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Real-time Reporting with Pulse

Working with Dashboards and Wallboards

11/30/2023

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- Supervisor

Use Genesys Pulse dashboards and wallboards to display real-time reports.

Related documentation:

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Use Pulse dashboards and wallboards to display real-time reports within widgets, so that you can monitor your contact center to suit your needs.

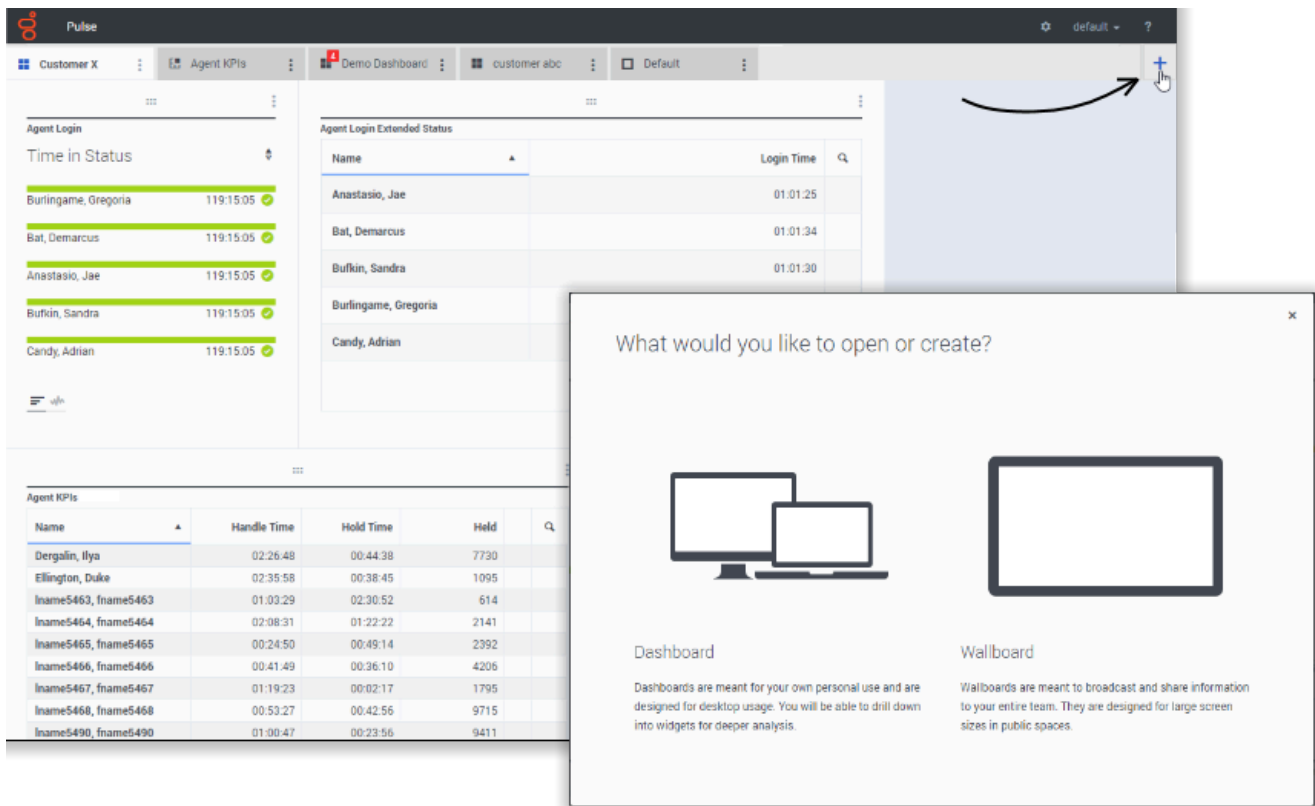
Dashboards are for personal use, and provide drill-down reports and contain more detail than a wallboard.

Wallboards can broadcast information on a large screen for a team of people. You can use only KPI widgets on your wallboards.

