String BI

Hashmi Infonet User

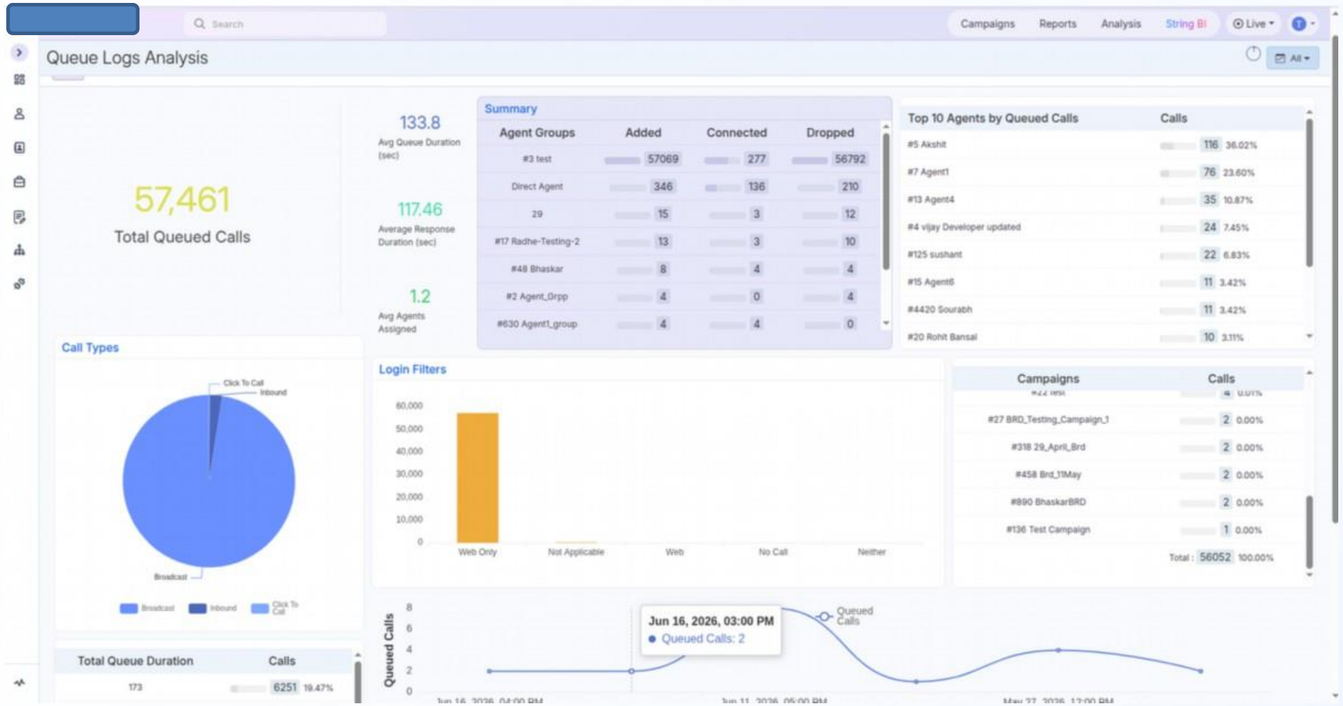


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Introduction- String BI



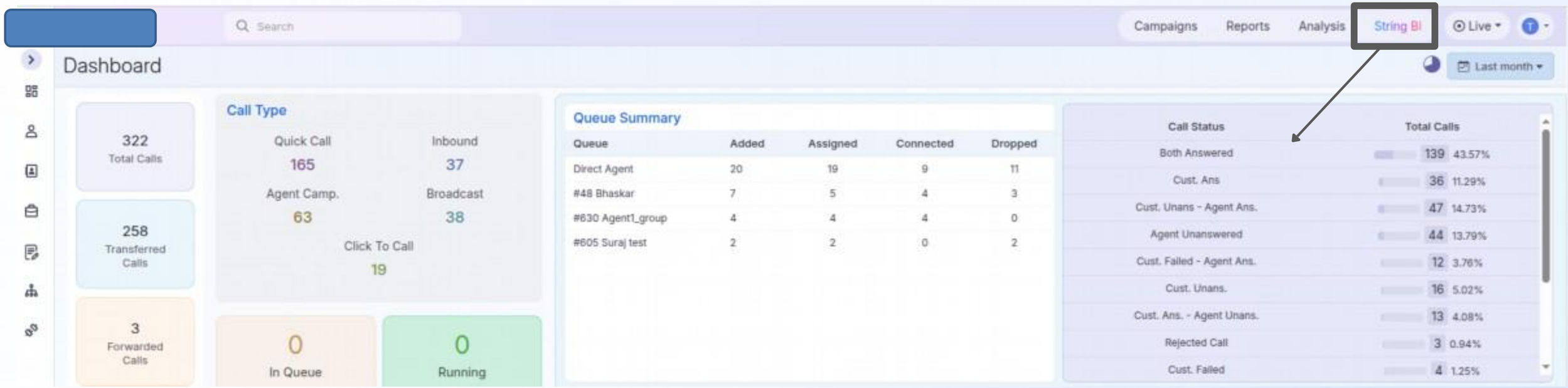
What is String BI?

