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Genesys Pulse Help

Import/Export

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Import/Export

Import and export of custom dashboards, wallboards, and templates

The screenshot shows the Pulse GAX interface. A menu is open with the following options: Dashboard Management, Wallboard Management, Widget Template Management, and Import/Export Options. The 'Import/Export Options' option is highlighted. Below the menu, a large number '6' is displayed. The main content area shows the 'Import/Export Options' page with a table of items. The table has columns for Name, Description, Modified, and a status column. The items listed are:

Name	Description	Modified	Status
Integration	Test for Integration	05/02/2015	Dashboard
Journey Dashboard		01/21/2015	Dashboard
Sales Dashboard		01/11/2015	Dashboard
Environment			
Scripts			
Pulse			
Environments			
BU-1			
Billing			
BU-1 Billing Dashboard	This dashboard monitors the Service Level across the B...	12/11/2015	Dashboard
Sales			
BU-1 Bluesky Team	Dashboard monitoring the Team Blue Sky in the Busine...	12/14/2015	Dashboard

Handwritten annotations include 'Import/Export Options' pointing to the menu item, 'Import and Export' pointing to the page title, and 'Filter' pointing to a search bar. A large number '6' is also present.

You can export dashboards, wallboards, and templates from one environment to another. This means after you create your own custom content based on the business requirements, you can easily build a package to use in other environments.

Tip

Pulse does not preserve links between created Widgets and Widget Templates after exporting and importing to other environments.

Prerequisite: Set User Permissions

To import or export package files, users must have appropriate permissions, as follows:

- **Pulse Manage Shared Dashboards**—ability to import/export Dashboards and Wallboards.
- **Pulse Manage Templates**—ability to import/export Templates.
- **Read-Write**—access to the appropriate folder if the import/export is performed for objects saved in Configuration Server.

Export package file from your environment

1. Select **Import/Export options** from the top right menu.
2. Select any dashboards, wallboards, and widget templates from the centralized repository. You can also apply a filter on the type of objects or the name of dashboards
3. Click **Export** to save a package file (json format) into your system.

Import package file to another environment

1. In the other environment, select **Import/Export** options from the top right menu.
2. Click **Import** to select a previously exported package file.
3. Select the dashboards, wallboards, and widget templates from package file to import into your current environment
4. Click **Import**.

What do I do next?

You might want to learn more about:

- [Dashboards and Wallboards](#)
- [Manage Report Templates](#)