Genesys Pulse Help

Getting started
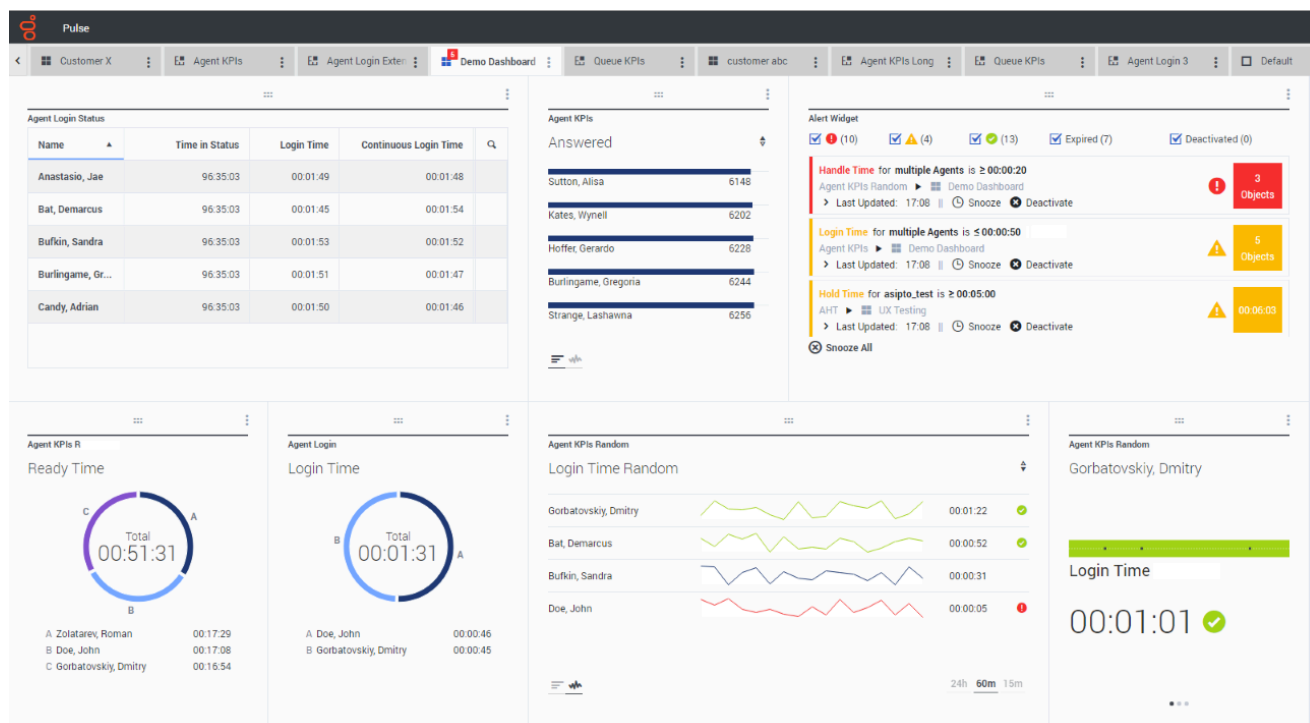
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Getting started

Genesys Pulse is your gateway for monitoring your contact center, so you can better meet your business needs.

> ## Important
>
> What you see in Genesys Pulse depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this help. If you think you should be able to do or see something you can't, or if you need help to change your password or otherwise manage your account, check with your supervisor or system administrator. They will be able to manage your account and your access privileges using Genesys Administrator Extension or Agent Setup (depending on your environment).

