Avaya Workforce Engagement

Dashboards Administration and User Guide

Version 15.2

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Contents

About this guide

This guide provides assistance for using Dashboards. Dashboard users: learn how to create, view, and share dashboards. Dashboard administrators: learn how to display a list of dashboards and their owners, change dashboard ownership, and delete dashboards.

Intended audience

This guide is designed to be used by:

- End users, including agents and supervisors.
- Professional services staff responsible for planning and setting up systems.
- Customer managers and supervisors.

Document revision history

<table>
<tr><th>Revision</th><th>Description of changes</th></tr>
<tr><td>1.07</td><td>Added a new topic titled "Interaction report portlets".</td></tr>
<tr><td>1.06</td><td>In the "Configure dashboard widget/portlet content" topic added a paragraph to provide general guidance about configuring parameters for widgets that produce reports.</td></tr>
<tr><td>1.05</td><td>Updates for V15.2 HFR7:
Renamed references to "Recorder Platform Analytics Configuration and Administration Guide" to "Real-Time Analytics Framework Configuration and Administration Guide."
In the topic "Available Dashboard widgets/portlets" it is noted that there are 39 widgets for Interactions and Analytics reports. Users are instructed to see the Workforce Optimization Reports Guide for information about these widgets/reports.</td></tr>
<tr><td>1.04</td><td>Updates for V15.2 HFR5:
Added the Recorder Health Summary widget
Added information about deleting a dashboard that includes SSRS portlets.</td></tr>
<tr><td>1.03</td><td>Updated for V15.2 HFR3:
Added new dashboard widgets for Identity Authentication and Fraud Detection:
Average Handle Time
Enrollments
Verifications
Added "Interaction Analytics portlet parameters" topic to Dashboard widget setup and parameters section.
Updated with new documentation template.</td></tr>
</table>

Chapter 1

My Dashboards

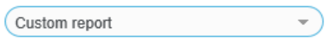
With My Dashboards, you can create, view, and share dashboards that provide summaries of data in different graphical formats. The data is displayed in dashboard widgets and generated by such applications as Workforce Management, Scorecards, Customer Feedback, Speech Analytics, and Interactions.

Show Me

Topics

Dashboard workspace controls

You view and manage content on the My Dashboards workspace with a set of controls.

Item	Description
Dashboard selector list 	Location: Upper, left corner of My Dashboards. Lists the dashboards available to you.
Private Shared by me Shared with me	Location: In the Dashboard selector list, on the left of a dashboard name. Indicates whether the dashboard is private or shared.
Hollow star Solid star	Location: In the Dashboard selector list, on the left of a dashboard name. Hollow star: Appears when you point to a dashboard name. Solid star: Indicates the default dashboard when one has been selected.
Edit Name	Location: When you are the dashboard owner, on the right of the dashboard selector. Use to change the name of a private dashboard.
Save	Location: Upper, right edge of My Dashboards. **Save** is only available when you are creating a dashboard and it has not yet been saved. After a dashboard is initially saved, changes are automatically saved.
Cancel	Location: Upper, right edge of My Dashboards. **Cancel** is only available when you are creating a dashboard and it has not yet been saved.
	Location: On the right of the dashboard selector. Point to these controls to view the properties for the current dashboard. An exclamation point on the information icon indicates that you edited a shared dashboard and need to redistribute the changes.
Plus icon	Location: Upper, right side of My Dashboards. Point to the Plus icon to show or hide the Slider menu.

Related topics

Widget controls , page 9

Automated Dashboards, page 11

Add a dashboard, page 12

Configure dashboard widget/portlet content, page 16

Widget controls

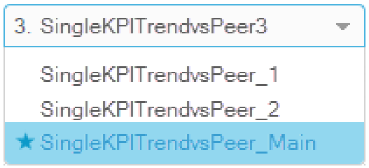
You view and manage the content of each widget on the My Dashboards workspace with a set of controls.

Common widget controls

Item	Description
Options	The down arrow displays a menu. Options on the menu can vary.
Maximize	Enlarges a widget to fill the entire workspace. Other widgets on the workspace are hidden.
Minimize	Reduces a widget to its original size before it was maximized.

