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# Contact Center Advisor and Workforce Advisor Help

Working with Metrics Libraries

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# Working with Metrics Libraries

A *metrics library* is a shortcut method for selecting the list of metrics to display on your dashboard. You have access to metrics libraries only if you have access to **Column Chooser** because you create metrics libraries in the **Column Chooser** window. In addition, only metrics to which you have access are displayed in the **Column Chooser** (see [Role-Based Access and Permissions](#)).

A metrics library enables you to:

- Create reusable lists of metrics to display on the dashboard. For example, you could create a set of metrics that might be required for a specific management task, such as a set of non-voice metrics.
- Maintain those lists.

## Creating a New Library

You can create a metrics library only in the **Column Chooser** window. As you create libraries, they are added to the **Select** drop-down list of libraries in the **Column Chooser** window. They are also added to a drop-down list that displays in the dashboard toolbar, beside the button that launches the **Column Chooser** window.

When you select a library from the **Select** drop-down list in the **Column Chooser** window, the description of that library is displayed next to the drop-down list, and the **Selected Metrics** pane is cleared and populated with the list of metrics that make up the library.

To create a new metrics library:

1. Open the **Column Chooser** window.
2. Choose an existing library from the **Select** drop-down list. For example, if you have not yet created any metrics libraries, you might select **From dashboard** to get started. If you previously created a metrics library, and you want to use that library as the basis for a new library, then select that library.
3. Click **Save as New Library**, or, if you have selected a library that you previously created and you want to copy it as the basis for a new library, then click the clone () button.
4. Enter a name for the library. The library name cannot be changed after the library is saved, so be sure to carefully consider what you will enter for the library name.
5. Enter a description (optional). If you create multiple libraries, the description can help you to remember the specific purpose of the library. The **Description** field is editable, so you can always change it later if you decide it could be improved.
6. Add your personal selection of metrics to the **Selected Metrics** pane. See [Selecting Metrics for Dashboard Display](#) for information about working with the **Available Metrics** and **Selected Metrics** panes in the **Column Chooser** window.
7. Click one of the following:
  - **Save & Apply** to both save the library and display it on the dashboard immediately.

- **Cancel** to discard the library without saving it. Clicking **Cancel** also closes the **Column Chooser** window and returns you to the dashboard.

## Selecting a Metrics Library for Dashboard Display

Once you have created personal metrics libraries, you can quickly change the set of metrics that displays on your dashboard by selecting a specific library. You can select a metrics library from the list of available libraries in the drop-down menu in the dashboard toolbar (beside the **Column Chooser** button), or in the **Select** drop-down menu at the top of the **Column Chooser** window.

## Using the Column Chooser Window

If you have not created any new libraries, then you will see only the two default libraries in the **Select** drop-down list in the **Column Chooser** window:

- **System Default**: The default list of metrics to display on the dashboard. An administrator configures this list of metrics. A system administrator might assign **permissions** to your role in order to limit the number and type of metrics that you can view; therefore, you might see only a subset of the full list of default metrics.
- **From Dashboard**: Retrieves the metrics exactly as displayed on the dashboard, which you can save as a new library.

To display a library's metrics in the dashboard, select the library in the **Select** drop-down menu in the **Column Chooser** window, and then click the **Apply** button.

## Using the Metrics Library Menu on the Dashboard

You can select the **System Default** set of metrics from the the **Metrics Library** drop-down menu in your dashboard toolbar, as well as any personal metrics libraries that you have created. Select a library from the drop-down menu to display that library's metrics in your dashboard.

Sometimes, you might see **Unsaved Library** displayed in the dashboard's **Metrics Library** drop-down menu. This means that you have a set of metrics displayed on your dashboard that is a unique group of metrics, and which is not saved as a reusable library. If you want to save the set of metrics as a library, then you must launch **Column Chooser** and save the library there (see [Creating a New Library](#) for instructions). If you do not save the **Unsaved Library**, and you select a different metrics library using the toolbar's drop-down menu, and confirm that you want to open the selected library (the application prompts you to confirm or deny the action), then the **Unsaved Library** is discarded. If you discard an unsaved library, and you later want that same set of metrics to display on your dashboard again, you must rebuild the list in **Column Chooser**.

## Editing a Library

You might decide that one of your metrics libraries is missing a key metric, or it might have a few more metrics than you need. You cannot change the name of a metrics library after it has been saved, but you can add or remove metrics. You can also change the library description. You can edit a

library only in the **Column Chooser** window. You cannot edit the default metrics libraries (System default and From dashboard), however you can save a default library with a new name, and then edit that.

To edit a saved metrics library:

1. Open the **Column Chooser** window.
2. Choose an existing library from the **Select** drop-down list.
3. Make your changes to the library.
4. Click one of the following:
  - **Save & Apply** to both save your changes to the library and to display it on the dashboard immediately.
  - **Apply** to display the updated library on your dashboard. Be aware that clicking **Apply** does not save your library. If you navigate away from the updated library using the **Metrics Library** drop-down menu on your dashboard, your changes to the library will be lost.
  - **Cancel** to both discard your changes to the library and to exit the **Column Chooser** window.

If you ever make unwanted changes to a saved library, but you do not want to exit **Column Chooser**, you can also navigate away from the library using the **Select** drop-down list (that is, simply load a different library). This action has the same result as clicking the **Cancel** button without closing the **Column Chooser** window.

## Deleting a Library

You can delete a library only in the **Column Chooser** window. You cannot delete the **System Default** or **From Dashboard** libraries, but you can delete a metrics library that you created.

To delete a metrics library:

1. Open the **Column Chooser** window.
2. Select the library in the **Select** drop-down list.
3. Click the trash can () button.

The library is permanently deleted.