

# **GENESYS**

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Pulse Help

Paneles y tableros

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# Paneles y tableros

Utilice los paneles y tableros de Pulse para mostrar informes en tiempo real dentro de widgets, lo que le permitirá supervisar su centro de contacto según sus necesidades.

Los paneles son para un uso personal y proporcionan informes desglosados y contienen más detalles que un panel.

Los tableros pueden difundir información en una pantalla grande para un equipo de personas. Puede utilizar los widgets de KPI solo en sus tableros.

| o Pulse              |                |                             |           |          |  |              | 🌣 default 🛩 ?   |
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| Time in Status       | ٥              | Name                        |           |          | Login Time                             | Q,           |   |
| Burlingame, Gregoria | 119:15:05 🥥    | Anastasio, Jae              |           |          | 01:01:25                               |              |   |
| Bat, Demarcus        | 119:15:05 🥝    | Bat, Demarcus               |           |          | 01:01:34                               |              |   |
| Anastasio, Jae       | 119:15:05 🤣    | Bufkin, Sandra              |           |          | 01:01:30                               |              |   |
| Bufkin, Sandra       | 119:15:05 🥝    | Burlingame, Gregoria        |           |          |  |              | ×   |
| Candy, Adrian        | 119:15:05 🥏    | Candy, Adrian               |           |          | What would you like t                  | o ope        | n or create?  |
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| Agent KPIs           |                |                             |           |          |  |              |   |
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| Iname5464, fname5464 | 02:08:31       | 01:22:22                    | 2141      |          |  |              |   |
| Iname5465, fname5465 | 00:24:50       | 00:49:14                    | 2392      |          | Dashboard                              |              | Wallhoard   |
| Iname5466, fname5466 | 00:41:49       | 00:36:10                    | 4206      |          | ereal revenue                          |              | A and a a a a a a a a a a a a a a a a a a                         |
| Iname5467, fname5467 | 01:19:23       | 00:02:17                    | 1795      |          | Dashboards are meant for your own pe   | ersonal use  | and are Wallboards are meant to broadcast and share information   |
| Iname5468, fname5468 | 00:53:27       | 00:42:56                    | 9715      |          | designed for desktop usage. You will b | be able to d | rill down to your entire team. They are designed for large screen |
| Iname5490, fname5490 | 01:00:47       | 00:23:56                    | 9411      |          | into widgets for deeper analysis.      |              | sizes in public spaces.   |
|                      |                |                             |           |          |  |              |   |

#### Agregar un panel o tablero

Para abrir o crear un nuevo panel o tablero, haga clic en Agregar un panel.

Luego, puede elegir entre un panel y un tablero.

El asistente le guía a través del resto de los pasos.

Una vez que se haya creado un panel o tablero, puede editar el título y establecer otras opciones,

como notificaciones de alerta o el tema de color del tablero. Seleccione **Personalizar** en el menú del panel para ajustar la configuración.

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Mostrar datos del tablero en modo de pantalla completa

| <mark>o</mark> 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. |   |  |  |  |  |  |
|                      | 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   |   |  |  |  |  |  |
|                      |   |   |  |  |  |  |  |

Seleccione **Ejecutar** desde los paneles del menú Más para mostrar los datos en el modo de pantalla completa.

Puede elegir varios tableros para ciclar. Puede utilizar el widget de texto anclado en la parte inferior widget de texto como ticker de noticias. Esta fuente de texto de pie de página (widget de texto anclado) permanecerá sin cambios mientras los tableros están en un ciclo.

### Administrar paneles y tableros compartidos

| റ്റ്  | Pulse   |                          |                 |                     |         |  | fault 🗝 ?   |
|-------|---|--------------------------|-----------------|---------------------|---------|--|---|
| < :   | E Agent KPIs Demo Dashbo                          | oard : 📋 UX Testing 🚦 UX | K Dashboard Tes | E Callback Activity | 📰 UX Da | shboard Tes : 🏚 Dashboard Mana                                   | g: > +  |
| Dasht | ooard Management<br>→                             | /1 Selected Object(s)    | Q, Search       |                     | ~       | 9  | Dashboard Management  |
|       | Name  | Description              | Widget Count    | Modified            |         | Demo Dashboard   | Wallboard Management<br>Widget Management<br>Widget Template Management |
|       | Pulse     Environment                             |                          |                 |                     |         | Modified October 2, 2017 by puls                                 | Import/Export Options   |
|       | <ul> <li>M Scripts</li> <li>M QA</li> </ul>       |                          |                 |                     |         | Access Groups:<br>Permissions are set via GAX Configu<br>Managar | ration  |
|       | <ul> <li>Demo Dashboard</li> <li>jglkh</li> </ul> |                          | 5               | 04/01/2016          |         | Link to Configuration Manager                                    |   |
|       | testing 123                                       |                          | 1               | 04/06/2016          |         |  |   |

Para administrar paneles y tableros compartidos, seleccione **Administrar**.

