **None (Time Bar is Off)** option is not available for the **Line** charts.
5. Optionally, select the **Enable playback** checkbox to enable the **Play/Pause** button (the Data DVR functionality) on the **Time Bar**. You can enable or disable this option in the **Global Default Settings** section for your data source. For more information about the requirements for playback, see [Live Mode And Historical Playback](#).
6. Select **Apply**.
The time bar for the visual is changed. If the visual is using a unified time bar, all the visuals using the unified time bar are also changed. See [Work With Unified Time Bars](#).
7. [Save](#) the dashboard or visual.



Change the Time Bar Field on the Time Bar

Change the time bar field for a visual using the time bar

1. Select the visual.
2. On the left side of the time bar, select the field name. A Time Bar dialog pops up listing all the time fields in the data source for the visual.
3. Select a new time field on the dialog. The **None (Time Bar is Off)** option is not available for the **Line** charts.
The time bar for the visual is changed. If the visual is using a unified time bar, all the visuals using the unified time bar are also changed. See [Work With Unified Time Bars](#).
4. Close the Time Bar dialog.
5. [Save](#) the dashboard.

Adjust the Time Bar Range

This applies to: *Visual Data Discovery*

You can adjust the time bar range using the time bar range dialog, the From and To sliders, and maximum range selector. You can also zoom into a selected time range.

Except for derived fields, the default range for a time bar field is the maximum range of its values.

The default range for a derived time field is always the current year. Use the [range dialog on the time bar](#) to adjust the range for the derived field to represent the actual data available. For example, if your derived field data is for 2017-2018, the default range will be the current year, which might fall after the actual dates in the data. Using the range dialog on the time bar, you can adjust the range to 2017-2018.

See the following topics:

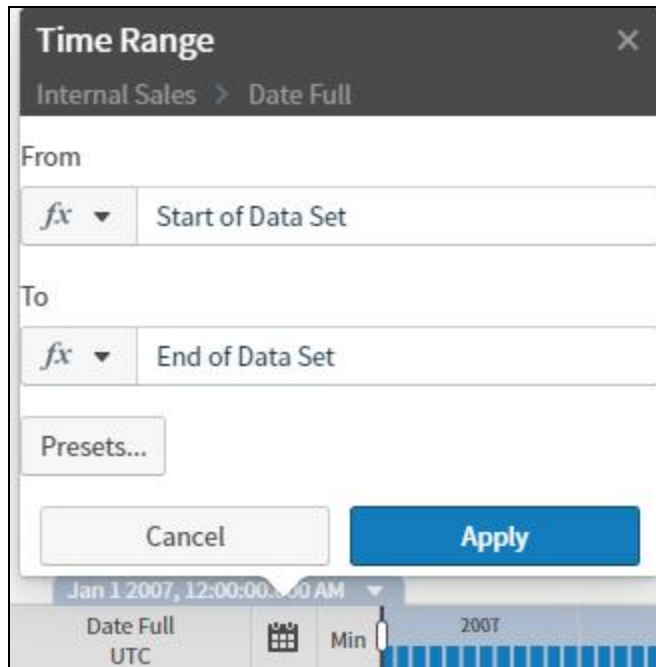
- [Adjust The Time Bar Range Using The Time Range Dialog](#)
- [Adjust The Time Bar Range Using Time Bar Sliders](#)
- [Select The Maximum Time Range](#)
- [Zoom Into A Time Bar Range](#)

Adjust the Time Bar Range Using the Time Range Dialog

This applies to: *Visual Data Discovery*

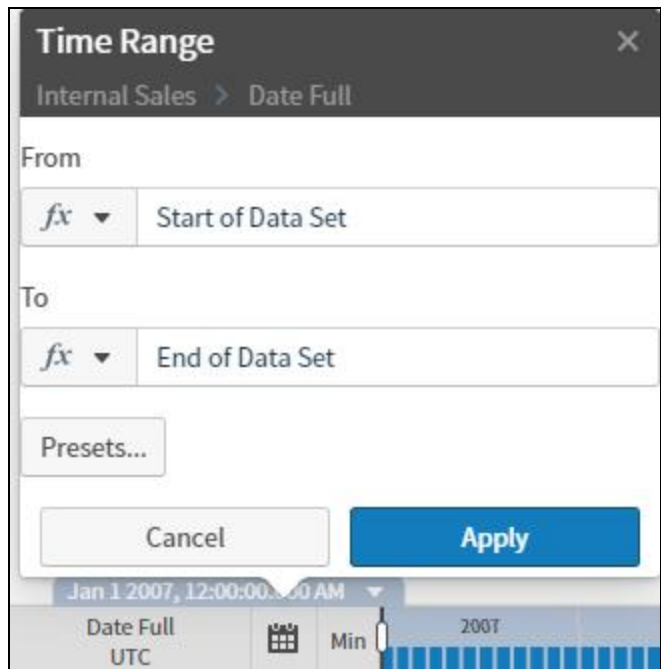
Adjust the time bar time range for a visual using the time range dialog

1. Select the visual.
2. Select the range setting icon () on the time bar. The Time Range dialog appears.

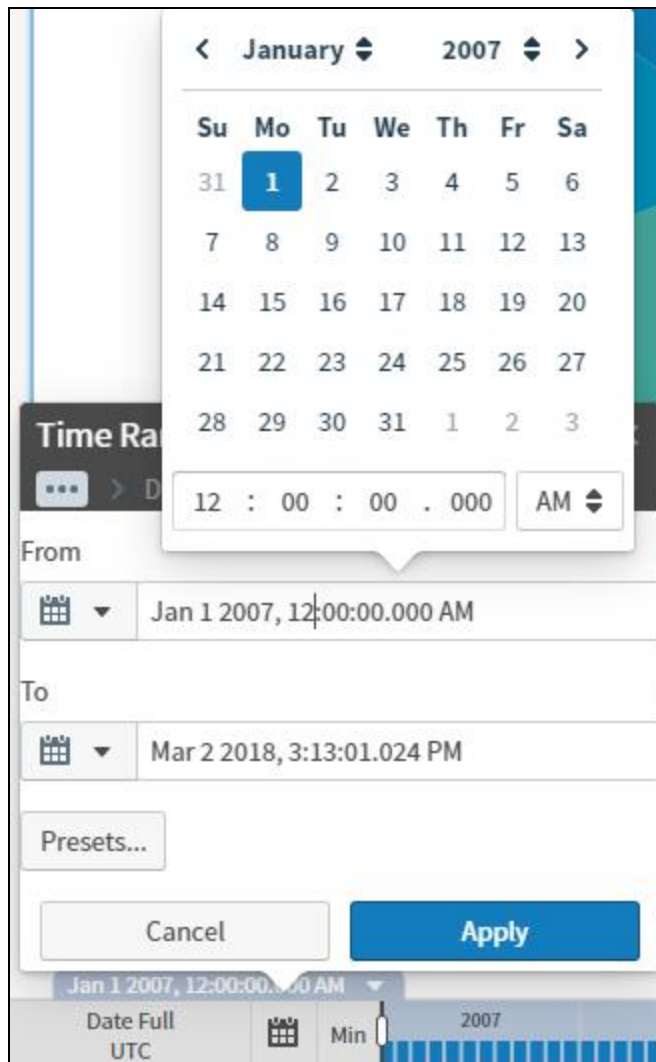


3. Use the **From** and **To** boxes to specify the default time bar range.
You can set the range in static time or dynamic time, or use preset ranges provided with Symphony.

- i. Select **Static Time** or **Dynamic Time** in the **fx** drop-down menu.



If you select **Static Time**, the **From** and **To** boxes are filled with default dates and times. Use the boxes to select specific from and to times:



Time Range

< January 2007 >

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

12 : 00 : 00 . 000 AM

From
Jan 1 2007, 12:00:00.000 AM

To
Mar 2 2018, 3:13:01.024 PM

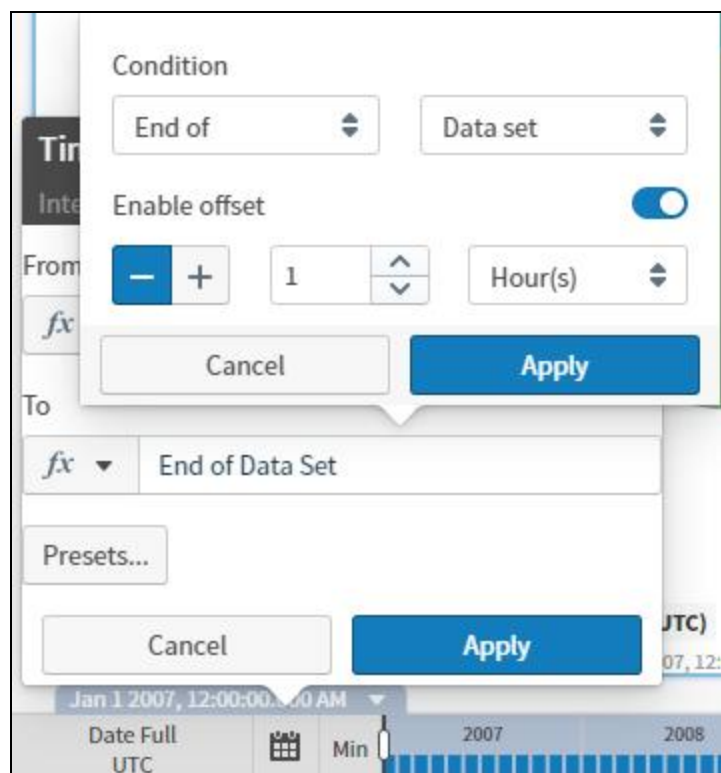
Presets...

Cancel Apply

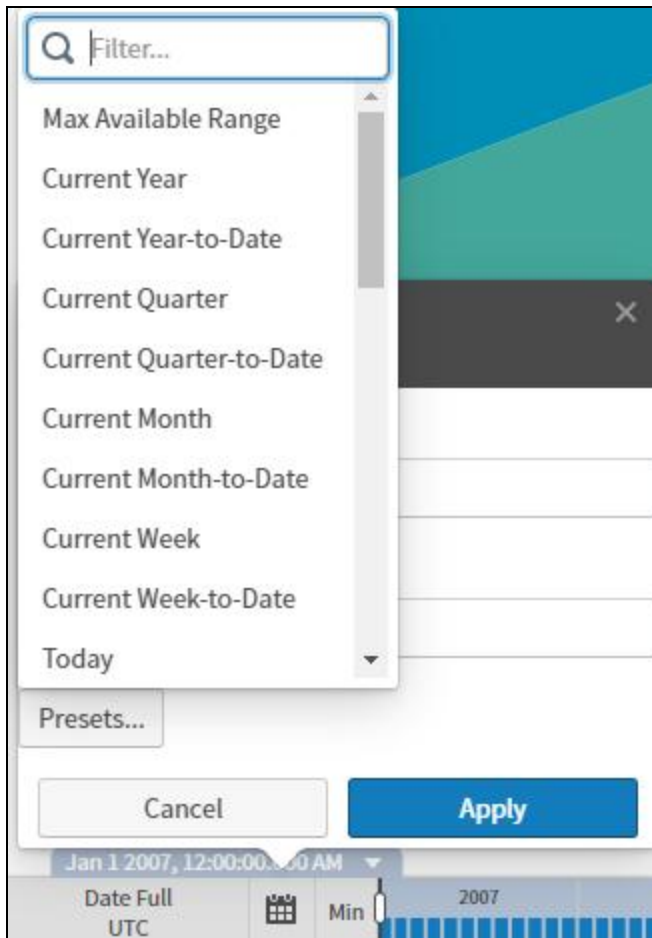
Jan 1 2007, 12:00:00.000 AM

Date Full UTC Min 2007

If you select **Dynamic Time**, the **From** and **To** boxes are filled with **Start of data** and **End of data** automatically. Use the boxes to select different dynamic from and to times:



- ii. Alternatively, select **Presets...** to fill the **From** and **To** boxes with predefined time ranges provided by Symphony:



Use the filter box at the top of the presets list to locate the preset setting you want. Descriptions of each of the preset options are provided in [Preset Time Ranges](#).

4. Select **Apply** to apply the new time range setting. It is applied to the visual. If the visual is using a unified time bar, the new time range setting is applied to all the visuals using the unified time bar. See [Work With Unified Time Bars](#).
5. Save the dashboard.

Adjust the Time Bar Range Using Time Bar Sliders

This applies to: *Visual Data Discovery*

Adjust the time bar time range for a visual using the time bar sliders

1. Select the visual.

2. Slide the From slider () on the time bar to the earliest time for the time range you want.

3. Slide the To slider () on the time bar to the latest time for the time range you want.

4. Save the dashboard.

To select the maximum range of values, select  on the time bar.

Select the Maximum Time Range

This applies to: *Visual Data Discovery*

Select the maximum time range on the time bar

1. Select the visual.
2. Select  on the right side of the time bar to select the maximum time range on the time bar.
3. Save the dashboard.

Zoom Into a Time Bar Range

This applies to: *Visual Data Discovery*

Zoom into a time bar range

1. Select a visual on the dashboard.
2. Select a time range for the time bar. See [Adjust The Time Bar Range](#).



3. Select zoom icon on the right side of the time bar to zoom into the selected range. Only the times for the time range you selected are shown on the time bar.



To view all the available times in the data, select all icon on the time bar. To select the maximum range of values, select maximize



on the time bar.

4. Save the dashboard.



Filters and Time Bar Interaction

This applies to: *Visual Data Discovery*

Using the filters and the time bar, you can examine your data in different dimensions. You can add time attributes when you create a new filter and control the filter from the time bar. This allows you to narrow the scope of the data by time. You can also set a filter directly in the time bar.

Filters applied in the Filters menu override any filters you set in the time bar.

The filters you create and the time bar actions you set influence the data shown on your visual. Depending on the filter settings and how they interact, it is possible that the combined results return no data. This is because the time filters that you set and the filters in the time bar are mutually exclusive. As a result, there is no data to display, so the intersection of the two time filters produces no result.

Work with Unified Time Bars

This applies to: *Visual Data Discovery*

When you work with your dashboard, you can apply the settings that you have configured on your time bar to multiple visuals from the same data source. This enables you to view and playback the data on different visuals for the same time period and filtered by the same time filter. The time bar shared by the visuals is called a unified time bar.



Note: You can only use a unified time bar for visuals for which the time bar has been enabled.

By default, new visuals from the same data source are applied to the same unified time bar on a dashboard, provided the dashboard has only one time bar configured for visuals using that data source. If the existing visuals on the dashboard use different time bars, new visuals are not assigned to the unified time bar and must be configured manually to do so.

Apply a Unified Time Bar to Multiple Visuals

If you have several visuals from the same data source or your visuals contain [cross-source links](#), you can use different time bar settings for different visuals.

Apply a unified time bar to multiple visuals that use the same data source on your dashboard

1. Select a visual on the dashboard and configure the time bar settings, as described above.
2. Select the time attribute on the left side of the time bar. The Time Bar dialog appears.



Note: If you are using a field that has time zone information disabled (select [Not Specified](#)), only the time-related information is shown in the user interface and exported with your data. Time zone labels are not included.

3. In the Time Bar dialog, select the visuals from your dashboard you want to use a unified time bar. The available visuals are listed in the **Applies to** section. The visuals selected will share a unified time bar. The unselected visuals will maintain their own individual time bars.



Note: If your dashboard contains visuals from different data sources, the **Applies to** section lists the visuals separated by data source. The active section in the **Applies to** list depends on the visual selected in the dashboard.

4. Save the dashboard.

Change the Unified Time Bar Attribute

Change the unified time bar attribute

1. Select a visual on the dashboard that is using the time bar.
2. Select the time attribute on the left side of the time bar. The Time Bar dialog appears.
3. In the Time Bar dialog, select a different time attribute. all the visuals using the unified time bar will adjust to use the new time attribute.

 **Note:** If your dashboard contains visuals from different data sources, the **Applies to** section lists the visuals separated by data source. The active section in the **Applies to** list depends on the visual selected in the dashboard.

4. Save the dashboard.

Change the Unified Time Bar Range

Change the unified time bar range

1. Select a visual on the dashboard that is using the time bar.
2. Do one of the following:
 - i. Select the range setting on the time bar and select a new static time range, dynamic time range, or preset time range for the time bar. See [Adjust the Time Bar Range](#).
 - ii. Use the time bar sliders to adjust the range.
3. Save the dashboard.

