GENESYS™

Contact Center Advisor and Workforce Advisor Help

CCAdv/WA Mobile View Dashboard

5/7/2025

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CCAdv/WA Mobile View Dashboard

NEW You can check the Pulse Advisors dashboards on your mobile device using a supported browser. This page gives you an overview of the Contact Center Advisor and Workforce Advisor applications for mobile devices.

You can view the full Advisors desktop dashboard on your mobile device, if necessary, but the dashboards are available as an optimized view that is intended specifically for mobile device users. The Contact Center Advisor (CCAdv) and Workforce Advisor (WA) mobile views give you access to the desktop dashboard's **Contact Centers** pane and the **Alerts** pane.The Advisors mobile view is designed to be an express service; it is not intended to be a replacement for the desktop dashboards.

To access the mobile view on your device, open a browser that supports Advisors applications and enter the URL that you use to access your Advisors desktop application. When you initially log in, you see the top level of the mobile view. This is the **Contact Centers** pane from the Advisors desktop applications, and is presented as a list in the mobile view. You can drill down to lower levels of the hierarchy from this top-level view. For more information, see Example: Drilling down through the hierarchy in mobile view, below.
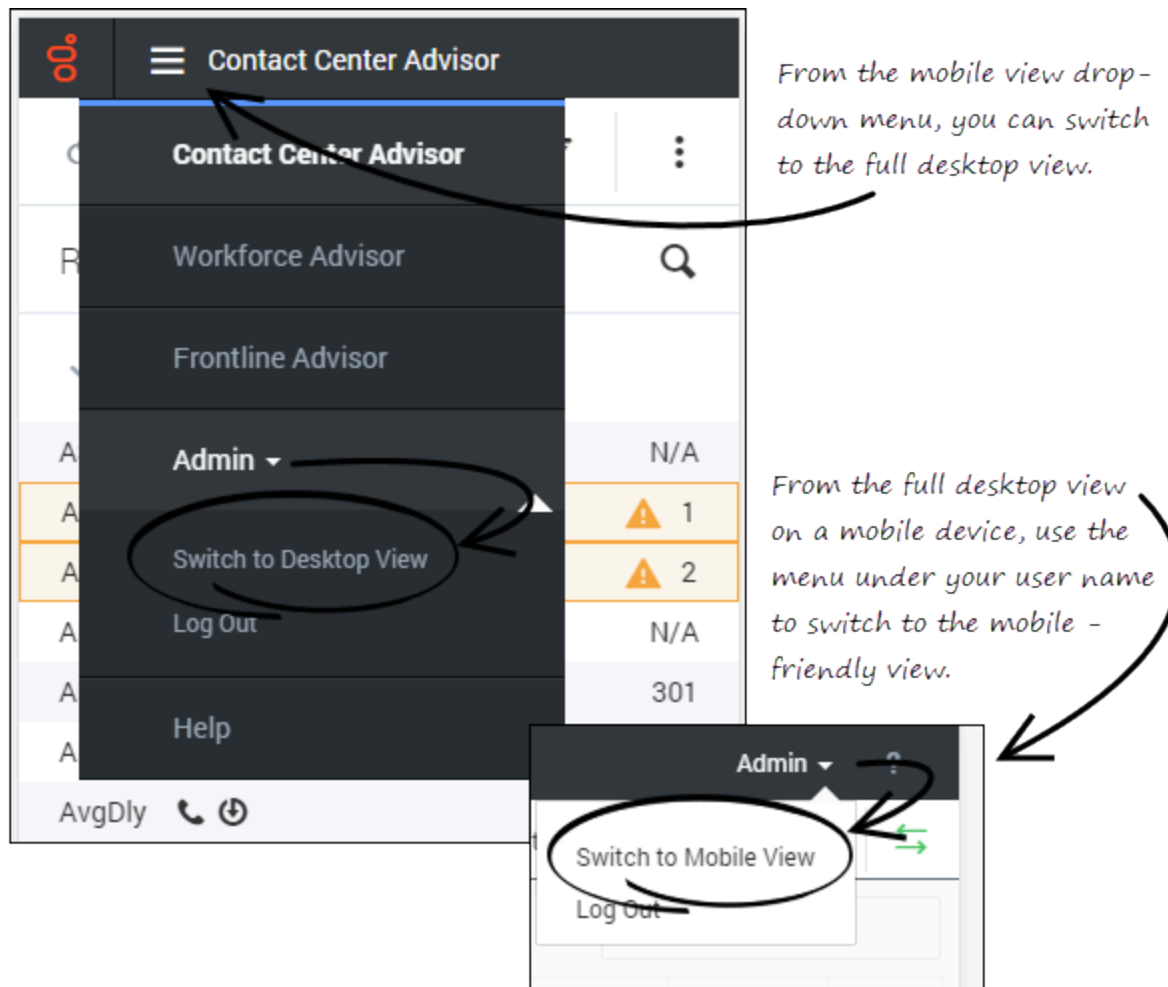
The Advisors mobile view includes tooltip information for buttons that display at the top of the mobile dashboard, but there are no tooltips associated with metrics. To use the mobile view effectively, you need to be familiar with at least one Advisors desktop dashboard and have an established list of metrics that you typically watch.

