MAYO CLINIC
LABORATORIES

Activity Metrics User's Guide

Release 1.21

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Introduction

Activity Metrics, a web-based application, helps you monitor your key quality metrics activity with Mayo Clinic Laboratories.

Activity Metrics provides several dashboards that help you visualize specific data activities with Mayo Clinic Laboratories, as well as a dashboard that summarizes the others. You can filter and sort these dashboards in numerous ways, save multiple filter and sort settings for each dashboard, and export your data to various file formats. The data is collected overnight each night to ensure that users have the most up-to-date information each morning.

With Activity Metrics, you can spot trends in your data, identify underlying process gaps and ordering issues that affect your metrics, and use this information to drive continuous-improvement initiatives.

Notes:

- As a web-based application, Activity Metrics uses your browser's cache for better responsiveness. If you see an **Access Denied** or other error while using the application:
    1. Clear the browser cache.
    2. Force a refresh of the browser window by using your browser's reload key sequence (typically, **Ctrl** + **R** or **Ctrl** + **F5**).
- Activity Metrics dashboards are best viewed with a screen resolution of 1920×1080 or higher with the browser's size maximized.

Registration

For instructions on how to register on the Mayo Clinic Laboratories website (MayoClinicLabs.com), please see our Frequently Asked Questions page.

To request access to Activity Metrics, contact Customer Service.

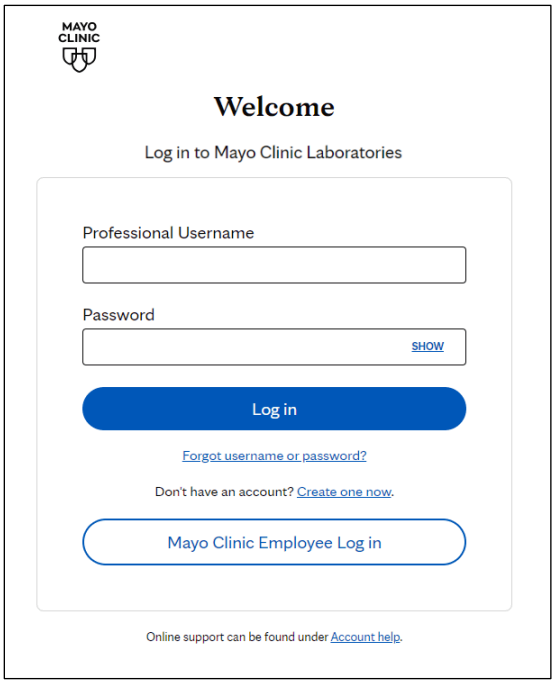
Note: Supported browsers include Chrome, Edge, Firefox, and Safari.

Logging into Activity Metrics

To access the Activity Metrics functionality once you have completed registration and been assigned the correct permission:

1. On MayoClinicLabs.com, at top right, click **My Dashboard**.

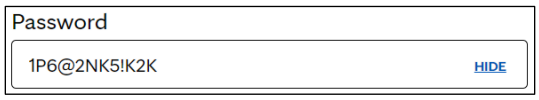
If you have not already logged in, the login window appears.



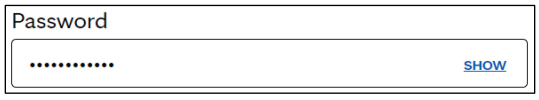
2. Enter your **Professional Username** (email address) and **Password.**

   Notes:

   - Passwords are case sensitive.
   - To help ensure you type your password correctly, you can click the **SHOW** link at the right end of the **Password** field. Your password becomes fully visible, and the button text changes to **HIDE**.

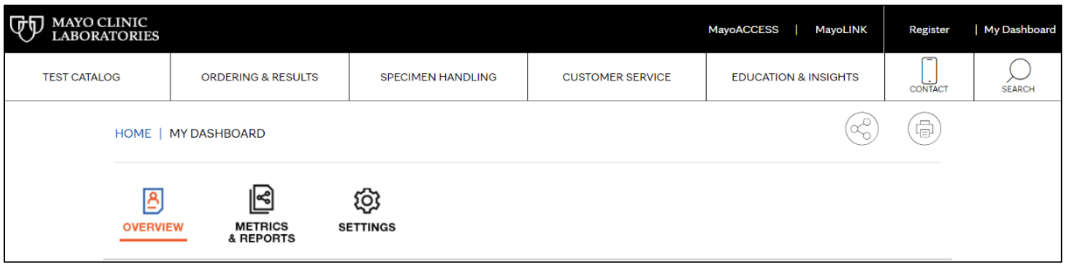
     

     To hide your password again, click the **HIDE** link. Your password is represented again by a series of dots, and the link text reverts to **SHOW**.

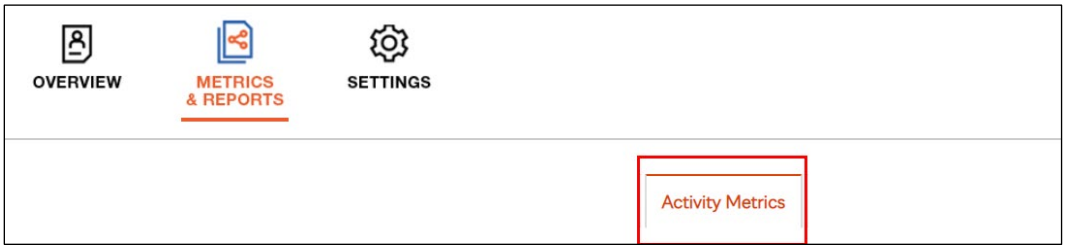
3. Click the **Log in** button.

Once you have logged in, your **Dashboard** appears.

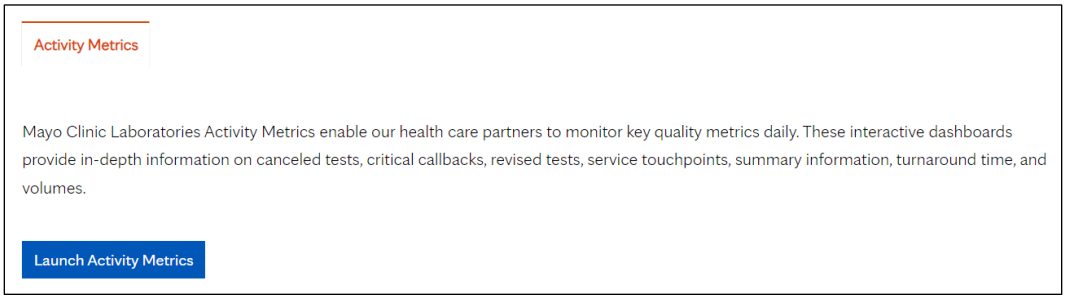


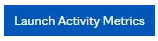
4. Click the **METRICS & REPORTS** icon.

5. Click the **Activity Metrics** tab.

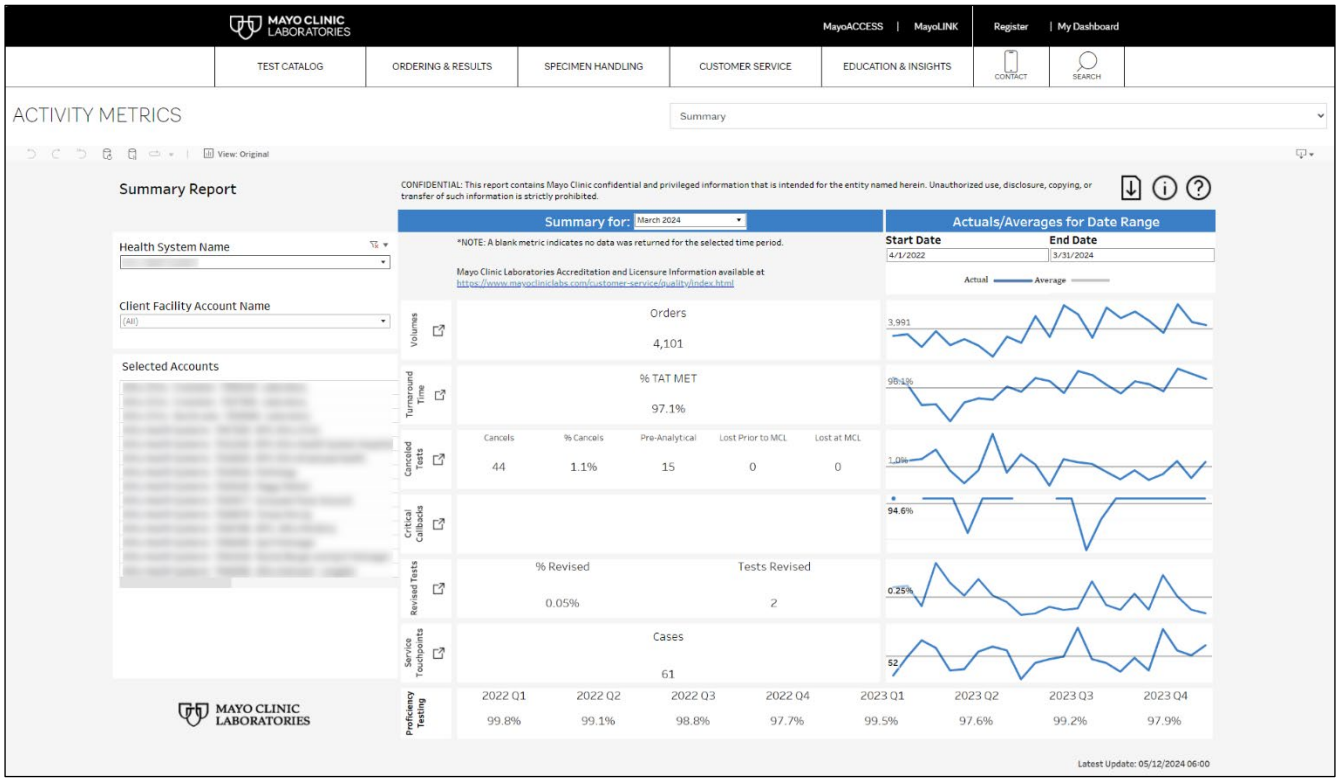


Below the tab, the following appears:



6. Click the **Launch Activity Metrics** button. 

The **Summary** dashboard appears.



Functionality overview

Dashboard drop-down menu

At top right of every dashboard in Activity Metrics is a drop-down menu of dashboards. When you log in, the **Summary** dashboard appears by default.

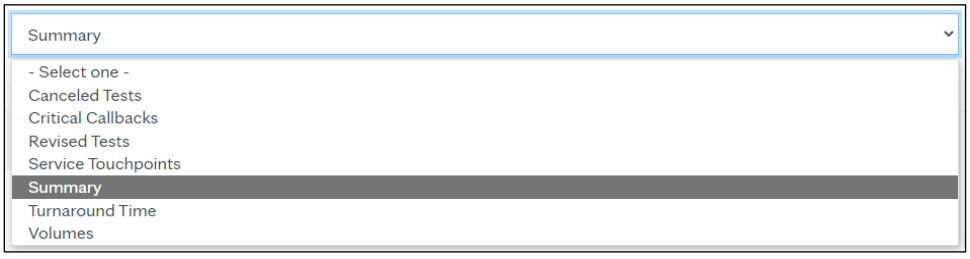
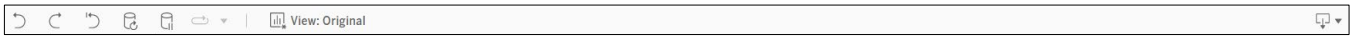


Tableau Toolbar



Across the top of the screen, below the words **ACTIVITY METRICS**, is the Tableau Toolbar, which offers various functionalities:

- **Undo my last action**

- **Redo my last action**
- **Reset view:** Restores your view to what you saw when you first opened the dashboard.
- **Refresh data in this view**
- **Pause data queries while applying actions**
- **View:** Allows you to set and manage Custom Views.
- **Tableau Download** icon**:** Allows you to download data from the dashboard in several different file formats.

For more information on views, see Managing Custom Views for an existing dashboard.

Tabs

Each dashboard except **Summary** has two tabs (right):

- The main (left-hand) tab visualizes your data by a particular metric and is named for that metric. Here, you can use the filters available for the dashboard to visualize certain data only. For more information, see Filtering data.
- The **Export** tab on the right provides a table of the data that is visualized on the main tab. Here, you can export the data to either Microsoft Excel or a CSV file. For more information, see Downloading data.

Icons at top right

At top right, below the Tableau Toolbar, each dashboard tab contains a selection of icons pertinent to the dashboard metric and the tab function:

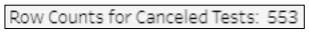
- **Download:** Appears on the **Summary** dashboard, where it allows you to download a snapshot of the data visualization.
- **Information:** Appears on all main tabs. When you hover over the icon, a tooltip that briefly explains the purpose of the dashboard appears.
- **Help:** Appears on all main tabs. Opens a page with additional information on Activity Metrics on MayoClinicLabs.com in a new browser tab.

Information bar

At the very bottom of each dashboard is a bar containing two useful indicators:

Row Counts

Row Counts (right) indicates how many rows of data appear on the main tab and how many will be exported (if you use the **Export** function).



Note: Pay attention to this number when visualizing or exporting data. Row counts exceeding 50,000 records could take several minutes to return results and in some cases may not return any results at all.

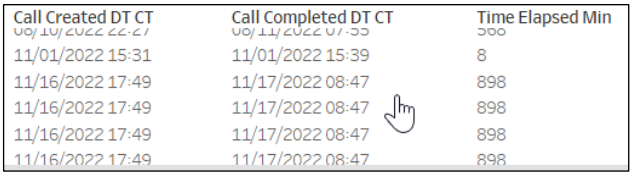
Latest Update

At bottom right of each dashboard is the **Latest Update** (below, right). This indicates when the data on the dashboard was last refreshed, assuring you that you are working with the most current and accurate information. All dashboards are updated daily.

Latest Update: 09/15/2023 02:23

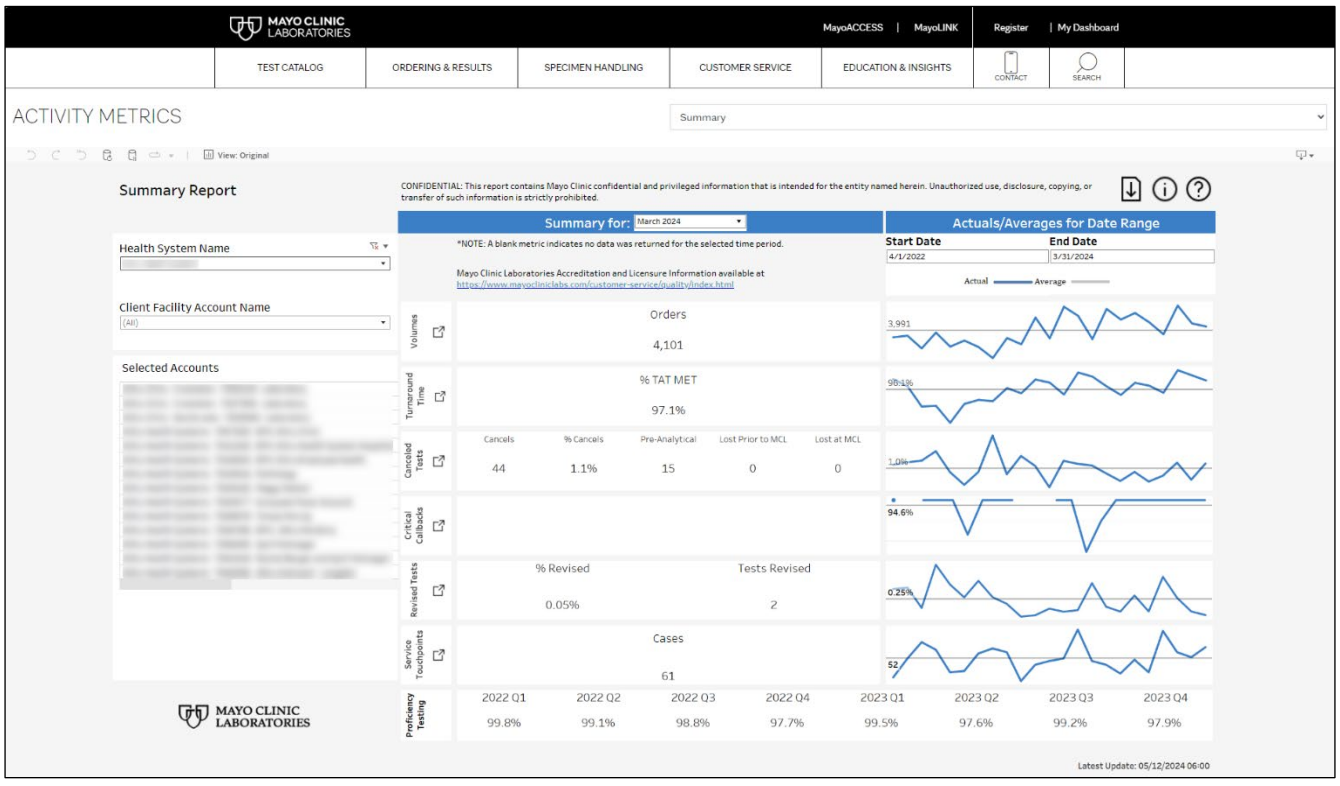
Scrolling

In a table or graph at the bottom of a dashboard, if you cannot view all rows of data, you can scroll up and down the rows (right). If you are displaying numerous columns, you can also scroll left and right.

