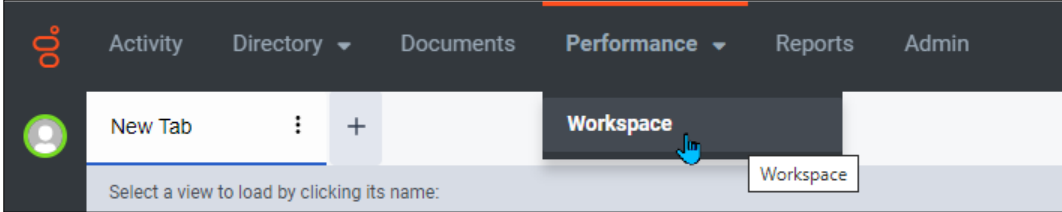
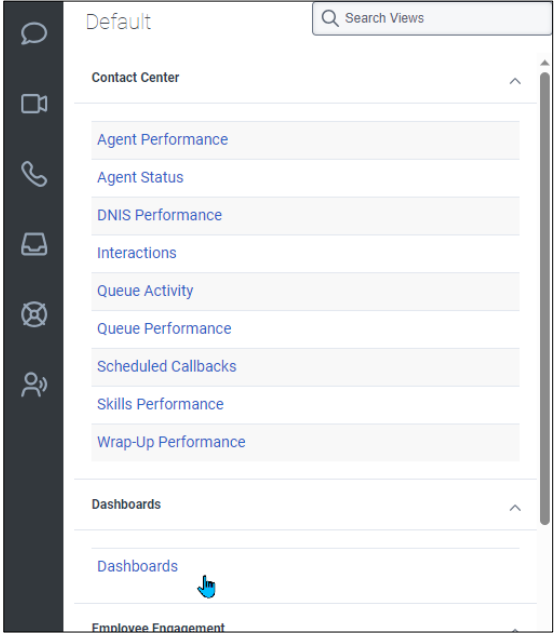


Creating and Using Dashboards

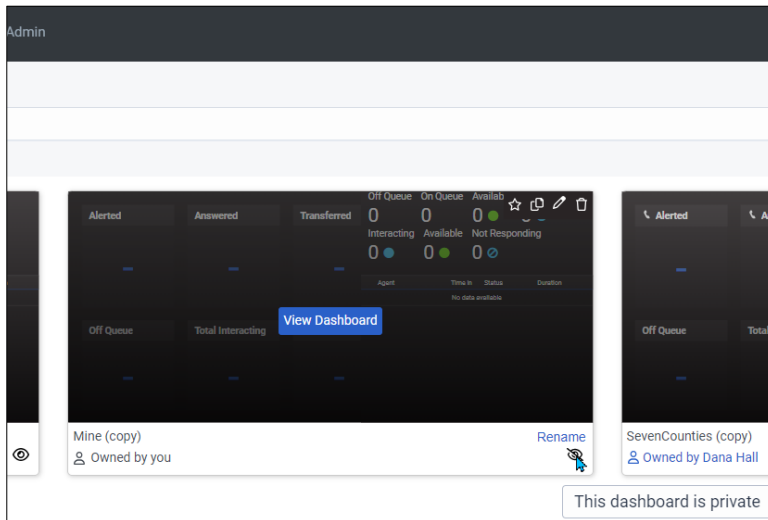
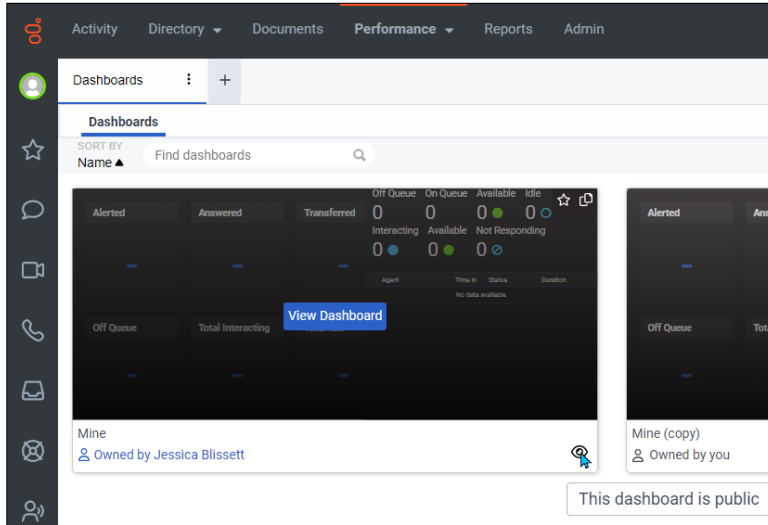
Version	Date	Intended Distribution To
1.0	07/28/2023	Genesys Cloud Users

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.