Remove a Visual from the Unified Time Bar

Remove a visual from a unified time bar

1. Select the visual on the dashboard.
2. Select the time attribute on the left side of the time bar. The Time Bar dialog appears.
3. In the Time Bar dialog, clear the checkbox associated with the visual in the **Applies to** section. The visual will no longer share the unified time bar.

Note: If your dashboard contains visuals from different data sources, the **Applies to** section lists the visuals separated by data source. The active section in the **Applies to** list depends on the visual selected in the dashboard.

4. Save the dashboard.

For example, suppose you need to filter the data in the *Sales by Hour* visual by the *Inserted* attribute for *JAN 10 2017 6 AM* on the *Real Time Sales* visual. When you select **Apply** to apply the filter, you will have to confirm breaking the unification. The *Real Time Sales* visual is updated and the time bar changes accordingly.

Live Mode and Historical Playback

This applies to: *Visual Data Discovery*

Live mode and historical playback (also known as Data DVR) allow you to get the most from data stores that support playback. The only difference between live mode and historical playback is the time range that is selected.

- Live mode refreshes field data on your visuals for date-time fields that are indexed as playable. In live mode, your data plays forever without an end date.
- Historical playback (Data DVR) shows the historical record of field data for date-time fields that are indexed as playable. Playback can show up to the last moment before the current period in your data.

Live mode and historical playback require:

- A date-time field in your data store (data base) that is either indexed or partitioned.
If indexed, the index should be non-clustered.

If your data store does not support indexing or partitioning, then live mode and historical playback are not available for that data. For most data stores, indexing is the default.
- The time zone used by the date-time field in the data source should align with the time zone used by the date-time field in your data store. The data source time zone can be set using the **Time Zone** attribute on the [Fields tab](#) of the data source definition.
- The data source should have live mode enabled. Use the **Live Mode** switch on the Global Settings tab of the data source configuration. See [Configure Time Bar Defaults](#).
- The data store should be capable of receiving new or updated data, that is, data that is not static like flat files.

Live mode and historical playback are supported for even time intervals. See [Even Time Intervals](#). Live mode and historical playback are not supported for fused data sources. See [Data Fusion Limitations](#).

 **Note:** Live mode and historical playback do not work for tables when the table is grouped. See [Group And Ungroup Table Data](#).

Playback mode (Data DVR) is available if the date-time field in your data source has the **playable** property set to **True** and the granularity of the field is not greater than **day**. When is the **playable** property in a data source set to true?

1. If the date-time field in the data store is indexed or partitioned. For Impala data stores, this option can also be enabled if the selected date field has a connection to the partitioned date field.

2. If the data store is Spark (for example, Spark SQL).

3. In Amazon Redshift, data sources for the first sort key.

Support for this feature by connector is shown in the following table.

Key:Y - Supported; N - Not Supported; N/A - not applicable

Connector	Supported?
Amazon Redshift	Y
Amazon S3	Y
Apache Drill	Y
Apache Phoenix	N
Apache Phoenix Query Server (QS)	N
Apache Solr	N
BigQuery	Y
Business Central Jet	N
Cloudera Impala	Y
Cloudera Search	N
Couchbase	N
Dremio	Y
Elasticsearch 7.0	Y
Elasticsearch 8.0	Y
File Upload	Y
HDFS	Y
Hive	Y
Jira	Y
MemSQL	Y
Microsoft SQL Server	Y
MongoDB	N
MySQL	Y
Oracle	Y



Connector	Supported?
PostgreSQL	Y
Python	N
Real Time Sales	Y
Salesforce	Y
SAP Hana	Y
SAP S/4HANA	Y
SAP IQ	Y
Spark SQL	Y
Snowflake	Y
Teradata	Y
TIBCO DV	Y
Trino	Y
File Upload (Upload API)	Y
Vertica	Y

See also [Configure Time Bar Defaults](#).

Even Time Intervals

This applies to: *Visual Data Discovery*

Even time intervals allow you to include all time groupings from your data source on a dashboard that have date or time data. You can select whether you want to display all time data, or just the data that returns a value. If time groups include a NULL value, these values are included. Filter by row as needed:

- Apply `Is not NULL` to hide null values
- Apply `Is NULL` to include only null values

Even time interval grouping is only available on dashboards that use a data source with date and time fields. It is also not available for KPI charts or maps.

Even time intervals can be displayed in live mode and historical playback using the time bar. See [Live Mode And Historical Playback](#).

See the following topics:

- [Apply Even Time Intervals On Most Visuals](#)
- [Apply Even Time Intervals On Pivot Tables](#)
- [Apply Even Time Intervals On Tables](#)

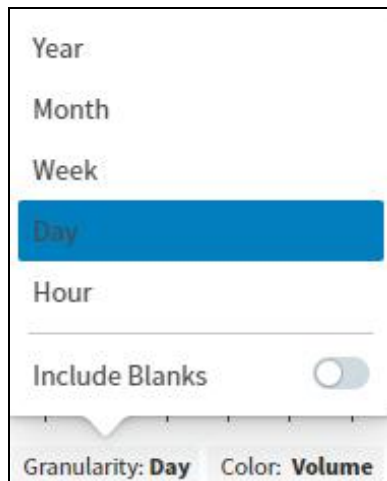
Apply Even Time Intervals on Most Visuals

This applies to: *Visual Data Discovery*

For more information about even time intervals, see [Even Time Intervals](#).

Apply even time intervals to data on bar, box plot, donut, floating bubble, heat map, line, packed bubble, pie, scatter, tree map, and word cloud visuals

1. [Edit](#) a dashboard with one of these visual styles that uses a data source containing date or time fields.
2. Select a time attribute for the visual Group (x-axis).
3. Select the Time Granularity box on the x-axis.



4. Slide **Include Blanks** on to request even time intervals. By default, the ability to show all values is disabled and only attributes with a value greater than NULL are displayed.

If this is a line chart, you can also select the **Display null as zero** checkbox to request that null values display as zeros on the chart:

Year
Month
Week
Day
Hour

Include Blanks ☐

☒ Display null as zero

Granularity: Hour

The dashboard updates to include all values from the data source.

Apply Even Time Intervals on Pivot Tables

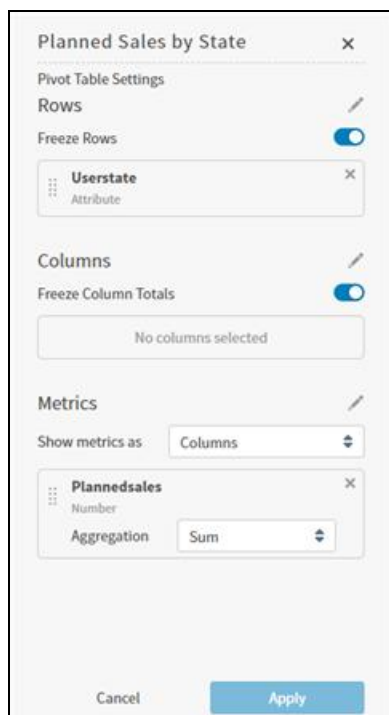
This applies to: *Visual Data Discovery*

For more information about even time intervals, see [Even Time Intervals](#).

Apply even time intervals to data on pivot tables

1. [Edit](#) a dashboard with a pivot table that uses a data source containing date or time fields.
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select settings  on the [sidebar menu](#). The Pivot Table Settings sidebar for the visual appears.



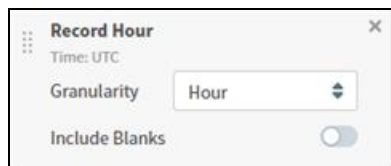
The screenshot shows the 'Pivot Table Settings' sidebar for a visual titled 'Planned Sales by State'. The sidebar is divided into three main sections: Rows, Columns, and Metrics.

- Rows:** The 'Freeze Rows' toggle is turned on. A single row attribute, 'Userstate', is selected.
- Columns:** The 'Freeze Column Totals' toggle is turned on. The message 'No columns selected' is displayed.
- Metrics:** The 'Show metrics as' dropdown is set to 'Columns'. A single metric, 'Plannedsales', is selected with an aggregation of 'Sum'.

At the bottom of the sidebar are 'Cancel' and 'Apply' buttons.

4. On the sidebar, select edit  in **Rows** or **Columns** and select a time field for the row or column. Select **OK**.

The time field is selected and expands so you can select its granularity and even time intervals setting.



5. Select the granularity for the time field.
6. Slide **Include Blanks** on to request even time intervals. By default, the ability to show all values is disabled and only attributes with a value greater than NULL are displayed.
7. Select **Apply** to apply the changes to the pivot table.
8. Optionally, select Filter to include a Null filter on the Range tab as needed:
 - i. Apply `Is not NULL` to hide null values
 - ii. Apply `Is NULL` to include only null values

[illegible]

Select **Continue** to add the filter, then **Apply** to apply your changes to the pivot table.

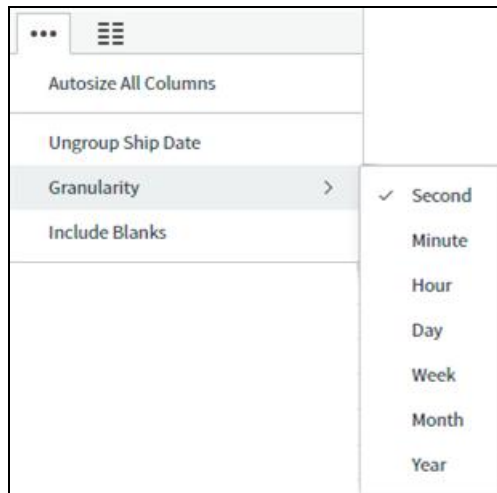
Apply Even Time Intervals on Tables

This applies to: *Visual Data Discovery*

If you group a table by a time field, you can select even time intervals for that time field. For more information about even time intervals, see [Even Time Intervals](#).

Apply even time intervals to a time field on a table from the table context menu

1. [Edit](#) a dashboard with a table that uses a data source containing date or time fields.
2. Group the table by a time field in the data. See [Group And Ungroup Table Data](#).
3. Select  next to the time field column heading to access the table context menu.



4. Select **Include Blanks** on the context menu. A check mark appears next to it.
Even time intervals are applied for the time field.

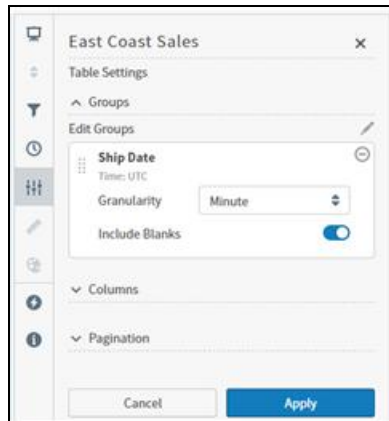
5. [Save](#) the dashboard.

Apply even time intervals to a time field using the sidebar menus

1. [Edit](#) a dashboard with a table that uses a data source containing date or time fields. At least one field must be grouped.
2. If you are editing the visual in a dashboard, select **Settings** from the [visual drop-down menu](#). The [sidebar menu](#) for the visual appears.

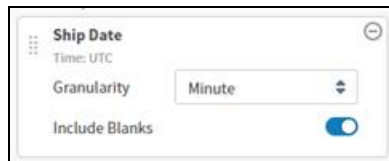
If you are editing the visual from the Visual Gallery, the sidebar appears to the right of the visual.

3. Select settings  on the [sidebar menu](#). The Table Settings sidebar for the visual appears.



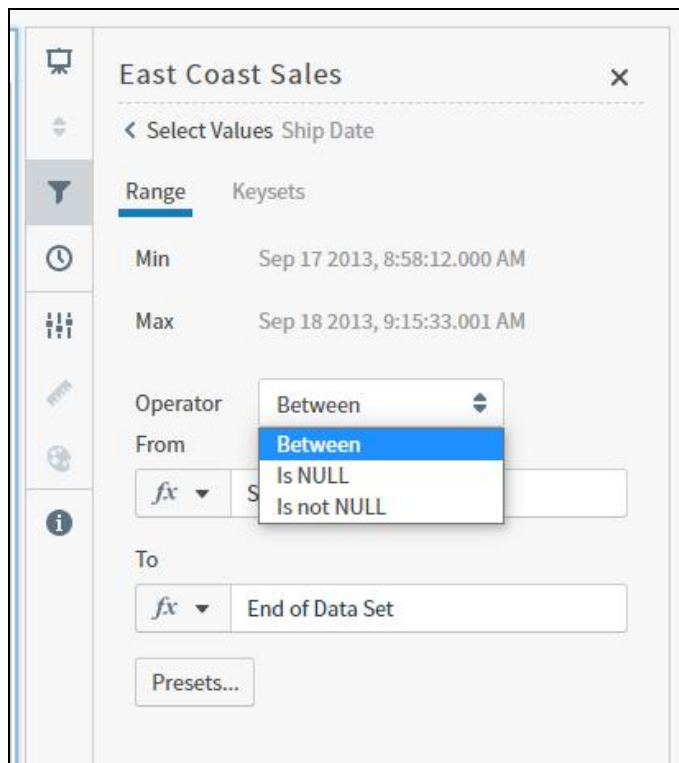
4. On the sidebar, select a time field in **Groups**.

The time field is selected and expands so you can select its granularity and even time intervals setting.



5. Select the granularity for the time field.
6. Slide **Include Blanks** on to request even time intervals. By default, the ability to show all values is disabled and only attributes with a value greater than NULL are displayed.
7. Select **Apply** to apply the changes to the table.
8. Optionally, select Filter to include a Null filter for this field on the Range tab as needed:

- i. Apply `Is not NULL` to hide null values
- ii. Apply `Is NULL` to include only null values



East Coast Sales [X]

< Select Values Ship Date

Range Keysets

Min Sep 17 2013, 8:58:12.000 AM

Max Sep 18 2013, 9:15:33.001 AM

Operator Between

From fx S

To fx End of Data Set

Presets...

Select **Continue** to add the filter, then **Apply** to apply your changes to the table.

Filter Data

This applies to: *Visual Data Discovery*

You can use filters to quickly find and display data on your dashboard [visuals](#) and in [filter snippets](#).

- To filter on attributes in your data, use row-level filters. These filters can be saved, reused, or shared with others in your environment. For more information, see [Apply Row-Level Filters](#).
- To filter your data using hierarchical fields, use hierarchy filters. These filters can be saved, reused, or shared with others in your environment. For more information, see [Filter by Hierarchy Field](#).
- Cross-visual filters are filters that are created from same-source and [cross-source link](#) fields. Visuals publish links to share with other visuals on the same dashboard and subscribe to links that are shared with them by other visuals. When a filter is created using the context menu from a link field, it becomes a *cross-visual filter* and is applied to all visuals that subscribe to the link, except the visual that created the filter. For more information, see [Control How Cross-Visual Filters Interact In A Dashboard](#).
- Wildcard filters can also be used to filter the data on your dashboard visuals. Wildcard filters are row-level filters that allow you to filter and analyze the data in a visual that matches specific combinations of character patterns. For more information, see [Apply Wildcard Filters To A Visual, Filter Snippet, Or Dashboard](#).
- Keysets are collections of unique data values that can be saved and used in further data analysis across data sources. They allow you to perform multipass and multisource filtering of the data. You can create a keyset by selecting a single field for the keyset from visual data. Filtering the visual data before creating the keyset limits the unique data values the keyset includes. The field you select for the keyset is known as the keyset's *key field*. Keysets can be applied as filters to other visuals that use the same or different data sources. For more information about keysets, see [Use Keysets](#).
- To filter on metrics and custom metrics, use aggregates, known as *group filters*. For more information about group filters, see [Apply Group Filters](#).
- You can restrict the data available to specific user groups using data source *row security filters*. See [Restrict Access To Data Using Row Security](#).
- Alternatively, use Filter Snippets to filter the data of your dashboard's visuals. See [Manage Filter Snippets](#).

Row-level, keyset, and group filters can be combined on a visual to provide the detail you need.



Note: When working with multiple filter types on the same visual, row-level filters (including wildcard filters) are applied first to a visual, keyset filters are applied next, and group filters are applied last on the aggregated result set.



When multiple values are specified for a single filter, the values are processed using OR processing. The records in the visual or filter snippet need only meet one of the filter value criteria to be selected for processing by the filter. However, when multiple filters are specified, AND processing is used. Records used must meet all filter criteria to be selected for use.