Video: Working with Dashboards and Wallboards

[Link to video](#)

Add a Dashboard or Wallboard



To open or create a new dashboard or wallboard, click **Add a Dashboard**, and choose between a dashboard and a wallboard.

The wizard guides you through the rest of the steps.

Once you have created a dashboard or wallboard, you can edit the title and set other options, such as Alert Notifications or the wallboard color theme. Select **Customize** from the dashboard menu to adjust settings.

Customize (Current Status)

Workflow Name *

Current Status

Description


Optional

Enable alert notifications in job

Theme

Header

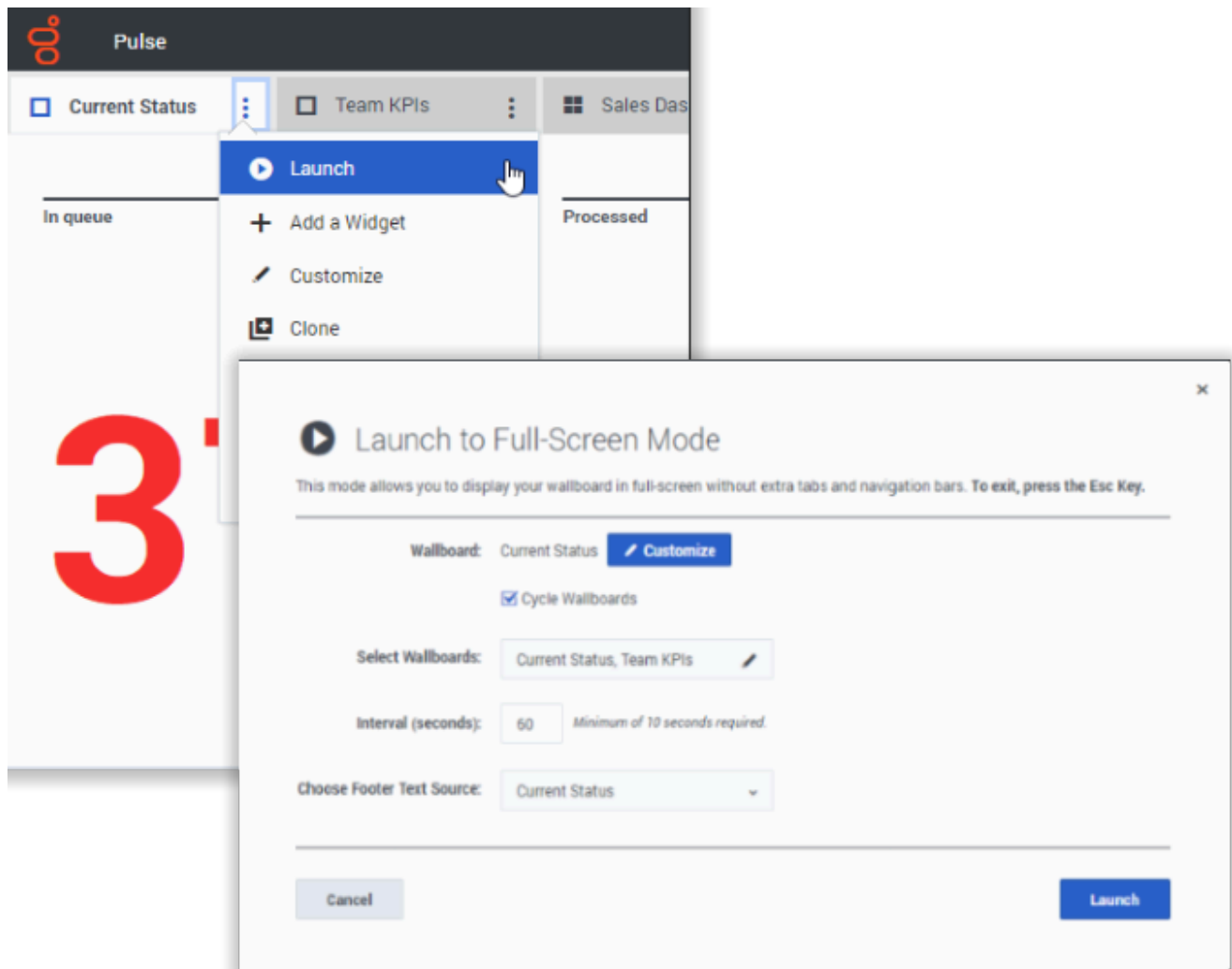
Customize the header to reflect the company branding.

