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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

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.