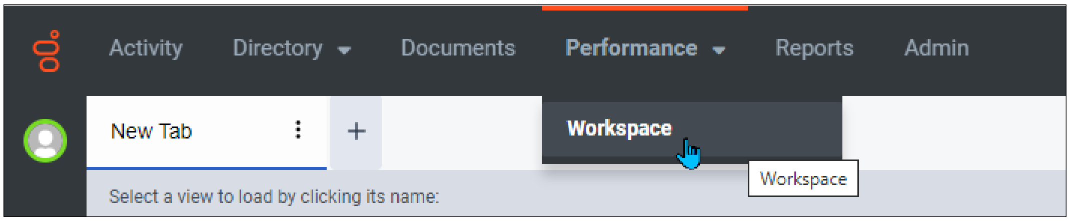
CONDUENT

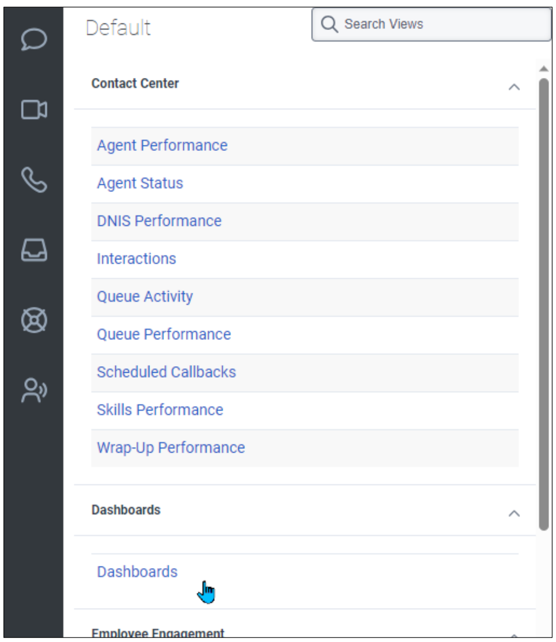
Creating and Using Dashboards

Version	Date	Intended Distribution To
1.0	**07/28/2023**	**Genesys Cloud Users**

Dashboards allow users to see real-time metrics data and performance information at a glance, for themselves or for their team. This Job Aid will outline the steps for creating and using Dashboards.

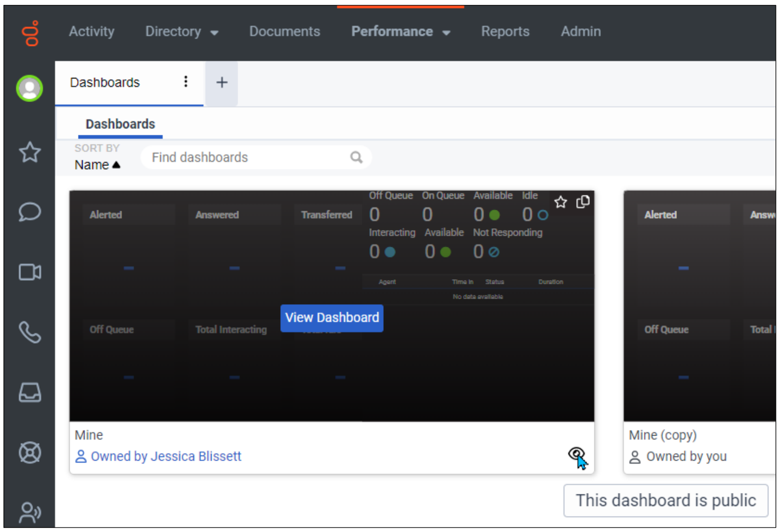
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>To access Dashboards, go to the Performance Tab and select Workspace.