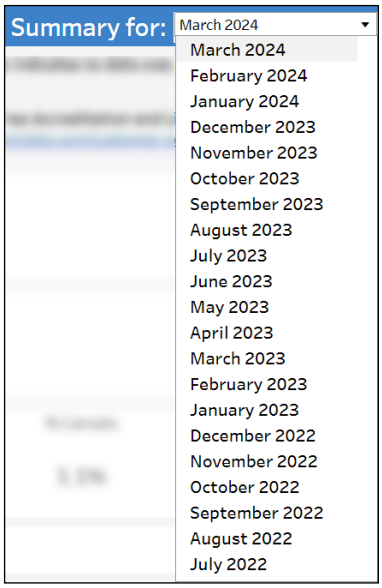


Available dashboards

Summary

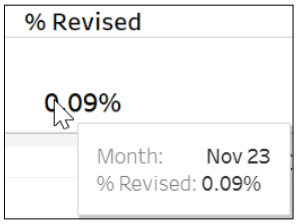


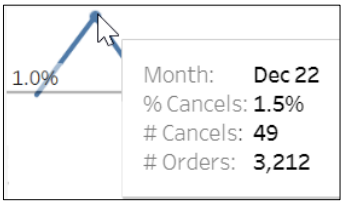
The **Summary** dashboard provides an overview of the metrics measured by all other dashboards. From the **Summary for:** drop-down menu at the top, select any of the last 24 full months of data (right).



This dashboard also offers actual-versus-average comparisons of all dashboard metrics. Here, you can quickly identify trends in volumes, turnaround times, canceled tests, critical callbacks, revised tests, and service touchpoints.

Tip: Hover over a number or percentage (below, left) or a data point in a line graph (below, right) to bring up a tooltip with relevant statistics.





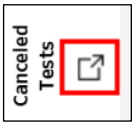
At the bottom of the dashboard, you can also view **Proficiency Testing** information for Mayo Clinic Laboratories for the last eight quarters.

Proficiency Testing	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
	99.8%	99.1%	98.8%	97.7%	99.5%	97.6%	99.2%	97.9%

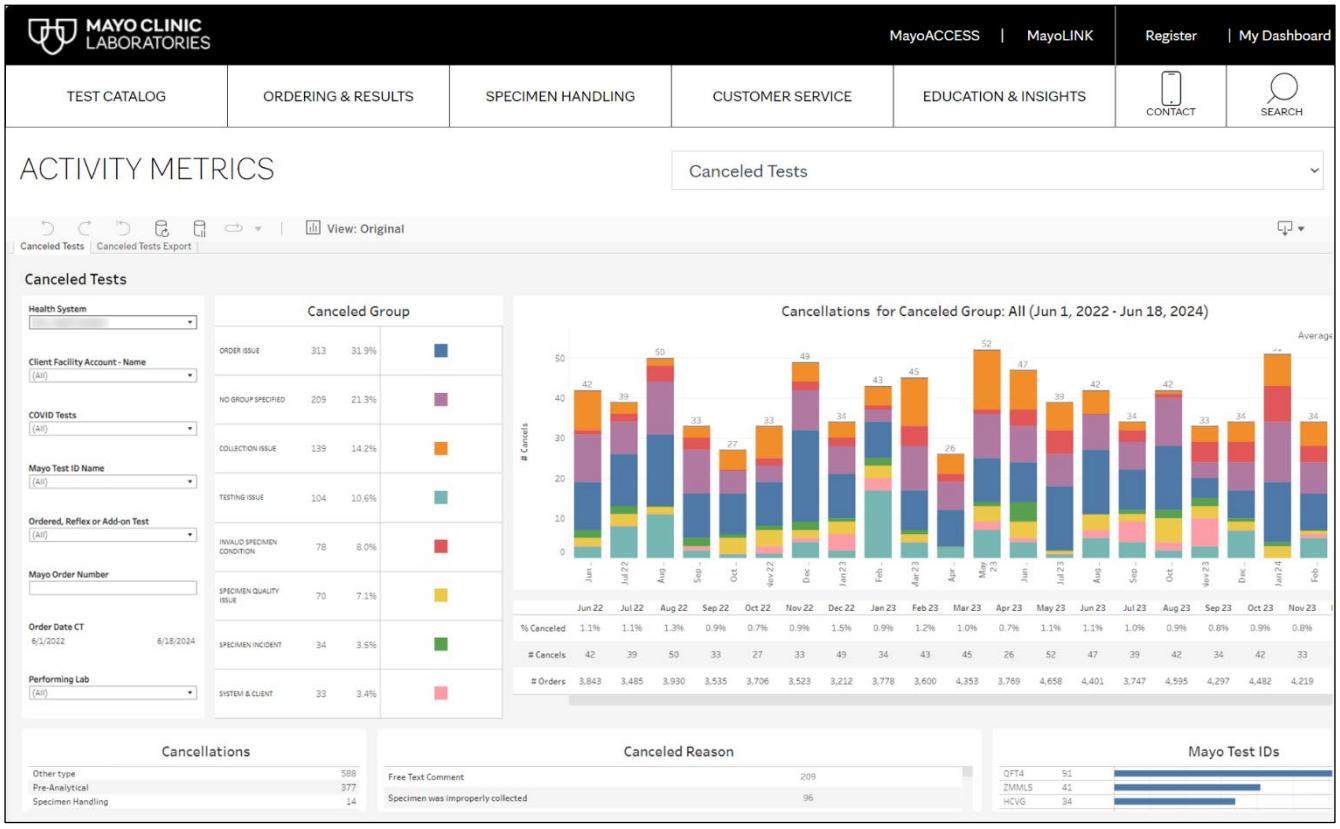
Notes:

- Unlike the other dashboards, the **Summary** dashboard has no **Export** tab. However, you can click the **Download** icon (see Icons at top right) to download an image of the dashboard as a PNG file. Related data can be exported from each of the other dashboards. For more information, see Downloading data.
- When a metric value is absent, no data was returned for the selected time period.

- At the left end of the row for any dashboard, you can click the **Open in New Tab** icon to open that dashboard in a new browser tab (right).



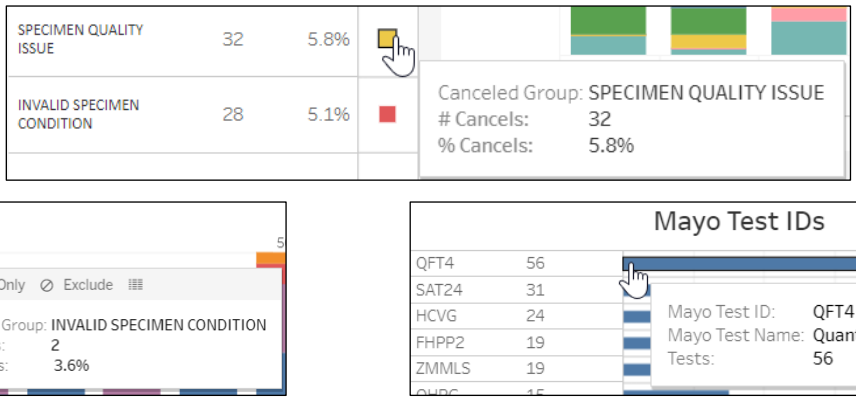
Canceled Tests



The **Canceled Tests** dashboard visualizes your monthly volumes of tests that were canceled by either your organization or by Mayo Clinic Laboratories. The default time range is the last 24 full months; to display more information, use the **Order Date CT** (date selector) filter to select a range over the past 24 rolling months. You can filter the data in several additional ways, including by specific Test IDs and by values from the color-coded **Canceled Group** legend.

The dashboard indicates the **Average Canceled** both at top right of the main **Cancellations** bar graph and at the bottom of the screen. Below the main graph are tables of **Cancellations** and **Canceled Reason** data, as well as a small horizontal bar graph of **Mayo Test IDs**.

Tip: Hover over a colored square in the **Canceled Group** legend (below, top) or a colored bar segment in the main **Cancellations** graph (below, bottom left) to bring up a tooltip showing the cancellation reason and other information. Hover over a bar in the **Mayo Test IDs** graph below the main graph (below, bottom right) to bring up a tooltip showing the **Test ID**, **Test Name**, and number of tests within the specified date range.



Cancel counts

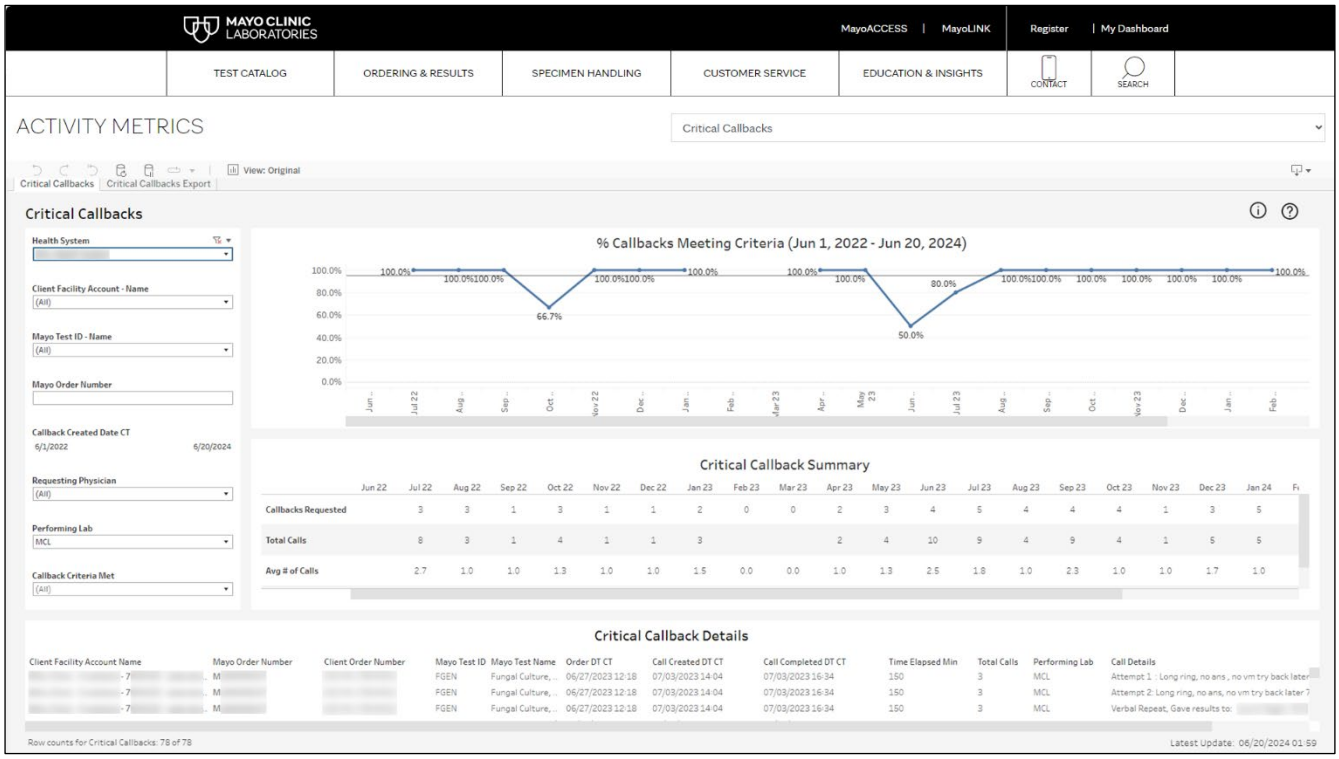
Cancellations are counted at the Mayo Test ID level and determined by the number of unique Cancellation Comments. Test order hierarchy dictates that one order can have multiple tests and one test can have multiple components.

If a Mayo Test ID with multiple components is canceled, the count is equal to the number of unique Cancellation Comments. For example:

- If an order has two tests and both are canceled, the count is 2.
- If an order has a profile test and one component on that profile is canceled, the count is 1.
- If one order has a profile test and two components of that test are individually canceled with different comments, the count is 2.

If the Mayo Test ID has components that were both reported and canceled, the order appears on both the **Canceled Tests** and **Turnaround Time** dashboards.

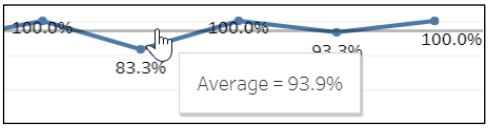
Critical Callbacks



The **Critical Callbacks** dashboard visualizes the number of critical callbacks made by Mayo Clinic Laboratories. The default time range is the last 24 full months; to display more information, use the **Callback Created Date CT** (date selector) filter to select a range over the past 24 rolling months. The **% Callbacks Meeting Criteria** line graph displays the monthly percentage of callbacks completed within 60 minutes of the callback request. Callback details include Test ID, duration of call, call completion time and date, time elapsed, and other information.

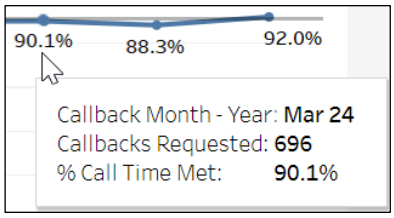
Note: Only critical test results are included on this dashboard. Other result types, such as semi-urgent, are not displayed.

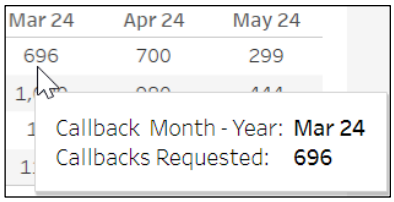
Tip: Hover over the average line in the main graph to bring up a tooltip with the average percentage of critical callbacks meeting the callback criteria for the specified timeframe (right).



