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

Managing widgets

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- Administrator

Use Widgets to display summary information about a specific set of interactions. With Widgets you can better understand the nature of all interactions within a specific interaction list.

Related documentation:

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Widgets are small applications you can include in a view in the **Dashboard** page.

Each widget is displayed in the page as a small rectangle.

Depending on your user permissions, you may be able to add, move, modify, minimize, and remove widgets.

A Dashboard can contain the following widget:

- Report widget

Add a widget

1. Select **Dashboard**.
2. Select the dashboard to which you want to add a widget.
3. Click **Add Widgets**. The available widgets are displayed at the top of the screen (Report widget).
4. Click the link associated with the widget you want to add to the dashboard. The widget is added to the dashboard.

Edit a widget

1. Select **Dashboard**.
2. Select the Dashboard whose widget's you want to change.
3. To change the widget name click the name to make it an editable field. Type the new name and click **OK**.
4. Click **Edit** and perform any of the following:
 - **Change the widget height:** Enter the new height in the field provided.

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- **Change the widget refresh rate:** Enter the new refresh rate in the field provided.
 - **Change the report description:** Enter the new description in the field provided.

Tip



You can format the widget description using **HTML** tags.

5. Click **Save** to save your changes.
6. Click **Close** to close the fields.


Move a widget

1. Select **Dashboard**.
2. Select the Dashboard whose widget you want to move.
3. Place your mouse on the widget title bar and click and drag the widget to its new location.

Minimize/maximize a widget


1. Select **Dashboard**.
2. Select the Dashboard whose widget you want to minimize / maximize.
3. Click the minus sign  to minimize the widget.
4. Click the plus sign  to maximize the widget.

Manually refresh a widget's data

1. Select **Dashboard**.
2. Select the Dashboard whose widget you want to refresh.
3. Click the **Refresh** icon  to update the data in the widget.

Delete a widget

1. Select **Dashboard**.

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2. Select the Dashboard whose widget you want to delete.
 3. Click the **Delete** icon  to remove the widget from the Dashboard.