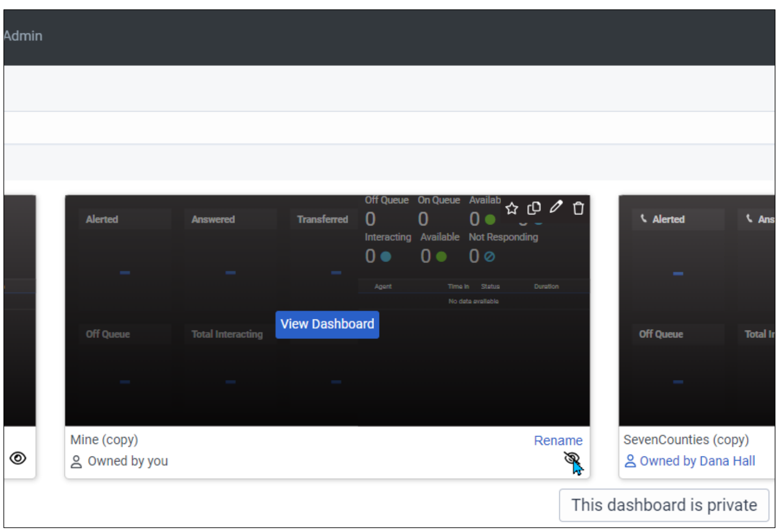

</td></tr>
<tr><td></td><td>From the left side menu, choose the Dashboards option.


</td></tr>
</table>

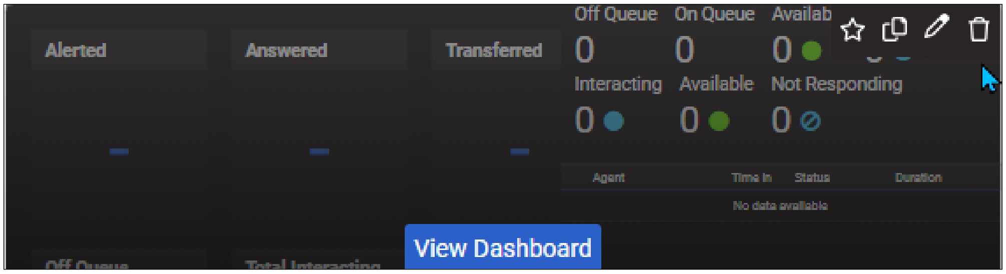
Using Dashboards

Some Dashboards will already be created and available to users. Note that the creator of the Dashboard is its owner; they can choose to make that Dashboard public or to keep it private for their own use.

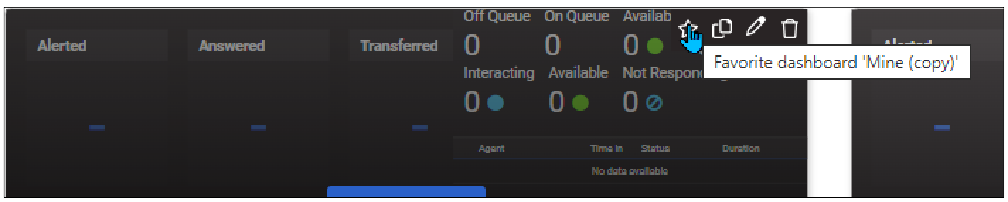


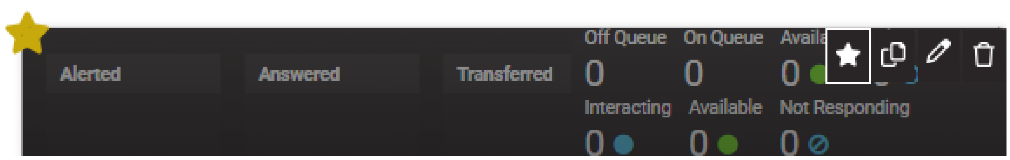


The owner of a Dashboard can edit or delete it using the icons in the upper left corner.