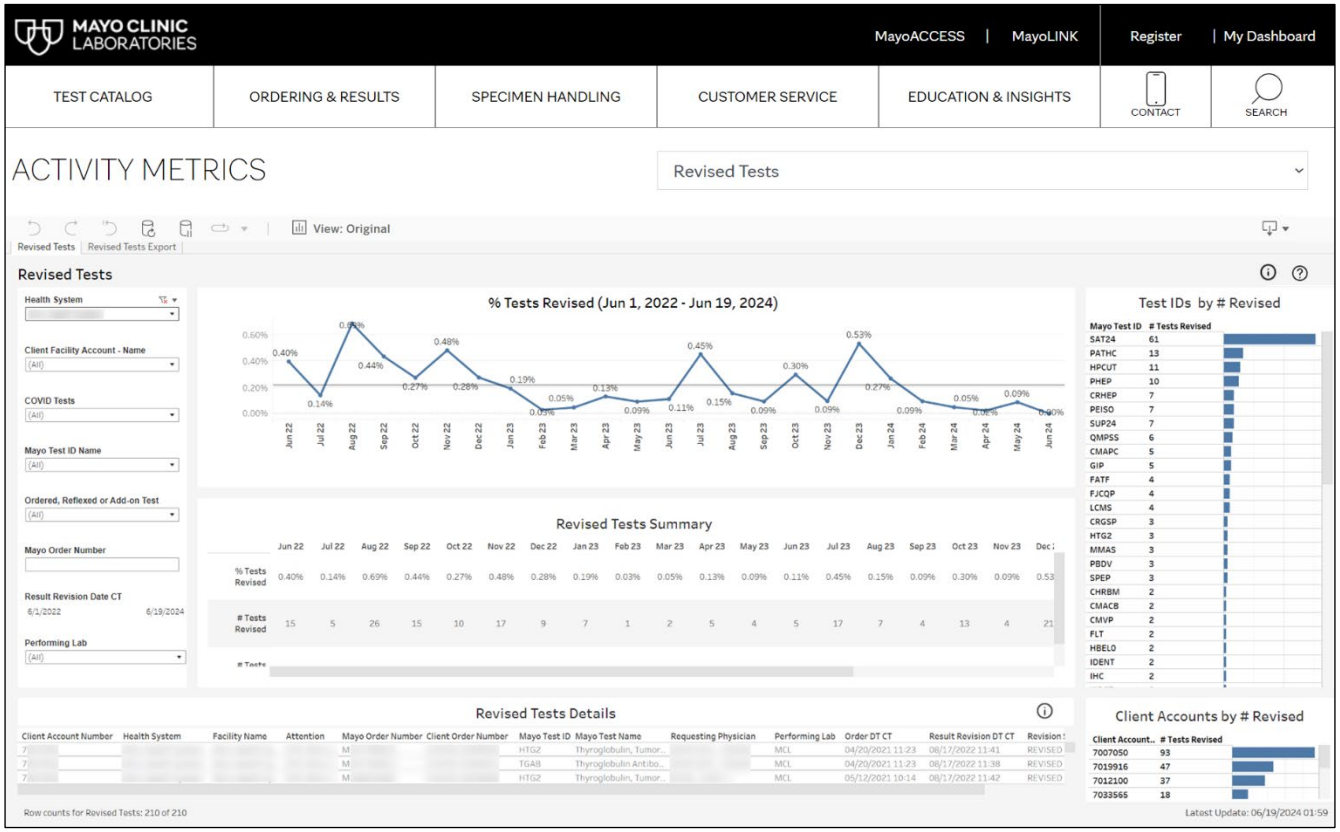
Below the line graph are the **Critical Callback Summary** and all **Critical Callback Details** data in tabular form. You can use this data to monitor Mayo Clinic Laboratories critical-callback performance.

Tip: Hover over a data point in the **% Callbacks Meeting Criteria** line graph (below, left) or a cell in the **Critical Callback Summary** table (below, right) to bring up a tooltip with relevant statistics.



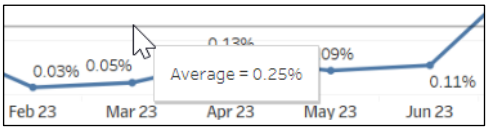


Revised Tests



The **Revised Tests** dashboard visualizes tests that have been revised and resulted. The default time range is the last 24 full months; to display more information, use the **Result Revision Date CT** (date selector) filter to select a range over the past 24 rolling months. The **% Tests Revised** line graph displays the monthly percentage of tests that have been revised.

Tip: Hover over the average line in the main graph to bring up a tooltip with the average percentage of tests revised during the specified **Result Revision Date** timeframe (right).



Below the line graph is the **Revised Tests Summary** table, which shows the percentage of tests revised, the number of tests revised, and the number of tests resulted per month. At bottom is the

Revised Tests Details table, which shows the details of each revised test, including its **Revision Status**.

The right side of the dashboard features the **Test IDs by # Revised** and (if applicable to your organization) **Client Accounts by # Revised** bar charts.

Note: Demographic-only revisions that do not affect reference ranges, such as name, are not included in this dashboard.

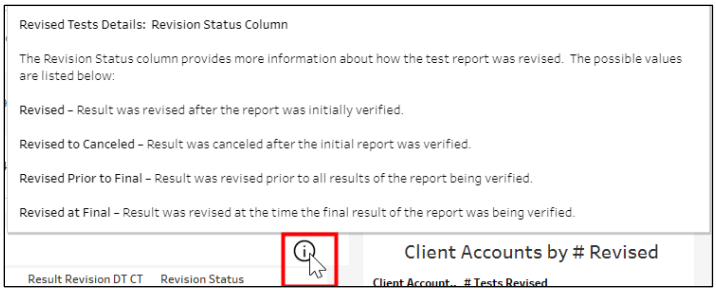
Revision Status

In addition to appearing in the **Revised Tests Details** table on the main tab, the **Revision Status** column is also displayed on the **Revised Tests Export** tab. Possible values are as follows:

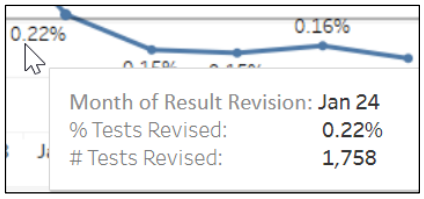
- **Revised:** Result was revised after report was initially verified.
- **Revised to Canceled:** Result was canceled after initial report was verified.
- **Revised Prior to Final:** Result was revised prior to all results of the report being verified.
- **Revised at Final:** Result was revised at the time of the final result of the report being verified.

Tips:

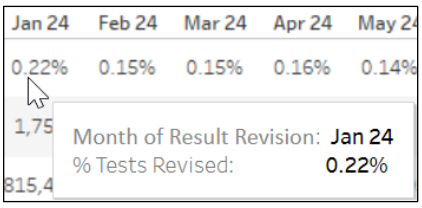
- Hover over the **Information** icon ⓘ above the **Revision Status** column to bring up a tooltip with the above information (right).



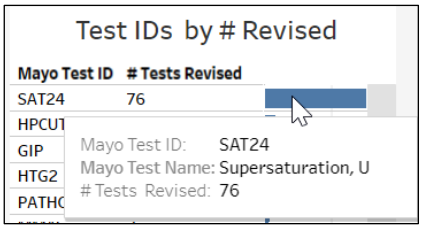
- Hover over a data point, bar, or table cell to bring up a tooltip with relevant statistics:



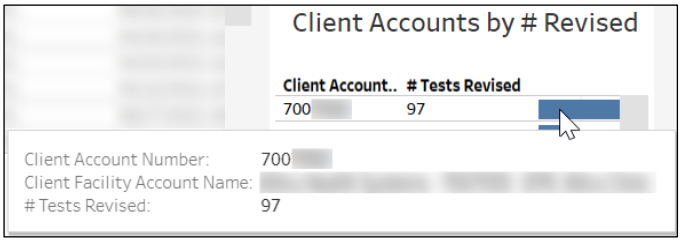
% Tests Revised



Revised Tests Summary table



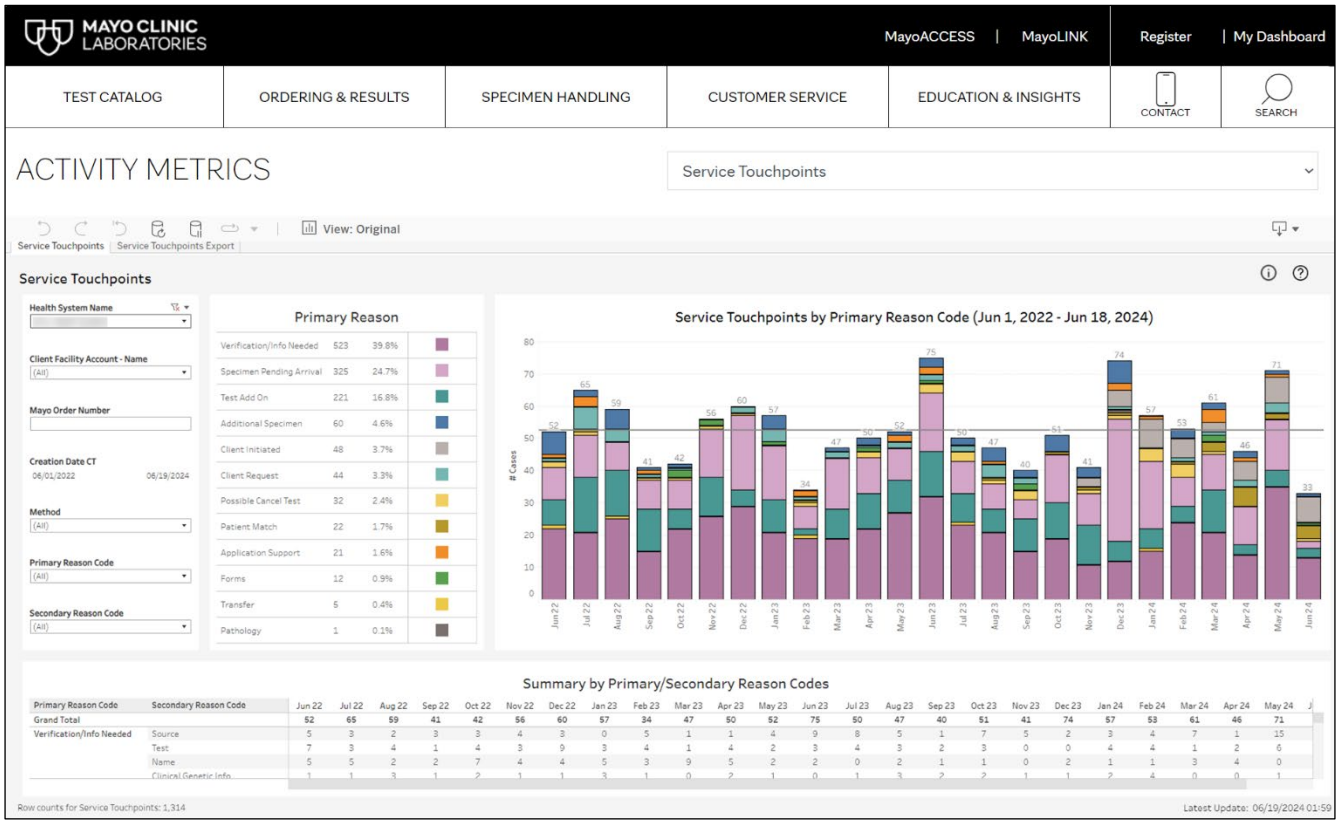
Test IDs by # Revised



Client Accounts by # Revised

Note: This does not apply to the **Revised Tests Details** table.

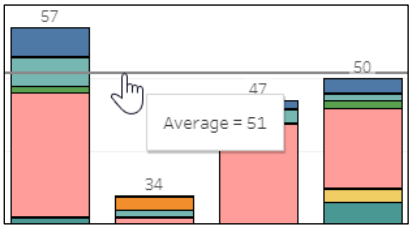
Service Touchpoints



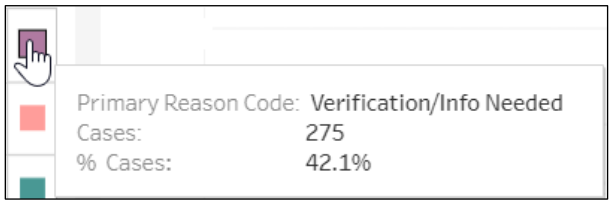
The **Service Touchpoints** dashboard visualizes the total numbers of case inquiries that required additional resolution and organizes them by primary and secondary reasons for contact. The default time range is the last 24 full months; to display more information, use the **Creation Date CT** (date selector) filter to select a range over the past 24 rolling months. You can filter data based on any or all primary reason and secondary reason codes.

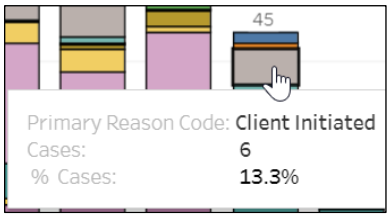
Tips:

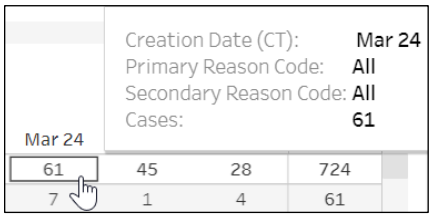
- Hover over the average line in the main graph to bring up a tooltip with the average number of case inquiries that required additional resolution during the specified timeframe (right).



- Hover over a colored square in the **Primary Reason** legend (below, top), a colored bar segment in the **Service Touchpoints By Primary Reason Code** bar graph (below, bottom left), or a cell in the **Summary by Primary/Secondary Reason** table (below, bottom right) to bring up a tooltip with the **Primary Reason Code** and other details.

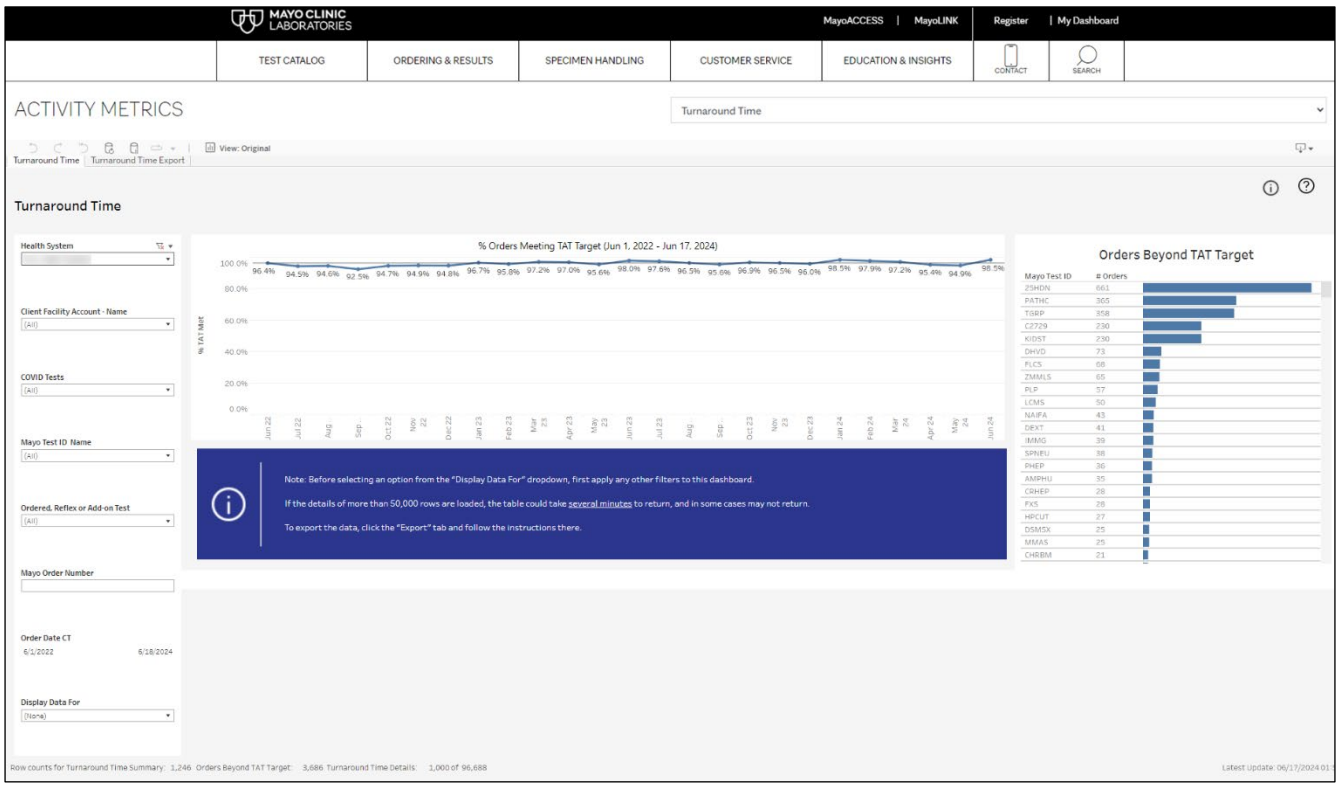






Note: If specimens are not received at Mayo Clinic Laboratories within 48 hours of batching (or, if applicable, transmission via interface), they may become service touchpoints for which the **Primary Reason** is **Specimen Pending Arrival**.