Now that you know what Genesys Pulse is, you're probably wondering how to use it. This Getting Started page will get you running, viewing, and managing reports. Let's get started.
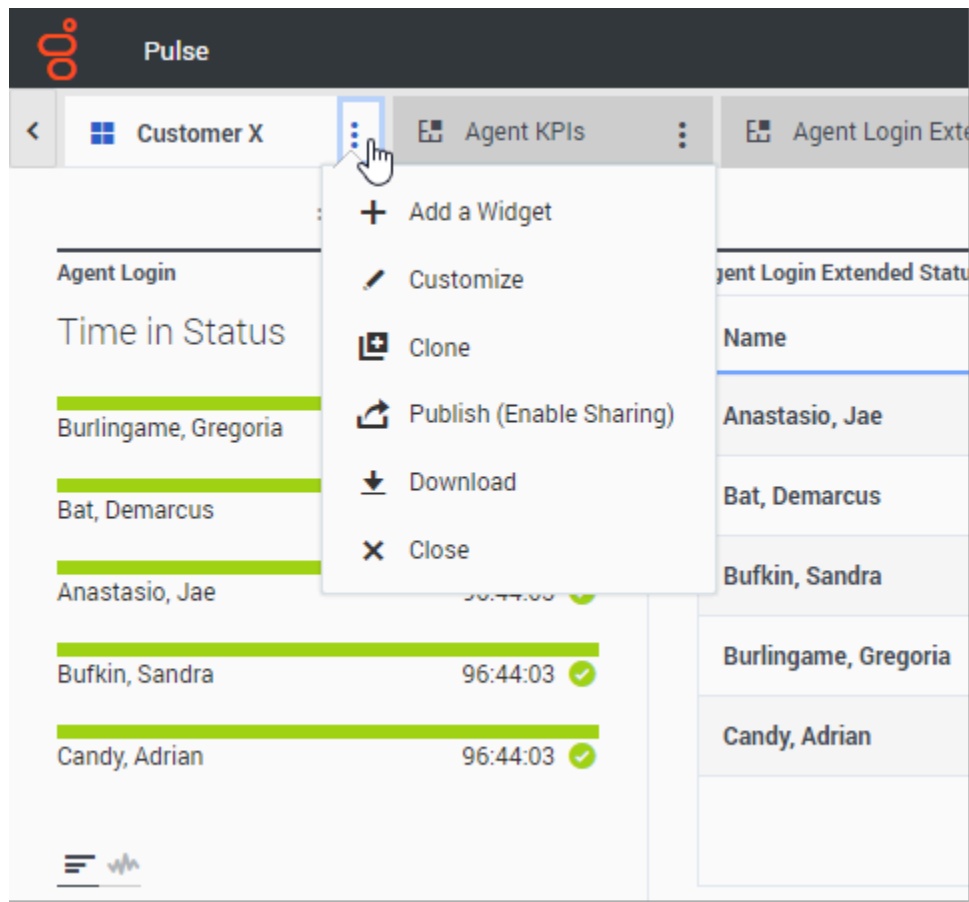
Access reports

You can open the Genesys Pulse dashboard to see the real-time reports.

Reports are displayed in widgets, which can easily be expanded to dashboard size to display additional detail.
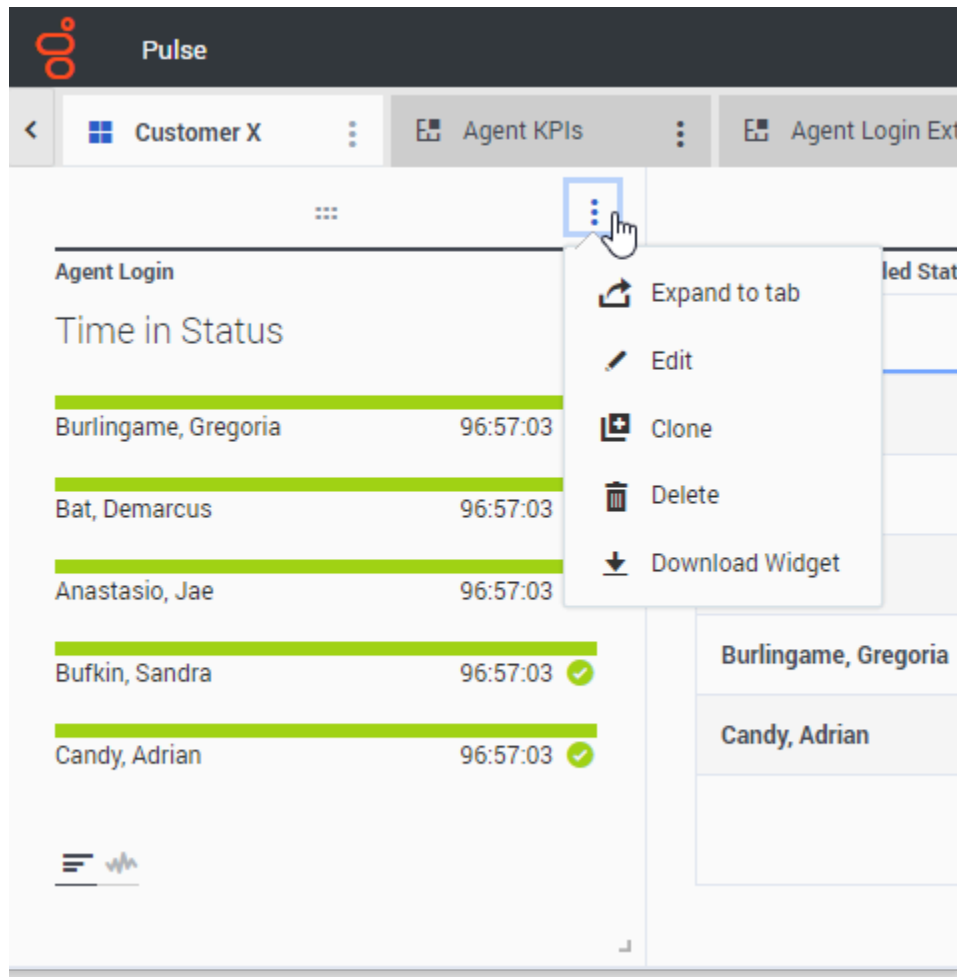
Manage dashboards and wallboards

Use tabs to manage Genesys Pulse dashboards and wallboards. Click the more icon in the right corner of the dashboard for options:

- **Add a Widget**—Add a new widget to the dashboard or wallboard.
- **Clone**—Create a new copy of the dashboard or wallboard.
- **Close**—Close the dashboard or wallboard.
- **Customize**—Change the name, description and other options of the dashboard or wallboard.
- **Download**—Export dashboard or wallboard in JSON format.
- **Launch**—Launch a wallboard.
- **Publish**—Share the unpublished dashboard or wallboard.