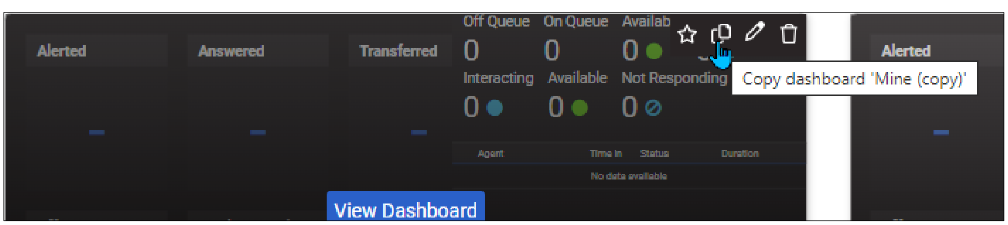


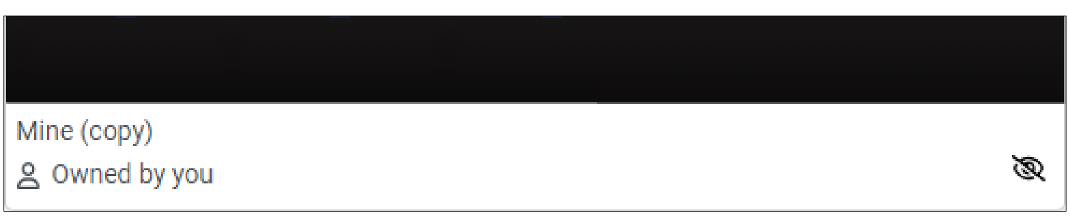
Users can tag a Dashboard they like by selecting the star icon in the top left corner of the Dashboard.





Users can also copy a Dashboard that they like by using the overlapping pages icon.



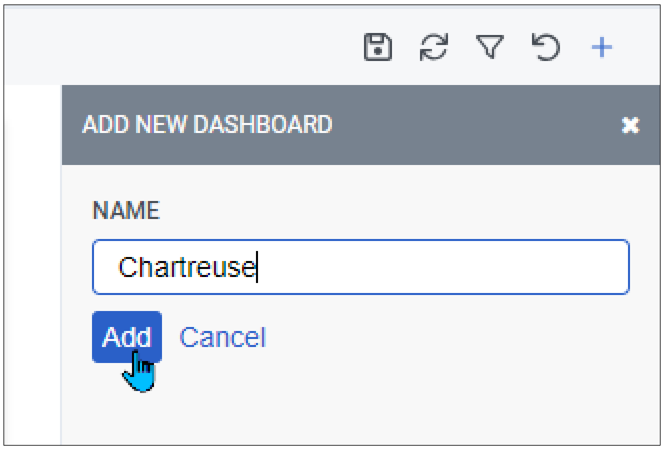


The owner of the Dashboard retains the rights to the that Dashboard, so it can’t be edited to another user’s preferences.

Creating Dashboards

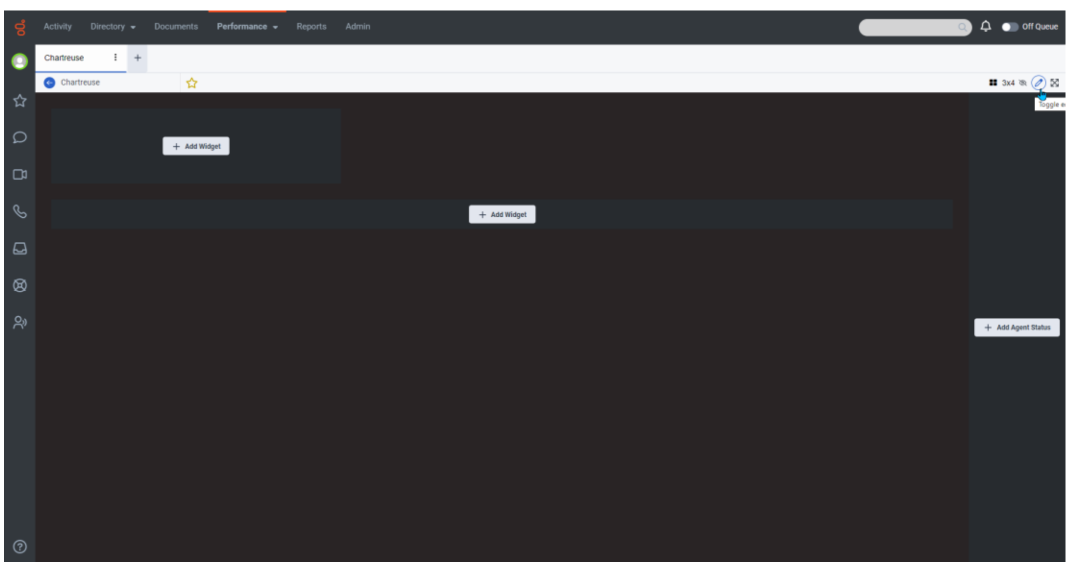
In addition to copying a Dashboard, users can create their own Dashboard, and share it with others by making it public, if desired.