Turnaround Time

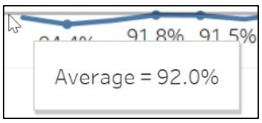


The **Turnaround Time** (TAT) dashboard tracks time elapsed between specimen receipt at Mayo Clinic Laboratories and result reporting. The default time range is the last 24 full months; to display more information, use the **Order Date CT** (date selector) filter to select a range over the past 24 rolling months.

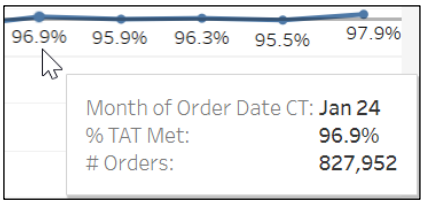
The main **% Orders Meeting TAT Target** line graph visualizes the percentage of tests meeting the **Published Report Available** time. The **Published Report Available** time is also known as the **TAT Target** (number of days) listed in the test catalog; orders exceeding this value are visualized in the **Orders Beyond TAT Target** bar chart. This data allows you to monitor Mayo Clinic Laboratories testing volumes and TAT performance.

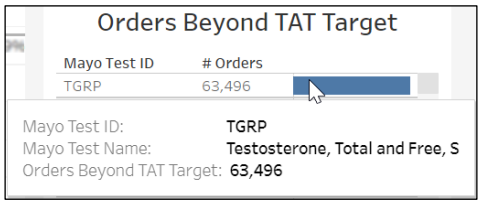
Tips:

- Hover over the average line in the main graph to bring up a tooltip with the average percentage of orders meeting the **Published Report Available** time during the specified timeframe (right).



- Hover over a data point in the line graph (below, left) or a bar in the **Orders Beyond TAT Target** bar chart (below, right) to bring up a tooltip with relevant statistics.

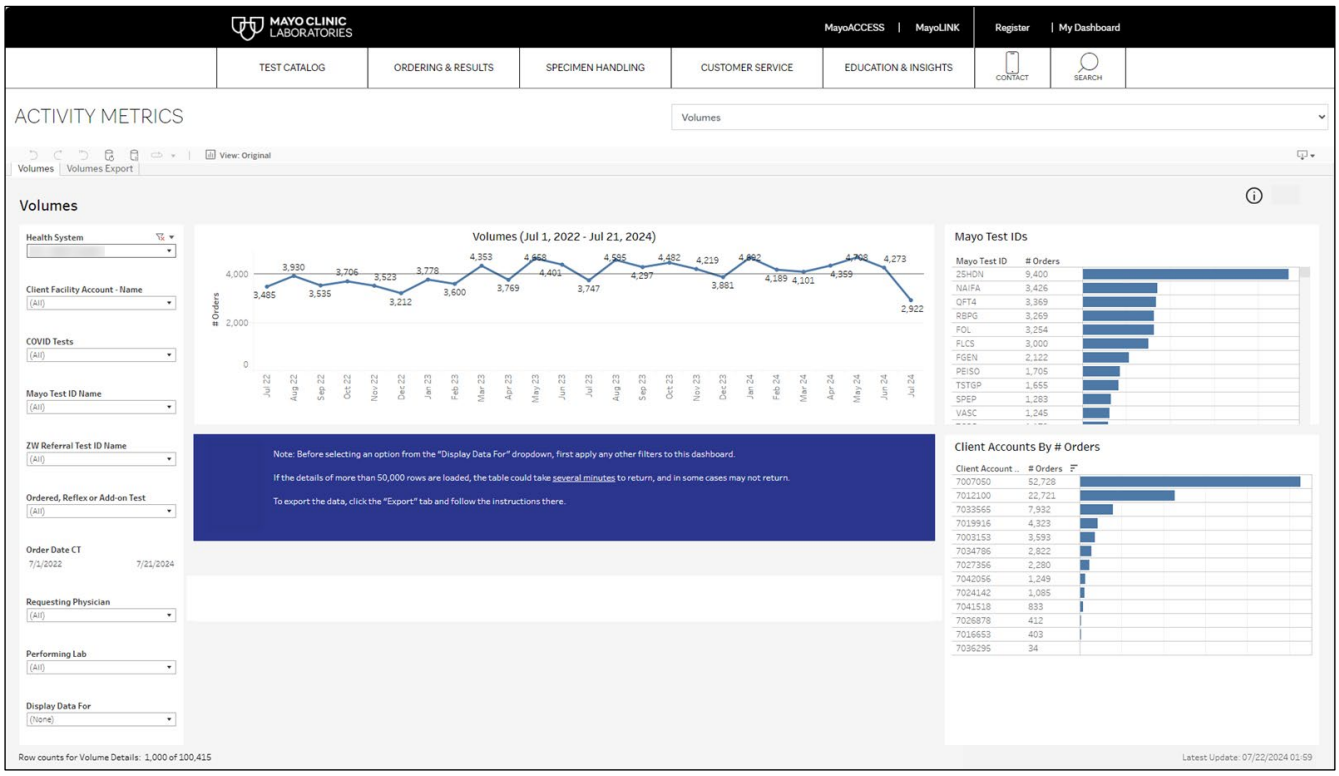




Notes:

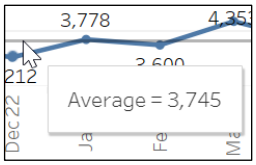
- If a test is added on after specimen receipt, TAT calculation starts from the date and time the add-on test was ordered. Add-on testing can start when the specimen becomes available.
- TAT for a reflex testing starts from the date and time the reflex was added on to the ordered test.
- To calculate the percentage of tests meeting **Published Report Available** time, a target time for each test is set by the performing lab and maintained in the Test Catalog under the **Report Available** field. Target TAT is determined by the maximum days shown in the **Published Report Available** field.
- Mayo Clinic Laboratories includes data for activity that can be more closely monitored and controlled. Therefore, the **Turnaround Time** dashboard does not include:
    - Transit time.
    - Referral or miscellaneous (ZW code) testing. Mayo Clinic Laboratories cannot control other reference labs' TAT. In addition, many miscellaneous ZW codes are published with generic TATs because each code can be used for a variety of tests at one laboratory. These variable TAT targets would inaccurately skew Mayo Clinic Laboratories' data and therefore have been excluded from Activity Metrics.

Volumes

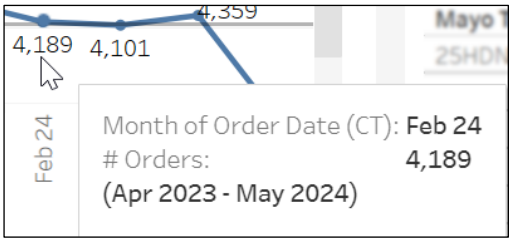


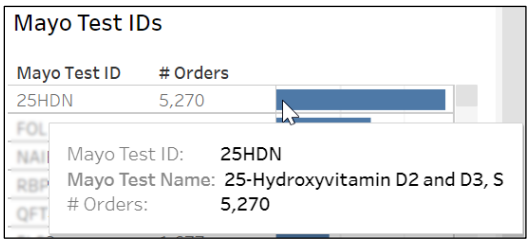
The **Volumes** dashboard visualizes the number of tests ordered as a line graph, sorted by dates of order creation. The default time range is the last 24 full months; to display more information, use the **Order Date CT** (date selector) filter to select a range over the past 24 rolling months. This dashboard also presents **Mayo Test IDs** and **Client Accounts By # Orders** data as bar graphs. You can use this data to monitor Mayo Clinic Laboratories testing volumes.

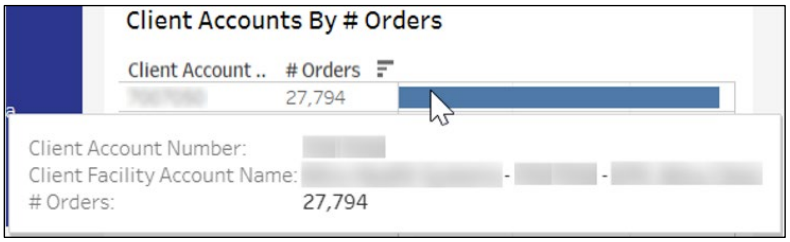
Tips:



- Hover over the average line in the main **Volumes** line graph to bring up a tooltip with the average number of tests ordered during the specified timeframe (right).
- Hover over a data point in the **Volumes** graph (below, left), a bar in the **Mayo Test IDs** bar graph (below, right), or a bar in the **Client Accounts By # Orders** bar graph (top of next page) to bring up a tooltip with various details.







Volume counts

Volumes are counted by individual test code, not by component or client order. For example, if one order contains the PAVAL (profile) and ACE tests, the dashboard displays a volume of 2.

Test codes for reflex and add-on tests are counted along with all other test codes and noted as such in the data summary. Canceled tests are also included as ordered test codes in the count but not separately identified as canceled.

Filtering data

All dashboards provide multiple means of filtering your data.

Note: When you exit from a dashboard, your filtering choices are not preserved. To save a set of filters for later use, follow the instructions in Managing Custom Views for an existing dashboard.

Drop-down menu filters

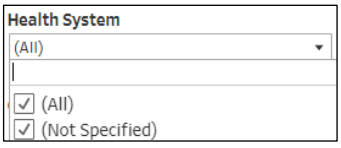
On the left side of all dashboards are various filters in the form of drop-down menus. The **Summary** dashboard has two such menus: **Health System** and **Client Facility Account – Name** (see details below).

From some of these menus, you can select one option only, while on others you can check one or more check boxes. After making your selection, click the **Apply** button (below, left) at the bottom of the menu, and then click elsewhere to close the menu. To cancel your selection, click the **Cancel** button (far right).

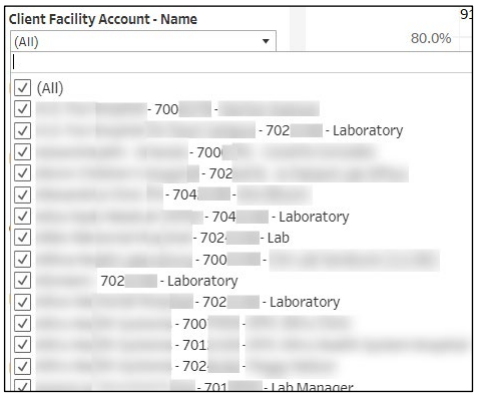
Many drop-down menu filters do not appear on all dashboards. The following section notes when a filter is available on certain dashboards only (with the exception of **Summary**).

Health System

What you can view in the **Health System** filter depends on your access level and permissions. If your organization is part of a health system and you have access to other accounts in that system, you can view data for one or more of the sites using this filter.



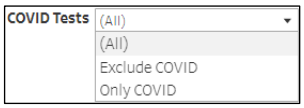
Client Facility Account - Name



The **Client Facility Account - Name** filter is also restricted by access levels and permissions. If your organization has multiple sites and you have access to them, you can view data for one or more of those sites using this filter. Select a site from the drop-down menu or enter the account number or first several characters of a site name into the text field.

Note: On the **Summary** dashboard, your selections in the **Client Facility Account - Name** filter are displayed in the **Selected Accounts** list below.

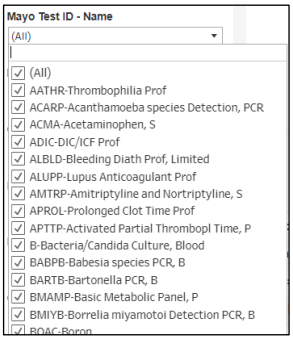
COVID Tests



The **COVID Tests** filter allows you to view only data for COVID-19 tests or all data except for COVID test data. You can include or exclude all SARS Test IDs, including PCR and serology-based tests.

This filter appears only on the **Canceled Tests**, **Revised Tests**, **Turnaround Time**, and **Volumes** dashboards.

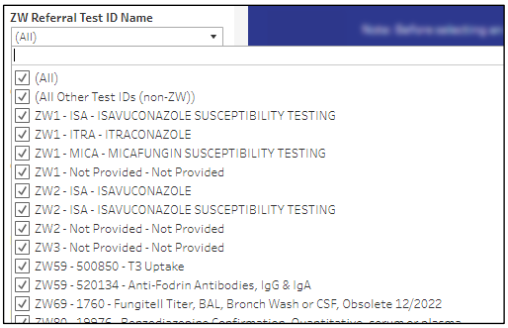
Mayo Test ID Name



You can use the **Mayo Test ID Name** filter to view data for one or more test codes listed in the Mayo Clinic Laboratories Test Catalog. The screenshot to the right presents only a very small selection of tests available.

This filter appears on all dashboards except **Service Touchpoints**.

ZW Referral Test ID Name

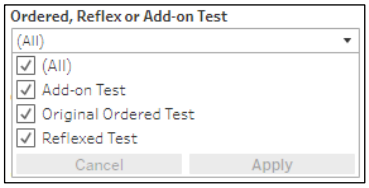


Use the **ZW Referral Test ID Name** filter to view data based on miscellaneous Referral Test IDs. By default, the filter displays all tests, referral and non-referral. Deselect the **(All Other Test IDs (non-ZW))** option to view data for referral (ZW) tests only.

You can select one or more specific ZW referral tests to view data for those individual tests.

This filter appears only on the **Volumes** dashboard.

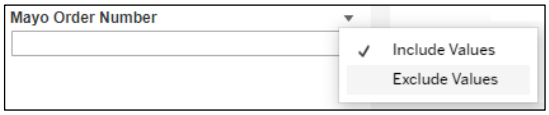
Ordered, Reflex or Add-on Test



The **Ordered, Reflex or Add-on Test** filter allows you to specify the type(s) of test you want to view data for.

This filter appears only on the **Canceled Tests**, **Revised Tests**, **Turnaround Time**, and **Volumes** dashboards.

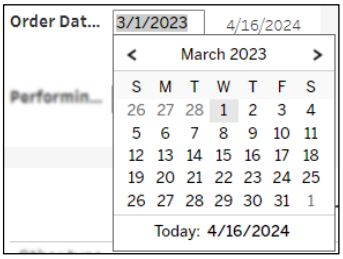
Mayo Order Number



Use the **Mayo Order Number** filter to view data for a particular Mayo order number or range thereof, or to view data from which certain order numbers have been excluded.

This filter appears on all dashboards except **Volumes**.

Date selector



This filter, which is named differently on different dashboards, allows you to view orders placed, callbacks made, or calls and fax inquiries made within a range of dates. Either click each of the start and end date fields and then enter the date manually, or find and select the desired date in the pop-up calendar (right).

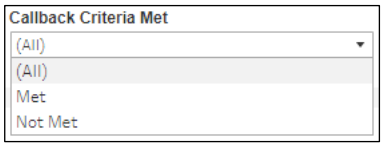
Dashboard-specific name of date selector filter	Dashboard(s)	Allows you to view within the selected range…
Order Date CT	**Canceled Tests**, **Turnaround Time**, **Volumes**	Orders placed
Callback Created Date CT	**Critical Callbacks**	Callbacks made
Result Revision Date CT	**Revised Tests**	Tests revised
Creation Date CT	**Service Touchpoints**	Calls and fax inquiries made

Requesting Physician

The **Requesting Physician** filter allows you to filter tests by the physician(s) who requested them.