DeepCall captures a vast amount of call and operational data, but turning that data into meaningful insights can be challengi ng. To bridge this gap, **String BI** tool is integrated into the system, helping you make sense of the information collected by Dee pCall.

It transforms raw data into easy-to-understand dashboards, charts, and reports, enabling you to monitor performance, identify trends, and make informed business decisions.

Note- You do not need any technical background to use it, if you can describe what you want to see, string BI will build it for you.

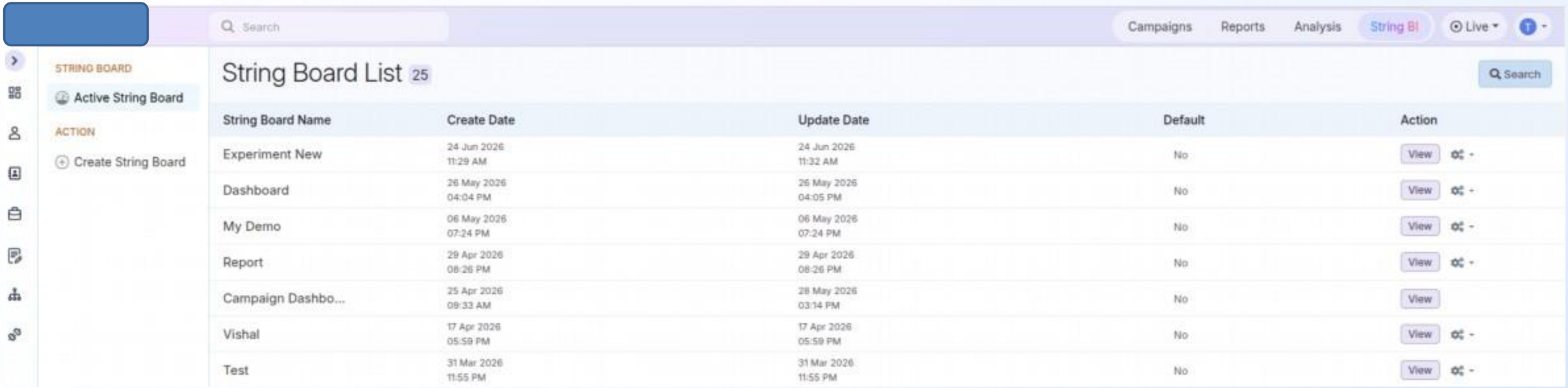
How to Access String BI?



Follow these simple steps to access String BI:

1. Log in to DeepCall.
2. On the dashboard, locate the **String BI** option in the top-right corner.
3. Click on the **String BI** option to open the String BI dashboard.
4. Once inside the dashboard, you can apply filters and configure fields to view and analyze the data you need.

String Board Types

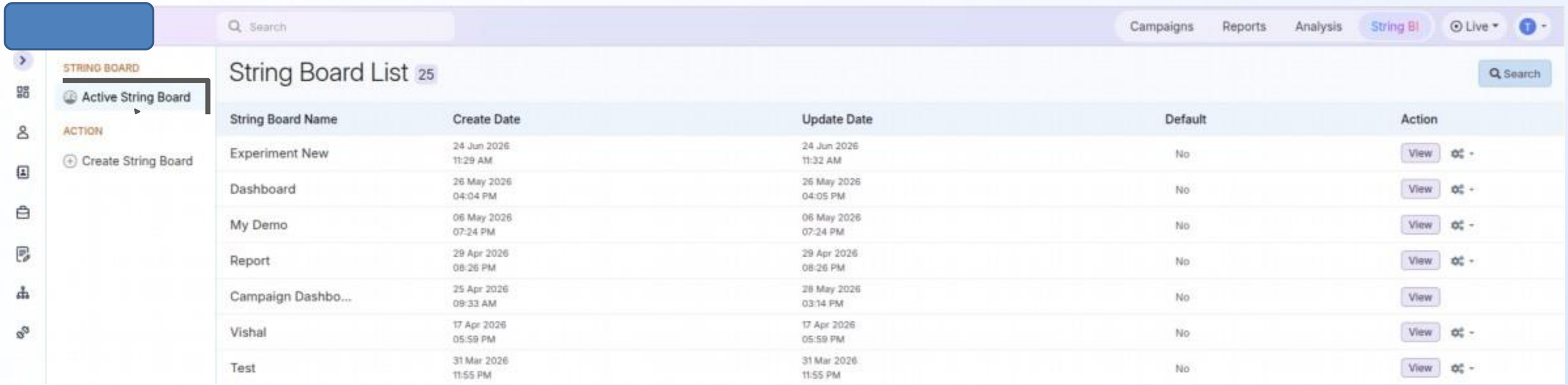


There are two options which will show on the screen in the left corner

- **Active String Board -** On clicking on this you can see the above mentioned list, these are the different boards created by the admin who can access to the whole data.
- **Create String Board-** On clicking on this you can redirect to the box where you have to put the string board name that will later shown in the active string board list.