Dashboard widget controls

Item	Description
Launch Full Report	Provided for any report based on an SSRS report-based portlet, such as WFM, Operations, and Scorecards. Launches the full version of the report based on the report parameters as defined by the portlet. • The full report launches in a pop-up window in HTML format. • If you launch another full report from a portlet, the same pop-up window will be reused (if still open). **NOTE**: If the full report is unable to run, the icon is hidden. **IMPORTANT**: Availability of this feature is limited to portlets that support it. Not all report-based portlets provide the launch full report option.

Item	Description
Select Chart 	Provided for certain report-based portlets containing multiple charts. Use the drop-down list to display only a single chart in the portlet. • indicates a chart the portlet will display by default. **TIP**: Select the icon to remove it as the selected chart. • displays when your pointer hovers over a chart that has not been selected to display by default. **TIP**: Select the icon to add it as the selected chart. • When no chart has been selected as the default, the portlet displays the first chart on the report, based on the occurrence of charts in the report. • Chart names/titles must be unique. **IMPORTANT**: Availability of this feature is limited to portlets which support it. Not all report-based portlets will provide the chart selection option.

Related topics

Dashboard workspace controls, page 8

Automated Dashboards, page 11

Add a dashboard, page 12

Configure dashboard widget/portlet content, page 16

Automated Dashboards

When the configuration is modified in the suite, the configuration change can trigger the creation of a new dashboard. For example, when the WIT (Work Item Tracking) Configuration is saved in Integration Management, the system adds the WIT dashboard to the user dashboard. This dashboard includes the WIT Aging Chart and the WIT Deadline Chart. The WIT dashboards appear only to users that have access rights to this specific dashboard.

Related topics

Widget controls , page 9

Add a dashboard, page 12

Configure dashboard widget/portlet content, page 16

Related information

WIT Configuration (*System Administration Guide*)

Add a dashboard

A dashboard is a collection of widgets that give you an overview of the reports and metrics that are the most important to you. Dashboards let you monitor many metrics at once, so you can quickly check information from multiple sources or see correlations between different reports.

The widgets on a dashboard gather information from variety of sources and display the data in a graphical view on My Dashboards. The presentation of the data varies based on its purpose (for example, bar charts, data plotted on graphs, aggregate statistics, reports, and summary of activities).

There is no limit to the number of dashboards that you can create. A dashboard must include one widget and can include up to six widgets. You can put up to three widgets on a row. After a widget is on your dashboard, you can resize or reposition it.

> Create each dashboard with a name that is unique across the suite. For example, you can include a descriptive name that identifies the organization, content focus, and possibly the date.

Show Me

Procedure

1 Select **Dashboards** under **My Information** on the **My Home** menu.

2 Point to the slider to show the menu, select **Add Dashboard**.

3 In the dashboard text field, type a name.

4 From the **Add Widgets** tree, expand the applications and categories to locate widgets. Check the related categories section to learn about available widgets.

   Identifies widgets you can use.

   Identifies applications/categories you can expand to see more widgets.

   Identifies applications/categories you can collapse to hide widgets.

   - To show or hide widgets for all applications/categories, use **Expand All** and **Collapse All**.
   - If you leave the slider and return later, the state of the tree remains as you left it. For example, expanded/collapsed applications/categories persist for your session.

5 To include a widget, drag it onto the dashboard.

   - To position a widget above or below another widget, drag the widget to the My Dashboards workspace until a horizontal dotted line is displayed. Drop the widget on the dotted line.
   - To position a widget to the left or right of another widget, drag the widget to the My Dashboards workspace until a vertical dotted line is displayed. Drop the widget on the dotted line.
   - To remove a widget, click the Options menu , then click **Remove**.

6 Optional: Resize and reposition the widgets on your dashboard.

7 Click **Save** .

Related topics

Configure dashboard widget/portlet content, page 16

Dashboard workspace controls, page 8
Available dashboard widgets/portlets, page 13

Available dashboard widgets/portlets

There are various widgets/portlets associated with different applications. The widgets are predefined and configurable.

The widgets available to you from the My Dashboards slider menu depend on the applications that your company has licensed and your role-based privileges.

