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# Genesys Recording, Quality Management, and Speech Analytics User's Guide

Report widget

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- Administrator

Use the Report widget to display the data for any report saved in your system. The Report widget can be configured to display information about a variety of topics. Adding more than one Report widget to a single dashboard enables you to display different types information.

### Related documentation:

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Use the Report widget to display any report saved in your system. You can configure it to display information about a variety of topics.

You can use this configurability to broaden the scope of information in a single dashboard by including more than one Report widget, where each Report widget displays different data.

From the Report widget you can:

- Run a report
- Drill down
- Configure a Report widget
- Edit a Report widget


## Run a report in the Report widget

1. Select **Dashboard**.
2. Select the dashboard in which you want to run the report.
3. Click **Edit**.
4. From the **Select** list, chose the report you want to view.
5. Click **Save**. The report appears in the **Report** widget.
6. If the report is too large for the widget change the report version:
  1. Click the report link in the bottom left corner of the widget. The report is opened in the Reports > Edit Report tab.
  2. From the **Version** list select **Mini**.
  3. Click **Run report**.
  4. Click **Save**.

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5. Select **Dashboard** and the name of the dashboard that contains the report you are changing. The report is re-sized to match the size of the **Report** widget.

## Drill down a Report widget

1. Click within the **Report** widget on the information for which you want to receive additional data.


The data may be in the form of additional reports or an interaction list (opened in a separate window). If a different report was accessed, click the **Back** icon  to return to the original report results.

## Configure a Report widget

When configuring a Report widget you can change its height, how often it is updated and what report(s) it includes.

1. In the upper right corner of the Report widget click **Edit**. The widget's configurable settings are displayed.
2. Change the following settings as required:
  - **Height**: The widget height in pixels.
  - **Refresh Rate**: The rate (in minutes) at which the data in the report is refreshed.
  - **Report Description**: An explanation about the report.
  - **Select**: Select the report to display in the widget.
3. Click **Save**. The widget settings are saved and a link to the specific report is added to the bottom left corner of the widget.
4. Click **Close** in the top right corner of the widget to hide the setting options.

## Edit a Report widget

1. Select **Dashboard**.
2. Select the dashboard that includes the report whose settings you want to change.
3. In the upper right corner of the Report widget, click **Edit**. The widget's configurable settings are displayed.
4. Do one of the following:
  - Click the **Edit Report** icon . The report is opened in the Reports > Edit Report tab in a new and separate
  - Click the name of the report in the bottom left corner of the specific widget. The Reports > Edit

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Report tab is opened for the specific report in the same window.

5. Modify the report settings as necessary.

### Important

You can format the widget description using HTML tags.

6. Click **Save Report Settings** or **Save report settings as**.

### Important

If the saved report was not in your account, you are prompted to create a copy of the report by giving it a new name. The new report is saved in your account.

7. If you selected to edit the report in a new and separate window, click **X** to close the window.