  If you want the dashboard to be default you can also set it as default and create new string board.

Active String Board



String Board Details

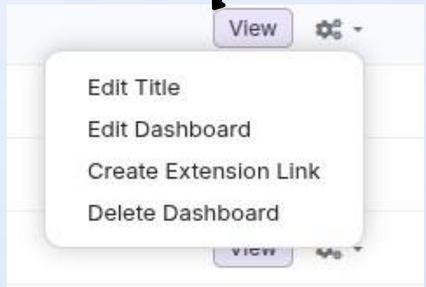
Clicking on an active String Board opens a detailed view displaying the following information:

- **String Board Name**- The name assigned to the selected string board for easy identification and reference when creating string board.
- **Create Date**- The date and time on which the string board was originally created.
- **Update Date**- The most recent date on which the string board was modified or updated.
- **Default**- Indicates whether the selected string board is set as the default configuration.



Action

The Action column provides a set of options to manage and interact with your string board. The available actions include:



- **Edit Title**- Allows you to rename the string board to better reflect its purpose.
- **Edit Dashboard**- Enables you to modify the layout and content of the dashboard.
- **Create Extension Link**- Generates a shareable link to extend or share the dashboard externally.
- **Delete Dashboard**- Permanently removes the string board from the system.

Note on Editing Permissions

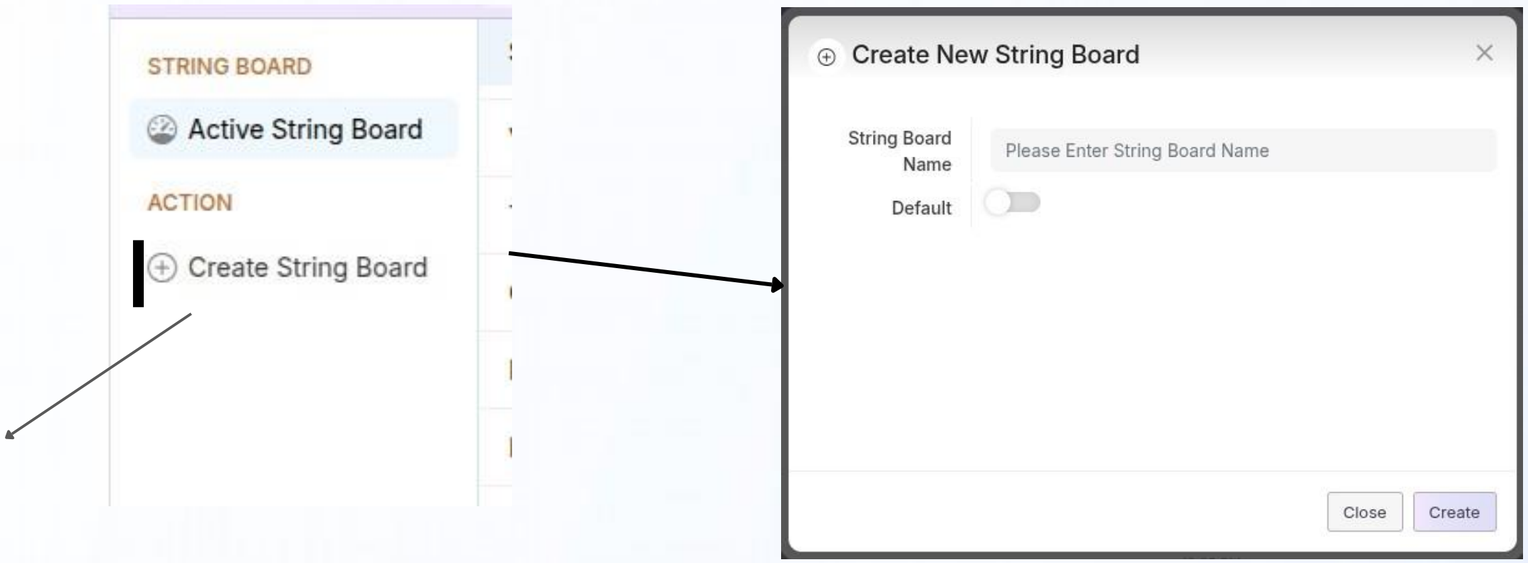
Not all string boards have full editing options available. String boards that were created by developers serve as **default templates** and are locked from structural editing. These cannot be modified by any user and will always retain their original layout and graph structure.