Current Status Powered by 

Header Color Text Color

Display Size

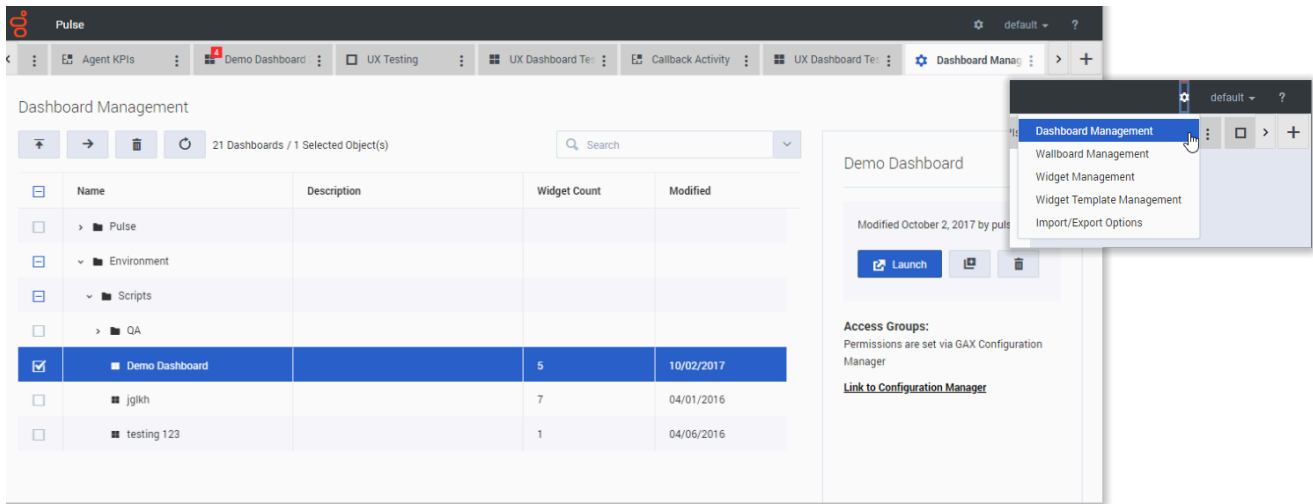
Display Wallboard Data in Full-screen Mode



Select **Launch** from the wallboard More menu to display the data in full-screen mode.

You can choose several wallboards to cycle. You can use pinned to the bottom Text Widget (see the Widget Templates page for more info) as a news ticker. This Footer Text Source (pinned Text Widget) will remain unchanged while wallboards are cycling.

Manage Shared Dashboards and Wallboards



To manage shared dashboards and wallboards select **Manage**.