The Advisors mobile dashboard view uses the same formatting that is configured for the desktop application. For example, if the values for metrics show two decimal places in the desktop dashboard view, then the mobile view also shows metrics values with two decimal places.

> ## Tip
> If the browser on your smartphone includes the **Add to Home screen** option in the menu, you can use it to create a shortcut to your Advisors mobile application on your device's home screen.
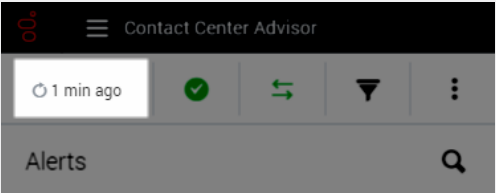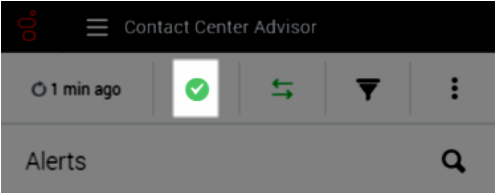
Device-aware Applications

From the mobile view drop-down menu, you can switch to the full desktop view.

From the full desktop view on a mobile device, use the menu under your user name to switch to the mobile-friendly view.
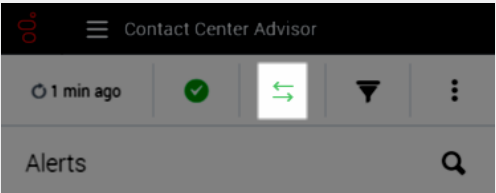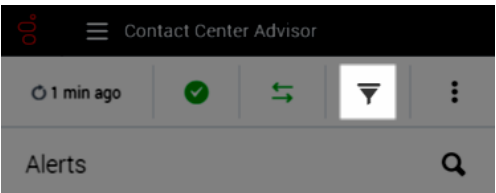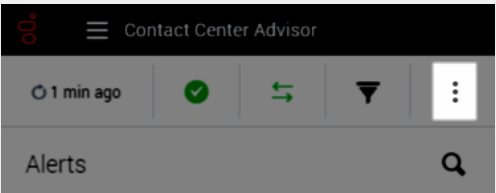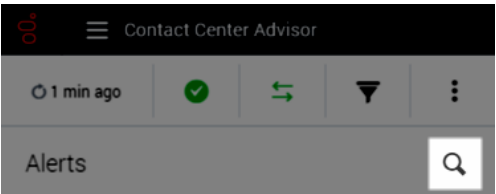
Advisors applications are device-aware. If you log in to an Advisors application on a mobile device, then the mobile view of the application opens. In the drop-down menu at the top of the mobile application, there is an option that lets you switch to the desktop view. When viewing the full CCAdv or WA dashboard on your mobile device, you can easily switch back to the mobile view by selecting that option in the menu under your user name.