However, even on these default templates, you still have the flexibility to:

- **Change the data source**- Update the values and data being fed into the dashboard.
- **Apply filters**- Select the desired time period or date range to view relevant data.

While the **underlying graphs and layout will remain fixed**, the **data displayed within them will update** according to your selected source and filters- ensuring the template remains consistent while still reflecting your specific data needs.

Create String Board



Creating a New String Board

When you click on the **Create String Board** option, a pop-up box will appear with the following fields and options:

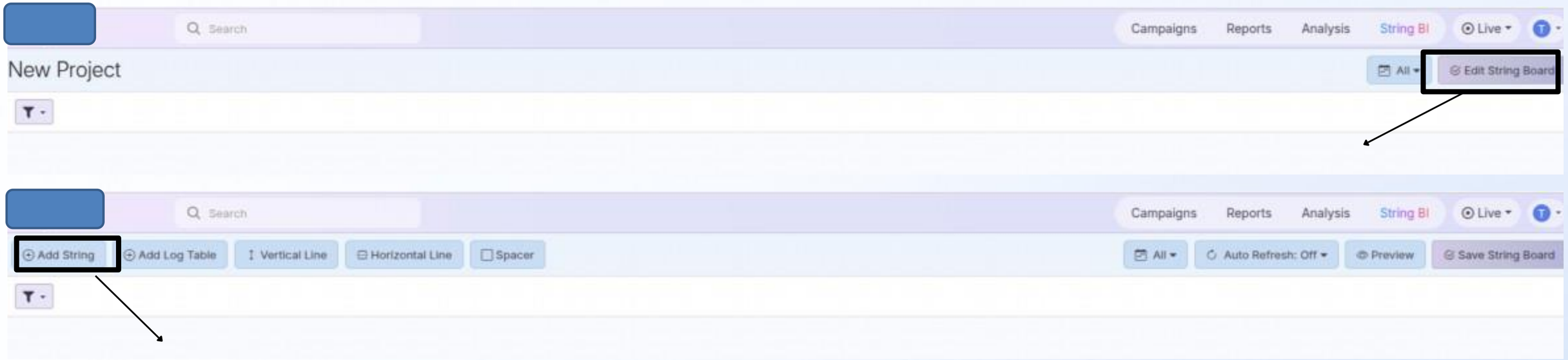
- **String Board Name**- Enter a suitable name for your string board that clearly identifies its purpose or the data it will represent.
- **Default Toggle**- A toggle button is provided to set this string board as your default.

Actions Available in the Pop-up

- **Close**- Click this if you wish to discard the process and exit without saving any changes.
- **Create**- Click this to confirm and create your new string board, which will then be available for you to start building and customizing as per your specific requirements.

Once created, your new string board will appear in your list of available boards, ready for you to add strings and configure your data visuals accordingly.

Create String



What are Strings?

They are individual elements that display data in a visual format, such as numbers, charts, graphs, and more. Each string can be fully customized and designed according to your specific requirements, based on the data source you have configured.

Getting Started with a New String Board

Once your string board has been successfully created, you can begin populating it with data visuals by clicking on the **Edit String Board** option. However, before diving in, it is important to have a clear idea of what data you want to visualize, as this will guide the entire setup process and help you configure each string more effectively.

- **Click on Edit String Board**- This will open the editing interface, revealing additional options and tools to help you build and customize your string board
- **Click on Add String**- Once inside the editing view, click on the **Add String** button to begin adding individual data elements to your board. This will open a dedicated configuration window where you can define and place all the required values and settings for string.

  Note: The detailed walkthrough of the Add String configuration window, including all available fields and options, will be covered in the next section.

