

# **GENESYS**

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## Real-time Reporting with Pulse

Working with Dashboards and Wallboards

9/8/2025

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• Supervisor

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

#### **Related documentation:**

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

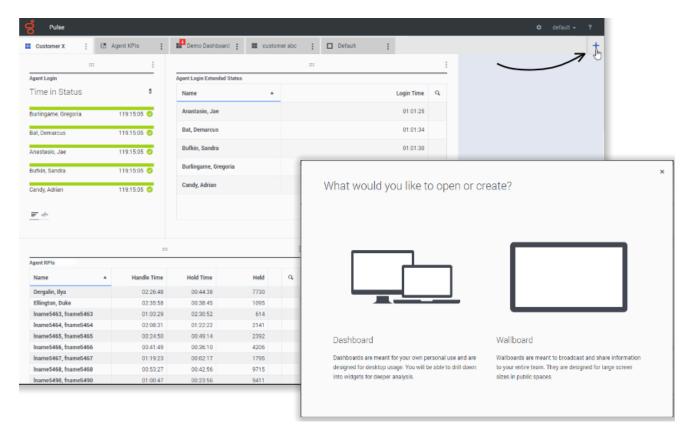
Dashboards are for personal use, and provide drill-down reports and contain more detail than a wallboard.

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 (Cu                                    | ment Status)              |                             |
|--|---------------------------|-----------------------------|
| Valloard Same 1                                  |                           |                             |
| Oursel Status                                    |                           |                             |
| Description                                      |                           |                             |
| Optional   |                           |                             |
| f Coulde dert net flagten<br>Nerse<br>Light Bask |                           |                             |
| Current St                                       | Active company banding    | Powered by Scenesys*        |
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## Display Wallboard Data in Full-screen Mode

| Pulse          |   |   |
|----------------|---|---|
| Current Status | ፤ 🗖 Team KPIs 🚦 📰 Sales Das   |   |
|                | Launch  |   |
| In queue       | + Add a Widget Processed  |   |
|                | Customize   |   |
|                | Clone   |   |
|                |   | × |
|                | Launch to Full-Screen Mode  |   |
|                | This mode allows you to display your wallboard in full-screen without extra tabs and navigation bars. To exit, press the Esc Key. |   |
| 3              | Wallboard: Current Status Customize   |   |
|                | Cycle Wallboards  |   |
|                | Select Wallboards: Current Status, Team KPIs  |   |
|                | Interval (seconds): 60 Minimum of 10 seconds required.  |   |
|                | Choose Footer Text Source: Current Status   |   |
|                |   |   |
|                | Cancel Launch   |   |
|                |   |   |

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

| <b>00</b> | Puls | se      |           |         |      |           |         |         |          |           |    |   |         |             |            |        |               |   |      |       |                          |         |           | ۵      | del     | fauit 🖣 | ?       |       |                 |             |    |        |                |   |
|-----------|------|---------|-----------|---------|------|-----------|---------|---------|----------|-----------|----|---|---------|-------------|------------|--------|---------------|---|------|-------|--------------------------|---------|-----------|--------|---------|---------|---------|-------|-----------------|-------------|----|--------|----------------|---|
| < :       | 68   | Agent K | PIs       | :       | P    | emo Dash  | board   | :       |          | JX Testir | ng | : | II UX I | ashboard Te | s <b>:</b> | E Call | back Activity | : | UX I | Dashb | oard Tes 🚦               | ٥       | Dash      | board  | Mana    | 9 :     | >       | +     |                 |             |    |        |                |   |
| Das       | hboa | ard Ma  | nagem     | ent     |      |           |         |         |          |           |    |   |         |             |            |        |               |   |      |       |                          |         |           |        |         |         |         |       |                 |             | ٠  | defaul | t <del>v</del> | ? |
| 4         | ;    | →       | Ô         | Ċ       | 21 0 | lashboard | s / 1 S | Selecte | ed Objec | :t(s)     |    |   |         | Q, s        | Search     |        |               |   | ~    |       |                          |         |           |        | 15      |         |         |       | nagem<br>nageme |             | ł  | : 0    | , c            | + |
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| C         | ]    |         | jglkh     |         |      |           |         |         |          |           |    |   |         | 7           |            |        | 04/01/2016    |   |      |       |                          | ngurau  |           | ilayei |         |         |         |       |                 |             |    |        |                |   |
| C         |      |         | testing 1 | 23      |      |           |         |         |          |           |    |   |         | 1           |            | 1      | 04/06/2016    |   |      |       |                          |         |           |        |         |         |         |       |                 |             |    |        |                |   |
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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

| <b>Pulse</b>         |   |                 |                                |                                  |                                    |          |
|----------------------|---|-----------------|--------------------------------|----------------------------------|------------------------------------|----------|
| Customer X           |   | E <b>.</b> Ager | nt KPIs                        | 🗄 Agent Login Ext                |                                    |          |
|                      | + | Add a Wid       | lget                           |                                  |                                    |          |
| Agent Login          | 1 | Customize       | e                              | jent Login Extended Stat         |                                    |          |
| Time in Status       | e | Clone           |                                | Name                             |                                    |          |
| Burlingame, Gregoria | ⊿ | Publish (E      | inable Sharing)                | Anastasio, Jae                   |                                    |          |
| Bat, Demarcus        | * | Download        |                                | Bat, Demarcus                    |                                    |          |
| Anna ta sin Jan      | × | Close           |                                |                                  |                                    |          |
| Anastasio, Jae       |   |                 | 🖆 Publish                      | Customer X (Ena                  | ble Sharing)                       |          |
| Bufkin, Sandra       |   | 9               |                                | en an instance of this dashboard | once you publish it to the server. |          |
| Candy, Adrian        |   | 9               | Dashboard Name *<br>Customer X |                                  |                                    |          |
|                      |   |                 | Description                    |                                  |                                    |          |
| <u> </u>             |   | _               | Customer X                     |                                  |                                    |          |
|                      |   |                 | Save to Genesys Cor            | nfiguration Server               |                                    |          |
|                      |   |                 | Dashboard Name                 |                                  |                                    | Modified |
|                      |   |                 | > 🖿 Environment                |                                  |                                    |          |
|                      |   |                 |                                |                                  |                                    |          |
|                      |   |                 |                                |                                  |                                    |          |
|                      |   |                 |                                |                                  |                                    |          |
|                      |   |                 | Saved Location : /Envir        | onment/Scripts/Customer X        |                                    |          |
|                      |   |                 | Cancel                         |                                  |                                    | Save     |
|                      |   |                 |                                |                                  |                                    |          |

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