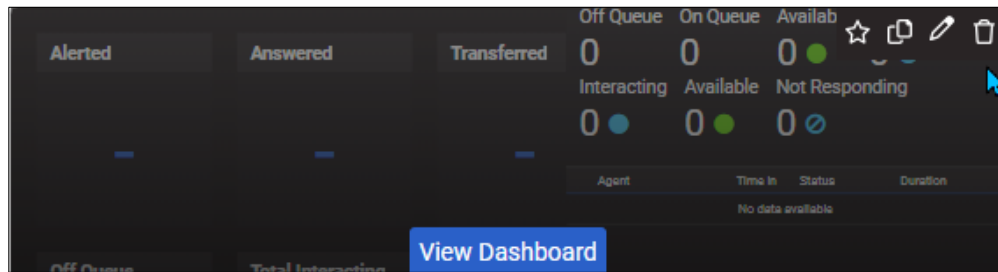
Step	Action
	<p>To access Dashboards, go to the Performance Tab and select Workspace.</p>  <p>The screenshot shows a navigation bar with tabs: Activity, Directory, Documents, Performance, Reports, and Admin. The 'Performance' tab is active. Below it, a sub-menu is open showing 'New Tab', '+', and 'Workspace'. A mouse cursor is clicking on 'Workspace', and a tooltip with the text 'Workspace' is visible.</p>
	<p>From the left side menu, choose the Dashboards option.</p>  <p>The screenshot shows a left-hand navigation menu. The 'Dashboards' option is highlighted with a mouse cursor. The menu items include: Default, Contact Center (with sub-items: Agent Performance, Agent Status, DNIS Performance, Interactions, Queue Activity, Queue Performance, Scheduled Callbacks, Skills Performance, Wrap-Up Performance), Dashboards, and Employee Engagement.</p>

Using Dashboards

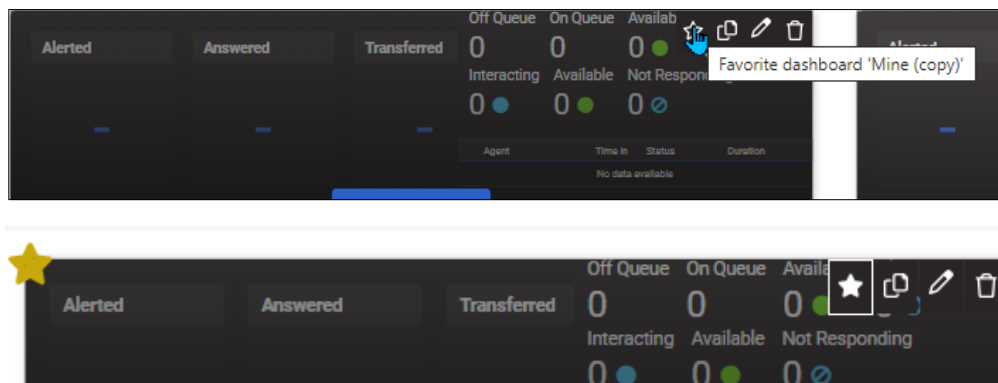
Some Dashboards will already be created and available to users. Note that the creator of the Dashboard is its owner; they can choose to make that Dashboard public or to keep it private for their own use.