You can create and modify derived fields and custom metrics on the Filters sidebar while you are applying filters to your data. See [Maintain Custom Metrics](#) and [Maintain Derived Fields](#).

Controls for filter use by end users are provided using the interactivity sidebar. See [Control How Users Interact With A Visual](#).

The following links contain more detailed instructions and examples for using filters.

- [Apply Row-Level Filters](#)
- [Apply Group Filters](#)
- [Maintain Saved Filters](#)
- [Apply A Saved Filter To A Visual, Filter Snippet, Or Dashboard](#)
- [Use Keysets](#)
- [Remove A Filter From A Visual, Filter Snippet Or Dashboard](#)
- [Viewing The Applied Filters For A Visual Or Filter Snippet](#)

The Filters Sidebar

This applies to: *Visual Data Discovery*

Use the Filters sidebar to:

- Apply and remove filters on a visual or dashboard
- Review and save filters that are applied to a visual or dashboard
- Add, modify, and delete custom metrics
- Add, modify, and delete derived fields

You can't delete a custom metric if it is used by any visuals, filter snippets, materialized views, actions, or chart defaults.



Note: If you try to delete a visual, filter snippet, dashboard, dashboard link, source, or source field, Symphony displays an error message naming any objects dependent on the item you're trying to delete. You can delete the item after you've removed the association from the dependent object. See [Fields Usage](#).

Access the Filters sidebar

Select the filter icon on the [visual](#), filter snippet, or [dashboard](#) to access the appropriate filter sidebar.

- To access the filter sidebar, select its filter icon () or select **Settings** from the [menu](#) () and then select  on the [sidebar menu](#).
- To access the dashboard filter sidebar, select its filter icon (). The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar appears showing any filters that have been applied.

When you first access the Filters sidebar, it shows the active (applied) filters, if there are any. Cross-visual filters that have been applied from same-source and cross-source links are listed separately from filters that are applied from the Filters sidebar.

Raw Sales Data

×

Filters

Add Filter

Save Filters

Row Level Filters

Category

Include

Accessories

⊖

Ts (UTC)

CONTROL FROM TIMEBAR

Cross-Visual Filters

Note - These filters will not be saved to the visual.

Userstate

Link - State

Include

Ohio

⊖

If there aren't any applied filters, the filters sidebar shows three tabs: **Row**, **Group**, and **Saved** and the dashboard filters sidebar shows two tabs: **Row** and **Saved**.

You can add, review, and save filter sets using the Filters sidebar.

See the following topics:

- [Apply Row-Level Filters](#)
- [Apply Wildcard Filters to a Visual, Filter Snippet, or Dashboard](#)
- [Apply Group Filters](#)
- [Maintain Saved Filters](#)



- Archive of documentation for Logi Symphony v24

- [Use Keysets](#)
- [Remove a Filter from a Visual, Filter Snippet or Dashboard](#)



Apply Row-Level Filters

This applies to: *Visual Data Discovery*

You can apply row-level filters and saved filters for the data in a visual. When all the visuals in a dashboard use data from the same data source, you can apply row-level and saved filters for the data in all the visuals on the dashboard.

- [Apply A Row-Level Filter To A Visual Or Filter Snippet](#)
- [Apply A Row-Level Filter To A Dashboard](#)
- [Set An Attribute Filter](#)
- [Set A Numeric Field Filter](#)
- [Set A Time Field Filter](#)
- [Apply A Saved Filter To A Visual, Filter Snippet, Or Dashboard](#)

Apply a Row-Level Filter to a Visual or Filter Snippet

This applies to: *Visual Data Discovery*

You can apply row-level filters for the data in a visual or filter snippet. When more than one filter is applied (either via the visual or filter snippet itself or via a [dashboard filter](#)), the filter conditions are ANDed. In other words, both filter conditions must be met for the data to appear in the visual or filter snippet.

Apply a row-level filter to a visual or filter snippet

- To access the filter sidebar, select its filter icon  or select **Settings** from the [menu](#) () and then select  on the [sidebar menu](#).
The Filters sidebar appears showing any filters that have been applied.
- Three tabs appear on the Filters sidebar, allowing you to create a row-level filter, a group filter, or a saved filter. If these tabs do not appear, select **Add Filter** to see them.

Tab	Description
Row	The Row tab allows you to create a row-level filter, as described in the rest of this topic.
Group	The Group tab allows you to create and use a group filter. See Apply Group Filters . If you are using a KPI, raw data, histogram, or map markers visual, the Group tab is not available because all filters on these visuals are row-level filters.
Saved	The Saved tab shows saved filters that you can apply to the dashboard, filter snippet, or visual. See Maintain Saved Filters .

- Select the Row tab and then select the filter attribute, number, or time field you want to use from the list. The process of creating a row-level filter varies based on the type of field you select.
 - If you select an attribute field, see [Set An Attribute Filter](#).
 - If you select a numeric field, see [Set A Numeric Field Filter](#).
 - If you select a time field, see [Set A Time Field Filter](#).

You can also select the add icon  to access the [Derived Field Editor](#) or the [Custom Metrics Editor](#) to create or modify derived fields and custom metrics to be used as filters. See [Access The Derived Field Editor From The Filters Sidebar](#) and [Access The Custom Metrics Editor From The Filters Sidebar](#).

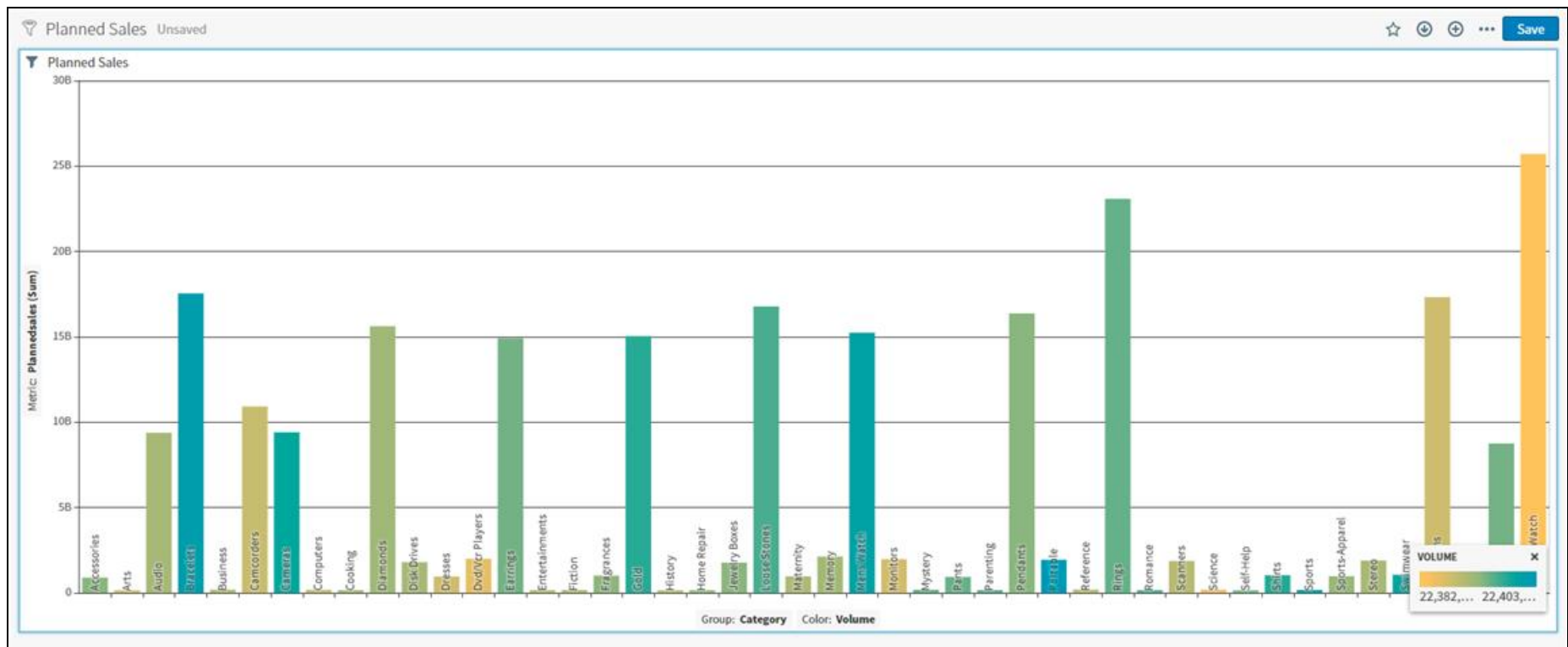
- After the filter specifics have been defined, select **Continue**. The filter is applied to the selected (active) visual or filter snippet. Note that a number appears in a green circle next to the filter icon on the visuals to which the filter has been applied. The number represents the number of filters applied to the visual.

To view the filters applied, see [Viewing The Applied Filters For A Visual Or Filter Snippet](#).

Example

Suppose you want to learn what the planned sales are for different product categories for male customers in San Francisco. You might apply a series of row-level filters using the following steps.

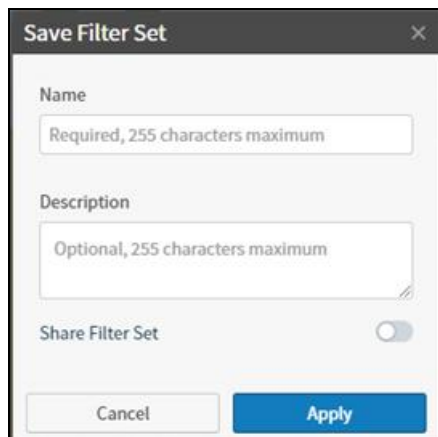
1. On your sales visual, select **Group** (x-axis) and then select **Product Category** from the list. The visual data is grouped by product category purchases.
2. On your sales visual, select **Planned Sales** for the **Metric** (y-axis). Your visual might look like this:



3. Select the filter icon () on the visual.
4. Select **Add Filter**, then on the Row tab, select **City**.

-
- The screenshot displays a Tableau dashboard titled "Planned Sales in San Francisco by Men". The main visualization is a bar chart showing the sum of planned sales across various categories. The y-axis is labeled "Metric: Planned Sales (Sum)" and ranges from 0 to 35M. The x-axis is labeled "Group: Category" and lists numerous product categories. The bars are colored based on a "Volume" metric, with a legend indicating a range from 28,947 to 29,802. The right sidebar contains filters for "City" (San Francisco) and "Gender" (Male). The dashboard also includes a top navigation bar with "Planned Sales" and "Unsaved" tabs, and a "Save" button.
- | Category | Planned Sales (Sum) | Volume |
|------------------|---------------------|---------|
| Accessories | ~1M | ~28,947 |
| Arts | ~1M | ~28,947 |
| Audio | ~12M | ~28,947 |
| Bracelets | ~23M | ~28,947 |
| Business | ~14M | ~28,947 |
| Camcorders | ~12M | ~28,947 |
| Computers | ~1M | ~28,947 |
| Cooking | ~1M | ~28,947 |
| Diamonds | ~20M | ~28,947 |
| Dishcloths | ~1M | ~28,947 |
| Dresses | ~1M | ~28,947 |
| Food & Beverages | ~1M | ~28,947 |
| Food & Play | ~1M | ~28,947 |
| Earrings | ~19M | ~28,947 |
| Entertainments | ~1M | ~28,947 |
| Fiction | ~1M | ~28,947 |
| Fragrances | ~1M | ~28,947 |
| Gold | ~19M | ~28,947 |
| History | ~1M | ~28,947 |
| Home Repair | ~1M | ~28,947 |
| Jewelry Boxes | ~1M | ~28,947 |
| Jewelry Boxes | ~1M | ~28,947 |
| Loose Stones | ~22M | ~28,947 |
| Memory | ~1M | ~28,947 |
| Monitors | ~20M | ~28,947 |
| Mystery | ~1M | ~28,947 |
| Paints | ~1M | ~28,947 |
| Parenting | ~1M | ~28,947 |
| Pendants | ~21M | ~28,947 |
| Portable | ~1M | ~28,947 |
| Reference | ~1M | ~28,947 |
| Rings | ~30M | ~28,947 |
| Romance | ~1M | ~28,947 |
| Science | ~1M | ~28,947 |
| Self-Help | ~1M | ~28,947 |
| Shirts | ~1M | ~28,947 |
| Sports | ~1M | ~28,947 |
| Sports-Apparel | ~1M | ~28,947 |
| Stereo | ~1M | ~28,947 |
| Tools | ~23M | ~28,947 |
| Travel | ~11M | ~28,947 |
| Video | ~34M | ~29,802 |

11. Filters are not saved automatically. To save your filter, select **Save Filters** on the Filters sidebar. The Save Filter Set dialog appears.



The image shows a 'Save Filter Set' dialog box with a close button (X) in the top right corner. It contains three input fields: 'Name' (required, 255 characters maximum), 'Description' (optional, 255 characters maximum), and a 'Share Filter Set' toggle switch. At the bottom, there are 'Cancel' and 'Apply' buttons.

Enter a name for the saved filter and, optionally, a description. If you want to share your filter, slide the **Share Filter Set** switch on (to the right). This shares the filter with other users when they view dashboards created using that same source.

Apply a Row-Level Filter to a Dashboard

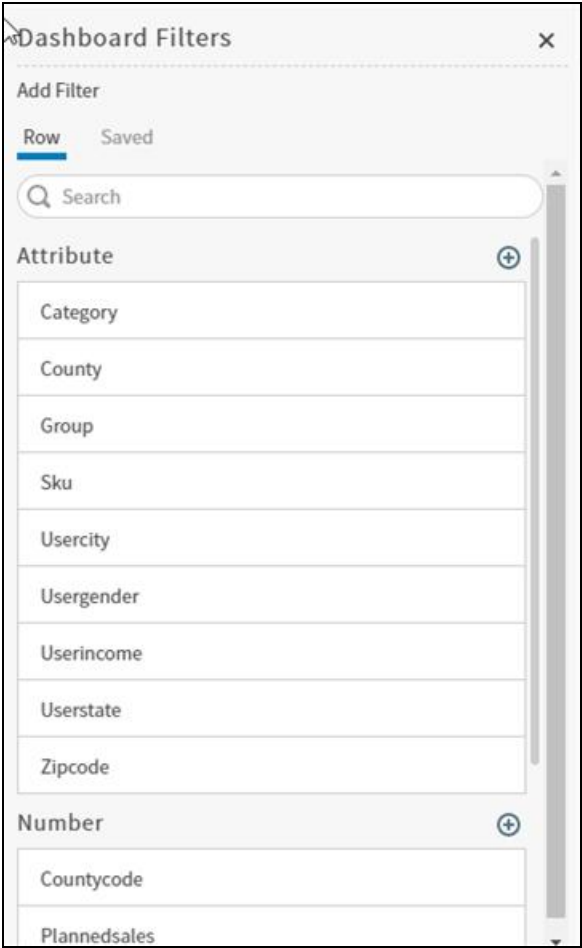
This applies to: *Visual Data Discovery*

When all the visuals in a dashboard use data from the same data source, you can apply row-level filters to the data on all the visuals in the dashboard. When more than one filter is applied to a visual (either via a dashboard filter or via the [specific visual](#)), the filter conditions are ANDed. In other words, both filter conditions must be met for the data to appear in the visual.

Apply a row-level filter to a dashboard

1. Select the filter icon  on the dashboard (to the left of the dashboard title). The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Dashboard Filters sidebar appears showing any dashboard filters that have been applied.



Two tabs are available on the Dashboard Filters sidebar, allowing you to create a row-level filter or a saved filter. If these tabs do not appear, select **Add Filter** to see them.

Tab	Description
Row	The Row tab allows you to create a row-level filter, as described in the rest of this topic.
Saved	The Saved tab shows saved filters that you can apply to the dashboard or visual. See Maintain Saved Filters .



2. Select the Row tab and then select the filter attribute, number, or time field you want to use from the list. The process of creating a row-level filter varies based on the type of field you select.
 - i. If you select an attribute field, see [Set An Attribute Filter](#).
 - ii. If you select a numeric field, see [Set A Numeric Field Filter](#).
 - iii. If you select a time field, see [Set A Time Field Filter](#).