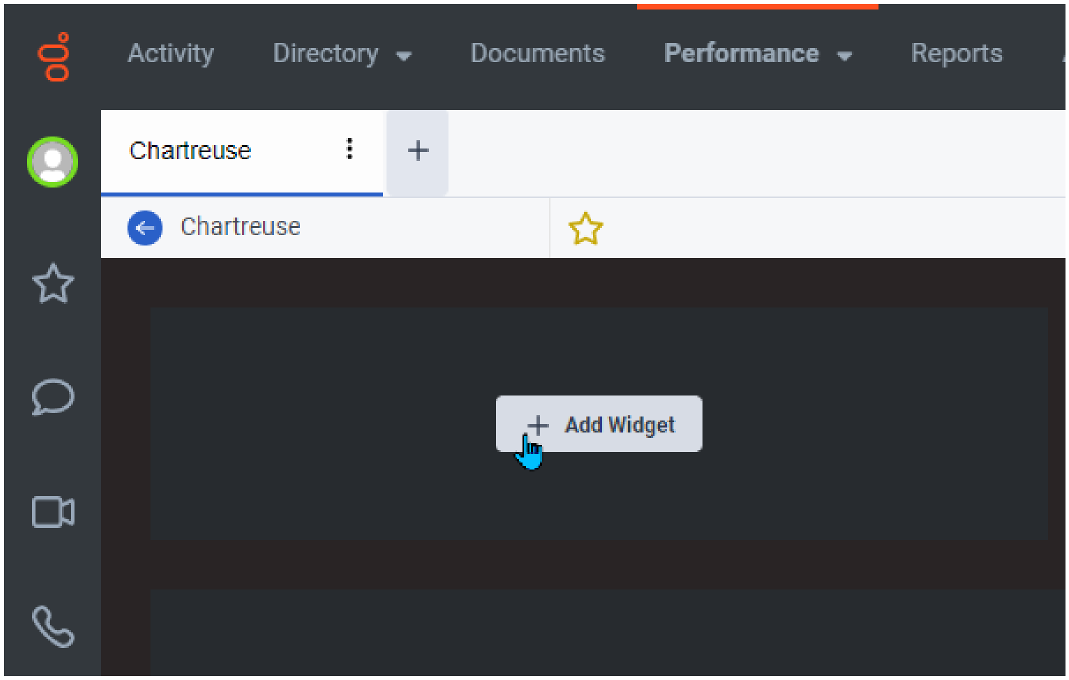
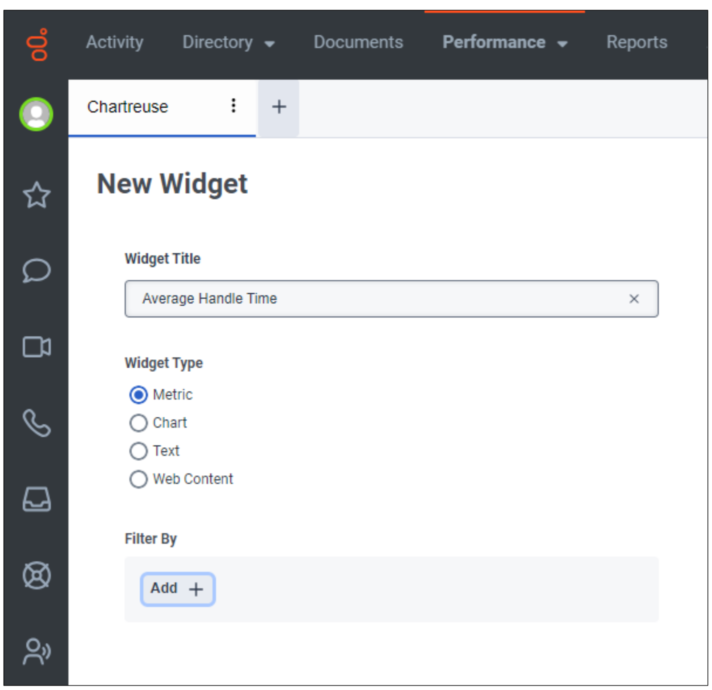
To create a Dashboard, select the plus symbol at the top right of the Dashboard screen.