There is no option to switch to the mobile-device view when you are using a desktop device to view the Advisors dashboards.

Advisors Mobile View Overview

When you initially open the Contact Center Advisor or Workforce Advisor application on a mobile

device, you see the hierarchy that displays in your desktop application's **Contact Centers** pane. You will recognize some of the information and buttons that display on the toolbar at the top of the mobile view from your desktop application. The following table describes the toolbar options.

Toolbar option	Description
	Last Updated timestamp: Tap the **Last Updated** timestamp to see the precise time at which data was last generated. The CCAdv server has assigned this timestamp to the snapshot of real-time metrics that external data sources have supplied to the server, and which the server used to calculate the metrics displayed in the dashboard.
	Data Source Status indicator: Like the desktop dashboards, the data source status indicator displays only in the Contact Center Advisor toolbar, and not in the Workforce Advisor toolbar. The indicator changes from green to red if an external data source has not updated within a configured time frame. Tap the **Data Source Status** indicator in your mobile view to see additional status information.
	Data Connection Status indicator: The **Data Connection Status** indicator displays on the toolbar in both Contact Center Advisor and Workforce Advisor. The indicator changes to red when the dashboard cannot connect to the server. Tap the **Data Connection Status** indicator in your mobile view to see additional status information. If the **Data Connection Status** indicator remains red for an extended period of time, report it to your system administrator.
	Filter: The **Filter** icon at the top of the view opens a **Filter** pane; the pane is specific to your view. In other words, the pane provides filtering options specific to the contact centers hierarchy if you were viewing the hierarchy when you tapped the **Filter** icon. If you have the **Alerts** pane open and you tap the **Filter** icon, then the filtering options are specific to the **Alerts** pane.
	More icon: Tap the **More** icon to open a pane from which you can switch between the **Dashboard** and **Alerts** views.
	Search: Tap the **Search** icon to open the **Search** field. When viewing the hierarchy in mobile view, you might always see the **Search** field, instead of the **Search** icon, depending on how your system administrator configures the view for your role in the enterprise.