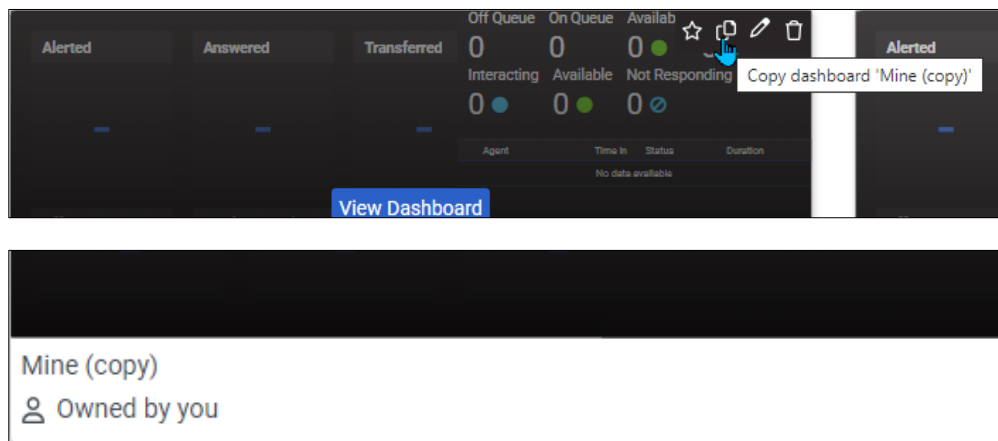
The owner of a Dashboard can edit or delete it using the icons in the upper left corner.



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.

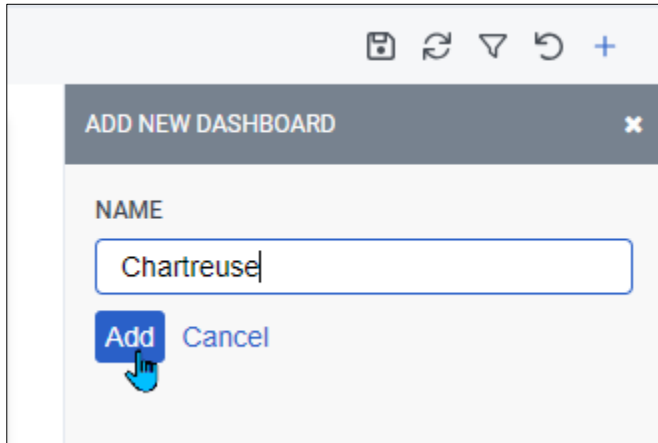


The owner of the Dashboard retains the rights to the that Dashboard, so it can't be edited to another user's preferences.

Creating Dashboards

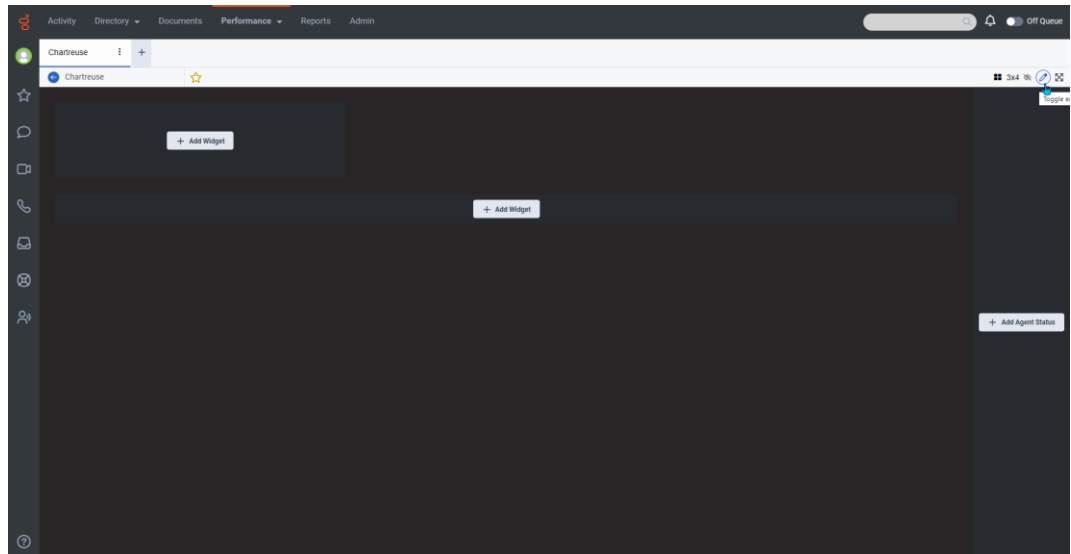
In addition to copying a Dashboard, users can create their own Dashboard, and share it with others by making it public, if desired.