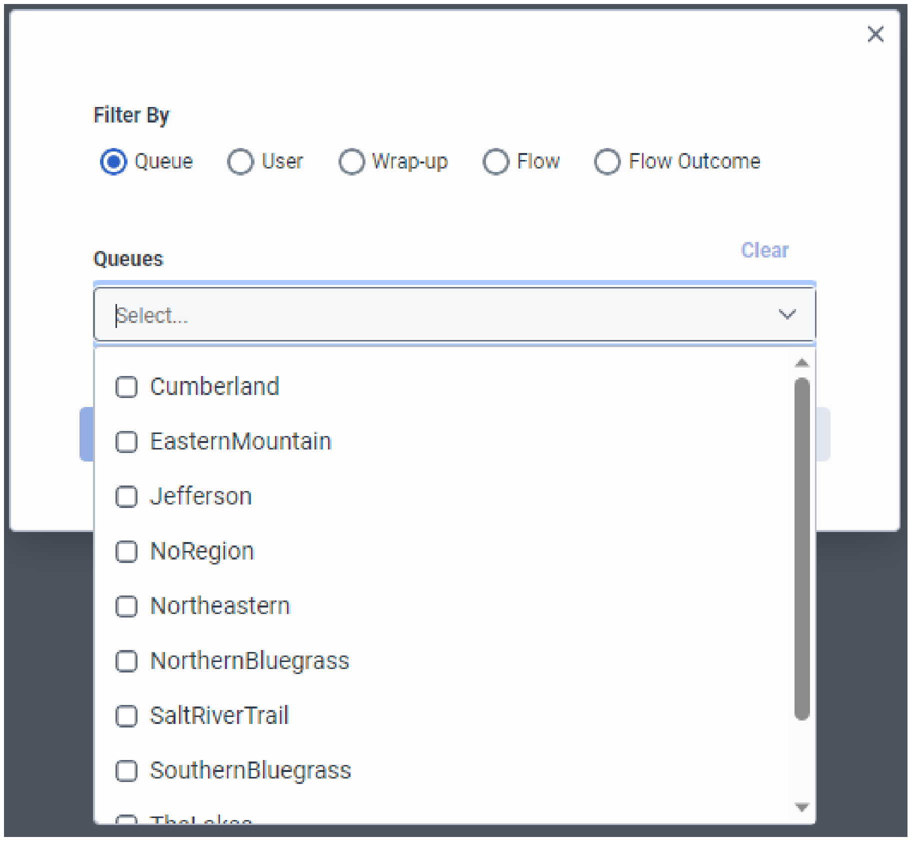


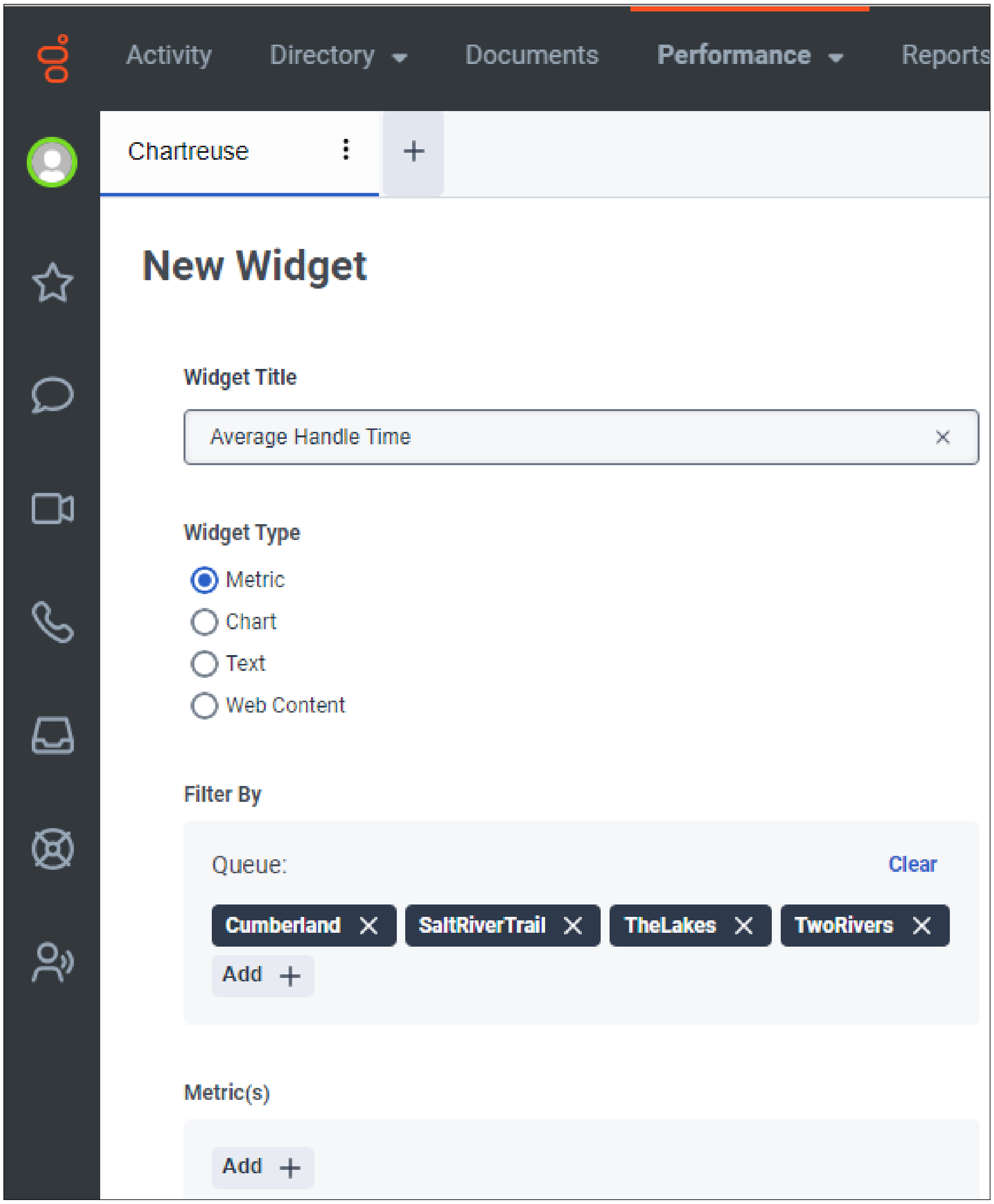
Enter a Dashboard name, and select the Add button.

In the resulting Dashboard template, select the Edit function at the top of the screen to add widgets (measured items).