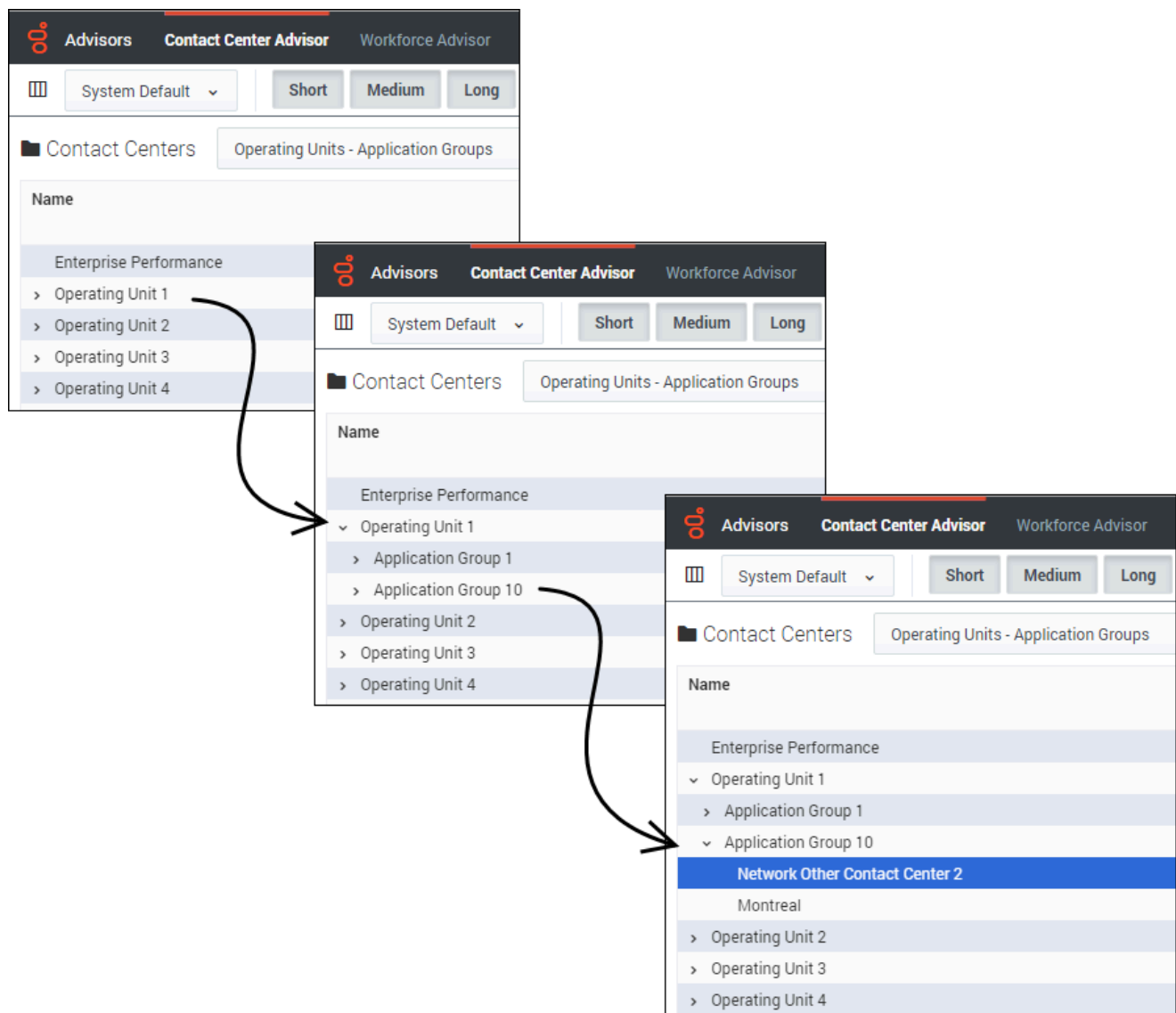## Changing the Displayed Metrics in Mobile View

Advisors mobile view does not include **Column Chooser**. The easiest way to change the group of metrics that you are viewing and tracking in your mobile view is to select a different metrics library.