Adding Data

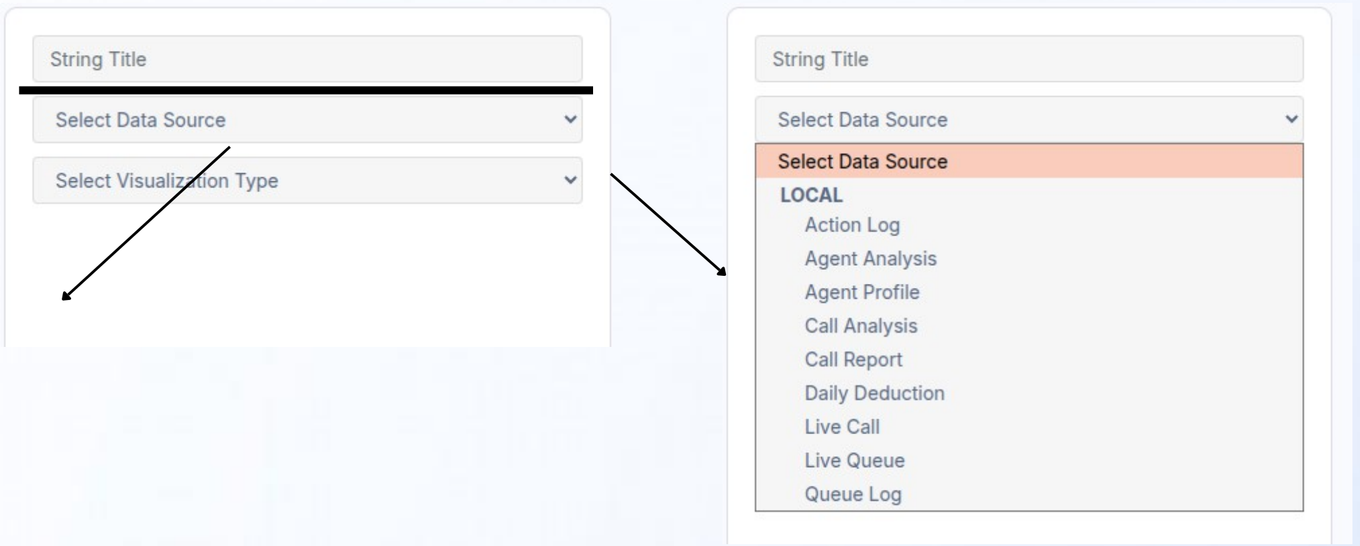


By defining your data requirements upfront and mapping them to the right string types, you can build a powerful and meaningful dashboard that gives you exactly the insights you need.

String Title

Enter an appropriate title for your string that clearly describes the data or metric it represents, making it easy to identify on the dashboard.

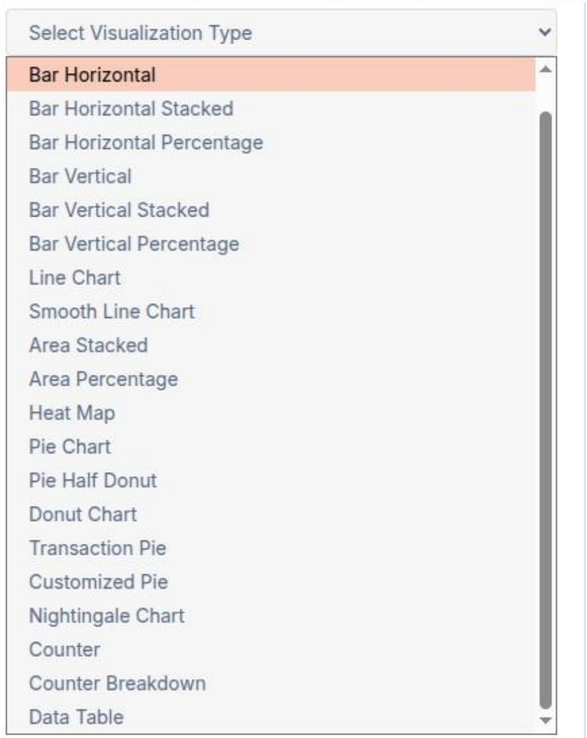
Select Data Source



Select Data Source

After entering the string title, click on the **Select Data Source** dropdown to view all available data sources. Select the appropriate source from the list based on the data you want to visualize in your string.