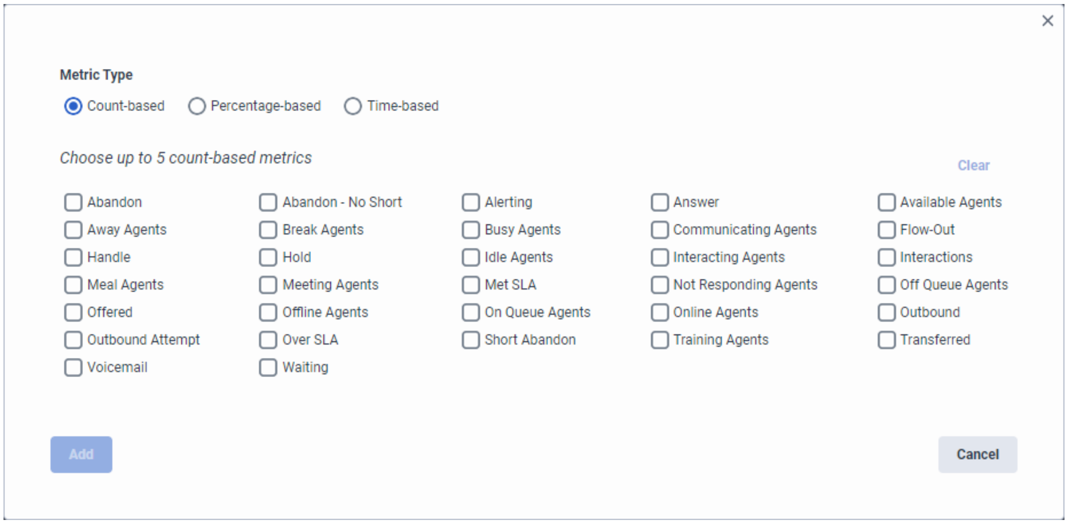


	Click on the plus symbol for each Widget space to add widgets. 
	Enter the criteria for Dashboard Widgets. 

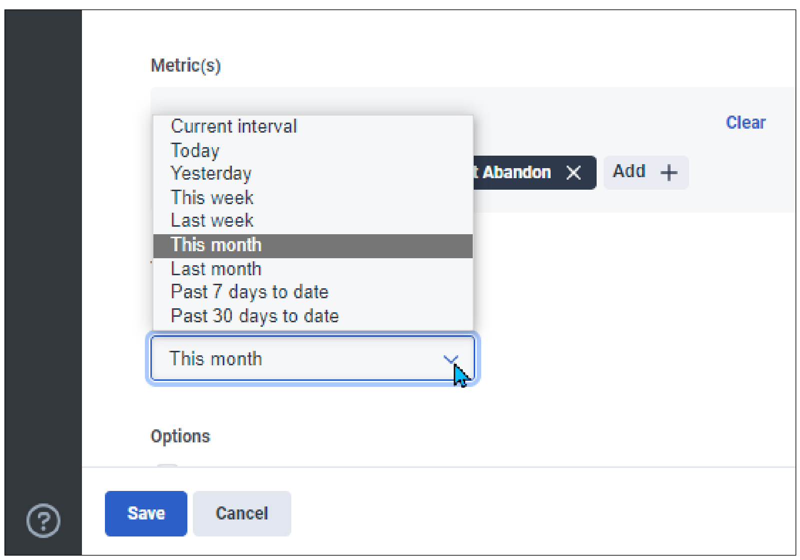
	Selecting the Add button at Filter By allows the user to filter by Queue, User, etc.  After choosing option, select the Add button.

	Next, select the plus symbol to add metrics. 