Application	Category	Dashboard widgets
Generic Dashboard	*n/a*	• Custom Reports: If no custom report exists, you see the message *There are no custom reports*. • Generic Web Portlet
Customer Feedback	*n/a*	• Customer Feedback Mini Dashboard
Interactions and Analytics	*n/a*	• Interaction Analytics Category Trends • Interaction Analytics Term Trends
Interactions	Activity Reports	• Contact Flag Usage per Assessor • Evaluation Activity per Employee • Evaluation Activity per Evaluator • Evaluation Activity per Group • Evaluation Flag Usage per Assigning User
Interactions	Analytics Driven Quality Reports	• Analytics Driven Quality per Employee • Analytics Driven Quality per Group
Interactions	Calibration Reports	• Calibration Report • Calibration Report by Question
Interactions	Productivity Reports	• Employee Productivity vs. Quality • Group Productivity vs Quality

Application	Category	Dashboard widgets
Interactions	Quality Reports	• Assessment Pass/Fail Count per Assessor • Average Assessment Form/Form Component Scores • Average Assessment Scores per Assessor • Average Evaluation Form/Form Component Scores • Average Evaluation Scores per Employee • Average Evaluation Scores per Evaluator • Average Evaluation Scores per Group • Average Evaluation Scores per Reason • Employee Scores per Evaluation • Evaluation Pass/Fail Count per Employee • Evaluation Pass/Fail Count per Evaluator • Evaluation Pass/Fail Count per Group • Evaluation Summary of Employees • Evaluation Summary per Employee • Evaluation Summary per Group • Evaluations Completed per Employee
Interactions	Recorded Contact Reports	• Average Talk Time per Employee • Average Talk Time per Group • Average Talk Time Percentage per Employee • Average Talk Time Percentage per Group • Daily Average Interactions per Employee • Daily Average Interactions per Group • Recorded Contacts Volume • Recorded Interactions per Employee • Recorded Interactions per Group
Interactions	Speech Usage Reports	• Speech Usage by Extension • Speech Usage by Interaction Volume • Speech Usage by Named Employee
Recorder	*n/a*	• Recorder Health Summary
Recorder	IAFD (Identity Authentication and Fraud Detection)	• Average Handle Time • Enrollments • Verifications

Application	Category	Dashboard widgets
Scorecards	*n/a*	• Scorecard Performance Map • Single KPI Trend • Single KPI Trend Vs Peer • Team Aggregate Mini Scorecard • Team Aggregate Multi KPI • Team Detail Dual KPI • Team Detail Single KPI
Speech Analytics	*n/a*	• Analytics Category Trends • Analytics Term Trends
Workforce Management	*n/a*	• Daily Service Goals and Backlog • Forecasted Vs Required Vs Actual • Multiple Day Group Schedule • Service Level Heat Map • Staffing Number Assessment by Interval
Workforce Management	Operations	• Capacity Plan • Intraday Productivity • Productivity • Utilization • VCT Events • WIT Aging Chart • WIT Aging Vs Deadline Goal Chart • WIT Drilldown Chart

Related topics

Add a dashboard, page 12

Configure dashboard widget/portlet content, page 16

Related information

Reports Guide

Configure dashboard widget/portlet content

A dashboard widget contains a discrete set of information from a designated source in the system. For example, the widgets are provided for source systems such as Workforce Management, Customer Feedback, Speech Analytics, Scorecards, and many others.

You can configure each widget with the specific information you want to see from the associated source system.

Dashboard widgets that host reports are designed to run reports that can run relatively quickly and produce an amount of data that can fit within the widget. The parameters you set for a report determine the length of time the report runs and the amount of data returned for the report. You should make sure that the parameters you specify for a report are such that the report will run relatively quickly and return an amount of data that can be displayed in the widget (considering the amount of space available in a widget).

Show Me

Before you begin

Add a dashboard, page 12

Procedure

1. Select **Dashboards** under **My Information** on the **My Home** menu.
2. From the dashboard selector list, select a dashboard.
3. To change the settings of a widget, inside the widget, click and select **Configure**.
4. Edit the settings.

> To configure some, but not all, parameters for User Preference, include the Employee Filter parameter when it is available. If shared dashboard users are allowed to configure some parameters, but are not allowed to configure the employee filter, they cannot save the configuration.

5. Click **Save**.

Related topics

Dashboard workspace controls, page 8
Available dashboard widgets/portlets, page 13
Multiday Group Schedule widget , page 30
Forecasted vs Required vs Actual widget, page 31
Interactions and Analytics report widget, page 33
Customer Feedback Mini Dashboard portlet , page 34
Scorecards Performance Map portlet , page 35
Generic Web Portlet (External website) portlet, page 32
Speech Analytics portlets, page 36

Identity Authentication and Fraud Detection widgets, page 39
Workforce Management and Scorecards widgets, page 38

Configure Internet Explorer to show mixed content

Set up Internet Explorer to allow the Dashboard to display secure (HTTPS) and non-secure (HTTP) content within a Generic Web portlet. This browser configuration enables you to select both secure and non-secure websites in the portlet.