Desde aquí se pueden realizar acciones en paneles, tableros y plantillas de widgets, incluyendo si se asignan a los grupos de usuarios.

Genesys Pulse contiene elementos guardados y compartidos en una tabla y muestra detalles de los elementos a la derecha.

#### Sugerencia

Vea Plantillas de widgets para saber cómo simplificar la creación del widget.

Oculte o comparta su panel o tablero personal con otros usuarios

| Pulse                |        |                              |  |      |
|----------------------|--------|------------------------------|--|------|
| Customer X           | : 8    | Agent KPIs                   | E Agent Login Ext  |      |
|                      | + Add  | d a Widget                   |  |      |
| Agent Login          | 🖌 Cus  | stomize                      | ent Login Extended Stat  |      |
| Time in Status       | 🕒 Clor | ne                           | Name   |      |
| Burlingame, Gregoria | 👍 Pub  | blish (Enable Sharing)       | Anastasio, Jae   |      |
| Bat, Demarcus        | 🛨 Dow  | wnload                       | Bat, Demarcus  |      |
| Anastasia Jac        | × Clos | se                           |  | >    |
| Anastasio, Jae       |        | Publish C                    | Customer X (Enable Sharing)                                      |      |
| Bufkin, Sandra       |        | 9 Users will be able to open | an instance of this dashboard once you publish it to the server. |      |
| Candy, Adrian        |        | 9 Customer X                 |  |      |
|                      |        | Description                  |  |      |
| <u>=</u> *           |        | Costomer X                   |  |      |
|                      |        | Save to Genesys Confi        | iguration Server   |      |
|                      |        | Dashboard Name               | Modifie  | rd   |
|                      |        | > 🖿 Environment              |  |      |
|                      |        |                              |  |      |
|                      |        |                              |  |      |
|                      |        |                              |  |      |
|                      |        | Saved Location : /Environ    | nment/Scripts/Customer X   |      |
|                      |        | Cancel                       |  | Save |
|                      |        |                              |  |      |

Puede compartir su panel o tablero personal con otros usuarios (por ejemplo, con un grupo de usuarios como el de líderes de equipos de ventas). Cuando use **Publicar** o **Guardar como** del menú más, tiene que seleccionar **Guardar en Genesys Configuration Server** y elegir el directorio para guardar y compartir su panel con otros usuarios. Asegúrese de darle un nombre específico a las necesidades del usuario.

Utilice la Administración del panel para ocultar su panel a otros usuarios. Seleccione un panel de control, haga clic en **Vínculo a Configuration Managerínculo al Configuration Manager** a la derecha debajo de **Grupos de acceso** y establezca la configuración de permisos para las personas

que verán sus paneles.

#### Importante

Para evitar que otros usuarios usen sus paneles, deberá contar con permisos GAX: Acceder a Configmanager; leer Scripts y crear/tener el control de los Scripts.

Para guardar los paneles o tableros en el Genesys Configuration Server, deberá tener Control de acceso completo al directorio destino.

#### Permitir que los usuarios personalicen los paneles



Es posible que los usuarios de Genesys Pulse quieran modificar sus paneles o tableros. Puede habilitar esto asignándoles los permisos adecuados.

En GAX, en la página **Configuration Manager**, en **Cuentas**, vaya a **Roles** y busque el rol asignado al usuario.

Edite los privilegios otorgados por la **función** en la ficha de **Privilegios asignados** en la sección **Pulse** para permitir las siguientes acciones:

- Administre fichas de Pulse—El usuario puede ejecutar y cerrar paneles y expandir widgets a la ficha.
- Edite la visualización del widget de Pulse—El usuario puede modificar las opciones de visualización del widget.
- Administre widgets de Pulse—El usuario puede crear, eliminar o modificar todas las opciones del widget.

## ¿Qué debo hacer después?

Tal vez quiera obtener más información sobre lo siguiente:

- Ejemplos de paneles y tableros
- Agregar widgets de informe a su panel o tablero
- Informes generales en tiempo real
- Mostrar contenido externo mediante un widget IFRAME