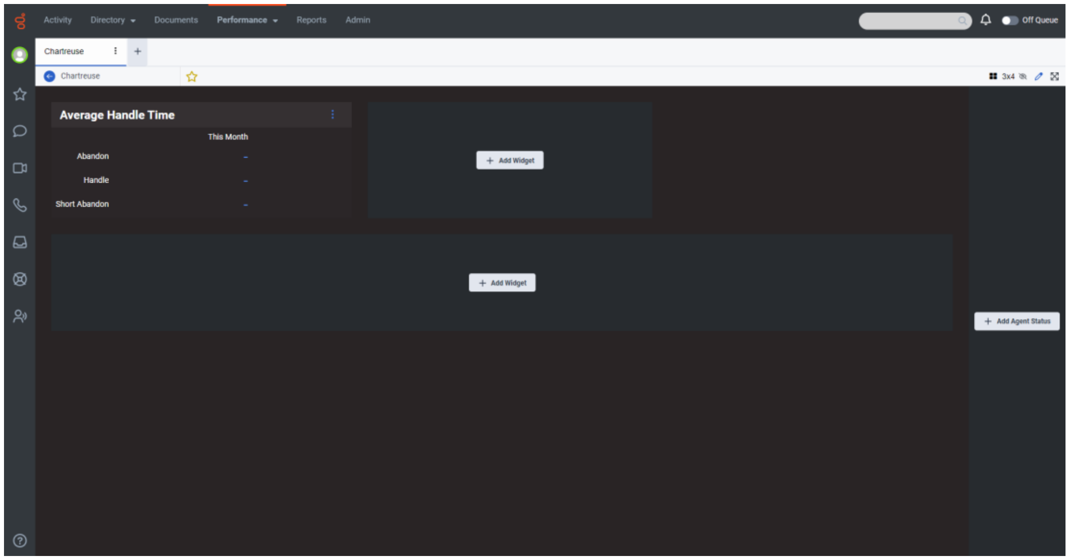
Choose from the available options, and select Add.



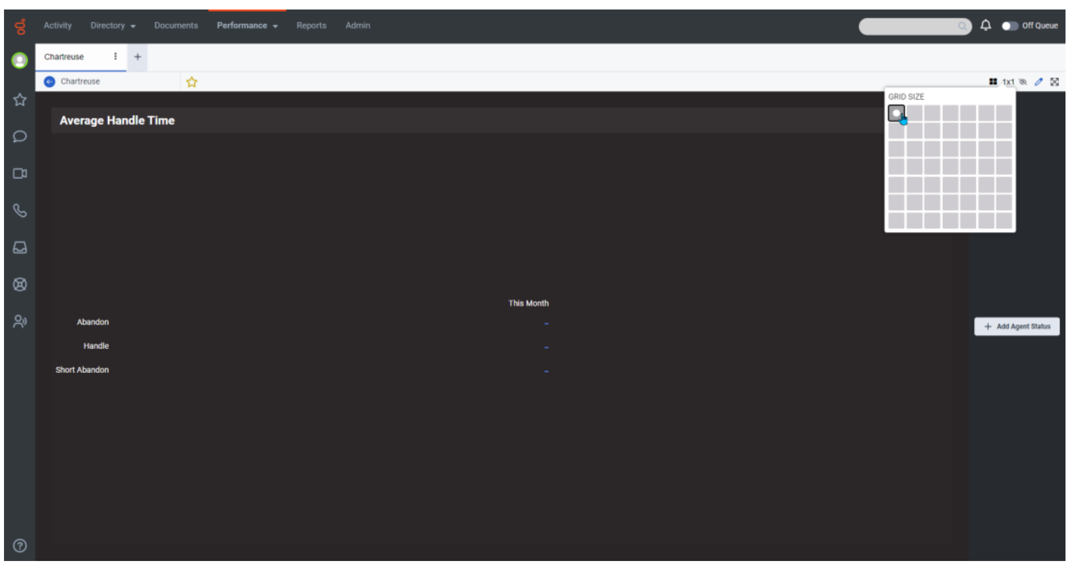
Choose the time period, and then Save.



The Widget is now complete, and the user can move on to creating the next Widget.



Updates can be made to the grid size for Widgets, to customize the user's view.



When one Widget field is complete, the new Dashboard is saved.