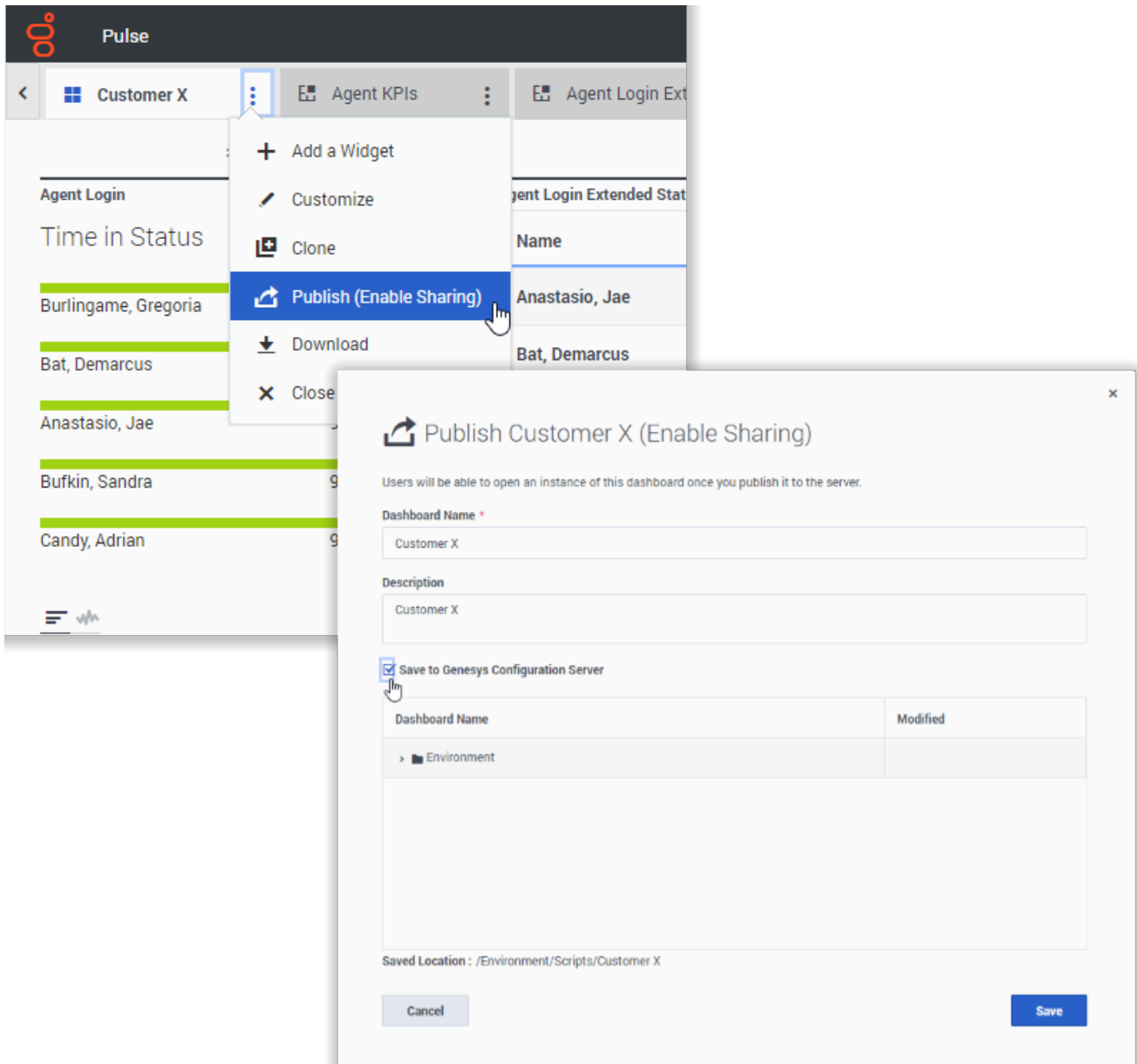
From here you can perform actions on dashboards and wallboards, including assigning them to groups of users.

Genesys Pulse lists saved and shared items in a table and displays item details to the right.

Tip

See Widget Templates to learn how to simplify widget creation.

Hide or Share a Dashboard or Wallboard with Other Users



You can share your custom dashboard or wallboard with others (for example, with a user group such as Sales Team Leads). When you **Publish** or **Save As** from the more menu, you must select **Save to Genesys Configuration Server**, and choose the directory to save and share the dashboard with others. Be sure to give it a name specific to the user's needs.

Use Dashboard Management to hide your dashboard from others. Select a dashboard, click **Link to Configuration Manager** on the right under **Access Groups**, and set permission settings for people who will view your dashboards.

Tip

You might not be able to manage access to your dashboards for other users, check with your supervisor or system administrator.
To save dashboards or wallboards to Genesys Configuration Server, you need the Full Control access to the target directory.

What do I do next?

You might want to learn more about:

- [Dashboard and wallboard examples](#)
- [Add report widgets to your dashboard or wallboard](#)
- [Popular real-time reports](#)
- [Displaying external content using an IFRAME widget](#)