Procedure

1. On your computer, open Internet Explorer.
2. Select **Tools > Internet Options**.
3. On the **Security** tab, click **Trusted Sites**.
4. Click **Sites**.
5. Enter the sites into your trusted sites.
    a. Type in the URL of the website to display in your Generic Web portlet.
    b. Click **Add**.
    c. Repeat steps a and b for each website to display in your Generic Web portlet.
    d. Click **Close**.
6. On the **Security** tab, click **Trusted Sites**.
7. Click the **Custom level** button.
8. On the **Reset to:** drop-down menu, select **Low**.
9. Click **Reset**. Select **Yes** on the warning message.
10. In the **Setting** list, under **Miscellaneous**, click **Enable** for the following:
    - **Display mixed content**
    - **Websites in less privileged web content zone can navigate into this zone**
11. Click **OK**. Select **Yes** on the warning message.
12. Click **OK** again and restart Internet Explorer.

Configure Chrome to show mixed content

Set up Chrome to allow the Dashboard to display secure (HTTPS) and non-secure (HTTP) content within a Generic Web portlet. This browser configuration enables you to select both secure and non-secure websites in the portlet.

Procedure

1. On your computer, open Chrome.
2. At the upper right, click the ≡ icon and then select **Settings**.
3. At the bottom of the page, click **Show advanced settings**.
4. Under the heading Network, click **Change proxy settings**.
5. On the **Security** tab, click **Trusted Sites**.
6. Click **Sites**.
7. Enter the sites into your trusted sites.
    a. Type in the URL of the website to display in your Generic Web portlet.

   b. Click **Add**.
   c. Repeat steps a and b for each website to display in your Generic Web portlet.
   d. Click **Close**.

8 On the **Security** tab, click **Trusted Sites**.

9 Click the **Custom level** button.

10 On the **Reset to:** drop-down menu, select **Low**.

11 Click **Reset**. Select **Yes** on the warning message.

12 In the **Setting** list, under **Miscellaneous**, click **Enable** for the following:

   - **Display mixed content**
   - **Websites in less privileged web content zone can navigate into this zone**

13 Click **OK**. Select **Yes** on the warning message.

14 Click **OK** again and restart Chrome.

View your dashboards

Provided that you have the correct privileges, you can view your dashboards on My dashboards. From this page, you can view the dashboards that you created and any dashboards that were shared with you by other users.

Before you begin

One or more dashboards have been shared with you or created by you.

Procedure

1. Select **Dashboards** under **My Information** on the **My Home** menu.
2. From the dashboard selector list, select a dashboard.

Related topics

Dashboard workspace controls, page 8
Duplicate a dashboard, page 21
View the properties of a dashboard, page 23
Edit your dashboards , page 24

Duplicate a dashboard

To create a dashboard similar to an existing dashboard, you can save time by duplicating it and modifying the copy.

After a dashboard is duplicated, the two dashboards function independently.

Duplicating a shared dashboard

If you duplicate a dashboard that was shared with you, changes made to the original dashboard do not affect the copy of the dashboard, even if the changes are distributed.

If you duplicate a shared dashboard, you must reconfigure any dashboard information specific to the user profile.

Example: Reconfiguring a duplicated shared dashboard

If dashboard includes the Utilization portlet, the employee filter configuration for the portlet is specific to the original dashboard owner. Another user cannot view the filter. In the duplicate dashboard, the Employee filter configuration is reset and must be reconfigured.

Before you begin

Add a dashboard, page 12

Procedure

1. Select **Dashboards** under **My Information** on the **My Home** menu.
2. From the dashboard selector list, select a dashboard.
3. On the right side, select the plus sign to display the Slider menu.
4. Under **Additional Actions**, select **Duplicate Dashboard**.
5. In the **Save As** field, enter a new, unique name for the dashboard copy.
6. Select **Duplicate Dashboard**.

Related topics

Dashboard workspace controls, page 8

View your dashboards, page 20

Delete a dashboard

When you no longer need a dashboard, you can delete it. If you delete a shared dashboard, it is deleted from the shared users too.