This filter appears only on the **Critical Callbacks** and **Volumes** dashboards.

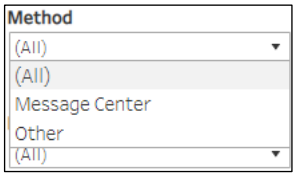
Callback Criteria Met



The **Callback Criteria Met** filter allows you to view callback data based on whether callbacks met the required criteria.

This filter appears only on the **Critical Callbacks** dashboard.

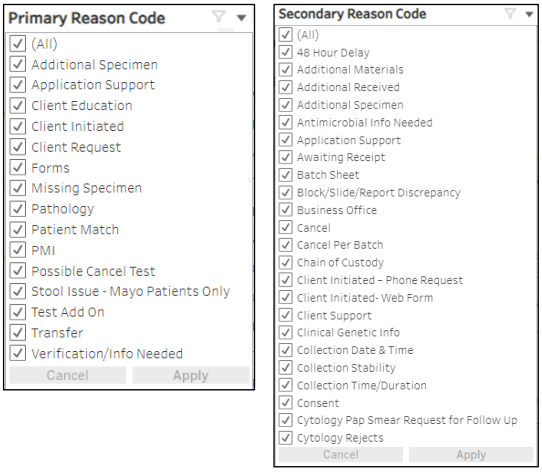
Method



Filter your calls and fax inquiries by whether they happened via Mayo Clinic Laboratories Message Center, by another communication method, or by all methods.

This filter appears only on the **Service Touchpoints** dashboard.

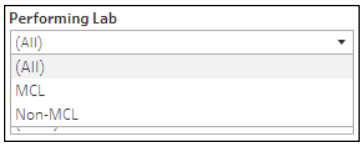
Primary Reason Code / Secondary Reason Code



Using these two filters, you can sort calls and fax inquiries by primary and secondary reason codes. These reason codes are used internally by Mayo Clinic Laboratories to identify missing order information, sample issues, delays, and other inquiries.

These filters appear only on the **Service Touchpoints** dashboard.

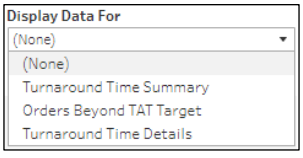
Performing Lab

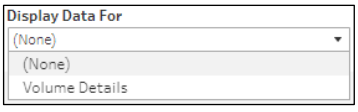


Use the **Performing Lab** filter to view tests performed by Mayo Clinic Laboratories, tests performed by other laboratories, or all performing labs.

This filter appears only on the **Canceled Tests**, **Revised Tests**, **Critical Callbacks,** and **Volumes** dashboards.

Display Data for





On either tab of the **Turnaround Time** dashboard, filter your data by **Turnaround Time Summary**, **Orders Beyond TAT Target**, or **Turnaround Time Details**. On either tab of the **Volumes** dashboard, filter your data by **Volume Details**.

Note: See Row Counts for precautions on loading or exporting numerous rows of data at one time.

Drilling down or up on the data visualization

On any dashboard that visualizes data by date (monthly), you can drill down to a weekly or daily view, or drill up to a quarterly or yearly one. This helps you more easily recognize trends, such as ordering patterns by quarter and staffing needs by day, and spot actionable elements in your interactions with Mayo Clinic Laboratories.

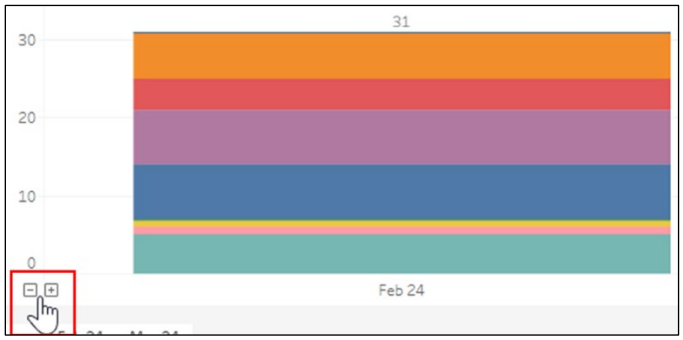
Drilling down or up on graphs

To drill down to a weekly or daily view on a graph:

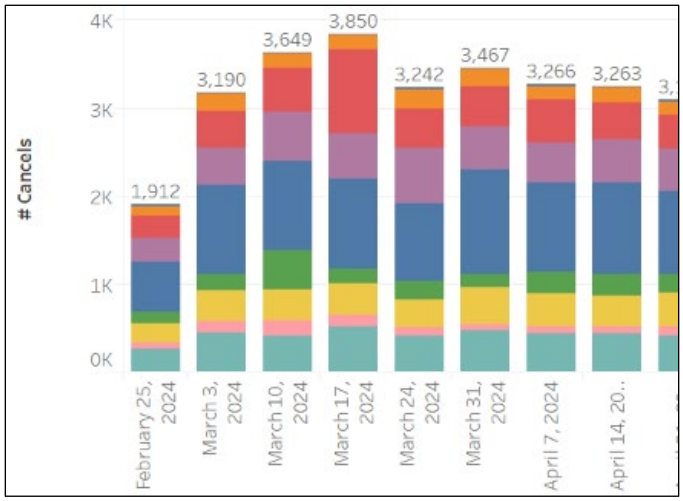
1. Narrow your date range using the date selector.

   Note: If you drill down beyond weekly view while viewing an overly broad time range, the date labels on the graph's *x*-axis will not be legible.

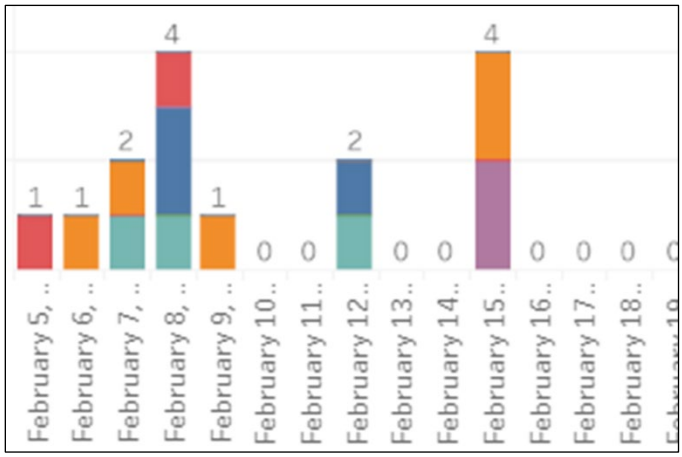
2. Hover over the bottom left corner of the graph to the left of the *x*-axis (where the date labels are shown) until the drill icons, a minus sign ⊟ and a plus sign ⊞, appear.



3. Click the plus sign icon once to change the display to weekly view.

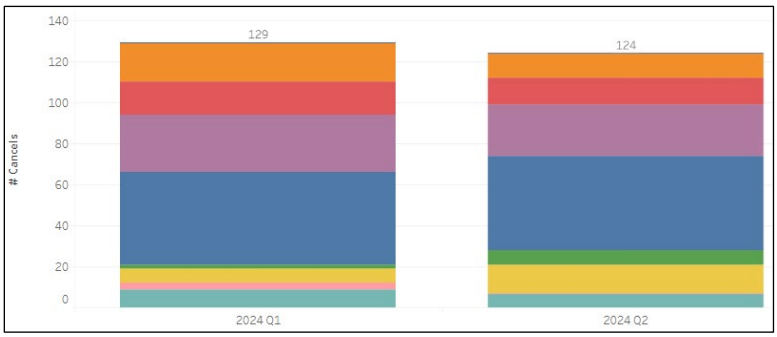


4. Click the plus sign icon again to change the display to daily view.

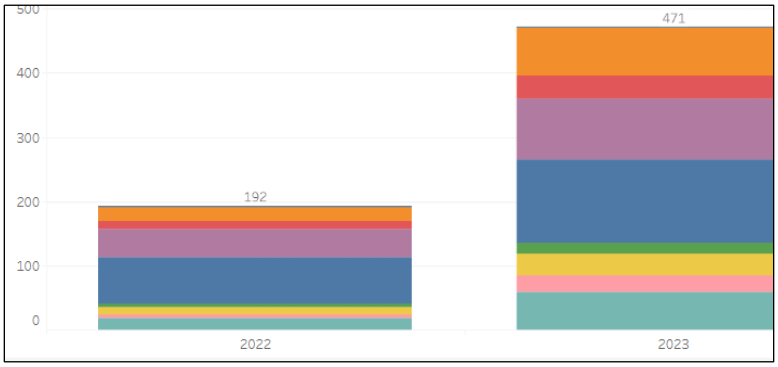


To drill up to a quarterly or yearly view on a graph:

1. Adjust the date range as needed using the date selector.
2. Hover over the bottom left corner of the graph to the left of the *x*-axis until the minus and plus sign icons appear.
3. Click the minus sign icon once to change the display to quarterly view.

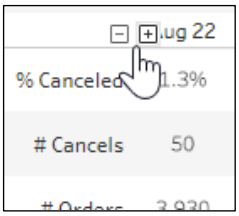


4. Click the minus sign icon again to change the display to yearly view.



Drilling down or up on tables

Drilling down and up works the same way on a table organized by date as it does for a graph organized by date. The only difference is that you hover over the top left corner of the table, to the left of the date headers (right).



	August 28, ..	September ..	September ..	September ..	September ..
% Canceled	100.0%	100.0%	0.0%	0.0%	0.0%
# Cancels	1	1	0	0	0
# Orders	1	1			

Table drilled down to weekly

	May 19, 2024	May 20, 2024	May 21, 2024	May 22, 2024
% Canceled	0.0%	0.6%	1.9%	0.6%
# Cancels	0	1	5	1
# Orders	1	181	265	171

Table drilled down to daily

	2022 Q3	2022 Q4	2023 Q1	20
% Canceled	2.5%	2.3%	2.1%	1
# Cancels	44,346	54,092	52,238	45
# Orders	1,741,622	2,351,063	2,520,101	2,54

Table drilled up to quarterly

	2022	2023	2024
% Canceled	2.4%	1.8%	1.6%
# Cancels	98,438	186,437	112,678
# Orders	4,092,685	10,087,400	6,940,926

Table drilled up to yearly

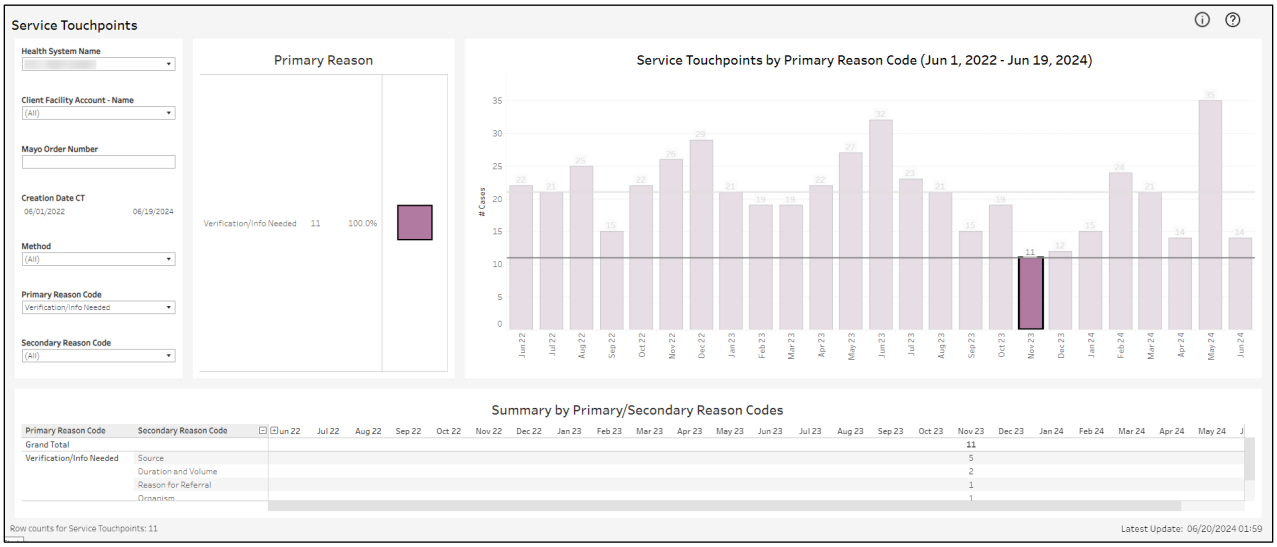
Note: Once you have drilled up or down on a graph beyond monthly view, you will no longer be able to filter the data further by clicking on a bar or line in the graph representing a different date. However, all other filtering options outside the graph will still function.

Filtering data by clicking in the main graph

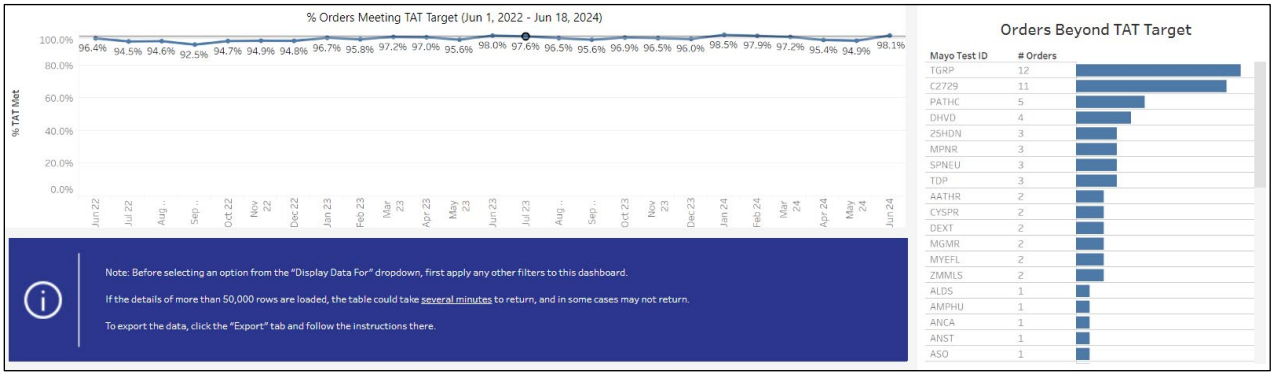
On dashboards whose main graphs are bar charts, if you click a colored segment of a bar, the graph is filtered by the criteria represented by the segment's color and by the entire bar.

In the screenshot below of the **Service Touchpoints** dashboard, in the **Service Touchpoints By Primary Reason Code** bar graph, the user has clicked the large purple bar segment for November 2023. Purple represents the **Primary Reason Code** of **Verification/Info Needed**. Data

shown in the table below the bar graph is for November 2023 service touchpoints with that primary reason. In addition, the **Primary Reason** legend reflects only **Verification/Info Needed**.