Metrics libraries are available for selection in the mobile dashboard **Filter** pane, but only if you have access to **Column Chooser** in the desktop application. Genesys recommends that you create metrics libraries using your desktop application's **Column Chooser** before attempting to change the list of metrics that you are viewing on a mobile device. However, if you need to display a metric on your mobile view that is not currently included in one of your metrics libraries, and you do not have access to a desktop device, then you can switch to desktop view on your mobile device, open **Column Chooser**, and change the list of metrics selected for dashboard display. The display of metrics in both your desktop application and your mobile view is updated whenever you make changes to the list of selected metrics in the desktop application's **Column Chooser** window. Refresh your mobile view to see the updated selection of metrics.
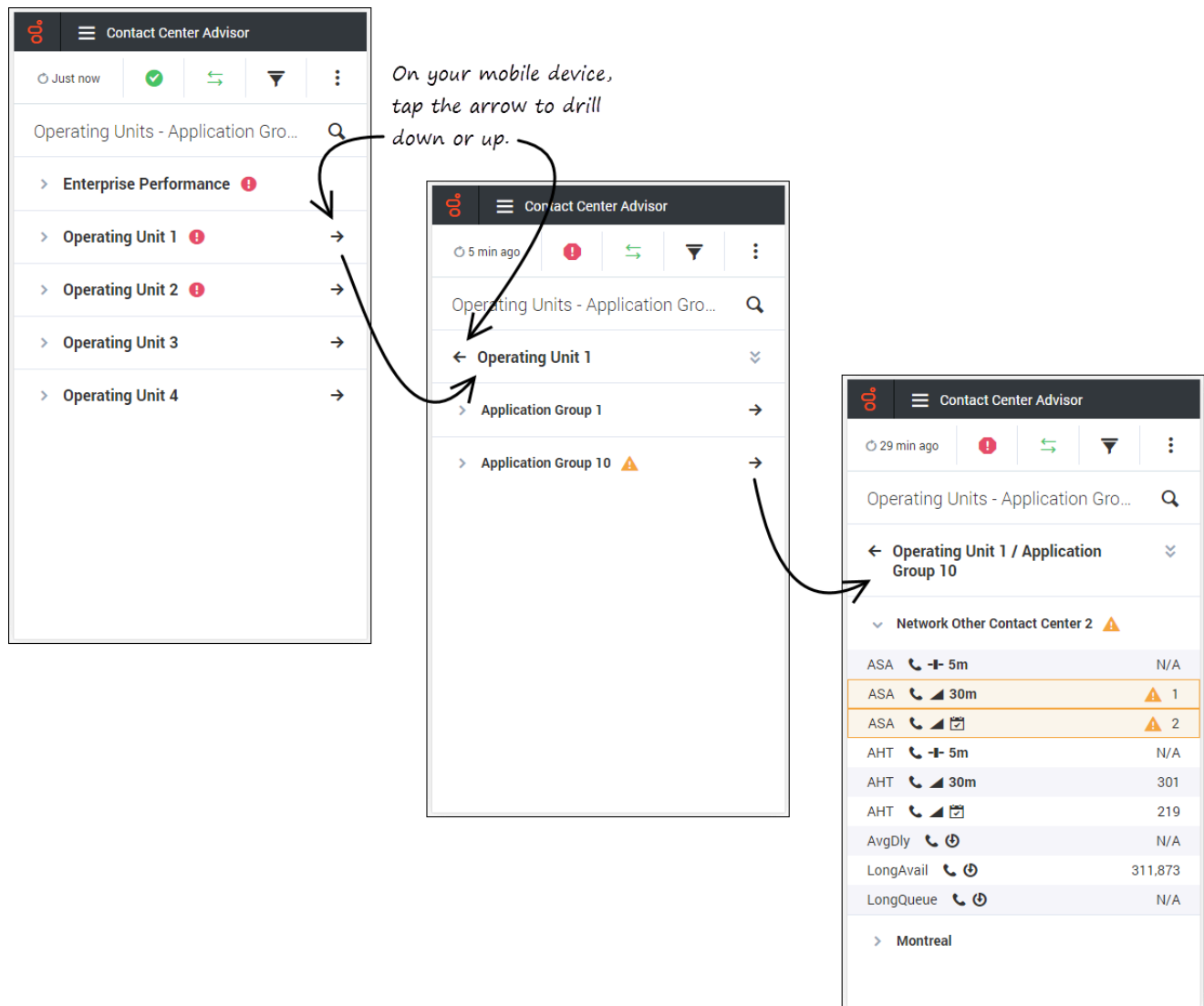
Example: Drilling down through the hierarchy in mobile view

The figures below compare navigation in the CCAdv desktop application's **Contact Centers** pane with navigation in the hierarchy view on a mobile device to demonstrate how to drill down (or up) through the mobile view hierarchy to find information about business objects and how they are performing.

The following figure shows how to drill down through the hierarchy in the **Contact Centers** pane when you use the CCAdv desktop application.

The following figure shows how to drill down through the hierarchy in the CCAdv mobile view. This is the same hierarchy that is demonstrated in the preceding figure. In the mobile view, you tap the arrow beside a business object name to drill down or up through the hierarchy.

On your mobile device, tap the arrow to drill down or up.

Alerts Screen in Mobile View

The following figure shows the **Alerts** pane in the CCAdv mobile view. Threshold-related alerts display a summary view when you open the **Alerts** pane. You can tap this type of alert to expand it and find additional information.

For more information about a threshold-related alert, tap it and it will expand.