Procedure

1. Select **Dashboards** under **My Information** on the **My Home** menu.
2. From the dashboard selector list, select the dashboard you want to delete.
3. From the **Additional Actions** menu, select **Delete Dashboard**.

Related topics

Deleting a dashboard that includes report portlets, page 57

Dashboard workspace controls, page 8

View your dashboards, page 20

View the properties of a dashboard

Properties describe a dashboard with information such as the last modified date, whether the dashboard is shared.

The properties information available depends on whether you are the dashboard owner or viewer. For example, when a dashboard is shared, both the viewer and owner see the number of entities that the dashboard is shared with. The owner, however, sees the actual entities (organizations, groups, employees, or roles) that the dashboard has been shared with. If more than five entities exist for a category, a Share Dashboard link is available to see all entities.

Before you begin

One or more dashboards have been shared with you or created by you.

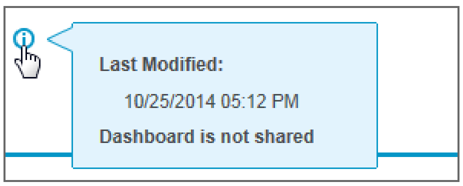
Procedure

1 Select **Dashboards** under **My Information** on the **My Home** menu.

2 In the dashboard selector list, select a dashboard.

3 On the right of dashboard selector list, click ⓘ.

Information about the dashboard you selected is displayed.



Related topics

Dashboard workspace controls, page 8

Edit your dashboards , page 24

Edit your dashboards

After you add a dashboard, you can change it if needed.

If you are the dashboard owner, you can make the same changes to your dashboard as you did when you first configured it. You can add, remove, resize, and reposition widgets.

If the dashboard was shared with you, you cannot add or remove widgets.

> If you change a shared dashboard, you cannot view the shared version of the dashboard. You are only able to view the latest, *work in progress* version of the dashboard.

Shared dashboard revision and redistribution

If you change a dashboard after you shared it with others, the changes do not affect the shared dashboards (unless you redistribute the dashboard).

If you revise a dashboard, you can redistribute the dashboard if you have the necessary privilege. The updated dashboard replaces the previous version shared with the entities in the share list.

Procedure

1. Select **Dashboards** under **My Information** on the **My Home** menu.
2. From the dashboard selector list, select the dashboard that you want to edit.
3. Change the dashboard as needed.

> When you edit a dashboard, there is no prompt to save it. Any changes that you make to the dashboard are saved automatically.

Related topics

Dashboard workspace controls, page 8

View your dashboards, page 20

Rename a dashboard

If you decide that you want a different name for a private dashboard, you can rename it. After you share a dashboard, you cannot change its name.

Before you begin

Add a dashboard, page 12

Procedure

1. Select **Dashboards** under **My Information** on the **My Home** menu.
2. From the dashboard selector list, select the dashboard that you want to rename.
3. On the right of the dashboard selector list, click the Edit name icon, and type the new name.

   Because the content of the dashboard is not changed, the **Last Update** date remains unchanged.

Related topics

Dashboard workspace controls, page 8

View your dashboards, page 20

Set or clear a default dashboard

If you have a dashboard that you use most often, you can set it as your default dashboard. After you log on and access My Dashboards, the default dashboard is selected.

Procedure

1. Select **Dashboards** under **My Information** on the **My Home** menu.
2. From the dashboard selector list, point to the dashboard that you want as your default dashboard.

   To the left of the dashboard name, the hollow star is displayed.
3. To set the default, click the hollow star .

   To the left of the dashboard name, the solid star is displayed. This icon indicates that this dashboard is the default dashboard.
4. To undo your default dashboard selection, click the solid star .

Related topics

Dashboard workspace controls, page 8

View your dashboards, page 20

Share a dashboard

Dashboards are private to you until you share them. If you develop a dashboard that you think is useful to other users you can share it. The other users are able to view your dashboard on their My Dashboards page.

You can share a dashboard with one or more entity types:

- Organizations
- Groups
- Roles (The role must have the View Dashboard privilege. In addition, the employees who have the associated role must be under the scope of the dashboard owner who shares the dashboard.)
- Employees (The role assigned to the employee must have the View Dashboard privilege. In addition, the employee must be under the scope of the dashboard owner who shares the dashboard.)

> When you share a dashboard with an organization or a group, child organizations and groups do not inherit the shared dashboard.