You can also select the add icon  to access the [Derived Field Editor](#) or the [Custom Metrics Editor](#) to create or modify derived fields and custom metrics to be used as filters. See [Access The Derived Field Editor From The Filters Sidebar](#) and [Access The Custom Metrics Editor From The Filters Sidebar](#).

3. After the filter specifics have been defined, select **Continue**. The filter is applied to all the visuals in the dashboard. Note that a number appears in a green circle next to the filter icon on the visuals to which the filter has been applied. The number represents the number of filters applied to the visual. After confirming your changes, select **Apply**.

Filter by Hierarchy Field

This applies to: *Visual Data Discovery*

You can filter your data by the values in a hierarchy field. The source used by the visual, visuals, dashboard (when only one source is in use) or associated filter snippet must be set up to include a hierarchy field. See [Hierarchical Fields and Structures](#).

Filter in a Visual or Dashboard

1. Select the filter icon on the [visual](#) or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the filter sidebar, select its filter icon  or select **Settings** from the Show More [menu](#)  and then select the filter icon  on the [sidebar menu](#).
 - ii. To access the dashboard filter sidebar, select its filter icon . The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar opens, showing currently applied filters, if any.

2. Select **Add Filter**. An Add Filter work area opens to the Row tab, and includes Group and Saved tabs.
3. On the Row tab, select an available hierarchy field to use to filter your data. A Select Values work area opens.
4. Select a filter **Operator** for your data.
 - a. When you select **Include**, you can individually select hierarchical values in the filter to be included. This allows exclusion of specific descendent data from a parent as needed.
 - b. When you select **Equals or Descendents of**, you can select groups of data quickly and easily; select a top level node and all of its descendents are included by default.
5. Select one or more nodes to filter your data. At least one filter value is required.
 - i. Use the **Search** box to find specific nodes.
 - ii. Select the node indicators to expand and collapse nodes, or select and deselect **Expand All** to expand and collapse all nodes.
6. After you've defined your filter specifics, select **Continue**.

- i. If you create the filter at the dashboard level, it is applied to all the visuals and filter snippets in the dashboard.
- ii. Otherwise, it is applied only to the selected (active) visual or filter snippet. After confirming your changes, select **Apply**.

Create a Filter Snippet - Hierarchy Data Type

1. Create a [new filter snippet](#).
2. Define the **Data Settings** to use a Data Type of **Hierarchy**.
3. Select an **Operator** for your data.
 - a. When you select **Include**, you and your users can individually select hierarchical values in the filter to be included. This allows exclusion of specific descendent data from a parent as needed.
 - b. When you select **Equals or Descendents of**, you and your users can select groups of data quickly and easily; select a top level node and all of its descendents are included by default.
4. Select an available **Source**. Any visuals in this dashboard that use this source can be affected by this filter snippet.
5. Select an available **Value Column**, then select **Apply**.
6. Your filter snippet updates, allowing users to filter data for widgets you connect to this filter snippet.

After you've connected the filter snippet to widgets, users can filter data in the filter snippet. They can:

- Use the **Search** box to find specific nodes.
- Select and deselect **Expand All** to expand and collapse all nodes.
- Select the node indicators to expand and collapse individual nodes and their descendents.

Additional Hierarchy Filters in a Filter Snippet

When you create a [new filter snippet](#), you define the initial data type, operator, data source, and value column to use in [Data Settings](#). You can add additional filters, including nested filters, as needed.



1. Open your existing filter snippet.
2. Select the Filters option from the [Filter Snippet sidebar](#).
3. Select **Add Filter**. An Add Filter work area opens to the Row tab, and includes Group and Saved tabs.
4. Select or create a field to filter from available options on the Row or Group tab.
 - i. Select an existing available field from [Attribute](#), [Number](#), [Time](#), or [Hierarchy](#) and define appropriate options to use.
 - ii. Alternatively, elect the add icon to add a [derived field](#) or [custom metric](#), and define appropriate options to use.
5. After you have defined the filter specifics, select **Continue**. After confirming your changes, select **Apply**.



Note: Optionally, nest multiple filters for more targeted filtering results. Select Nest Filters, then link multiple filters using **AND** and **OR** filtering.

Set an Attribute Filter

This applies to: *Visual Data Discovery*

You can filter data by the values in an attribute field.

Set a Filter in a Visual or Dashboard

1. Select the filter icon on the [visual](#) or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the filter sidebar, select its filter icon  or select **Settings** from the Show More [menu](#) () and then select the filter  on the [sidebar menu](#).
 - ii. To access the dashboard filter sidebar, select its filter icon . The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar opens, showing currently applied filters, if any.

2. Select **Add Filter**. An Add Filter work area opens to the Row tab, and includes Group and Saved tabs.
3. Select the Row tab. If the style of your visual is an arc gauge, KPI chart, table (raw data), histogram, or map markers chart, the Group tab is available, but you cannot create a group filter because all filters for these visual styles are row-level filters. If you are using the dashboard filters sidebar, the Group tab is not available.

The Saved tab shows saved filters that you can apply to a dashboard or visual. See [Maintain Saved Filters](#).

4. On the Row tab, select the filter attribute you want to use from the list of available attributes. A Select Values work area opens that you can use to select values and define this filter's specifics. See the table below for available options.

Tab	Description
Value	The Value tab allows you to select: - A filter operator (Include or Exclude, depending on whether you want to include or exclude the value from the data). - An optional custom value. To create and select a custom value, enter the value in the Customize field and select Add. Your custom field is added and selected in the list of possible values. To remove the custom value, uncheck it in the list of possible values. It is removed from the filter and from the list of possible values for the filter.

Tab	Description
	One or more values from the list of available values for the attribute you selected. To select all values, select Select All. Use the search bar to quickly find a value. You can type the name of the value in the Search bar (or characters in the value name) to limit the list of values. A maximum of 1000 values are listed. If no values are listed or if you cannot find your value, type the exact name of the value (as stored in your data) into the Search bar and select the add icon  to select it. This will force your instance to use this value when sending the query to the data store. See Apply Row-Level Filters.
Wildcard	The Wildcard tab allows you to specify a wildcard filter for the attribute. See Apply Wildcard Filters To A Visual, Filter Snippet, Or Dashboard .
Keyset	The Keyset tab allows you to select a keyset filter for the attribute. See Use Keysets for instructions on using keysets in a filter.

 **Note:** You can also select the add icon  to access the [Derived Field Editor](#) or the [Custom Metrics Editor](#) to create or modify derived fields and custom metrics to be used as filters. See [Access The Derived Field Editor From The Filters Sidebar](#) and [Access The Custom Metrics Editor From The Filters Sidebar](#).

5. After you have defined the filter specifics, select **Continue**. After confirming your changes, select **Apply**.
- i. Filters you create at the dashboard level are applied to all the visuals in the dashboard that use that source.
- ii. Filters you create at the visual level apply only to the selected (active) visual.

 **Note:** Optionally, nest multiple filters for more targeted filtering results. Select **Nest Filters**, then link multiple filters using **AND** and **OR** filtering.

Additional Attribute Filters in a Filter Snippet

When you create a [new filter snippet](#), you define the initial data type, operator, data source, and value column to use in [Data Settings](#). You can add additional filters, including nested filters, as needed.

1. Open your existing filter snippet.
2. Select the Filters option from the [Filter Snippet sidebar](#).
3. Select **Add Filter**. An Add Filter work area opens to the Row tab, and includes Group and Saved tabs.



4. Select or create a field to filter from available options on the Row or Group tab.
 - i. Select an existing available field from [Attribute](#), [Number](#), [Time](#), or [Hierarchy](#) and define appropriate options to use.
 - ii. Alternatively, elect the add icon to add a [derived field](#) or [custom metric](#), and define appropriate options to use.
 5. After you have defined the filter specifics, select **Continue**. After confirming your changes, select **Apply**.
-  **Note:** Optionally, nest multiple filters for more targeted filtering results. Select Nest Filters, then link multiple filters using [AND](#) and [OR](#) filtering.

Set a Numeric Field Filter

This applies to: *Visual Data Discovery*

You can filter visual data by the values in a numeric field.

Set a Filter in a Visual or Dashboard

1. Select the filter icon on the [visual](#) or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the filter sidebar, select its filter icon  or select **Settings** from the Show More [menu](#) () and then select the filter  on the [sidebar menu](#).
 - ii. To access the dashboard filter sidebar, select its filter icon . The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar opens, showing currently applied filters, if any.

2. Select **Add Filter**. An Add Filter work area opens to the Row tab, and includes Group and Saved tabs.
3. Select the Row tab. If the style of your visual is an arc gauge, KPI chart, table (raw data), histogram, or map markers chart, the Group tab is available, but you cannot create a group filter because all filters for these visual styles are row-level filters. If you are using the dashboard filters sidebar, the Group tab is not available.

The Saved tab shows saved filters that you can apply to a dashboard, visual, or filter snippet. See [Maintain Saved Filters](#).

4. On the Row tab, select the numeric field you want to use from the list of available number fields. A Select Values work area opens that you can use to select values and define this filter's specifics. See the table below for available options.

Tab	Description
Range	Select a relational comparison operator in the Operator selection box. Data is included in the visual when the data in the filter field meets the condition set by the relational operator and the numeric values you specify. Valid numeric operators are described in Operators. The Range tab initially shows the full range of values available. It provides an Operator selection box and From and To boxes for you to use to select the range of values. Use the arrows in the From and To boxes to increase and decrease the maximum and minimum values.
Keyset	The Keyset tab allows you to select a keyset to apply as the filter (see Use Keysets).



Note: You can also select the add icon  to access the [Derived Field Editor](#) or the [Custom Metrics Editor](#) to create or modify derived fields and custom metrics to be used as filters. See [Access The Derived Field Editor From The Filters Sidebar](#) and [Access The Custom Metrics Editor From The Filters Sidebar](#).

5. After you have defined the filter specifics, select **Continue**. After confirming your changes, select **Apply**.
 - i. Filters you create at the dashboard level are applied to all the visuals in the dashboard that use that source.
 - ii. Filters you create at the visual level apply only to the selected (active) visual.



Note: Optionally, nest multiple filters for more targeted filtering results. Select **Nest Filters**, then link multiple filters using **AND** and **OR** filtering.

Additional Numeric Field Filters in a Filter Snippet

When you create a [new filter snippet](#), you define the initial data type, operator, data source, and value column to use in [Data Settings](#). You can add additional filters, including nested filters, as needed.

1. Open your existing filter snippet.
2. Select the Filters option from the [Filter Snippet sidebar](#).
3. Select **Add Filter**. An Add Filter work area opens to the Row tab, and includes Group and Saved tabs.
4. Select or create a field to filter from available options on the Row or Group tab.
 - i. Select an existing available field from [Attribute](#), [Number](#), [Time](#), or [Hierarchy](#) and define appropriate options to use.
 - ii. Alternatively, elect the add icon to add a [derived field](#) or [custom metric](#), and define appropriate options to use.
5. After you have defined the filter specifics, select **Continue**. After confirming your changes, select **Apply**.



Note: Optionally, nest multiple filters for more targeted filtering results. Select **Nest Filters**, then link multiple filters using **AND** and **OR** filtering.

Set a Time Field Filter

This applies to: *Visual Data Discovery*

When you select a time attribute for a visual or filter snippet, you can filter the time range you display.



Note: If you are using a field that has time zone information disabled (select **Not Specified**), only the time-related information is shown in the user interface and exported with your data. Time zone labels are not included.

Set a Time Range for a Time Field Filter in a Visual or Dashboard

1. Select the filter icon on the [visual](#) or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the filter sidebar, select its filter icon  or select **Settings** from the Show More [menu](#)  and then select the filter icon  on the [sidebar menu](#).
 - ii. To access the dashboard filter sidebar, select its filter icon . The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar opens, showing currently applied filters, if any.

2. Select **Add Filter**. An Add Filter work area opens to the Row tab, and includes Group and Saved tabs.
3. Select the Row tab. If the style of your visual is an arc gauge, KPI chart, table (raw data), histogram, or map markers chart, the Group tab is available, but you cannot create a group filter because all filters for these visual styles are row-level filters. If you are using the dashboard filters sidebar, the Group tab is not available.

The Saved tab shows saved filters that you can apply to a dashboard or visual. See [Maintain Saved Filters](#).

4. On the Row tab, select a time field you want to use from the list of available time fields. A Select Values work area opens that you can use to select values and define this filter's specifics on Range and Keysets tabs.
5. On the Range tab, you can optionally apply a null filter to the full time range. Select an **Operator** option as needed:
 - i. Apply **Between** to specify a time range
 - ii. Apply **Not Between** to exclude a specified time range

iii. Apply `Is NULL` to include only null values

iv. Apply `Is not NULL` to hide null values

Overnight Bonus

← Select Values Start Date

Range	Keysets
Min	May 20, 2000
Max	Sep 24, 2009

Operator

Between

From

⌚

⌵

To

⌚

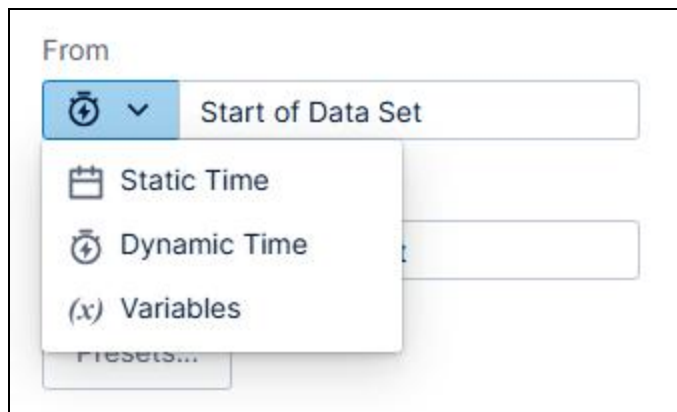
⌵

End of Data Set

Presets...

6. If you did not apply a `Null` filter, you can use the **From** and **To** boxes to specify the time range for the filter. You can set the range in static time, dynamic time, use variables, or use preset ranges provided.

- i. Select **Static Time**, **Dynamic Time**, or **Variables** in the drop-down menu.



If you select **Static Time**, the **From** and **To** boxes are filled with default dates and times. Use the boxes to select specific from and to times

If you select **Dynamic Time**, the **From** and **To** boxes are filled with **Start of Data Set** and **End of Data Set** automatically. Use the **Condition** boxes to select different dynamic from and to times:

Planned Sales
×

← Select Values

Range	Keysets
Min	May 20, 2000
Max	Sep 24, 2009

Operator

Between

From

⌚

▼

Start of Data Set

Condition

Start of

▼

Data set

▼

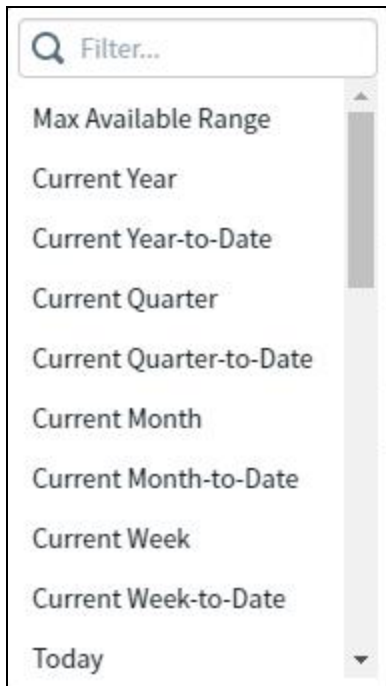
Enable offset
☐

Cancel

Apply

If you select **Variables**, define a variable for use in filtering.

- ii. Alternatively, select **Presets** to fill the **From** and **To** boxes with predefined time ranges provided.



Use the filter box at the top of the presets list to locate the preset setting you want. Descriptions of each of the preset options are provided in [Preset Time Ranges](#).

7. Alternatively, select a keyset on the **Keysets** tab to use for the filter. See [Use Keysets](#).
8. After you have defined the filter specifics, select **Continue**. After confirming your changes, select **Apply**.
 - i. Filters you create at the dashboard level are applied to all the visuals in the dashboard that use that source.
 - ii. Filters you create at the visual level apply only to the selected (active) visual.



Note: Optionally, nest multiple filters for more targeted filtering results. Select **Nest Filters**, then link multiple filters using **AND** and **OR** filtering.

Additional Time Field Filters in a Filter Snippet

When you create a [new filter snippet](#), you define the initial data type, operator, data source, and value column to use in [Data Settings](#). You can add additional filters, including nested filters, as needed.