- **Save As**—Save a new copy of the published dashboard or wallboard.
- **Update Shared Copy**—Overwrite the published copy of the dashboard or wallboard.
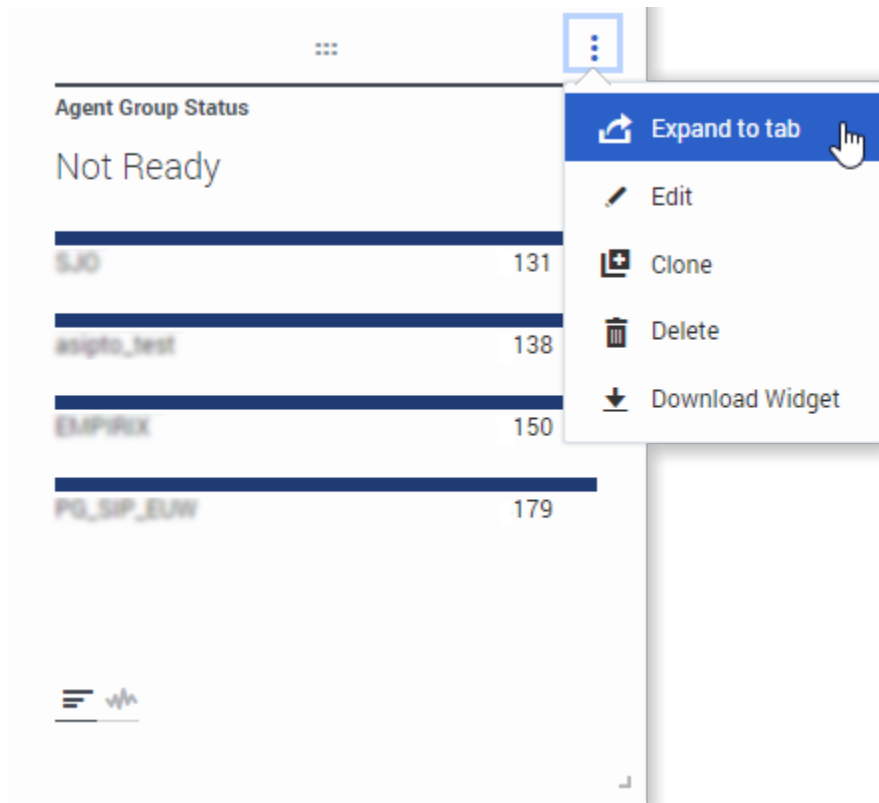
Use report widgets

[Genesys Pulse widgets](#) display Donut, Grid, Key Performance Indicator (KPI), Time Tracking, or List charts of key statistics for objects on your dashboard.

You can

- **Clone**—Create a copy of the widget.
- **Delete**—Delete the widget.
- **Download**—Download the report data as a CSV file.
- **Edit**—Make changes to the widget.
- **Expand to Tab**—See an expanded, detailed view of the report.

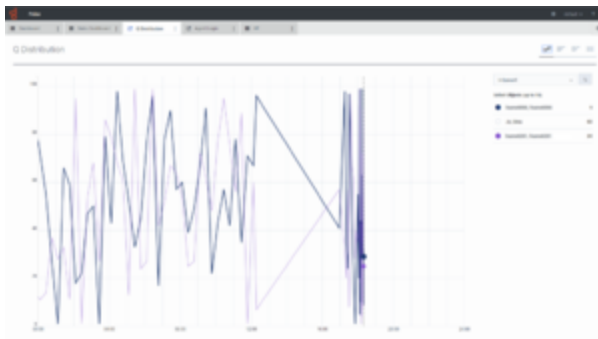You can also add new widgets to your dashboard.

Expand reports to dashboard

Click the more icon in the top right corner of a widget and select **Expand to Tab** to see a detailed view of your report. This expanded report opens within a new tab, so it will not impact your initial dashboard.

You can:

- Download the report data as a CSV file by selecting **Download Widget** from the the more menu.
- Make changes to the source widget by selecting **Edit** from the the more menu.
- Sort options, define objects, and define statistics you want to display.
- View different chart types available in the expanded widget:
  - **[+] Time Tracking**

- **[+] Grouped Bar**

- **[+] Stacked Bar**

- **[+] Data**

  Starting with release 9.0.001, new options are available in the `Customize` menu:

  - **Row Density**:
    `Comfy` (default) or `Compact`

  - **Row Color Contrast**:
    Low (default) or `High`

  - **Reset Column Width** - resets columns width to default values.

What do I do next?

You might want to learn more about:

- Manage dashboards and wallboards
- Dashboard and wallboard examples
- Add report widgets
- Popular real-time reports
- Display external content using an IFRAME widget