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

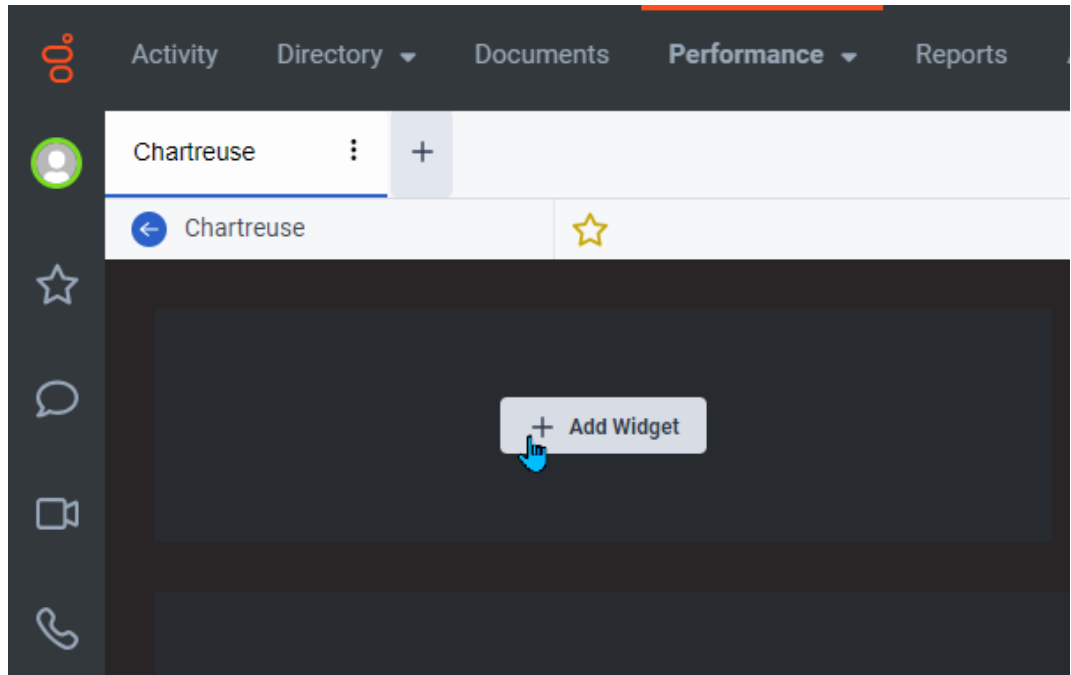


Enter a Dashboard name, and select the Add button.

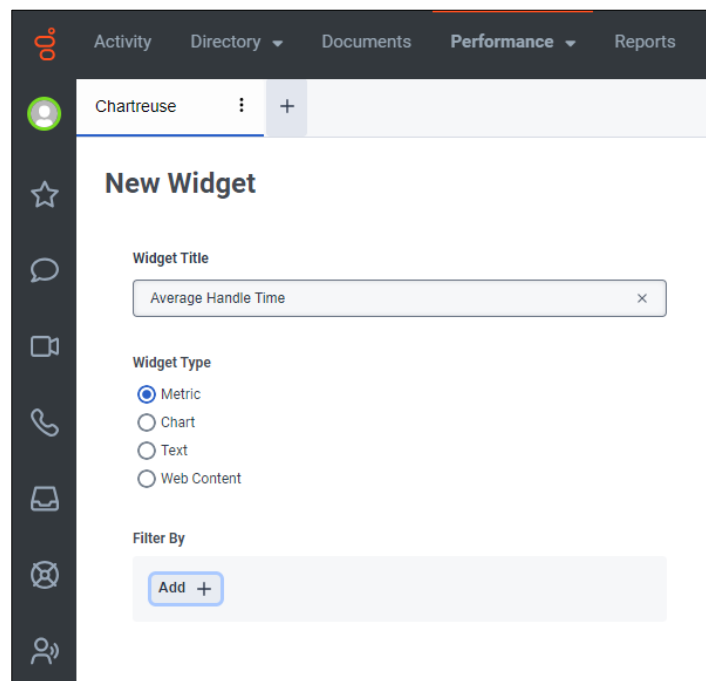
In the resulting Dashboard template, select the Edit function at the top of the screen to add widgets (measured items).