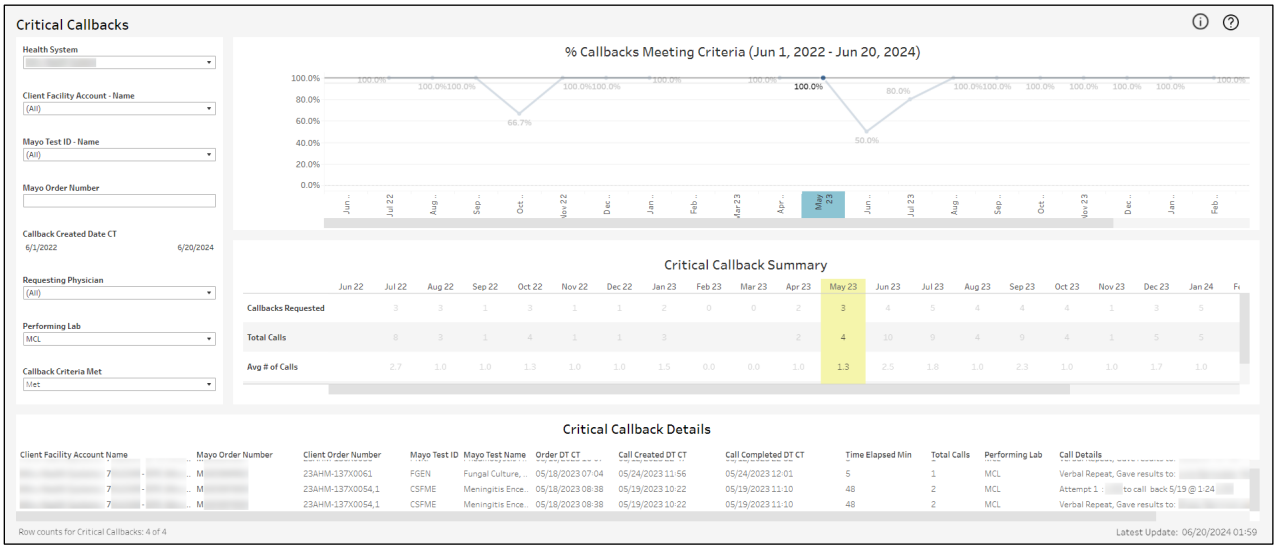


In the screenshot below, on the **% Orders Meeting TAT Target** line graph on the **Turnaround Time** dashboard, the data point for July 2023 is selected. This filters the data shown in the **Orders Beyond TAT Target** bar graph to the right.



On the **Critical Callbacks** dashboard as seen below, the May 2023 data point in the **% Callbacks Meeting Criteria** line graph has been selected. The **Critical Callback Summary** table highlights the

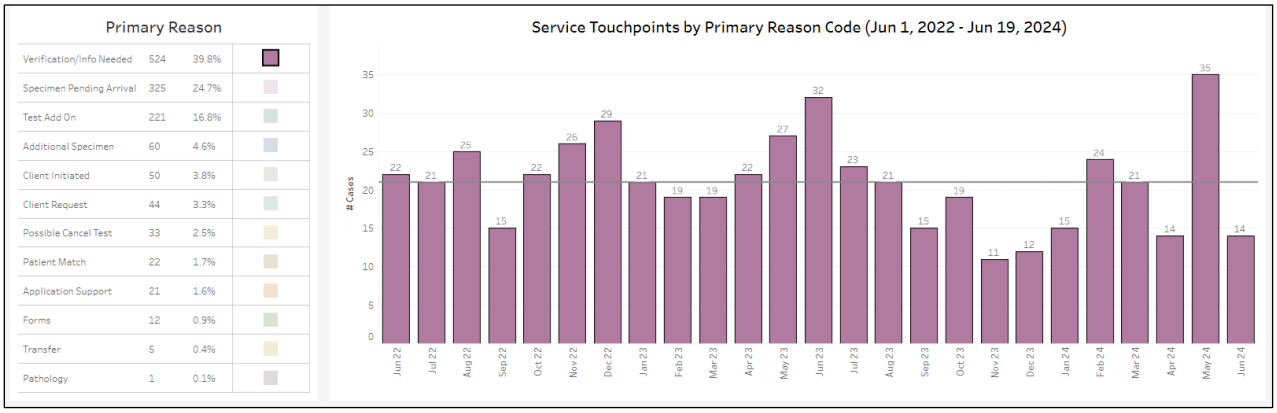
column for that month, and the **Critical Callback Details** table is filtered to reflect only details for callbacks during that month.



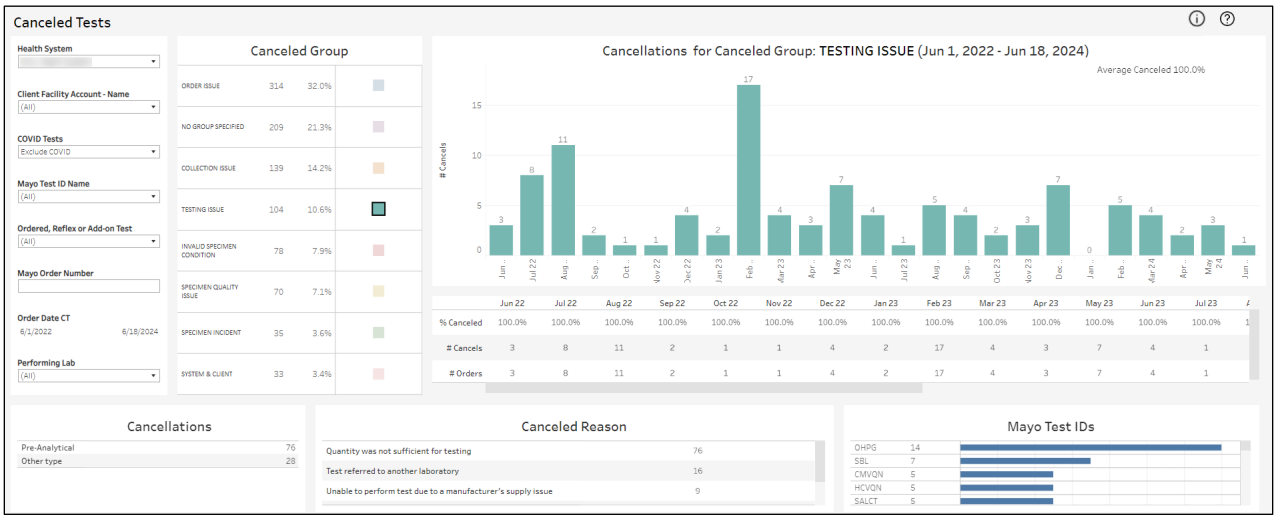
To remove the filter, click the same item again.

Filtering data by clicking in a legend

Clicking on a square in a legend filters the main graph by the criterion the square represents. The screenshot below shows the main **Service Touchpoints by Primary Reason Code** bar graph of the **Service Touchpoints** dashboard filtered by a selection from the **Primary Reason** legend (**Verification/Info Needed**).



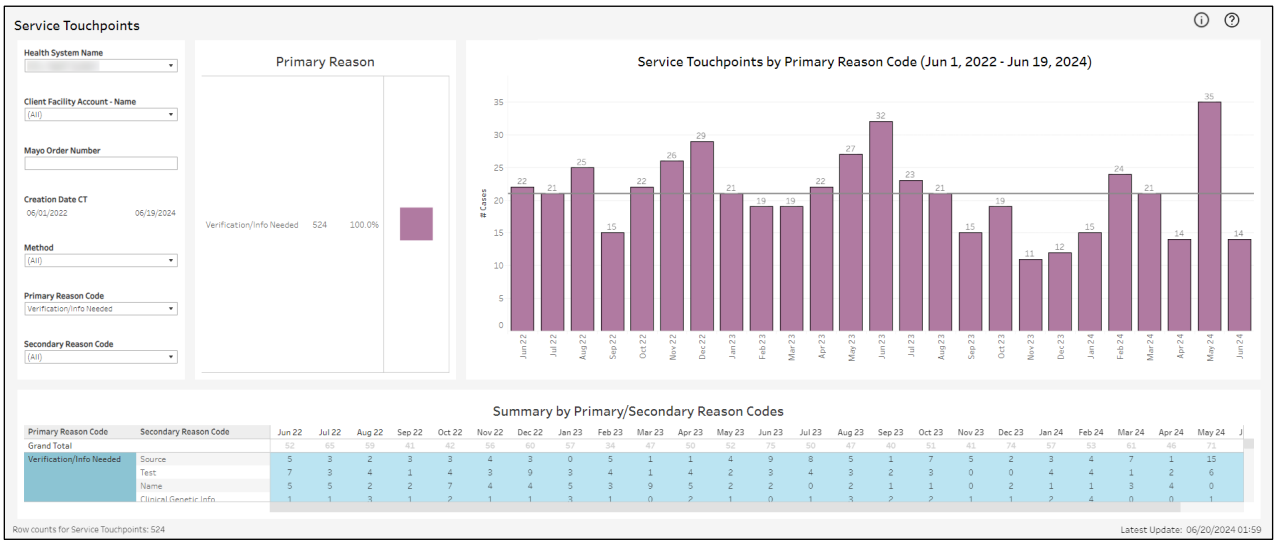
On some dashboards, such as **Canceled Tests** below, selecting a square in the legend also filters the tables below the main graph.



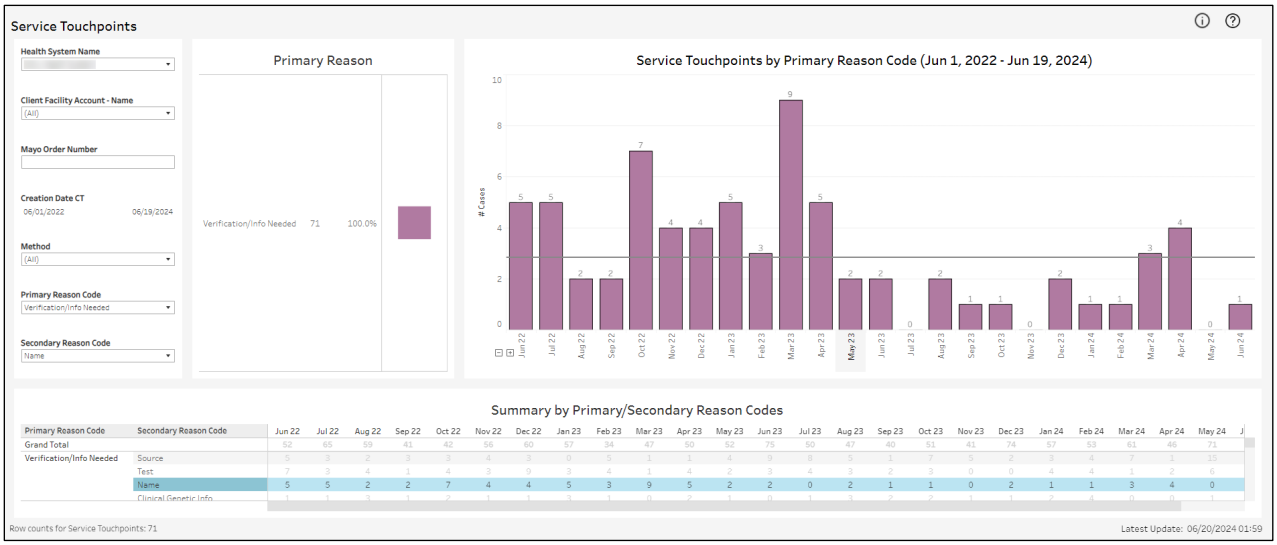
To remove the filter, click the same item again.

Filtering data by clicking in a table or secondary graph

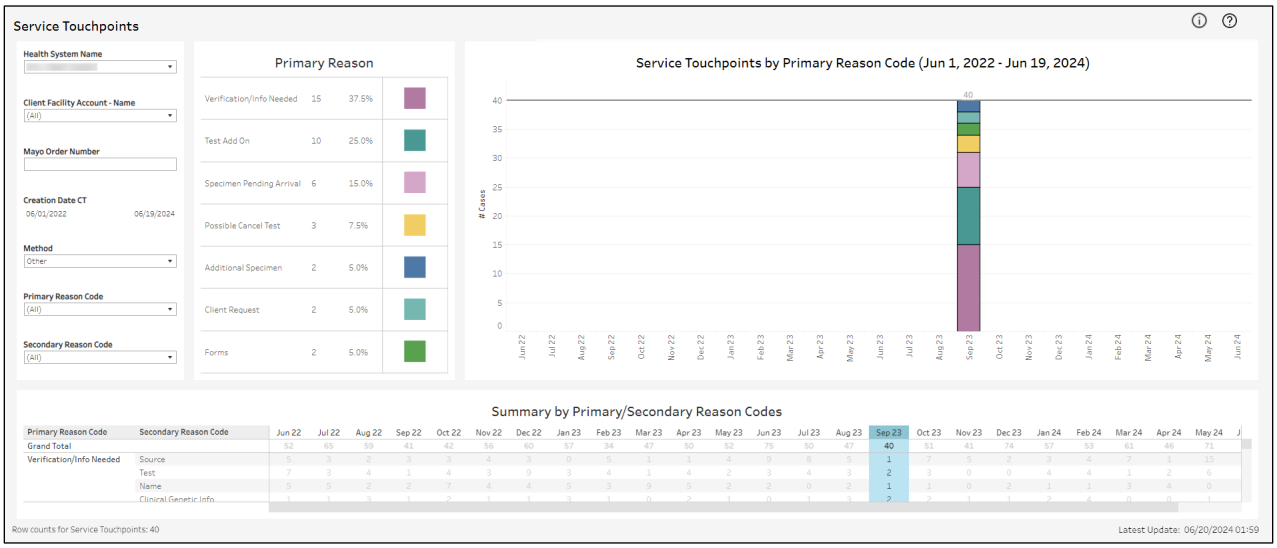
You can narrow down the data displayed in the main graph of a dashboard by clicking on a cell or row of a table or by clicking on a bar in a smaller bar graph. For example, below is a view of the **Service Touchpoints** dashboard filtered by **Primary Reason Code** (**Verification/Info Needed**).



Here, the same dashboard is also filtered by **Secondary Reason Code** (**Name**).

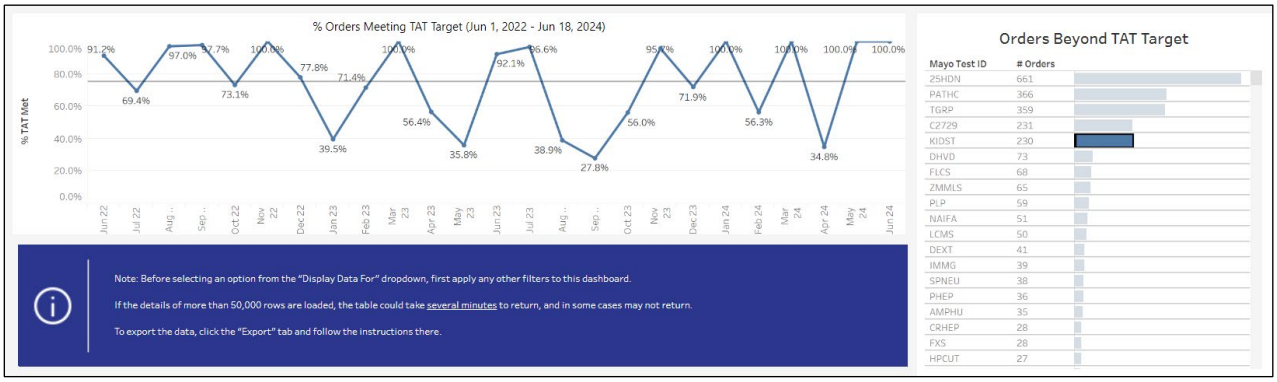


In this screenshot, the **Service Touchpoints** dashboard is filtered by the selection of a particular month (September 2023) in the **Summary by Primary/Secondary Reason Codes** table.



On the **Turnaround Time** dashboard, you can filter the **% Orders Meeting TAT Target** line graph by clicking the bar of a Test ID in the **Orders Beyond TAT Target** bar graph. In the screenshot below, the

main graph is filtered by orders for the **KIDST** (Kidney Stone Analysis) test that exceeded the TAT target.



You can also combine these filters. In the image below of the **Canceled Tests** dashboard, the **Cancellations** bar graph is filtered by selections in the **Canceled Reason** table (**Free Text Comment**) and **Mayo Test ID** table (**ZMMLS:** Antimicrobial Susceptibility, Aerobic Bacteria, Varies).