Select Visualization Type

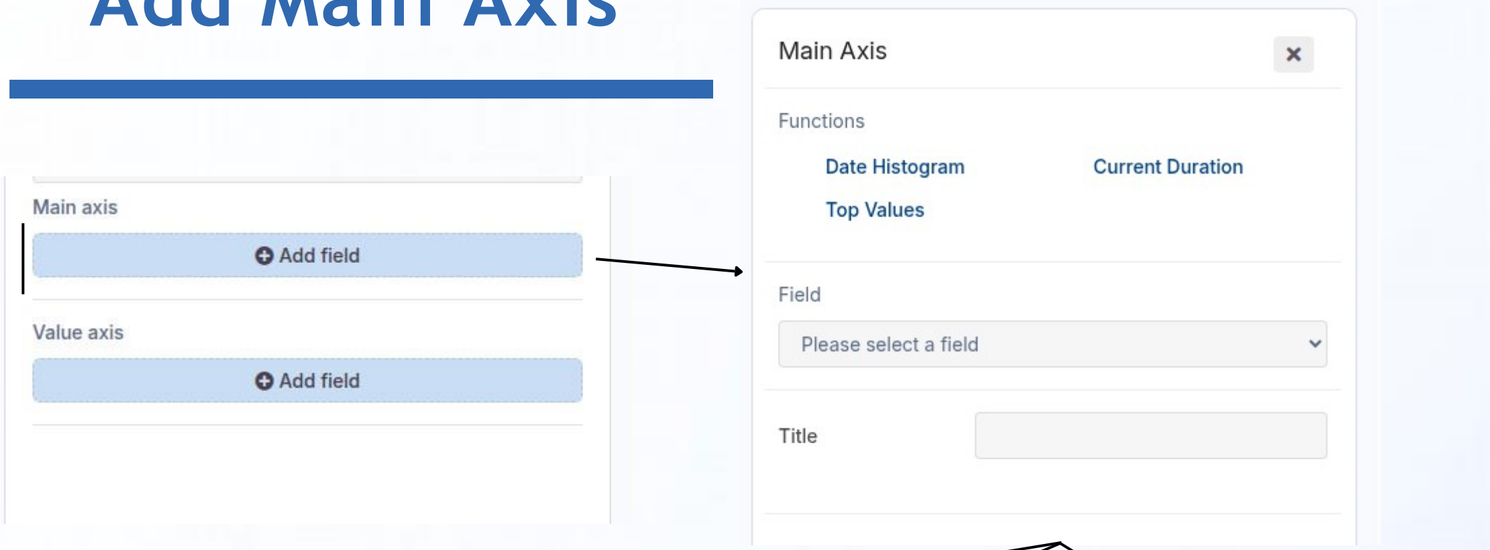


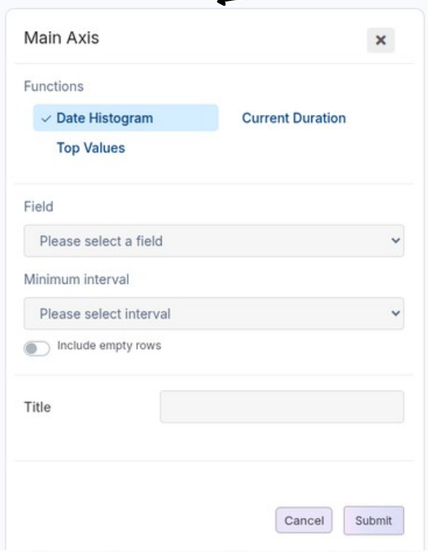
Select Visualization Type

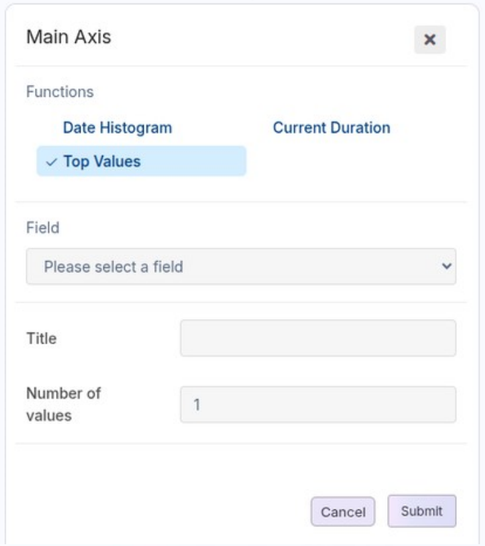
After selecting your data source, choose a visualization type that best suits the way you want to represent your data. A variety of options are available, including:

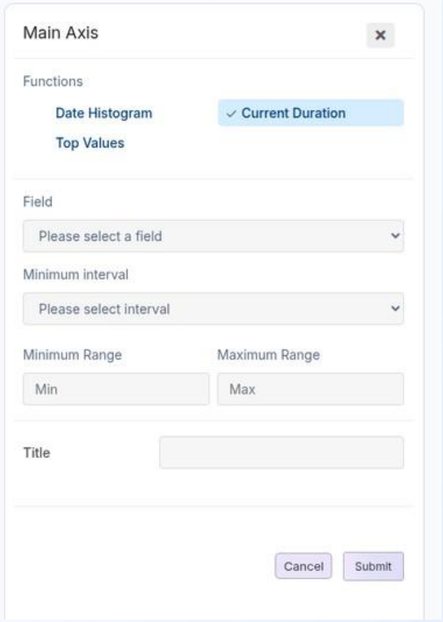
- **Bar Horizontal**
- **Bar Horizontal Stacked**
- **Line Chart**
- **Area Stacked**
- **Area Percentage**
- **Donut Chart**
- **Nightingale Chart**
- **Data Table**
- And many more options to suit your specific reporting needs

Add Main Axis









Configuring the Main Axis and Value Axis

Once you have selected your visualization type, you will be prompted to configure two axes:

Main Axis

Clicking on the Main Axis will present three function options:

- **Date Histogram** — Used to plot data over time intervals. Options include:
  - **Field & Title** — Define the data field and axis title
  - **Minimum Interval** — Set the smallest time interval for grouping data
  - **Include Empty Rows** — A toggle to include or exclude empty data rows in the chart

Add Value Axis

Main Axis Continued-

- **Top Values** - Used to display the most frequently occurring values. Options include:
  - **Field & Title** - Define the data field and axis title
  - **Number of Values** - Specify how many top values you want to display

- **Current Duration**- Used to represent data based on duration. Options include:
  - **Field & Title**- Define the data field and axis title
  - **Minimum Interval** - Set the smallest duration interval
  - **Minimum Range** - Define the lower boundary of the duration range
  - **Maximum Range**– Define the upper boundary of the duration range.