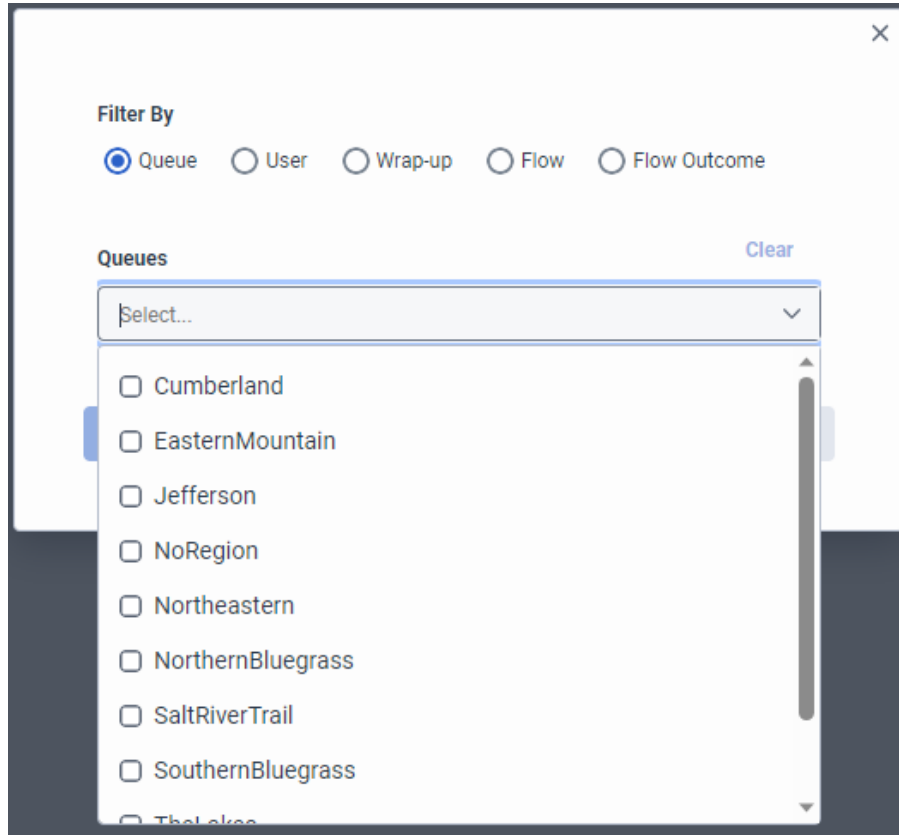
Click on the plus symbol for each Widget space to add widgets.



Enter the criteria for Dashboard Widgets.