1. Open your existing filter snippet.
2. Select the Filters option from the [Filter Snippet sidebar](#).
3. Select **Add Filter**. An Add Filter work area opens to the Row tab, and includes Group and Saved tabs.
4. Select or create a field to filter from available options on the Row or Group tab.
 - i. Select an existing available field from [Attribute](#), [Number](#), [Time](#), or [Hierarchy](#) and define appropriate options to use.
 - ii. Alternatively, elect the add icon to add a [derived field](#) or [custom metric](#), and define appropriate options to use.
5. After you have defined the filter specifics, select **Continue**. After confirming your changes, select **Apply**.



Note: Optionally, nest multiple filters for more targeted filtering results. Select Nest Filters, then link multiple filters using **AND** and **OR** filtering.

Apply Wildcard Filters to a Visual, Filter Snippet, or Dashboard

This applies to: *Visual Data Discovery*

Wildcard filters are row-level filters you can use to filter the data on your dashboard visuals or filter snippets. Wildcard filters allow you to filter and analyze the data that matches specific combinations of character patterns.



Note: When working with multiple filter types on the same visual, row-level filters (including wildcard filters) are applied first to a visual, keyset filters are applied second, and group filters are applied last on the aggregated result set.

Many connectors support wildcard filters, but support for case-sensitivity in wildcard filters varies depending on the connector's data store.

Support for this feature by connector is shown in the following table.

Key: Y - Supported; N - Not Supported; N/A - not applicable

Connector	Supported?
Amazon Redshift	Y
Amazon S3	Y
Apache Drill	Y
Apache Phoenix	Y
Apache Phoenix Query Server (QS)	Y
Apache Solr	Y
BigQuery	Y
Business Central Jet	Y
Cloudera Impala	Y
Cloudera Search	Y
Couchbase	Y
Dremio	Y
Elasticsearch 7.0	Y
Elasticsearch 8.0	Y
File Upload	Y
HDFS	Y
Hive	Y

Connector	Supported?
Jira	Y
MemSQL	Y
Microsoft SQL Server	Y
MongoDB	Y
MySQL	Y
Oracle	Y
PostgreSQL	Y
Python	Y
Real Time Sales	Y
Salesforce	Y
SAP Hana	Y
SAP S/4HANA	N
SAP IQ	Y
Spark SQL	Y
Snowflake	Y
Teradata	Y
TIBCO DV	Y
Trino	Y
File Upload (Upload API)	Y
Vertica	Y

See [Wildcard Case-Insensitive Filters](#) and [Wildcard Case-Sensitive Filters](#) to determine whether case-insensitive or case-sensitive wildcards are supported.

Apply a wildcard filter

- Select the filter icon on the [visual](#), filter snippet, or [dashboard](#) to access the appropriate filter sidebar.
 - To access the filter sidebar, select its filter icon  or select **Settings** from the [menu](#)  and then select  on the [sidebar menu](#).
 - To access the dashboard filter sidebar, select its filter icon . The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar appears showing any filters that have been applied.

2. Select the Row tab. If the style of your visual is an arc gauge, KPI chart, table (raw data), histogram, or map markers chart, the Group tab is available, but you cannot create a group filter because all filters for these visual styles are row-level filters. If you are using the dashboard filters sidebar, the Group tab is not available.

The Saved tab shows saved filters that you can apply to a dashboard, visual, or filter snippet. See [Maintain Saved Filters](#).

3. On the Row tab, select the filter attribute you want to use from the list of available attributes. A second page with three tabs appears in the Filters sidebar.
 - i. The Value tab allows you to select a filter value for the attribute. See [Apply Row-Level Filters](#) for instructions on using a regular row-level filter.
 - ii. The Wildcard tab allows you to specify a wildcard filter for the attribute. Continue following the steps in these instructions.
 - iii. The Keyset tab allows you to select a keyset filter for the attribute. See [Use Keysets](#) for instructions on using keysets in a filter.

You can also select the add icon  to access the [Derived Field Editor](#) or the [Custom Metrics Editor](#) to create or modify derived fields and custom metrics to be used as filters. See [Access The Derived Field Editor From The Filters Sidebar](#) and [Access The Custom Metrics Editor From The Filters Sidebar](#).

4. Select the Wildcard tab to create a row-level wildcard filter.
5. Select an operator from the drop-down menu for the **Operator** box on the **Wildcard** tab.

Operator	Data is included in the visual...
Contains	When the data in the filter attribute you selected contains the wildcard string you will specify in the next step.
Does Not Contain	When the data in the filter attribute you selected does not contain the wildcard string you will specify in the next step.
Begins With	When the data in the filter attribute you selected begins with the wildcard string you will specify in the next step.
Does Not Begin With	When the data in the filter attribute you selected does not begin with the wildcard string you will specify in the next step.
Ends With	When the data in the filter attribute you selected ends with the wildcard string you will specify in the next step.
Does Not End With	When the data in the filter attribute you selected does not end with the wildcard string you will specify in the next step.

6. In the **Value** box, type a string of characters that represents the wildcard string for the filter. Data is included in the visual when the data in the filter field meets the condition set by this operator and the wildcard string you specify.
7. By default the **Case Sensitive** slider is on (selected). When this option is selected, the wildcard filter includes data in the visual only if the filter attribute data exactly matches both the value of the wildcard string and the case of the wildcard string value. Slide the option off if you do not care if the visual data exactly matches the case of the wildcard string.



- Archive of documentation for Logi Symphony v24

8. If you want to specify another wildcard value, select the add icon  next to the **Values** title on the Wildcard tab. Then repeat Steps 5-7 above for the new wildcard value. Multiple wildcard values are treated as OR operations. A record can meet the filter criteria specified by any of the wildcard values to be selected for filter processing.
 9. Select **Apply**. If you create the filter at the dashboard level, it is applied to all the visuals in the dashboard. Otherwise, it is applied only to the selected (active) visual.
 10. Optionally, repeat these steps to apply additional filters to the visual or dashboard.
- See [Remove A Filter From A Visual, Filter Snippet Or Dashboard](#) for information on removing a wildcard filter from a visual or dashboard.

Apply a Filter to Dashboard Visuals Using the Context Menu

This applies to: *Visual Data Discovery*

You can filter visuals on a dashboard that use the same source or linked cross source simultaneously using the context menu of one of the visuals when the visuals are subscribed to the links. These filters are cross-visual filters. See [Subscribe A Visual To A Link](#) for more information about subscribing to dashboard links.



Note: Unlike row-level filters, cross-visual filters are not saved with the visual.

Example:

- You have a bar chart, pie chart, and table that show data from the same product sales data source (same source link) and are all subscribed to the same source link. In this scenario, you can use the context menu to simultaneously filter the data in two of the three visuals by any field in the data source. The visual you use to select the filter is not affected.
- You add a donut chart to the three visuals above in the same dashboard, but the donut chart uses data from a different sales data source. Cross-source link the two data sources by a field (for example, State) to subscribe all of the visuals to the cross-source link. When you use the context menu to filter one of the visuals by State, the subscribed visuals are all filtered. The visual you use to select the filter is not affected.

Controls for use of filters by end users are provided using the interactivity sidebar. See [Control How Users Interact With A Visual](#).

To view the filters applied to a visual, see [Viewing The Applied Filters For A Visual Or Filter Snippet](#).

Apply A Context Menu Filter

Apply a context menu filter to all dashboard visuals that subscribe to a same source or cross-source link

1. Open the dashboard and select one of the data points in one of the visuals. The context menu appears.
2. Select **Filter** on the context menu. The filter is applied to all of the visuals subscribed to the link. The visual you use to select the filter is not affected.

The **Filter** option on the context menu is only available when the visual publishes a link for the field it is also using for its visual grouping. It is *not* available if the published cross-visual links for the visual are muted. See [Mute A Published Link](#).

Apply Group Filters

This applies to: *Visual Data Discovery*

You can use group filters to filter the aggregated result set of a visual or filter snippet. Group filters are filters based on metrics and custom metrics, rather than fields (row-level filters).

You can create custom metrics or derived fields to use as a group filter on the fly. See [Access The Derived Field Editor From The Filters Sidebar](#) and [Access The Custom Metrics Editor From The Filters Sidebar](#) for information on how to access the Derived Field Editor or the Custom Metrics Editor from the Filters sidebar.

Group filters are applied in the same way row-level filters are applied. Using group filters, you can filter on saved custom metrics that are not applied to your visual or filter snippet. Metrics and custom metrics can be limited at the data source level. If the Filters sidebar does not display all fields, refresh the field at the data source to display all elements within the data. For steps, see [Display All Unique Elements For A Selected Filter Panel Attribute](#).

The following visual styles do not support group filters:

- [Arc gauges](#)
- [KPI charts](#)
- [Histograms](#)
- [Marker maps](#)
- [Tables of raw data](#)

Global dashboard filters do not include group filters that may be applied to the visuals or filter snippets in the dashboard, even if all items on the dashboard use the same data source. You also cannot apply a group filter to your dashboard; only row-level filters (and keyset filters) can be applied globally to a dashboard.



Note: When working with multiple filter types, row-level filters are applied first to a visual, keyset filters are applied next, and group filters are applied last on the aggregated result set.

Read the following topics for more information:

- [Apply A Group Filter From A Metric](#)
- [Apply A Group Filter From A Custom Metric](#)

Apply a Group Filter from a Custom Metric

This applies to: *Visual Data Discovery*

Suppose you want to find product purchases made by males within certain areas of Los Angeles, while also comparing their income levels. Specifically, you are interested in men whose sales average more than \$100,000. You might create a filter using the following steps. This example requires that you have already applied a row-level filter for the city of Los Angeles.

Since you do not have a custom metric created yet for average sales, one needs to be created.

Create the custom metric

1. Select the filter icon on the [visual](#), [filter snippet](#), or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the filter sidebar, select its filter icon () or select **Settings** from the [menu](#) () and then select  on the [sidebar menu](#).
 - ii. To access the dashboard filter sidebar, select its filter icon (). The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar appears showing any filters that have been applied.

2. Select **Add Filter**. A work area opens for applying Row, Group, and Saved filters.
3. Select an add icon () and select **Add Custom Metric** from the resulting menu. The Custom Metrics Editor appears.
4. In the Function Library, double-select **AVG(field)**.
5. In Fields, select **Sales**.
6. Select **Run** to see a preview of the results.
7. Name your custom metric and select **Save**.
8. Close the Custom Metrics Editor.

Now that you have created and successfully saved the custom metric you want to use, you can apply it to the visual, filter snippet, or dashboard.

Filter your data by the aggregated field



1. Select the filter icon on the [visual](#), [filter snippet](#), or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the filter sidebar, select its filter icon () or select **Settings** from the [menu](#) () and then select  on the [sidebar menu](#).
 - ii. To access the dashboard filter sidebar, select its filter icon (). The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar appears showing any filters that have been applied.

2. Select **Add Filter**.
3. Ensure that the row-level filter for males in Los Angeles is applied.
4. Select **Add Filter**.
5. From the list of available attributes, select **Zipcode**.
6. Choose the zip codes you want to include in your results. For example, all the 900 zip codes or 90211, 90305, and 90701.
7. Select **Apply**.
8. Select **Add Filter**.
9. Select the **Group** tab.
10. Select your saved custom metric from the list of available custom metrics for use.
11. Select the **Operator** tab and then select the greater-than (>) operator.
12. In the value field, enter 100 and then select **Apply**. In the Filters sidebar , you can see all the filters you have applied thus far.
13. On the visual canvas, select **Group** and ensure **Product Category** is selected for an attribute.
14. To view the differences in average sales for products, simply filter on different income brackets. For example, apply a filter for incomes between \$100 to \$1000.

Apply a Group Filter from a Metric

This applies to: *Visual Data Discovery*

Suppose you want to find product sales greater than \$200,000 for the last quarter within the greater Los Angeles area. You might create a group filter using the following steps. This example requires that you have already applied a row-level filter for the city of Los Angeles.

Group filters can only be applied from a specific visual or filter snippet. They cannot be applied to a dashboard.

Create the group filter

1. Select the filter icon () or select **Settings** from the [menu](#) () and then select  on the [sidebar menu](#).

The Filters sidebar appears showing any filters that have been applied.

2. Select **Add Filter**. A work area opens for applying Row, Group, and Saved filters.

3. Select the Group tab and select the numeric field **Sales** on the tab.

The Range tab appears in the Filters sidebar. By default, the Aggregation function is set to Sum. You can select other values from the drop-down list.

4. Select the **Greater Than** operator in the Operator selection box. This allows you to input a threshold value, rather than a value range.

5. Specify a threshold value of 200000 in the Value box.

6. Select **Apply**.

7. After the visual updates, select **Group** and then select **Product Category**. This displays all sales of products totally over \$200,000.

8. Remember to [save your filter](#).

Apply a Saved Filter to a Visual, Filter Snippet, or Dashboard

This applies to: *Visual Data Discovery*

You can apply row-level filters for the data in visuals and filter snippets. When all the visuals and filter snippets in a dashboard use data from the same data source, you can apply row-level filters for all the visuals and filter snippets in the dashboard.

Apply a row-level filter to a visual or dashboard

1. Select the filter icon on the [visual](#), [filter snippet](#), or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the filter sidebar, select its filter icon () or select **Settings** from the [menu](#) () and then select  on the [sidebar menu](#).
 - ii. To access the dashboard filter sidebar, select its filter icon (). The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar appears showing any filters that have been applied.

If you are using the filters sidebar, three tabs are available: **Row**, **Group**, and **Saved**.

If you are using the dashboard filters sidebar, only the **Row** and **Saved** tabs are available.

Tab	Description
Row	The Row tab allows you to create a row-level filter, as described in the rest of this topic.
Group	The Group tab allows you to create and use a group filter. See Apply Group Filters . If you are using a KPI, raw data, histogram, or map markers visual, the Group tab is not available because all filters on these visuals are row-level filters.
Saved	The Saved tab shows saved filters that you can apply to the dashboard or visual. See Maintain Saved Filters .

2. Select the **Saved** tab and then select the save filter you want to use. If none are listed, you must create one. See [Create A Saved Filter](#).

Viewing the Applied Filters for a Visual or Filter Snippet

This applies to: *Visual Data Discovery*

You can view the filters that have been applied to a visual or filter snippet using the Filters sidebar or directly on the visual or filter snippet. Note that the filters are categorized into row-level filters and cross-visual filters. Row-level filters are saved with the visual and filter snippet; cross-visual filters are not.

View filters on the Filters sidebar

- To access the filter sidebar, select its filter icon () or select **Settings** from the [menu](#) () and then select  on the [sidebar menu](#).

The Filters sidebar appears showing any filters that have been applied.

Raw Sales Data

×

Filters

Add Filter

Save Filters

Row Level Filters

Category

Include

8 Selected

⊖

Accessories, Bracelets, Diamonds, Earrings, Gold, Loose Stones, Pendants, Rings

Record Hour (UTC)

Between

END OF DATA -1 HOUR to END OF DATA

⊖

Cross-Visual Filters

Note - These filters will not be saved to the visual.