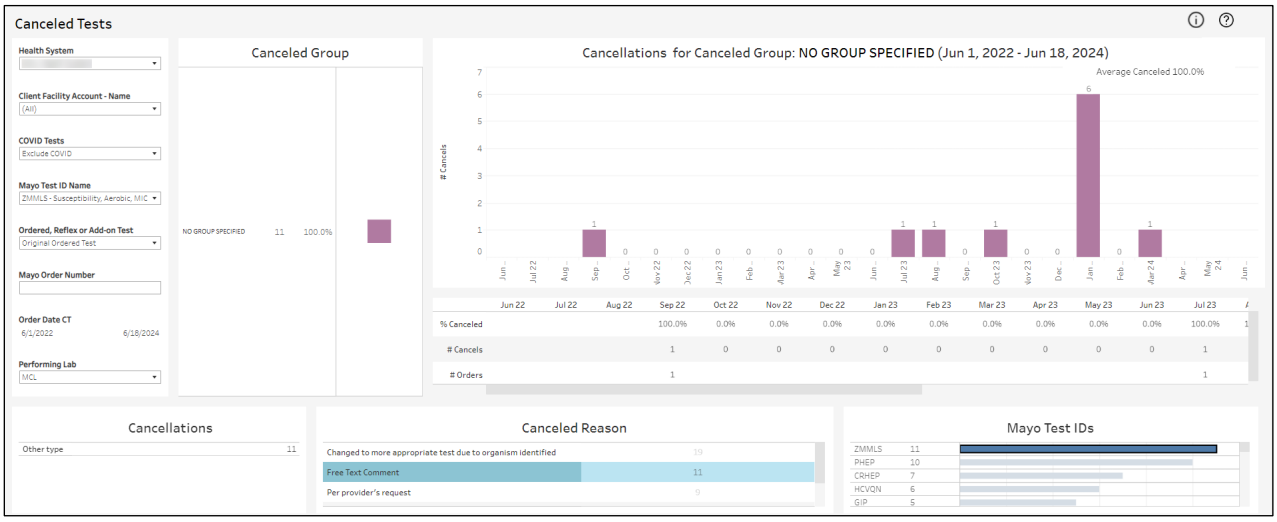
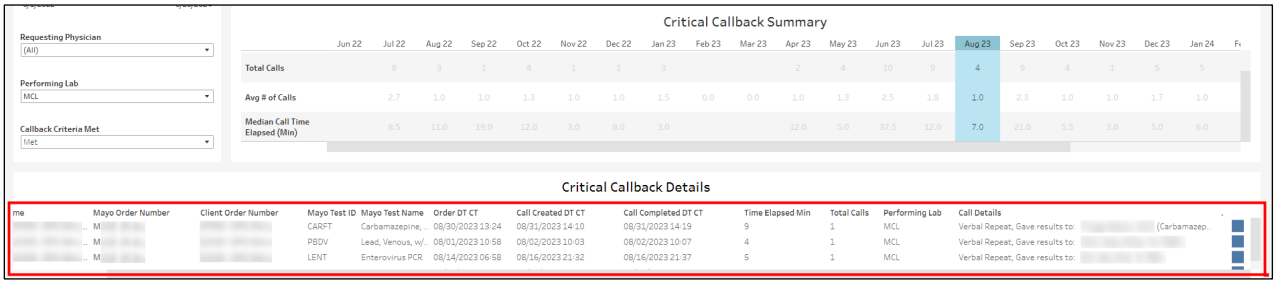
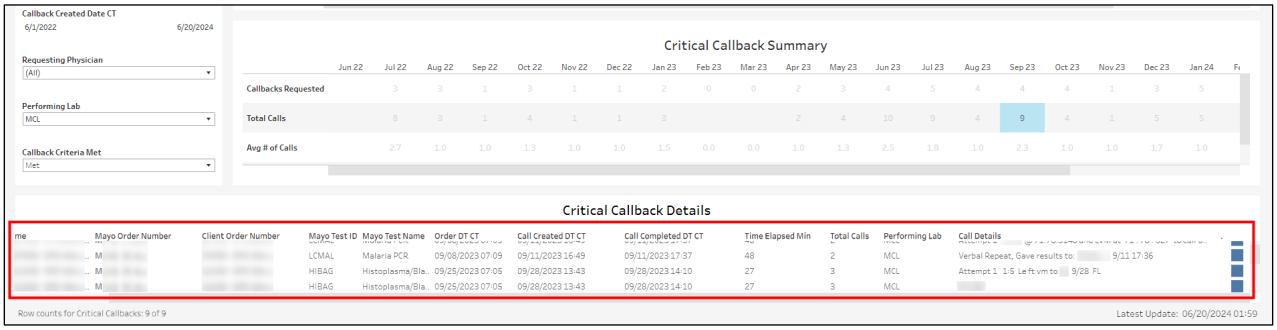


Table selections can also affect data shown in other tables. For example, on the **Critical Callbacks** dashboard, if you select a column in the **Critical Callback Summary** table, the **Critical Callback Details** table is filtered by the criterion of that column (note that the main graph is not affected).



If you click a cell in the **Critical Callback Summary** table, such as the number of **Callbacks Requested** in September 2023, the **Critical Callback Details** table reflects only details for callbacks requested during that month.

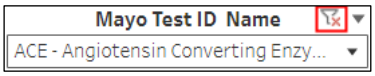


To remove the filter, click the same item again.

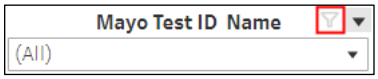
Clearing filters

To clear a filter so that all values are visible again:

- If the filter was set using a drop-down menu, click the **Cancel Filter** icon at top right of the menu (right).

  The **Filter** icon appears in its place (right), indicating that the menu is now unfiltered.

  If the drop-down menu you used to set the filter has check boxes, you can select the **(All)** check box at the top to select all check boxes, which clears the filter.

- If you filtered a dashboard by selecting a square in a legend; a segment in a bar chart; a point on a line graph; or a table cell, row, or column, click the same item again to clear the filter.

- As discussed under Tableau Toolbar, you can also click the **Reset view** icon to restore your view to what you saw when you first opened the dashboard.

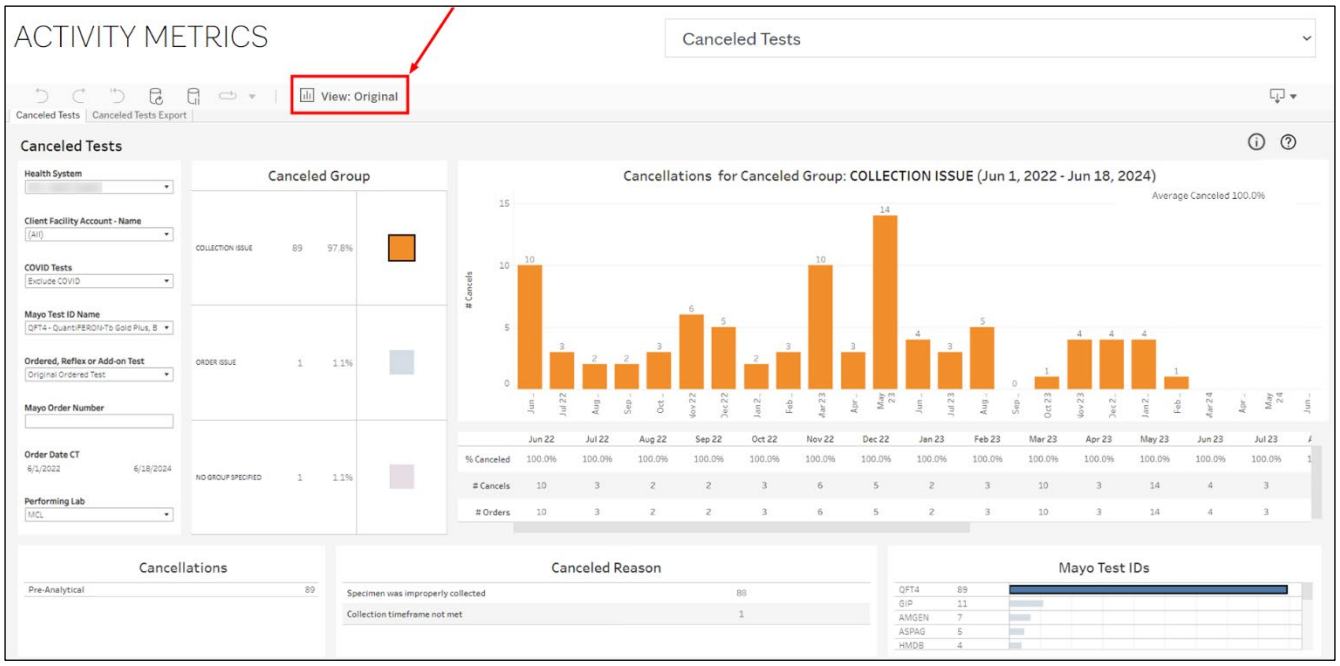
Managing Custom Views for an existing dashboard

When you apply filters or otherwise customize your view of a dashboard for a specific business scenario, you can save the modified view as a Custom View for future use. You can create and save multiple Custom Views of one dashboard.

Creating a Custom View

Depending on your access level and permissions, you can create a Custom View by first applying all customizations (such as filters) required for the use case, and then following these steps:

1. At top left, in the Tableau Toolbar, click the **View** option (right).

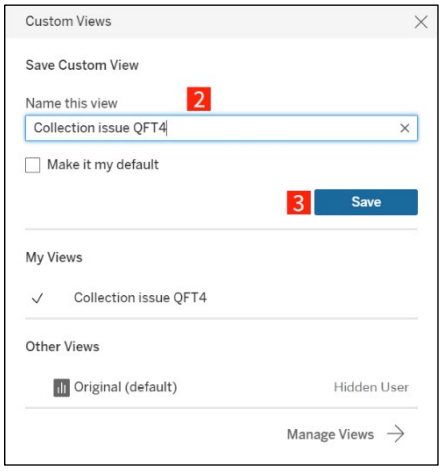


   The **Custom Views** dialog box appears.

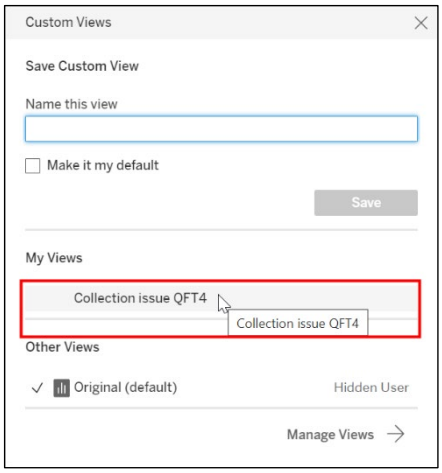
2. In the **Save Custom View** section, enter a name for the view in the **Name this view** text field (right).

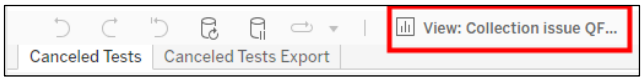
3. At bottom right of the **Save Custom View** section, click the **Save** button. Save

   The **Custom Views** dialog box closes.



4. Click the **View** option in the Tableau Toolbar again to bring the dialog box back up.
5. In the **My Views** section, select the newly created view (right).



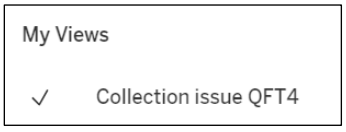


The dashboard refreshes, and the **View** option in the Tableau Toolbar now displays the name of the newly created Custom View (left).

Note: You can skip steps 4 and 5 above if you check the **Make it my default** check box for the new view before clicking the **Save** button.

To create additional Custom Views, filter/modify the View again and repeat the steps above, entering a different name into the **Name this view** text field for each new Custom View.

Notes:



- You can click any Custom View in the **My Views** section of the **Custom Views** dialog box to select it (right).
- All Custom Views are private. You cannot share a Custom View with other users.

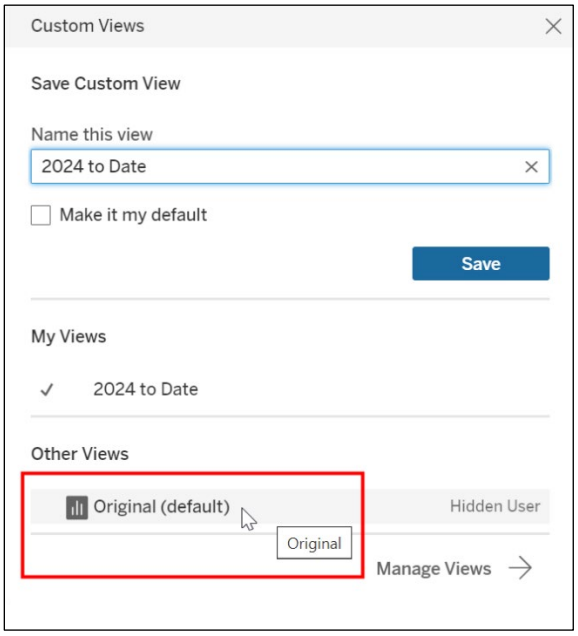
Reverting to Original View

To revert to the original view of a dashboard:

1. In the Tableau Toolbar, click the **View** option (right).

The **Custom Views** dialog box appears.

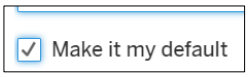
2. In the **Other Views** section, click **Original**.



The dashboard automatically reverts to **Original** view.

Setting a Custom View as the default view

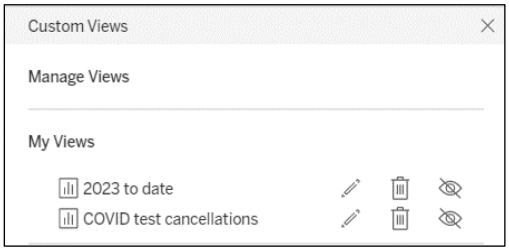
To set a Custom View as your default view, check the **Make it my default** check box (right) in the **Save Custom View** section of the **Custom Views** dialog box.



Editing and deleting Custom Views

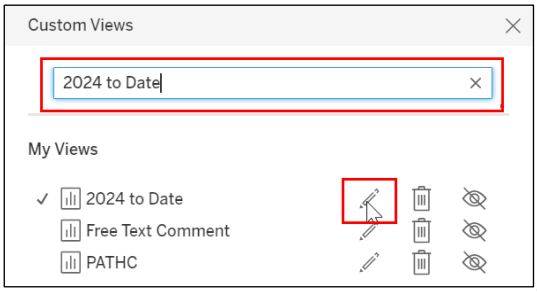
You can access further options for managing Views via the **Manage Views** link at the bottom of the **Custom Views** dialog box (right).

For each saved view, **Manage Views** provides two options:



- **Rename this view:** To rename the view, click the pencil icon .

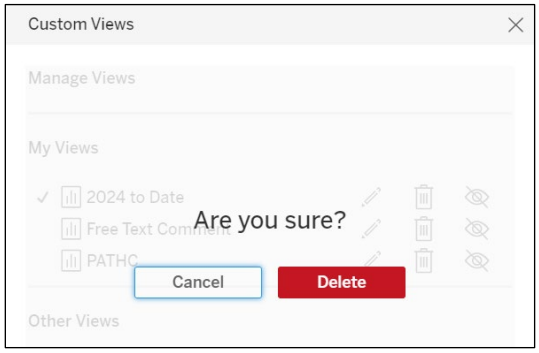
A text field appears in the **Custom Views** section above. Edit the name, then click outside the text field to automatically save your change.



/

- **Delete View:** To delete the view, click the trash icon .

  A message appears, asking if you are sure you want to delete the view. Click either the **Cancel** or the **Delete** button.



The slashed-eye icon indicates **View Status**; that is, that this **Custom View** is private.