Value Axis

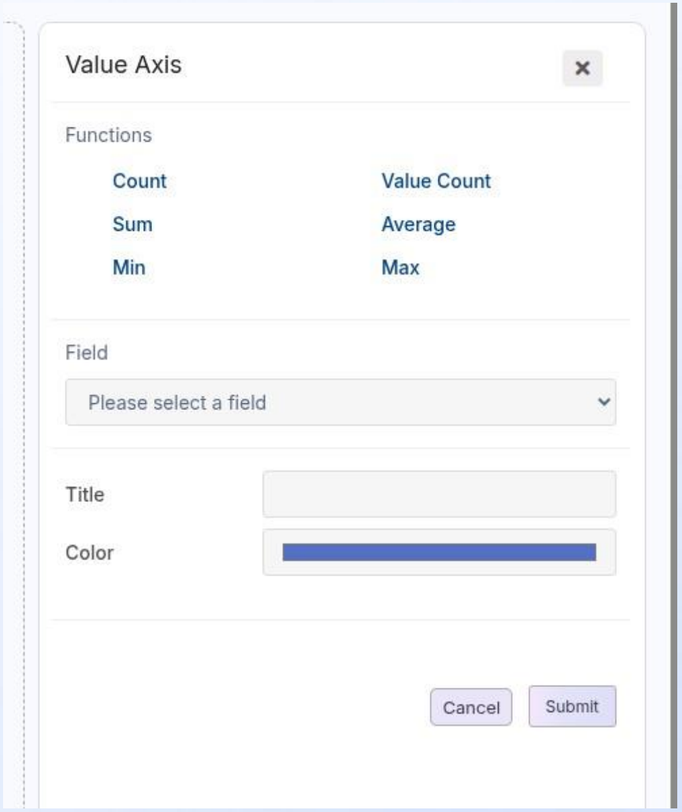
The Value Axis determines how your data will be measured and displayed in the chart. The following functions are available:

Count, Value Count, Sum, Average, Min, Max

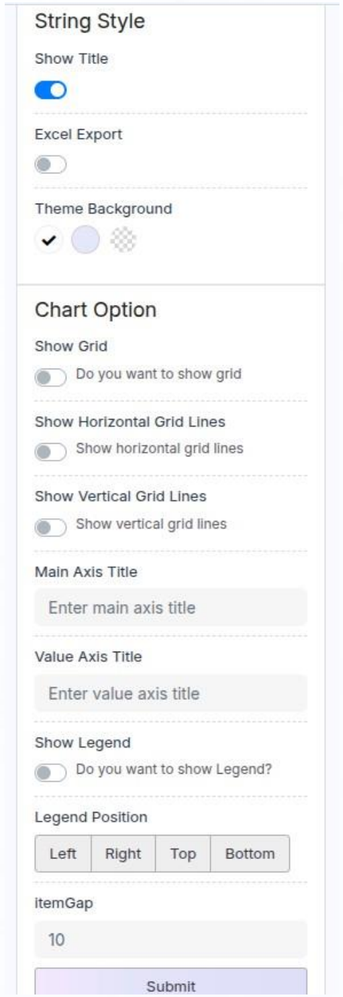
Regardless of the function selected, the following common fields are available for all:

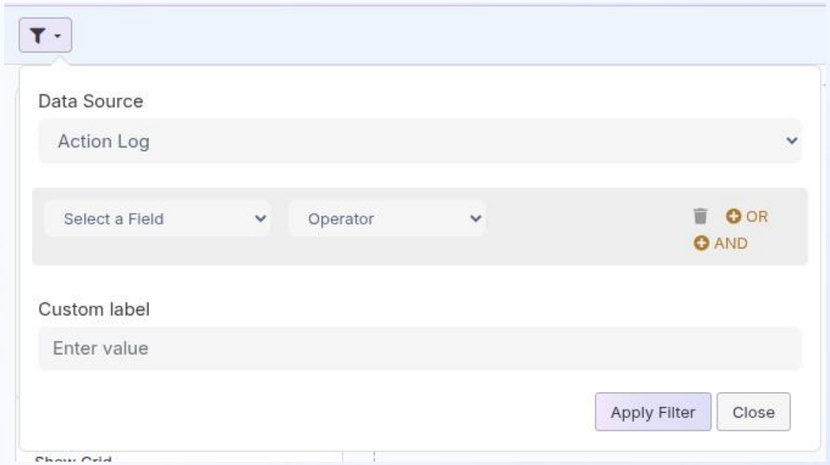
- **Field**- Select the data field to be measured
- **Title** - Enter a label for the value axis
- **Color**- Choose a color to represent the data in the visualization

  Once all the required details have been filled in as per your requirement, click **Save** to apply the configuration or **Cancel** to discard the changes.