Userstate

Link - State

Include

Pennsylvania

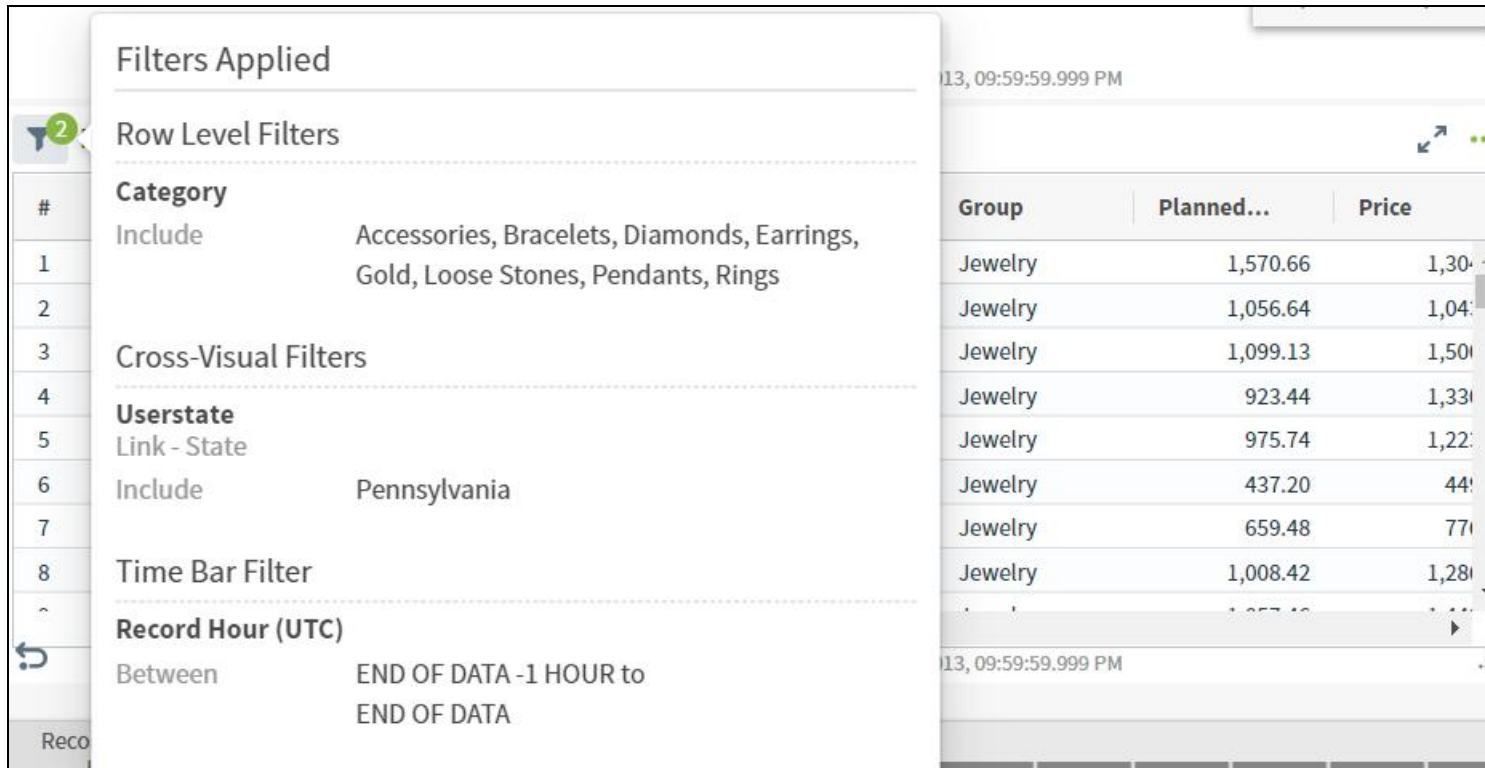
⊖

View filters directly on the visual or filter snippet

- Hover over the filter icon () on the visual or filter snippet.

The Filters sidebar appears showing any filters that have been applied. The following example shows a visual with three filters applied: a row level filter by sales category, a cross-visual filter for the state of Pennsylvania, and a time bar filter.

 **Note:** Time bar filters are not included in the total filter count shown in the green circle.



The screenshot shows the Logi Symphony interface with the Filters sidebar open. The sidebar is titled "Filters Applied" and contains three sections: Row Level Filters, Cross-Visual Filters, and Time Bar Filter. The Row Level Filters section shows a filter for "Category" with the value "Accessories, Bracelets, Diamonds, Earrings, Gold, Loose Stones, Pendants, Rings". The Cross-Visual Filters section shows a filter for "Userstate" with the value "Link - State" and "Include" for "Pennsylvania". The Time Bar Filter section shows a filter for "Record Hour (UTC)" with the value "Between" and "END OF DATA -1 HOUR to END OF DATA". The data table on the right shows columns for "Group", "Planned...", and "Price". The table contains 10 rows of data, all with "Jewelry" in the "Group" column. The "Planned..." column values range from 437.20 to 1,570.66, and the "Price" column values range from 44 to 1,300. The table is filtered to show only "Jewelry" items.

#	Category	Include	Accessories, Bracelets, Diamonds, Earrings, Gold, Loose Stones, Pendants, Rings
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Group	Planned...	Price
Jewelry	1,570.66	1,300
Jewelry	1,056.64	1,040
Jewelry	1,099.13	1,500
Jewelry	923.44	1,330
Jewelry	975.74	1,220
Jewelry	437.20	440
Jewelry	659.48	770
Jewelry	1,008.42	1,280
Jewelry	1,057.10	1,110



Maintain Saved Filters

This applies to: *Visual Data Discovery*

After a filter is created and applied to a visual or filter snippet, it can be saved and applied to other visuals or filter snippets that use the same data source. A saved filter can include the settings of one or more filters.

The following topics describe how to maintain a saved filter.

- [Create A Saved Filter](#)
- [Edit A Saved Filter](#)
- [Delete A Saved Filter](#)

Create a Saved Filter

This applies to: *Visual Data Discovery*

When you have created filters and applied them to a dashboard, they are listed under **Active Filters** on the Filter dialog. You can save these filters to be applied later to visuals or filter snippets from the same data source. A saved filter can include the settings from one or more filters.



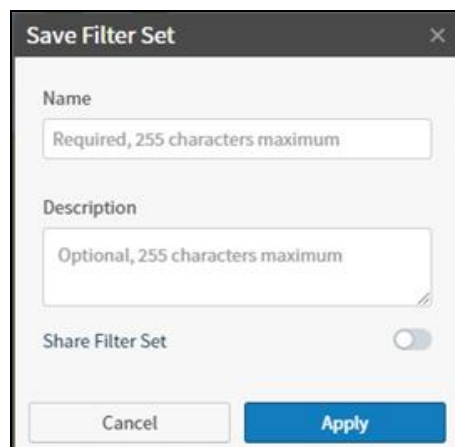
Note: Cross-visual filters that have been applied from same-source and cross-source links are not saved when filters are saved for a visual. Saved filters only include row-level filters for the visual.

Save a filter

1. Select the filter icon on the [visual](#), filter snippet, or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the filter sidebar, select its filter icon () or select **Settings** from the [menu](#) () and then select  on the [sidebar menu](#).
 - ii. To access the dashboard filter sidebar, select its filter icon (). The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar appears showing any filters that have been applied. If no filters have been applied, create one that you want to save. See [Apply Row-Level Filters](#), [Set a Numeric Field Filter](#), and [Set a Time Field Filter](#).

2. Select **Save Filters** on the Filters sidebar. The Save Filter Set dialog appears.



The dialog box titled "Save Filter Set" contains the following fields and controls:

- Name:** A text input field with a placeholder "Required, 255 characters maximum".
- Description:** A text input field with a placeholder "Optional, 255 characters maximum".
- Share Filter Set:** A toggle switch currently turned off.
- Buttons:** "Cancel" and "Apply" buttons at the bottom.



3. Supply a name for the saved filter in the **Name** field.
4. Optionally, provide a description for the saved filter in the **Description** field.
5. If you want to share this set with other users, select **Share Filter Set**.
6. Select **Apply**.

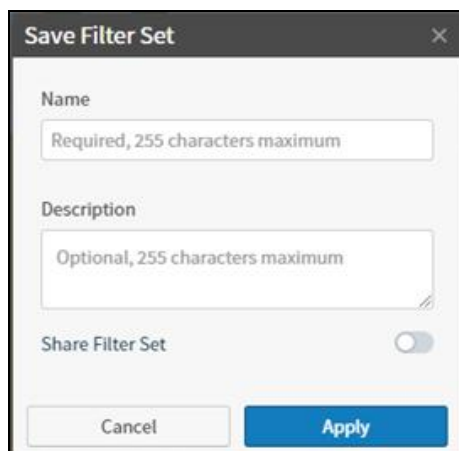
The Save Filter Set dialog closes and the filter is saved. You can see the saved filter on the **Saved Filters** tab of the filters dialog in other visuals that use the same data source.

7. [Save](#) the dashboard.

Example

Suppose you want to create a saved filter for different jewelry sales.

1. On your sales visual, sales filter snippet, or sales dashboard (if all the visuals on the dashboard are using the same sales data source), open the Filters sidebar.
2. On the Filters sidebar, create and apply a filter for jewelry sales. See [Apply Row-Level Filters](#).
 - i. Select the **Row** tab on the Filters sidebar.
 - ii. Depending on how the data in your data source is organized, select whatever attribute you use to identify a jewelry sale (for example, Category).
 - iii. On the next page of the Filters sidebar, select jewelry types in the possible attribute values (for example, for the Category attribute, you might select rings, earrings, pendants, and bracelets).
 - iv. Select **Apply** to apply the filter. Your visual, visuals linked to a filter snippet, (or dashboard) now shows all sales data for jewelry. The first page of the Filters sidebar appears again.
3. Select **Save Filter** on the Filters sidebar. The Save Filter Set dialog appears.



The image shows a 'Save Filter Set' dialog box with a close button (X) in the top right corner. It contains three input fields: 'Name' with a placeholder 'Required, 255 characters maximum', 'Description' with a placeholder 'Optional, 255 characters maximum', and a 'Share Filter Set' toggle switch. At the bottom are 'Cancel' and 'Apply' buttons.

4. Enter a name for the saved filter (for example, Jewelry Sales) and, optionally, a description. If you want to share your filter, slide the **Share Filter Set** switch on (to the right). This shares the filter with other users when they view dashboards created using that same source.
5. Select **Apply** to save the Jewelry Sales filter.

Edit a Saved Filter

This applies to: *Visual Data Discovery*

You can edit saved filters that apply to the data source used by a visual or filter snippet on your dashboard. Changes that you make are only applied to the dashboard, visual, or filter snippet where you made the change and not to other objects that have already applied the saved filter.

Edit a saved filter

1. Select the filter icon on the [visual](#), filter snippet, or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the filter sidebar, select its filter icon () or select **Settings** from the [menu](#) () and then select  on the [sidebar menu](#).
 - ii. To access the dashboard filter sidebar, select its filter icon (). The dashboard-level filter icon is available only when all the visuals and filter snippets are from the same data source.

The Filters sidebar appears showing any filters that have been applied.

2. Select the Saved tab.
3. Select the name of the saved filter that you want to edit. The saved filter is applied appropriately.
4. Alter the filter as needed. See [Apply Row-Level Filters](#) and [Remove A Filter From A Visual, Filter Snippet Or Dashboard](#).
5. Optionally, save the altered filter. It will be saved separately from the original saved filter. You are required to enter a unique name for the saved filter.
6. [Save](#) the dashboard.

Delete a Saved Filter

This applies to: *Visual Data Discovery*

When you delete a saved filter, it is deleted for every visual, filter snippet, and dashboard that uses the same data source.

Delete a saved filter

1. Select the filter icon on the [visual](#), filter snippet, or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the filter sidebar, select its filter icon () or select **Settings** from the [menu](#) () and then select  on the [sidebar menu](#).
 - ii. To access the dashboard filter sidebar, select its filter icon (). The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar appears showing any filters that have been applied.

2. Select the Saved tab.
3. Locate the saved filter you want to delete and select . A warning dialog appears.
4. Click **Delete**. The filter is deleted, but its filter settings are still applied to your current dashboard, visuals, and filter snippets.
5. [Save](#) the dashboard.

Use Keysets

This applies to: *Visual Data Discovery*

Keysets are collections of unique data values that can be saved and used in further analysis of your data. They allow you to perform multipass and multisource filtering of your data.

You can create a keyset by selecting a single field for the keyset from visual data. Filtering the visual data before creating the keyset limits the unique data values the keyset includes. The field you select for the keyset is known as the keyset's *key field*. For example, from a visual that lists airport codes nationwide but that has been filtered to show only Virginia airports, you can create a keyset listing only Virginia airport codes by selecting the airport code field as the keyset's key field.

You can also create and update a keyset from a CSV file.

You can apply a keyset as a visual filter.

- This limits the visual's result set to records containing values stored in the keyset.
- Apply keyset filters to visuals from the same or different data sources. However, the data source for the target visual must contain a field storing the same kind of data as the keyset's key field.
- You can update a keyset at any time by uploading new values for the keyset.



Note: When working with multiple filter types on the same visual or filter snippet, row-level filters (including wildcard filters) are applied first to a visual or filter snippet, keyset filters are applied second, and group filters are applied last on the aggregated result set.

To control whether keysets can be created or managed from a visual, use the interactivity sidebar. See [Control How Users Interact With A Visual](#).

See the following topics.

- [Create A Keyset](#)
- [Create A Keyset From The Visual Result Set](#)
- [Create A Keyset From A Data Point](#)
- [Create A Keyset From A CSV File](#)
- [Review And Apply A Keyset As A Visual Filter](#)



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- [Delete A Keyset](#)
- [Upload Keyset Data From A CSV File Using The API](#)
- [Update Keyset Values From A CSV File Using The API](#)



Create a Keyset

This applies to: *Visual Data Discovery*

You can create a keyset in several ways. Keysets are shared by all users of the Symphony instance.

- [Create A Keyset From The Visual Result Set](#)
- [Create A Keyset From A Data Point](#)
- [Create A Keyset From A CSV File](#)
- [Update Keyset Values From A CSV File Using The UI](#)

To control whether keysets can be created or managed from a visual, use the interactivity sidebar. See [Control How Users Interact With A Visual](#).

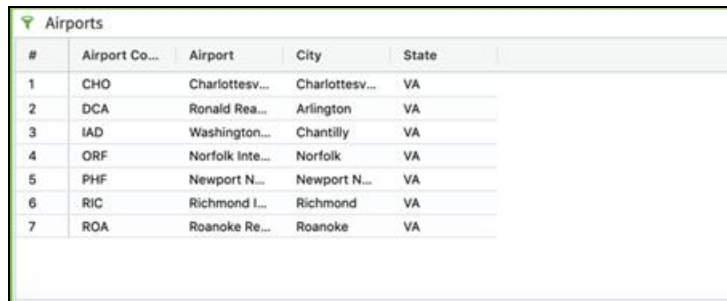
Create a Keyset From the Visual Result Set

This applies to: *Visual Data Discovery*

You can create a keyset from the result set of a visual. Filtering the visual data before creating the keyset will limit the unique data values included in the keyset.

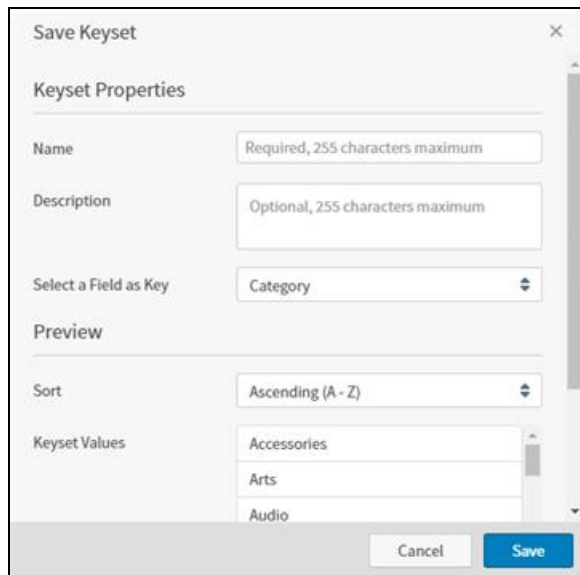
Create a keyset from a visual result set

1. Create a visual and filter it as desired.



#	Airport Co...	Airport	City	State
1	CHO	Charlottesv...	Charlottesv...	VA
2	DCA	Ronald Rea...	Arlington	VA
3	IAD	Washington...	Chantilly	VA
4	ORF	Norfolk Inte...	Norfolk	VA
5	PHF	Newport N...	Newport N...	VA
6	RIC	Richmond I...	Richmond	VA
7	ROA	Roanoke Re...	Roanoke	VA

2. Select and then **Create Keyset** from the [visual drop-down menu](#). The Save Keyset dialog appears.



Save Keyset

Keyset Properties

Name

Required, 255 characters maximum

Description

Optional, 255 characters maximum

Select a Field as Key

Category

Preview

Sort

Ascending (A - Z)

Keyset Values

Accessories

Arts

Audio

Cancel

Save

3. Enter a name for the keyset in the **Name** box. Because the keyset will be shared by all users of the Symphony instance, be sure to enter a unique name.



4. Optionally, enter a description for the keyset in the **Description** box.
5. In the **Select a Field as Key** box, enter the field that should be used as the key for the keyset. A list of keyset values for the field you selected appears on the Save Keyset dialog. These values can include an empty value.
6. Select **Save** to save the keyset.