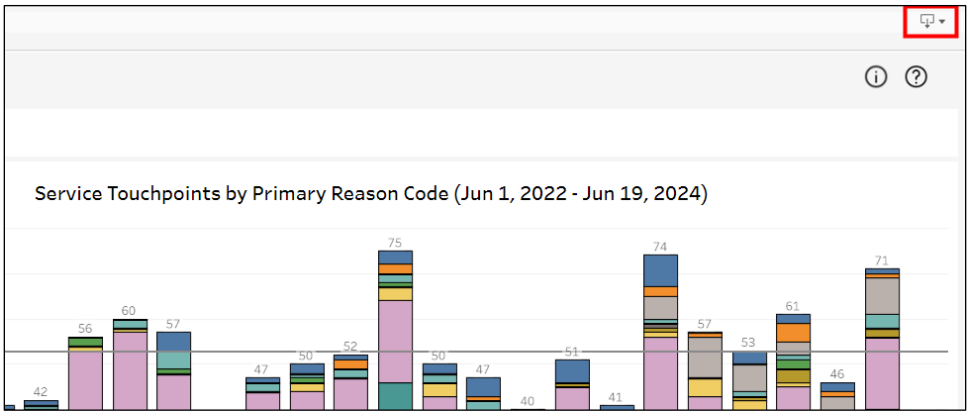
Downloading data

Activity Metrics provides several options for downloading data. We recommend using the **Crosstab** option to ensure that you retrieve the most complete information. There are two ways of downloading crosstab data.

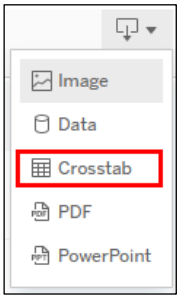
Downloading data from the main dashboard tab

To download data directly from a dashboard's main tab:

1. At top right of the dashboard, click the **Tableau Download** icon.

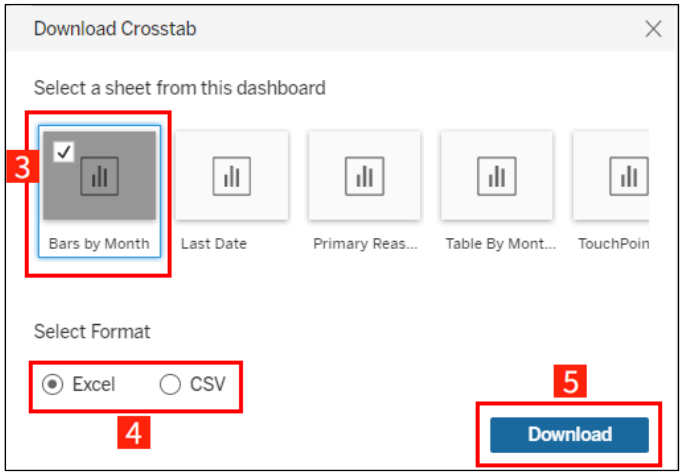


   The **Tableau Download** drop-down menu appears (right).



2. Select the **Crosstab** option.

   The **Download Crosstab** dialog box appears.



3. Select the exact sheet you want to download.

   Note: Do not select any sheet whose filename begins with **Z_**.

4. Under **Select Format**, select the radio button for **Excel**.

5. At bottom right, click the **Download** button.

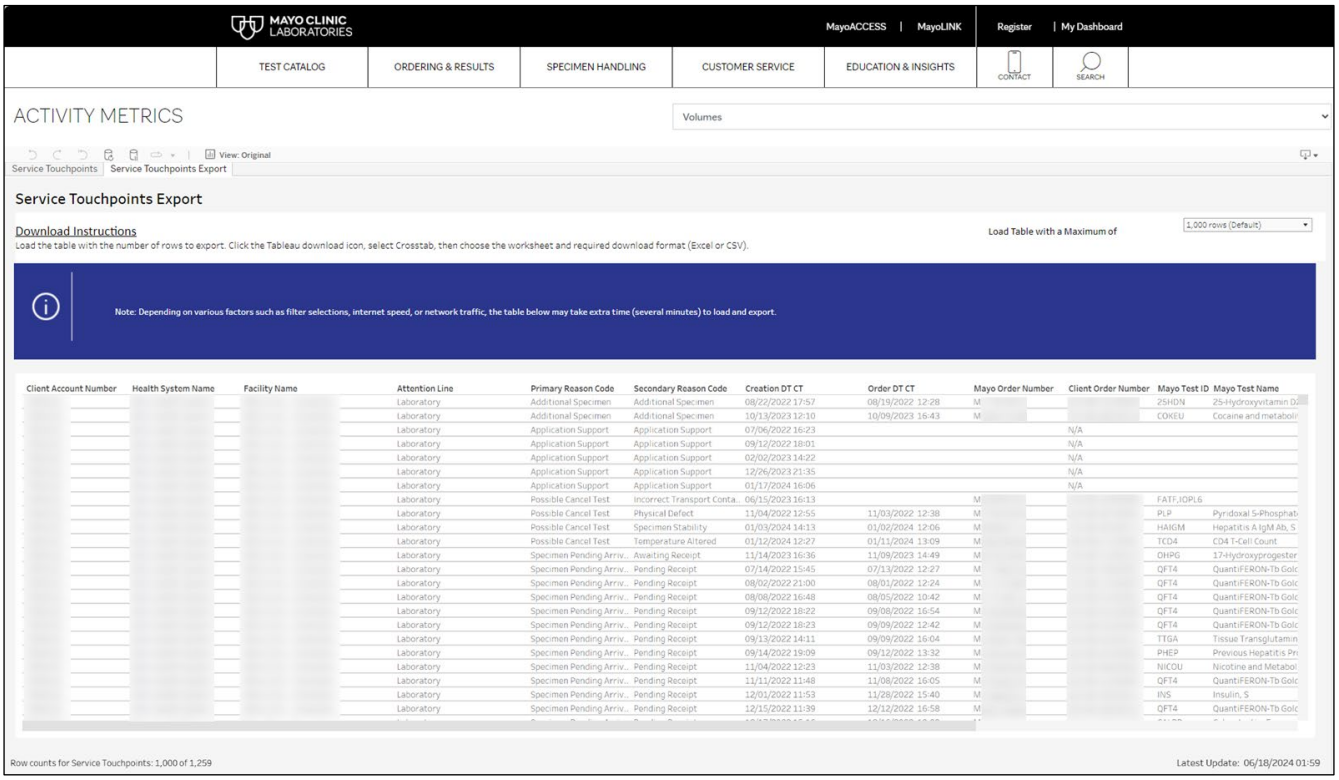
Downloading data from the Export tab

To download data from the **Export** tab of a given dashboard, in the Tableau Toolbar:

1. Click the **Export** tab.

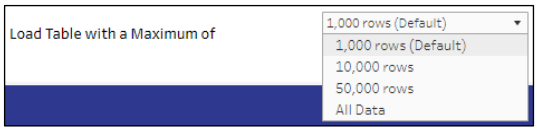
   For example, on the **Service Touchpoint** dashboard, click the **Service Touchpoints Export** tab (right).

   The **Export** tab for the given dashboard appears.

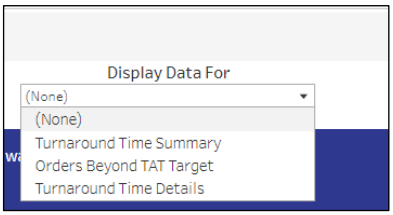


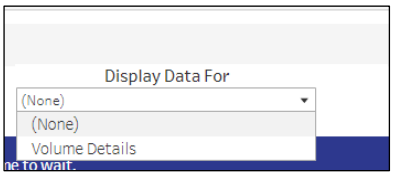
   By default, only the first 1,000 rows of data are shown in the table and may be downloaded.

2. *Optional:* Using the **Load Table with a Maximum of** drop-down menu, you can also choose to download 10,000 rows, 50,000 rows, or all data.



3. If you are downloadi.ng from the **Turnaround Time Export** tab, at top right, choose a data option from the **Display Data for** drop-down menu (right).

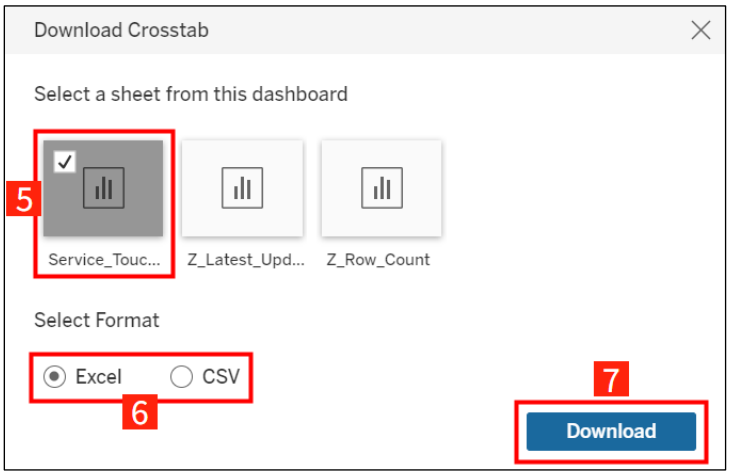




If you are downloading from the **Volumes Export** tab, at top right, select **Volume Details** from the **Display Data for** drop-down menu (left).

4. At top right, click the **Tableau Download** icon and, from the drop-down menu, select the **Crosstab** option.

   The **Download Crosstab** dialog box appears.



5. Select the exact sheet you want to download.

   Note: Do not select any sheet whose filename begins with **Z_**.

6. Under **Select Format**, select the radio button for **Excel**.
7. At bottom right, click the **Download** button. Download

Notes:

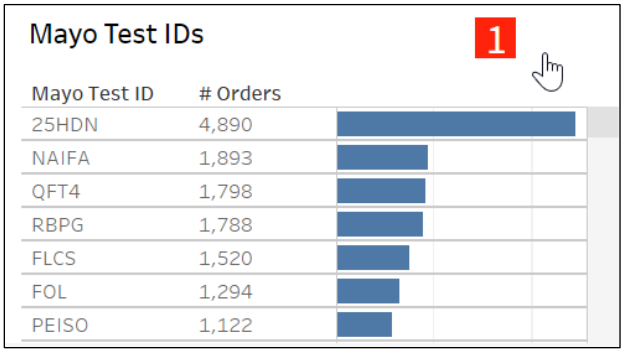
- To cancel a download that is taking too long, close the browser tab.
- You can also copy and paste data from the **Export** tab into an Excel spreadsheet:
  1. Click the cells, rows, or columns to highlight them.
  2. Press your **Ctrl** + **C** keys to copy the data.
  3. In the spreadsheet, press **Ctrl** + **V** to paste.

Downloading data from a section on a dashboard

To download data specific to one section of a dashboard:

1. Click in the section from which you would like to download data.

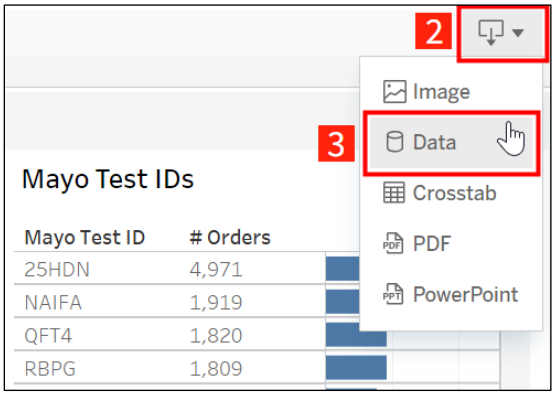
   Note: The screenshots in this section show a test frequency utilization being downloaded from the **Volumes** dashboard.



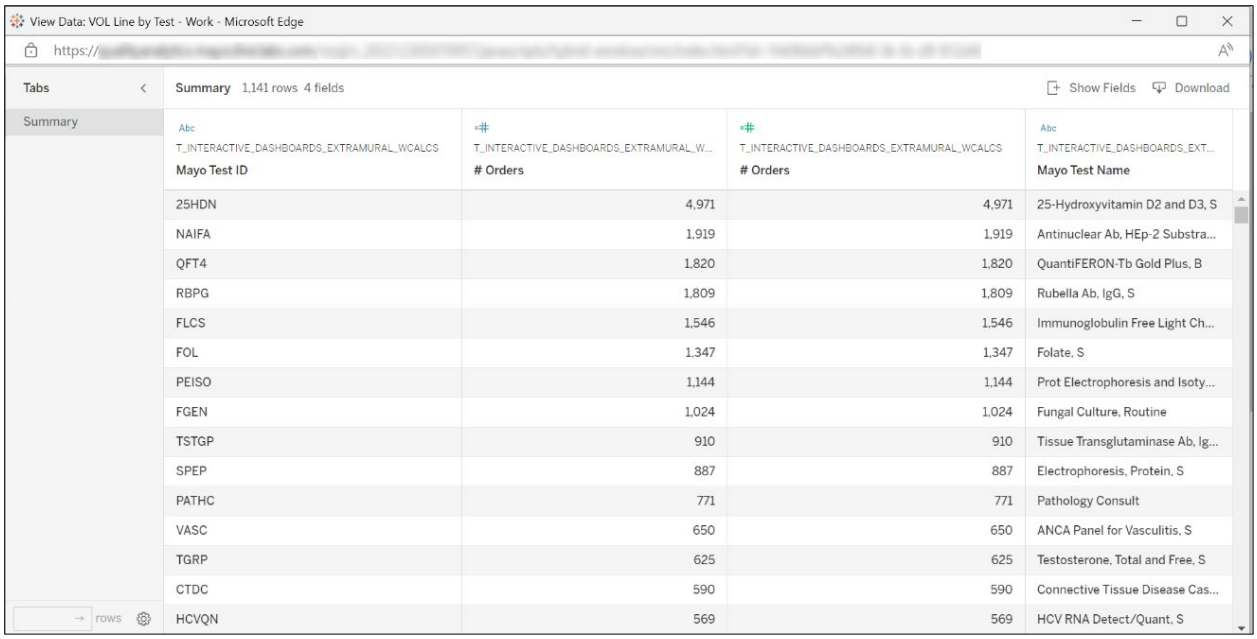
   Note: Do not click on a specific data point or bar, which will cause Activity Metrics to filter that section by the corresponding data.

2. At top right of the dashboard, click the **Tableau Download** icon.

3. From the menu, select **Data**.

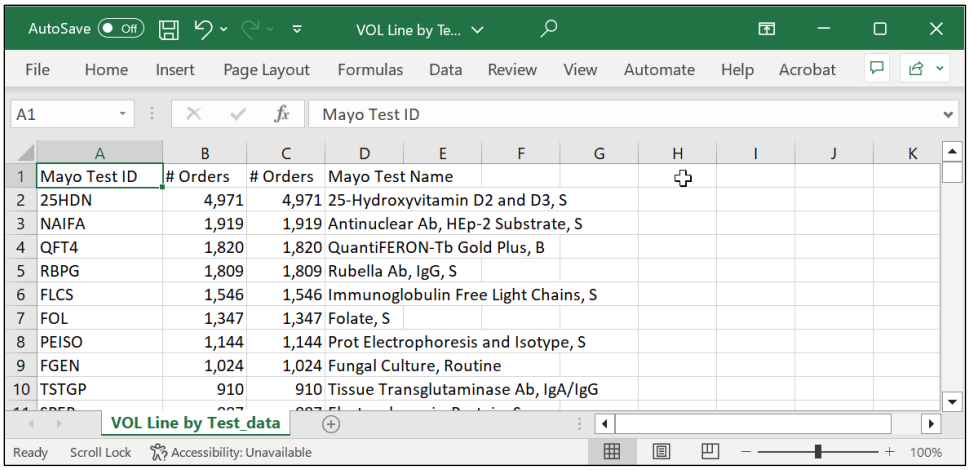


The **View Data** window appears, displaying data for the selected dashboard section.



4. At top right of the window, click the **Download** icon.

   The downloaded CSV file contains data from the selected section only.



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