String Customization and Filter Option





String Customization

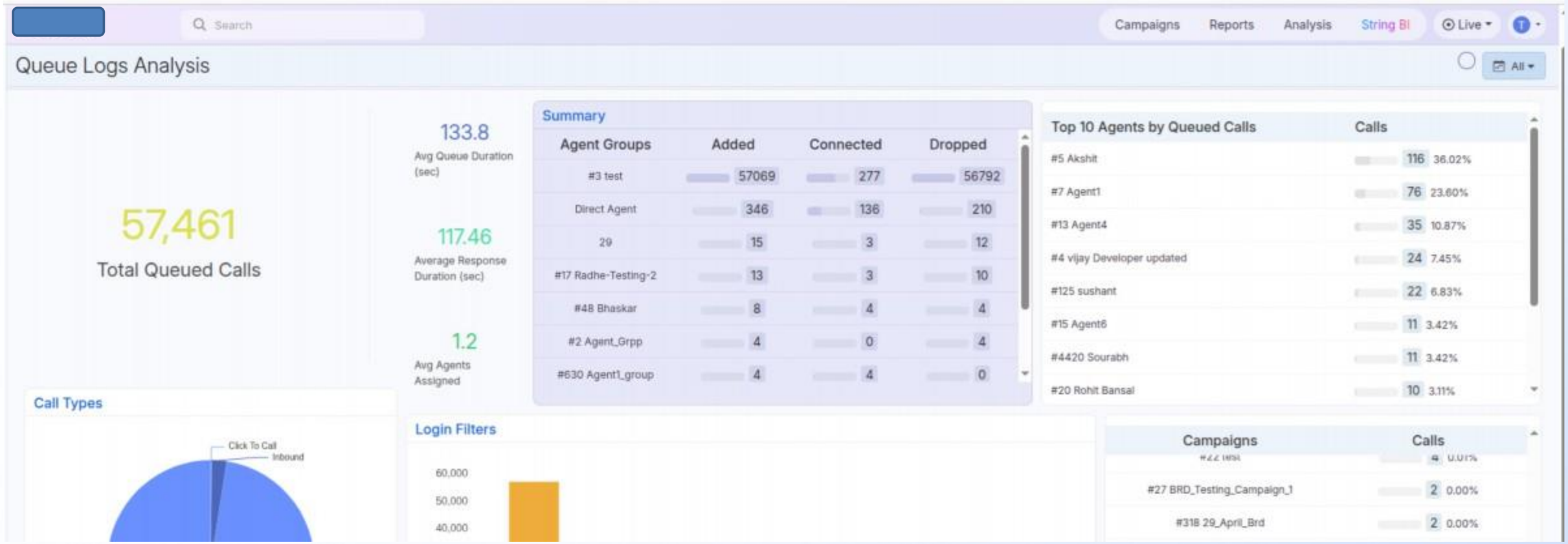
Once your string has been created, you can further personalize it using the following customization options present on the left side of screen:

- **Theme**- Choose a visual theme to match your dashboard look and feel
- **Show Grid**- Toggle the grid lines on or off within the string
- **Main Axis Title**- Add or edit the title for the main axis
- **Value Axis Title**- Add or edit the title for the value axis
- **Show Legends**- Toggle the visibility of legends on the string
- **Legend Position**- Set the placement of the legend as Left, Right, Top, or Bottom
- **Item Gap**-Adjust the spacing between items displayed in the string

Filter Option

A filter option is also available at the top left of the screen, allowing you to change the targeted data source directly. Any changes made here will automatically reflect in the string without needing to reconfigure it manually.

String Board



String Board Overview

This is how your completed string board will appear, populated with different strings based on the data you have configured. Each string displays its respective data visual, giving you a comprehensive and personalized view of your metrics all in one place. You can continue to edit, resize, reposition, or make any changes to the strings at any time to ensure the dashboard meets your evolving requirements.

Edit /Delete & Additional Customization of String



Resizing, Repositioning & Managing Strings

Resize & Reposition

To adjust the size or position of any string on your dashboard, simply click on **Edit String Board** from the right side of the dashboard. Once in edit mode, you can drag the string from its corners to resize it or move it to your desired position on the board.

String Options

Each string has a **three-dot menu** available in its top right corner. Clicking on it will reveal the following options:

- **Edit** — Opens the string configuration to make changes to its settings, data source, or visualization
- **Remove** — Deletes the string from the string board

Additional Customization Options

Apart from strings, the following additional elements are also available to further customize and enhance the layout of your string board:

Log Table, **Vertical Line**, **Horizontal Line**, **Spacer**

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THANK YOU!

DO YOU HAVE ANY QUESTIONS?

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