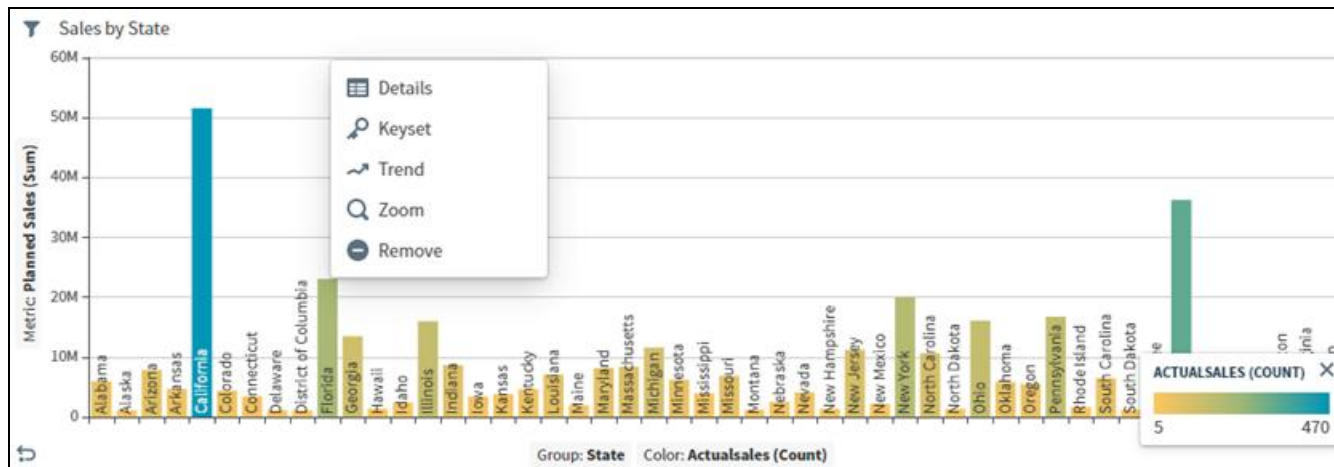
Create a Keyset From a Data Point

This applies to: *Visual Data Discovery*

You can create a keyset from a data point in a visual using the context menu. The result set used for the keyset is automatically filtered by the data point you select.

Create a keyset from a data point

1. Create a visual.
2. Select a data point in the visual. The context menu appears:



3. Select **Keyset**. The Save Keyset dialog appears.

Save Keyset

Keyset Properties

Name

Required, 255 characters maximum

Description

Optional, 255 characters maximum

Select a Field as Key

Product Category

Preview

Sort

Ascending (A - Z)

Keyset Values

Accessories

Arts

Audio

Bracelets

Business

Camcorders

Cameras

Cancel

Save

4. Enter a name for the keyset in the **Name** box. The keyset is shared by all users of the Symphony instance, and must be a unique name.
5. Optionally, enter a description for the keyset in the **Description** box.
6. In the **Select a Field as Key** box, select a field to use as the key for the keyset. This should be the field by which the original visual was grouped. A list of keyset values for the field you selected appears on the Save Keyset dialog. These values can include an empty value.



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7. Select **Save** to save the keyset.

Create a Keyset From a CSV File

This applies to: *Visual Data Discovery*

You can create a keyset from a CSV file. The CSV file must meet the following requirements:

- The data values in the file must be in a single column.
- The file must be UTF-8 formatted.
- The file cannot contain more than 1000 rows.
- The data type of the CSV values (number, time, attribute, etc.) must match the data type of the field to which the CSV keyset data will be applied.

Create a keyset from a CSV file

1. Review a visual in the Visual Gallery or in a dashboard.
2. Select the filter icon on the [visual](#) or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the visual filter sidebar, select its filter icon () or select **Settings** from the [visual menu](#) () and then select  on the [sidebar menu](#).
 - i. To access the dashboard filter sidebar, select its filter icon (). The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar appears, showing any filters that have been applied.

3. Select **Add Filter**.
4. Select a filter field on the Filter sidebar. Remember that the field data type must match the data type of the CSV data you will upload (for example, if the field is a numeric field, the CSV data must be also be numeric).

The Filters sidebar displays three tabs:

- i. The **Value** tab allows you to select values for the filter.
- ii. The **Wildcard** tab allows you to specify a row-level wildcard filter for the visual.

- iii. The **Keyset** tab allows you to select a keyset for the filter or to upload a CSV file as a keyset.



Note: If your example uses numeric data, the tabs may vary. See [Set A Numeric Field Filter](#).

- 5. Select the **Keyset** tab. The keysets and saved filters defined in your environment are listed.
- 6. Select **Upload Keyset Values**. An Upload Keyset Values panel appears in the Filters sidebar allowing you to specify information about the CSV file and the keyset you are creating.
 -  **Note:** If the upload file contains more records than are allowed by the Symphony environment configuration, the keyset will not upload and an error occurs.
- 7. Enter a name for the keyset in the **Name** box. Because the keyset will be shared by all users of the Symphony instance, be sure to enter a unique name.
- 8. Optionally, enter a description for the keyset in the **Description** box.
- 9. In the **Choose a file to Add Keyset Values** box, browse for and select the CSV file containing the keyset values you want to upload.

Planned Sales by Category
×

← Upload Keyset Values (Category)

Keyset Details

Name*

Jewelry

Description

Optional, 255 characters maximum

Choose a file to Add Keyset Values*

None (required)

Browse

File must be a single column UTF-8 formatted CSV.

Cancel

Upload Keyset

10. Select **Upload Keyset** to upload the CSV file for the keyset.

If the upload occurs successfully, a message displays that the upload was successful and the keyset details appear in the Filter sidebar. The keyset is now available to all users of the Symphony instance.

11. When you are finished setting your filter values, select **Continue** and examine your updates. If they are correct, select **Apply**.

Update Keyset Values From a CSV File Using the UI

This applies to: *Visual Data Discovery*

You can update the values of a keyset from a CSV file. The CSV file must meet the following requirements:

- The data values in the file must be in a single column.
- The file must be UTF-8 formatted.
- The file cannot contain more than 1000 rows.
- The data type of the CSV values (number, time, attribute, etc.) must match the data type of the field to which the CSV keyset data will be applied.

Update keyset values from a CSV file

1. Review a visual in the Visual Gallery or in a dashboard.
2. Select the filter icon on the [visual](#) or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the visual filter sidebar, select its filter icon () or select **Settings** from the [visual menu](#) () and then select  on the [sidebar menu](#).
 - ii. To access the dashboard filter sidebar, select its filter icon (). The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar appears showing any filters that have been applied.

3. Select **Add Filter** or, if the keyset is already used to filter the visual, select the keyset name. If you select **Add Filter**, proceed to the next step. If you select the keyset name, the keyset details are displayed and you should skip to Step 6 of this procedure.
4. Select the filter field on the Filter sidebar. Remember that the field data type must match the data type of the CSV data you will upload (for example, if the field is a numeric field, the CSV data must be also be numeric).

The Filters sidebar displays three tabs:

- i. The **Value** tab allows you to select values for the filter.
- ii. The **Wildcard** tab allows you to specify a row-level wildcard filter for the visual.



- iii. The **Keyset** tab allows you to select a keyset for the filter or to upload a CSV file as a keyset.
5. Select the **Keyset** tab. The keysets and saved filters defined in your environment are listed.
6. Select the keyset to which you want to reupload keyset values. The keyset details appear.

Planned Sales by Category
×

← Select Values (Category)

Keyset Details

Keyset Name
Jewelry

Data Source
RealtimeSales

File Name
JewelryTypes.csv

Created by
admin

Date Modified
May 4, 2021 11:17 AM

Keyset Values
Reupload Values

Sort
Ascending (A - Z)

Accessories

Bracelets

Diamonds

Earrings

Gold

Jewelry Boxes

Loose Stones

Pendants

Cancel
Continue

7. Select **Reupload Values**. An Upload Keyset Values panel appears in the Filters sidebar allowing you to specify information about the CSV file and the keyset you are updating.

Planned Sales by Category

< Upload Keyset Values (Category)

Keyset Details

Name*

Jewelry

Description

Optional, 255 characters maximum

Choose a file to Add Keyset Values*

None (required)

Browse

File must be a single column UTF-8 formatted CSV.

Cancel

Upload Keyset

The Name and Description fields are read-only when you update keyset values from a CSV file.

8. In the **Choose a file to Add Keyset Values** box, browse for and select the CSV file containing the updated keyset values you want to upload.

 **Note:** If the upload file contains more records than are allowed by your environment configuration, the keyset will not upload and an error occurs.

9. Select **Upload Keyset** to upload the CSV file for the keyset.

If the upload occurs successfully, a message displays that the upload was successful and the keyset details appear in the Filter sidebar. The keyset is now available to all users of this instance.

10. When you are finished setting your filter values, select **Continue** and examine your updates. If they are correct, select **Apply**.



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Upload Keyset Data From a CSV File Using the API

This applies to: *Visual Data Discovery*

You can upload keyset data from a CSV file using the API. Use the `POST /api/keysets/upload` API endpoint to do this. The CSV file must provide the field name, file data, the file name, the keyset name, and the data source definition ID. A keyset description is optional.

You must be the owner of the keyset or be a user with the **Administer Dashboards** [privilege](#).

The CSV file should be in the following format. A header should not be included.

```
fieldName:<field-name>
fileData: <file-information>
fileName:<CSV-file-name>
keySetName:<keyset-name>
keySetDesc:<optional-keyset-description>
sourceId:<data-source-id>
```

The response from this endpoint includes a unique ID for the keyset. You will need this ID if you update the keyset from a CSV file.

For more information, see your API documentation.

API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.



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Update Keyset Values From a CSV File Using the API

This applies to: *Visual Data Discovery*

You can update keyset data from a CSV file using the API. Use the `PUT /api/keysets/upload/<keyset-id>` API endpoint to do this. The keyset ID was assigned when the keyset was initially uploaded using a CSV file. See [Upload Keyset Data From A CSV File Using The API](#).

It should be in the following format. A header should not be included.

```
fileData: <file-information>
fileName:<CSV-file-name>
keySetId:<keyset-ID>
keySetName:<keyset-name>
keySetDesc:<optional-keyset-description>
sourceId:<data-source-id>
```

For more information, see your API documentation.

API documentation is provided with your Symphony installation at this link: `<symphony-URL>/discovery/swagger-ui.html`.

Review and Apply a Keyset as a Visual Filter

This applies to: *Visual Data Discovery*

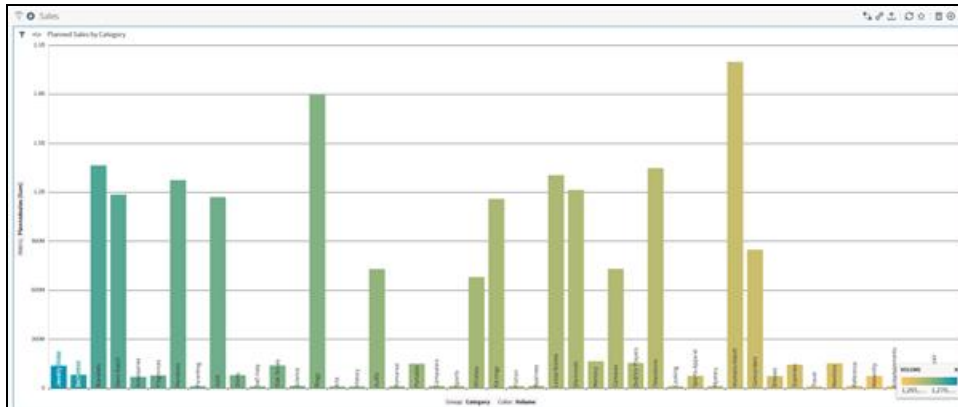
You can review and apply a keyset as a visual filter to visuals that use the same or different data sources. Visuals are limited to records containing values stored in the keyset. You can update a keyset at any time by uploading new values for the keyset.



Note: To apply a keyset to a visual, the data source for the target visual must include a field storing the same data as the key field used for the keyset. The key field is defined when the keyset is created. See [Create A Keyset](#).

Review and apply a keyset as a visual filter

1. For the purposes of this procedure, suppose you want to list the planned sales for jewelry. Assuming you have a keyset containing a list of jewelry (see [Create A Keyset](#)), apply it to a bar chart showing planned sales by category.



2. Select the filter icon on the [visual](#) or [dashboard](#) to access the appropriate filter sidebar.
 - i. To access the visual filter sidebar, select its filter icon () or select **Settings** from the [visual menu](#) () and then select  on the [sidebar menu](#).
 - i. To access the dashboard filter sidebar, select its filter icon (). The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar appears showing any filters that have been applied.

3. Select **Add Filter**.



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4. Locate the data field in the Filters sidebar list that contains the same kind of data as the data in the keyset you want to use. In our example, it is Category.

The Filters sidebar displays three tabs:

- i. The **Value** tab allows you to select values for the filter.
- ii. The **Wildcard** tab allows you to specify a row-level wildcard filter for the visual.
- iii. The **Keyset** tab allows you to select a keyset for the filter or to upload a CSV file as a keyset.

 **Note:** This example uses a non-numeric filter. See [Set A Numeric Field Filter](#).

5. Select the **Keyset** tab. The keysets and saved filters defined in your environment are listed.

Planned Sales by Category
×

← Select Values (Category)

Value Wildcard Keyset

Upload Keyset Values

Q Search...

Jewelry ⊖

Cancel Continue

6. Select the keyset you want to apply. Details about the keyset appear on the Filters sidebar.

Planned Sales by Category
×

← Select Values (Category)

Keyset Details

Keyset Name
Jewelry

Data Source
RealtimeSales

File Name
JewelryTypes.csv

Created by
admin

Date Modified
May 4, 2021 11:17 AM

Keyset Values
Reupload Values

Sort
Ascending (A - Z)

Accessories

Bracelets

Diamonds

Earrings

Gold

Jewelry Boxes

Loose Stones

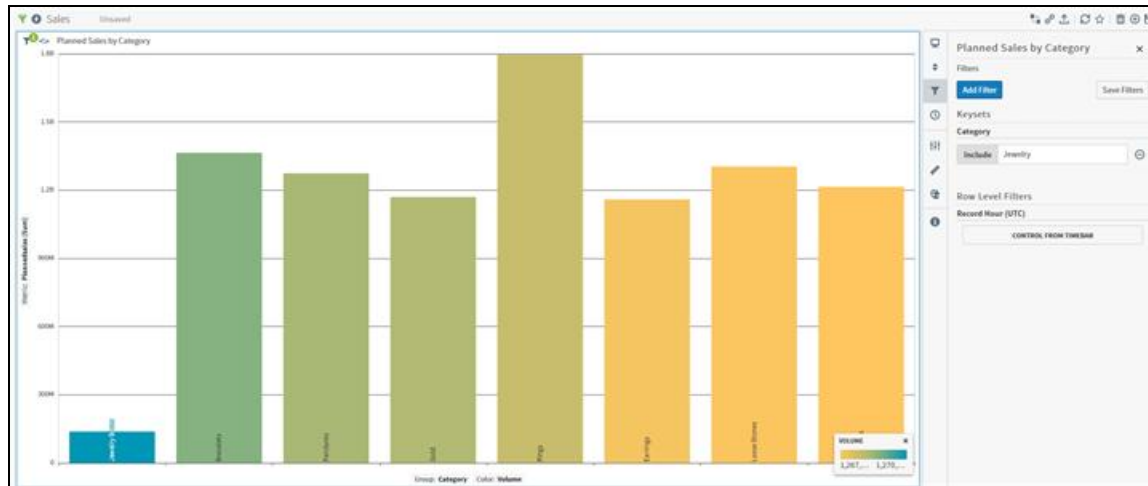
Pendants

Cancel
Continue

Sort the data in the keyset as needed by selecting the up and down arrows () in the Preview area. This sort has no effect on the visual result set when the keyset is applied.

- When you are finished setting your filter values, select **Continue** and examine your updates. If they are correct, select **Apply**.

The visual is filtered by the keyset data.



Select the **x** in the upper right corner of the Filters sidebar to close it.

Delete a Keyset

This applies to: *Visual Data Discovery*

You can only delete a keyset if it is not used by any visual in the environment.



