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Genesys Cloud CX Maturity Level

Inbound - Maturity Level for GenesysCloud

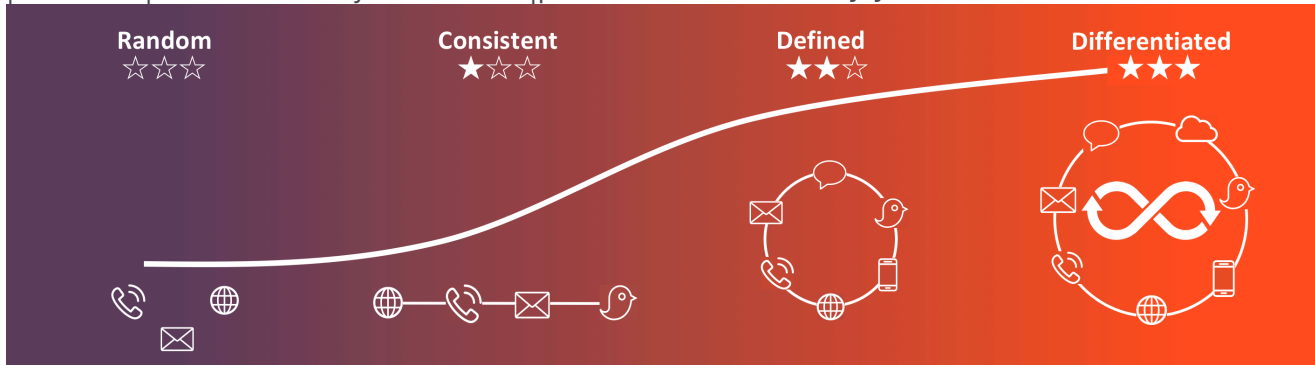


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Outbound (CX Contact) CX Contact H

[Import / Export a Dashboard and Pa](#)

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{ {#cargo_store:_table=Article |Platform= |DisplayName=Inbound |TocName= |Dimension=
|Context= |Product=Genesys Use Cases |productshort=UseCases} }
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Consistent	Defined	Differentiated
No use cases with Consistent maturity for this product category.	<ul style="list-style-type: none"> CE43 - Genesys Personalized Routing with Callback 	No use cases with Differentiated maturity for this product category.

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Learn how to import/export a Dashboard and Panels.

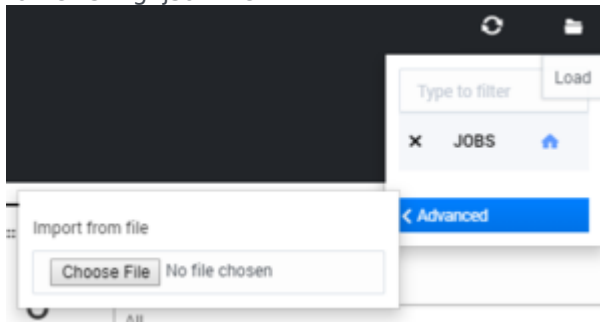
Related documentation:

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Import an Analytics Dashboard


CX Contact Analytics dashboards can be imported/exported. The imported/exported file is a **.json** file. The dashboards can also be manually exported as a **.pdf** file and a dashboard panel can be manually exported as a **.csv** file.

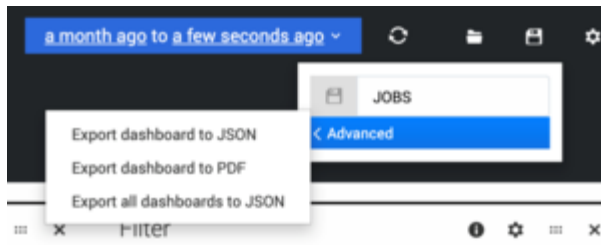
1. Select **Analytics** and click the **Load** icon .
2. In the **Type to filter** text box type the name of the dashboard you want to load. A list of dashboards matching the name appears. Or, click **Advanced** and then click **Choose file** to import dashboard data from an existing **.json** file.



3. Select the **.json** file containing the dashboard data you would like to import. The data in the select **.json** file is uploaded as the current dashboard.

Export an Analytics Dashboard

1. Select **Analytics**.
2. Open the dashboard whose data you would like to export to a **.json** file and click the **Save** icon .
3. Click **Advanced** and then click **Export dashboard to JSON** (that is, to export the current dashboard only) or click **Export all dashboards to JSON** (to export all dashboards from all indexes).



4. Select a location for the .json file and click **Save**.
The JSON file will store the definition of the Dashboard, not the actual data displayed on it.


Schedule an export of the Dashboard or Panel

In addition to being able to create automation jobs to export the fields in Elasticsearch indexes, you can also schedule an export of the Analytics Dashboard to PDF files or the Panel to PDF or CSV files for the purposes of reporting. Export of the Dashboard and Panel is implemented via the API Aggregator, using a headless browser (Puppeteer) to render the Outbound Analytics pages and store them in PDF format. The API Aggregator receives the name of Dashboard or Panel and the time interval for data rendering by means of input parameters from the Job Scheduler. List Manager implements the export of Panels with tabular data to the CSV files.

To schedule an export of the Dashboard or Panel:


1. In the **List Automation** job, select the **Edit Automation** tab.
2. In the **Rules** section, for the **Action type**, choose **Export Analytics Data**.
3. In the **Export type** field, choose either **Dashboard** or **Individual panel**.
4. In the **Data Source (Dashboard)** field, select the data source from the drop-down list.
5. If you are exporting a Panel, select the panel name from the drop-down list.
This control is enabled only when the selected Export type is Individual panel.
6. Select the time interval for this export.
7. In the **Output file name format** field, enter the format you want to use for the output file.
8. For the **Output data file format**, choose **PDF** or **CSV**.
The CSV button is enabled, only when Individual panel is selected for Export type.
9. (Optional) Select **secure with encryption** to encrypt the export if PGP encryption is not mandatory.
10. Click **Save list automation**.

Manually export a Dashboard as a PDF file

1. Select **Analytics**.
2. Open the dashboard whose data you would like to manually export to a **.pdf** file and click the **Save** icon .

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3. Click **Advanced** and then click **Export dashboard to PDF**.
 4. Select a location for the .pdf file and click **Save**.
The PDF file will contain the data currently displayed on the screen.

Manually export a Dashboard Panel as a CSV file or PDF file

1. Select **Analytics**.
2. Open the dashboard whose panel you would like to manually export to a **.csv** or **.pdf** file.
3. Click the download **Export** icon .
4. Select either the **Export panel to CSV** tab or the **Export panel to PDF** tab.
5. Review the details in the window that appears and click **Download CSV / Download PDF**.
6. Export the contents of the panel, as shown, selecting all data or currently loaded data.