

GENESYS

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Genesys Pulse Help

Working with Dashboards and Wallboards

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Working with Dashboards and Wallboards

Use Pulse dashboards and wallboards to display real-time reports within widgets, so that you can monitor your contact center to suit your needs.

Dashboards are for personal use, and provide drill-down reports and contain more detail than a wallboard.

Wallboards can broadcast information on a large screen for a team of people. You can use IFrame, Text, or KPI widgets on your wallboards.

Pulse Perio Dashboard 🚦 🔳 customer abc 🚦 🗖 Default EB Agent KPIs Customer X : ţ, Agent Login Agent Login Extended Status Time in Status ٥ Name . Login Time a Anastasio, Jae 01:01:25 Burlingame, Gregoria 01:01:34 Bat, Demarcus Bat, Demarcus 01:01:30 Bufkin, Sandra Anastasio Jae Burlingame, Gregoria Bufkin, Sandra × Candy, Adrian What would you like to open or create? 119:15:05 🥥 Candy, Adrian = Agent KPI Handle Time Hold Time Held q Name 02:26:48 Dergalin, Ilya 00:44:38 7730 Ellington, Duke 02:35:58 00:38:45 1095 Iname5463 fname5463 01:03:29 02:30:52 614 Iname5464, fname5464 02:08:31 01:22:22 2141 Iname5465, fname5465 00:24:50 00:49:14 2392 Dashboard Wallboard name5466, fname5466 00:41:49 00:36:10 4206 name5467, fname5467 01:19:23 00:02:17 1795 Dashboards are meant for your own personal use and are Wallboards are meant to broadcast and share information designed for desktop usage. You will be able to drill down to your entire team. They are designed for large screen Iname5468, fname5468 00:53:27 00:42:56 9715 into widgets for deeper analysis. sizes in public spaces 01:00:47 9411 ne5490, fname5490 0.23.56

Add a dashboard or wallboard

To open or create a new dashboard or wallboard, click **Add a Dashboard**.

Then you can choose between a dashboard and a wallboard.

The wizard guides you through the rest of the steps.

Once a dashboard or wallboard is created you can edit the title and set other options, such as Alert

Notifications or the wallboard color theme. Select **Customize** from the dashboard menu to adjust settings.

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Display wallboard data in full-screen mode

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Current Status	📔 🗖 Team KPIs 🚦 📰 Sales Das	
	▶ Launch	
In queue	+ Add a Widget Processed	
	Customize	
	Clone	
		×
	Launch to Full-Screen Mode	
	This mode allows you to display your wallboard in full-screen without extra tabs and navigation bars. To exit, press the Esc Key.	
3	Wallboard: Current Status Customize	
	Cycle Wallboards	
	Select Wallboards: Current Status, Team KPIs	
	Interval (seconds): 60 Minimum of 10 seconds required.	
	Choose Footer Text Source: Current Status ~	
	Cancel Launch	

Select **Launch** from the wallboard More menu to display the data in full-screen mode.

You can choose several wallboards to cycle. You can use pinned to the bottom Text Widget as a news ticker. This Footer Text Source (pinned Text Widget) will remain unchanged while wallboards are cycling.

Manage shared dashboards and wallboards

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M	Demo Dashboard		5	10/02/2017		Manager				
	🗰 jglkh		7	04/01/2016	L	Link to Configuration Manager				
	testing 123		1	04/06/2016						

To manage shared dashboards and wallboards select Manage.

From here you can perform actions on dashboards and wallboards, including assigning them to groups of users.

Genesys Pulse lists saved and shared items in a table and displays item details to the right.

Tip

See Widget Templates to learn how to simplify widget creation.

Hide or share your custom dashboard or wallboard with other users

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		-	lish Customer X (Ena
Bufkin, Sandra		9 Users will be ab Dashboard Nam	le to open an instance of this dashboard
Candy, Adrian		9 Customer X	
= *		Description Customer X	
		Save to Gene	esys Configuration Server
		Dashboard Na	ame
		> 🖿 Environ	ment
		Saved Location	: /Environment/Scripts/Customer X
		Cancel	

You can share your custom dashboard or wallboard with others (for example, with a user group such as Sales Team Leads). When you **Publish** or **Save As** from the more menu, you must select **Save to Genesys Configuration Server**, and choose the directory to save and share the dashboard with others. Be sure to give it a name specific to the user's needs.

Use Dashboard Management to hide your dashboard from others. Select a dashboard, click **Link to Configuration Manager** on the right under **Access Groups**, and set permission settings for people

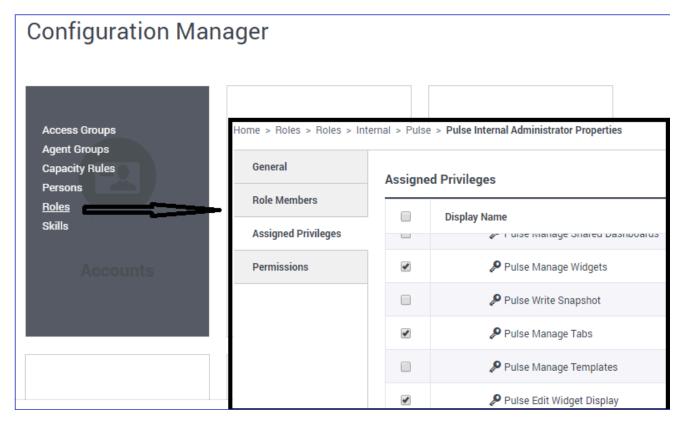
who will view your dashboards.

Important

To prevent others from using your dashboards, you need the GAX permissions: Access Configmanager; Read Scripts; and Create/Full Control of Scripts.

To save dashboards or wallboards to Genesys Configuration Server, you need Full Control access to the target directory.

Allow users to customize dashboards



Your Genesys Pulse users might want to modify their dashboards or wallboardss. You can enable this by granting them the proper permissions.

In GAX, on the **Configuration Manager** page, under **Accounts**, go to **Roles** and find the role assigned to the user.

Edit the privileges granted by the **Role** on the **Assigned Privileges** tab in the **Pulse** section to allow following actions:

- Pulse Manage Tabs—User can launch and close dashboards and expand widgets to tab.
- Pulse Edit Widget Display—User can modify widget display options.
- Pulse Manage Widgets—User can create, remove, or modify all widget options.

What do I do next?

You might want to learn more about:

- Dashboard and wallboard examples
- Add report widgets to your dashboard or wallboard
- Popular real-time reports
- Displaying external content using an IFRAME widget