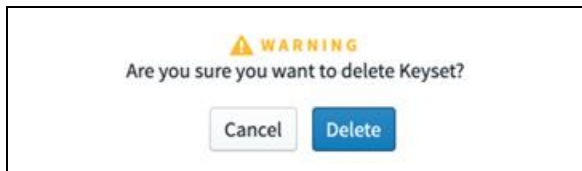
Note: Keysets can only be deleted by the user account that created them or by any Symphony user belonging to a group with the **Administer Dashboards** privilege. In addition, they can only be deleted if they are not used by any visual in the environment.

Delete a keyset

1. Select the filter icon on the [visual](#) or [dashboard](#) to access the appropriate filter sidebar.
- i. To access the visual filter sidebar, select its filter icon () or select **Settings** from the [visual menu](#) () and then select the filter () icon on the [sidebar menu](#).
- i. To access the dashboard filter sidebar, select its filter icon (). The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar appears showing any filters that have been applied.

2. Select **Add Filter**.
3. Locate and select the field in the Filters sidebar to which the keyset applies. A second page with a Keyset tab appears in the Filters sidebar.
4. Select the Keyset tab. The keysets defined in your environment that apply to the field you have selected are listed.
5. Select the delete icon () next to the keyset name. A warning dialog appears.



6. Select **Delete**. The keyset is deleted.

Control Filter Dialog Values

This applies to: *Visual Data Discovery*

You can control the behavior of filter dialogs by data source. These controls are set on the [Fields tab](#) of the [data source configuration](#).

- For attribute fields, you can require your users to manually enter attribute values to include in the visual or dashboard, instead of letting them select values from a list. See [Controlling Attribute Field Filters](#).
- For number fields, you can specify the initial (default) minimum and maximum values available for selection as filters. See [Controlling Number Field Filters](#).
- For time fields, you can specify the initial (default) minimum and maximum dates and times for the filter or, when shown on the time bar, the initial (default) time range shown. You can change these settings by manipulating the filters and time bar on the visual. See [Controlling Time Field Filters](#).

Controlling Attribute Field Filters

Control attribute field filters

1. Edit the data source configuration for which you want to control attribute field filters. See [Edit A Data Source Configuration](#).
2. Select the [Fields tab](#) in the data source work area.
3. Locate the attribute field in the field table on the Fields tab.
4. Select (check) **Only Allow Custom Values** in the sidebar menu.
5. When your changes are complete, select **Save**.

To test this, create a new dashboard visual or filter snippet using the data source. Then filter the data on the visual by the attribute. You will be required to enter the values to filter. Add at least one value or custom value for the attribute to the filter.

Add a value

1. Select **Include** or **Exclude** using the drop-down menu in the **Operator** box.
2. Type a value into the search box and select the add icon . Be sure to specify the values using the proper sentence case. For example, if the values are stored in lowercase letters only, but you enter a value with starting a capital letter, the search will not work.

Sales by State

×

< Select Values (Category)

Value

Wildcard

Keyset

Q rings

⊕

Operator

Include

⬆

☒

Select All

Please add at least one value to start.

3. The value is added to the list of selected values.

Sales by State

×

< Select Values (Category)

Value Wildcard Keyset

Q Search...

Operator Include

☒ Select All

☒ bracelets

☒ earrings

☒ pendants

☒ rings

☒ watches

- When you are finished setting your filter values, select **Continue** and examine your updates. If they are correct, select **Apply**.

For more information about setting attribute filters, see [Set An Attribute Filter](#).

Controlling Number Field Filters

Control number field filters

- Edit the data source configuration for which you want to control number field filters. See [Edit A Data Source Configuration..](#)
- Select the [Fields tab](#) in the data source creation work area.
- Locate the number field in the field table on the **Fields** tab.

-

To test this, create a new dashboard visual or filter snippet using the data source. Then filter the data by the number field you specified a custom range for. The values show as default in the filter are the custom range you specified in the data source configuration.

Sales by State

← Select Values (Plannedsales)

Range Keyset

Min 1

Max	10
-----	----

Operator	Between
----------	---------

From

1

To

10



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When you are finished setting your filter values, select **Continue** and examine your updates. If they are correct, select **Apply**.

For more information about setting numeric filters, see [Set A Numeric Field Filter](#).

Controlling Time Field Filters

Control the default time field filter and time bar ranges

1. Edit the data source configuration for which you want to control time field filters. See [Edit A Data Source Configuration](#).
2. Select the [Fields tab](#) in the data source configuration.
3. Locate the time field in the field table on the **Fields** tab.
4. Select to enable Custom Range in the sidebar menu.
5. Specify minimum and maximum values for the filter ranges for the time field in the **From** and **To** boxes.

Select the value in the **From** or **To** time fields to select a new date and time in the resulting calendar pop-up.

< November 2013 >

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

10 : 00 : 00 . 000 PM

6. Select **Save** to apply the custom filter range.



Note: If a [Custom Range](#) has been defined for a field, the minimum and maximum fields used in filters remain unchanged when you refresh source data. These fields are shown with cache actions disabled on the [Cache tab](#).

To test this, create a new dashboard visual or filter snippet using the data source. Then filter the data by the time field. The values you can select for the filter are restricted to the custom range you specified in the data source configuration. For more information about specifying time filters, see [Set A Time Field Filter](#).

Sales by State

X

< Select Values (Ts)

Range

Keysets

Min

Nov 10, 2013 10:00:00.000 PM

Max

Nov 28, 2013 10:00:00.000 PM

From

fx

▼

Start of Data Set

To

fx

▼

End of Data Set

Presets...

When you are finished setting your filter values, select **Continue** and examine your updates. If they are correct, select **Apply**.

Remove a Filter from a Visual, Filter Snippet or Dashboard

This applies to: *Visual Data Discovery*

You can remove row-level and cross-visual filters for the data in a visual. When all the visuals in a dashboard use data from the same data source, you can remove row-level filters for all the visuals and filter snippets in the dashboard.

The process for removing a filter from a visual, filter snippet, or dashboard is the same for [row-level filters](#), [wildcard filters](#), [group filters](#), [cross-visual filters](#), and filters applied by a [keyset](#) or a [saved filter](#). The applied filters for a visual, filter snippet, or dashboard appear on the Filters sidebar and are removed in the same way. To delete a saved filter or a keyset from your environment, see [Maintain Saved Filters](#) and [Use Keysets](#).

Remove a filter from a visual or dashboard

1. Select the filter icon on the [visual](#), filter snippet, or [dashboard](#) to access the appropriate filter sidebar.

- i. To access the filter sidebar, select its filter icon () or select **Settings** from the [menu](#) () and then select  on the [sidebar menu](#).
- ii. To access the dashboard filter sidebar, select its filter icon (). The dashboard-level filter icon is available only when all the visuals are from the same data source.

The Filters sidebar appears showing any filters that have been applied.

2. Locate the filter you want to remove on the Filters sidebar.

3. Select  associated with the filter. If you remove the filter at the dashboard level, it is removed from all the visuals and filter snippets in the dashboard. Otherwise, it is removed only from the selected (active) visual or filter snippet.

Share a Dashboard with Users

This applies to: *Visual Data Discovery*

Your users can share dashboards easily amongst themselves in a user-friendly manner. Allow them to grant and [revoke](#) VIEWER, COMMENTER, or EDITOR access level to a dashboard for sharing. When a user shares a dashboard, the users who receive it can access the underlying visuals and sources used in the dashboard. See [Shared Access - Viewers](#).

Share dashboards with:

- Existing users in a non-tenant environment.
- Existing users and groups within a tenant, and optionally with everyone in a tenant using the **Share with everyone** tab. You must enable dashboard sharing in your tenant environment. See [Server-Level Variables](#).
- As an administrator, you can filter users who can receive a dashboard using the recipient rules API. See [Configure Recipient Rules](#).

Share a Dashboard

1. Log into Symphony in data discovery as a user who can share dashboards ([Manage Dashboards Permission privilege](#)). Your user account must meet one of the following conditions:
 - i. Access as the OWNER of a dashboard - the user who created it and has READ, WRITE, and DELETE permissions for it.
 - ii. Access as the EDITOR of a dashboard - the user who can edit and has READ and WRITE permissions for it.
 - iii. In a group with the [Administer Dashboards privilege](#).
2. Open the dashboard you wish to share from the [list of available](#) dashboards.
3. Select Share Dashboard . The **Share [Dashboard Name]** work area opens with a **Select Users** work area visible. In a multi-tenant environment, several

tabbed work areas are shown: **Select Users**, **Select Groups**, and **Share with everyone**.

4. Select and add users using the work area.
5. Enter a full or partial user or group name in the search field to find and select existing users and groups.

 **Note:** If you use the **Share with everyone** work area, you can skip this step.

6. Select an access level for the selected users, groups, or everyone in your tenant: **Viewer**, **Commenter**, or **Editor**.

 **Note:** All users can see comments associated with widgets in your dashboard when comments are enabled. See [Manage Widget Comments](#) for more information on working with comments.

7. Select **Add** to grant selected users and groups access to this dashboard.

Dashboard owners and users with **Viewer**, **Commenter**, or **Editor** access to the dashboard are listed in the **Existing Access** list.

 **Note:** If you use the **Share with everyone** work area, all users are given the access level you selected.

8. Select **Save** to save your changes. Any user or group on the Existing Access list retain their access until you [revoke their access](#).



Note: [Local visuals](#) inherit a dashboard's access level. To share visuals from the Visual Gallery included in your dashboard, you need appropriate permissions or privileges, and `DATA ACCESS` permission for the sources of those visuals. See [Shared Access - Viewers](#), [Shared Access - Commenters](#), and [Shared Access - Editors](#).

Shared Access - Viewers

Sharing User or Group Access - Dashboards	Sharing User or Group Access - Visuals	Sharing User or Group Access - Sources	Recipient Access
Sharing user has dashboard access: - OWNER or EDITOR of the dashboard - Has Administer Dashboards privilege	No visuals access	No source access	Recipients are given access to: - VIEWER access level to the dashboard - No visual access - No source access
Sharing user has dashboard access: - OWNER or EDITOR of the dashboard - Has Administer Dashboards privilege	Sharing user has visual access: - Owner of the visual - Has Manage Visuals privilege, and <code>READ</code> permission for the visuals - Has Administer Visuals privilege	No source access	Recipients are given access to: - VIEWER access level to the dashboard - VIEWER access level to the visuals - No source access
Sharing user has dashboard access: - OWNER or EDITOR of the dashboard - Has Administer	Sharing user has visual access: - Owner of the visual - Has Manage Visuals privilege, and <code>READ</code>	Sharing user has source access: Owner of the source	Recipients are given access to: - VIEWER access level to the dashboard - VIEWER access level to the visuals

Sharing User or Group Access - Dashboards	Sharing User or Group Access - Visuals	Sharing User or Group Access - Sources	Recipient Access
Dashboards privilege	permission for the visuals Has Administer Visuals privilege	- Has Manage Sources privilege, and <code>DATA ACCESS</code> permission for the source - Has Administer Sources privilege	<code>DATA ACCESS</code> permission to the source

Shared Access - Commenters

Sharing User or Group Access - Dashboards	Sharing User or Group Access - Visuals	Sharing User or Group Access - Sources	Recipient Access
Sharing user has dashboard access: <code>OWNER</code> or <code>EDITOR</code> of the dashboard - Has Administer Dashboards privilege	No visuals access	No source access	Recipients are given access to: <code>COMMENTER</code> access level to the dashboard - No visual access - No source access
Sharing user has dashboard access: <code>OWNER</code> or <code>EDITOR</code> of the dashboard - Has Administer Dashboards privilege	Sharing user has visual access: - Owner of the visual - Has Manage Visuals privilege, and <code>READ</code> permission for the visuals - Has Administer Visuals privilege	No source access	Recipients are given access to: <code>COMMENTER</code> access level to the dashboard <code>COMMENTER</code> access level to the visuals - No source access

Sharing User or Group Access - Dashboards	Sharing User or Group Access - Visuals	Sharing User or Group Access - Sources	Recipient Access
Sharing user has dashboard access: - OWNER or EDITOR of the dashboard - Has Administer Dashboards privilege	Sharing user has visual access: - Owner of the visual - Has Manage Visuals privilege, and READ permission for the visuals - Has Administer Visuals privilege	Sharing user has source access: - Owner of the source - Has Manage Sources privilege, and DATA ACCESS permission for the source - Has Administer Sources privilege	Recipients are given access to: - COMMENTER access level to the dashboard - COMMENTER access level to the visuals - DATA ACCESS permission to the source

Shared Access - Editors

Sharing User or Group Access - Dashboards	Sharing User or Group Access - Visuals	Sharing User or Group Access - Sources	Recipient Access
Sharing user has dashboard access: - OWNER or EDITOR of the dashboard - Has Administer Dashboards privilege	No visuals access	No source access	Recipients are given access to: - EDITOR access level to the dashboard - No visual access - No source access
Sharing user has dashboard access: OWNER or EDITOR of the dashboard	Sharing user has visual access: OWNER or EDITOR of the visuals	No source access	Recipients are given access to: - EDITOR access level to the dashboard - EDITOR access level to the visuals

Sharing User or Group Access - Dashboards	Sharing User or Group Access - Visuals	Sharing User or Group Access - Sources	Recipient Access
Has Administer Dashboards privilege	Has Administer Visuals privilege		No source access
Sharing user has dashboard access: - OWNER or EDITOR of the dashboard - Has Administer Dashboards privilege	Sharing user has visual access: - OWNER or EDITOR of the visuals - Has Administer Visuals privilege	Sharing user has source access: - OWNER or EDITOR of the sources - Has Manage Sources privilege, and DATA ACCESS permission for the source - Has Administer Sources privilege	Recipients are given access to: - EDITOR access level to the dashboard - EDITOR access level to the visuals - DATA ACCESS permission to the sources

Revoke or Change Shared Dashboard Access

This applies to: *Visual Data Discovery*

Users with appropriate access can revoke Viewer, Commenter, and Editor access from [shared dashboards](#) if needed.

If you or your users revoke a recipient's access to a dashboard, the recipient still has `READ` access to the visuals and `DATA ACCESS` to the source. See [Shared Access - Viewers](#).

Revoke dashboard viewer, commenter, or editor access

1. Log in as a user who can share dashboards. Your user account must meet one of the following conditions:
To revoke an access level:
 - i. Access as the `OWNER` of a dashboard - the user who created it and has `READ`, `WRITE`, and `DELETE` permissions for it.
 - ii. Access as the `EDITOR` of a dashboard - the user who can edit and has `READ` and `WRITE` permissions for it.
 - iii. In a group with the [Administer Dashboards](#) privilege.
2. Open the dashboard you need from the [list of available](#) dashboards.
3. Select Share Dashboard . The **Share [Dashboard Name]** work area opens with several tabbed work areas: **Select Users**, **Select Groups**, and **Share with everyone** for tenants in your environment.
4. Use the **Search** box to find one or more users or groups in the **Existing Access** list in the **Select Users** work area, **Select Groups** work area, or **Share with everyone** work area (when you are working within a tenant).
5. Select the remove icon () next to the user name or group name to remove their access to the dashboard. Select the remove icon as appropriate in the **Share with everyone work** area.
6. Select **Save** to save your changes.

Change dashboard access

1. Log in as a user who can share dashboards. Your user account must meet one of the following conditions:
To change a user's access level:

- i. Access as the **OWNER** of a dashboard - the user who created it and has **READ**, **WRITE**, and **DELETE** permissions for it.
 - ii. Access as the **EDITOR** of a dashboard - the user who can edit and has **READ** and **WRITE** permissions for it.
 - iii. In a group with the **Administer Dashboards** privilege.
2. Open the dashboard you need from the [list of available](#) dashboards.
 3. Select Share Dashboard . The **Share [Dashboard Name]** work area opens with several tabbed work areas: **Select Users**, **Select Groups**, and **Share with everyone** for tenants in your environment.
 4. Use the **Search** box to find one or more users or groups in the **Existing Access** list in the **Select Users** work area, **Select Groups** work area, or **Share with everyone** work area (when you are working within a tenant).

 **Note:** All users can see comments associated with widgets in your dashboard when comments are enabled. See [Manage Widget Comments](#) for more information on working with comments.
 5. Select **Save** to save your changes.

 **Note:** When you revoke access to a dashboard, they can no longer access the dashboard, but may still have access to shared visuals and sources.