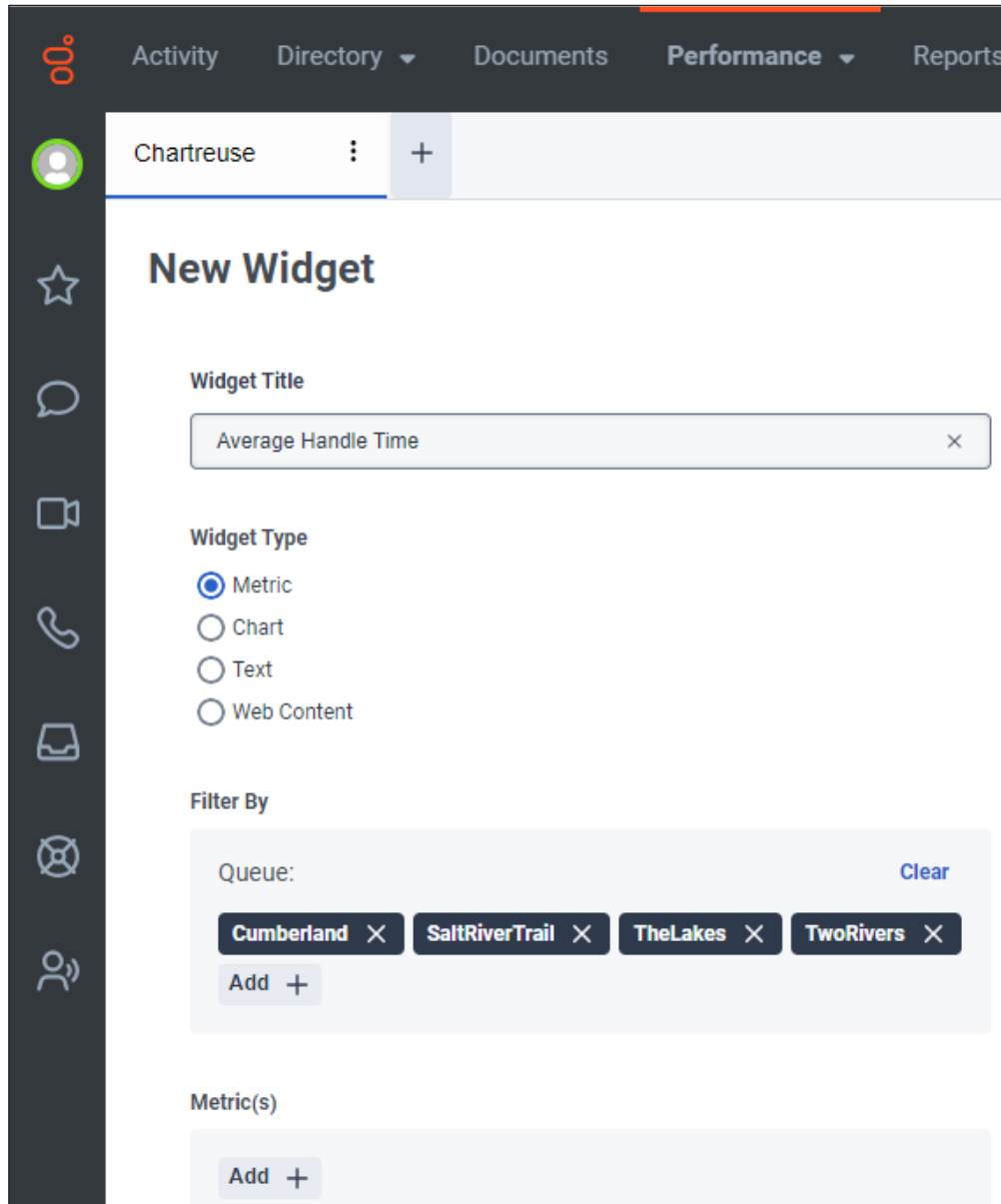


Selecting the Add button at Filter By allows the user to filter by Queue, User, etc.



After choosing option, select the Add button.

Next, select the plus symbol to add metrics.



The screenshot displays the 'New Widget' configuration screen. At the top, a navigation bar includes 'Activity', 'Directory', 'Documents', 'Performance', and 'Reports'. Below this, a breadcrumb trail shows 'Chartreuse' with a plus sign to add more items. The main section is titled 'New Widget' and contains the following fields:

- Widget Title:** A text input field containing 'Average Handle Time' with a close button (X).
- Widget Type:** A group of radio buttons with 'Metric' selected. Other options are 'Chart', 'Text', and 'Web Content'.
- Filter By:** A section labeled 'Queue:' with a 'Clear' link. It contains four filter tags: 'Cumberland', 'SaltRiverTrail', 'TheLakes', and 'TwoRivers', each with a close button (X). Below the tags is an 'Add +' button.
- Metric(s):** A section with an 'Add +' button.

Choose from the available options, and select Add.

Metric Type

Count-based
 Percentage-based
 Time-based

Choose up to 5 count-based metrics Clear

<input type="checkbox"/> Abandon	<input type="checkbox"/> Abandon - No Short	<input type="checkbox"/> Alerting	<input type="checkbox"/> Answer	<input type="checkbox"/> Available Agents
<input type="checkbox"/> Away Agents	<input type="checkbox"/> Break Agents	<input type="checkbox"/> Busy Agents	<input type="checkbox"/> Communicating Agents	<input type="checkbox"/> Flow-Out
<input type="checkbox"/> Handle	<input type="checkbox"/> Hold	<input type="checkbox"/> Idle Agents	<input type="checkbox"/> Interacting Agents	<input type="checkbox"/> Interactions
<input type="checkbox"/> Meal Agents	<input type="checkbox"/> Meeting Agents	<input type="checkbox"/> Met SLA	<input type="checkbox"/> Not Responding Agents	<input type="checkbox"/> Off Queue Agents
<input type="checkbox"/> Offered	<input type="checkbox"/> Offline Agents	<input type="checkbox"/> On Queue Agents	<input type="checkbox"/> Online Agents	<input type="checkbox"/> Outbound
<input type="checkbox"/> Outbound Attempt	<input type="checkbox"/> Over SLA	<input type="checkbox"/> Short Abandon	<input type="checkbox"/> Training Agents	<input type="checkbox"/> Transferred
<input type="checkbox"/> Voicemail	<input type="checkbox"/> Waiting			

Add
Cancel

Choose the time period, and then Save.

Metric(s)

Abandon ✕ Add +

Clear

Current interval

Today

Yesterday

This week

Last week

This month

Last month

Past 7 days to date

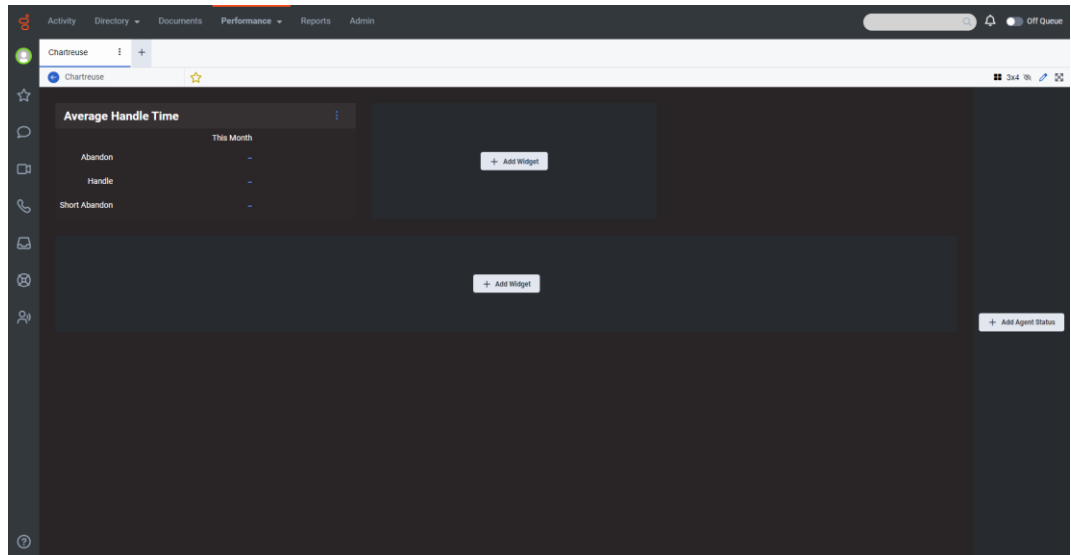
Past 30 days to date

This month ✕

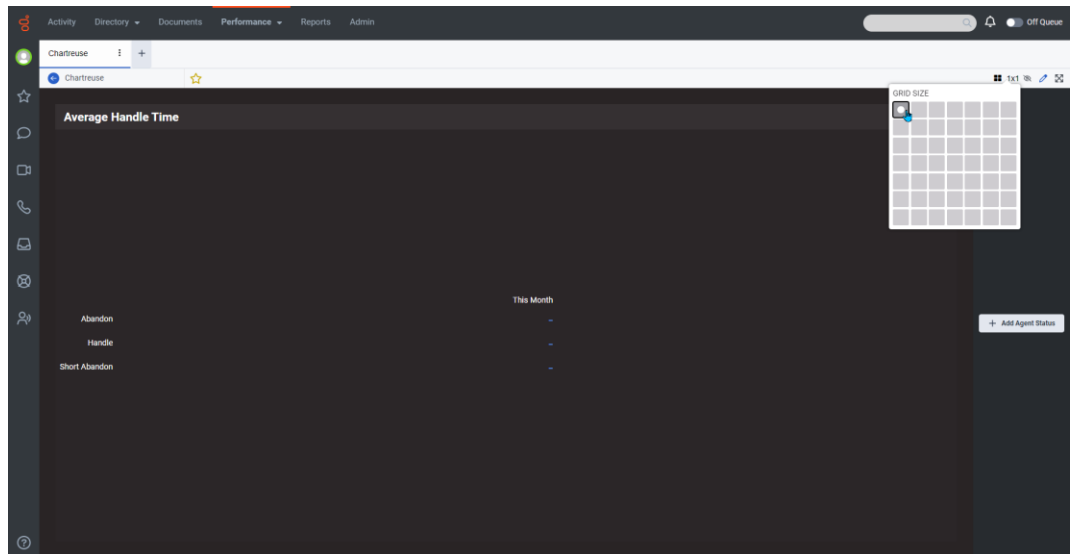
Options

Save
Cancel

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.