Show Me

Changes to who can see a shared dashboard

After you share a dashboard, you can change the organizational entities you shared your dashboard with.

- If you add new entities to the share list, the last version of the shared dashboard is shared with them.
- If you remove entities from the share list, the dashboard is no longer shared with them.

Before you share a dashboard

By default, the *Agent* role does not have the *View Dashboard* privilege. If the *View Dashboard* privilege is granted to the *Agent* role, there are limitations on the types of portlets users with this role can view. Only share dashboards with the following types of portlets:

- Generic Web Portlets
- Simple custom reports
- SSRS portlets

  When configuring the SSRS Portlets partially and then sharing them, the shared user who would configure and render the reports must also have the *Delete Report Schedule* privileges.
- HTML portlets

  Examples of HTML portlets include

  - Customer Feedback Mini Dashboard
  - Multi Day Group Schedule
  - Forecasted Vs Required Vs Actual
  - Scorecard Performance Map

- Team Aggregate Mini Scorecard

Procedure

1 Select **Dashboards** under **My Information** on the **My Home** menu.

2 From the dashboard selector list, select the specific dashboard you want to share from the dashboard selector list.

3 On the right side, select the plus sign to display the Slider menu.

4 Under **Additional Actions**, select **Share Dashboard**.

5 In the **Share Dashboard** dialog box, under **Share with**, select **Employees** or **Roles**.

6 Select the specific entities (**Roles** or **Employees**)with whom you want to share the dashboard.

For **Employees**, click the icon for the *list* of entities with whom you want to share the dashboard:

Organizations

Groups

Employees

Employees (listed by organization)

Employees (listed by group)

For **Roles**, select the specific roles with whom you want to share the dashboard.

7 To add an entity to the selected list, use the right arrow button. Once selected, these entities have dashboard access.

To remove an entity from the selected list, use the left arrow button.

8 Click **Save**.

> For all relevant Workforce Management (WFM), Operations, and Scorecards report-based portlets: When the dashboard owner configures the report parameters, the shared dashboard user can view information for all organizations in the portlet, even if the organization is outside the scope of the user.

Related topics

Redistribute a shared dashboard, page 28

Revert a shared dashboard, page 29

Troubleshooting for WFM, Operations, and Scorecards SSRS report-based portlets , page 42

Dashboard workspace controls, page 8

Redistribute a shared dashboard

If you change a shared dashboard and want the entities that you shared the dashboard with to have the changed version of the dashboard, you can redistribute it. When you redistribute a dashboard, the new version replaces the previous version shared with the selected entities (including any changes they made to the dashboard).

Before you begin

Change the content of a shared dashboard (for example, adding widgets, deleting widgets).

Edit your dashboards , page 24

Procedure

1. Select **Dashboards** under **My Information** on the **My Home** menu.
2. From the dashboard selector list, select the updated dashboard that you want to redistribute.
3. On the right side, click the plus sign to display the Slider menu.
4. Under the **Additional Actions** menu, select **Redistribute Dashboard**.

Related topics

Dashboard workspace controls, page 8

View your dashboards, page 20

Share a dashboard, page 27

Revert a shared dashboard

When you change a dashboard that you shared with others or a dashboard that was shared with you and want to discard the changes, you can revert to the last version of the shared dashboard.

When you change a shared dashboard (shared either by you or with you) and want to discard these changes, you can revert to the last version of the shared dashboard (not the last saved version).

Before you begin

Edit a shared dashboard to activate the revert option.

Procedure

1. Select **Dashboards** under **My Information** on the **My Home** menu.
2. From the dashboard selector list, select the dashboard you want to restore.
3. On the right side, click the plus sign to display the Slider menu.
4. From the **Additional Actions** menu, select **Revert to Shared Dashboard**.

Related topics

Dashboard workspace controls, page 8

View your dashboards, page 20

Edit your dashboards , page 24

Share a dashboard, page 27

Dashboard widget setup and parameters

Dashboard widgets are available based on the licenses that your company has purchased. After a widget has been placed on a dashboard, it can be configured.

Related topics

Dashboard workspace controls, page 8
Available dashboard widgets/portlets, page 13
Multiday Group Schedule widget , page 30
Forecasted vs Required vs Actual widget, page 31
Interactions and Analytics report widget, page 33
Customer Feedback Mini Dashboard portlet , page 34
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Generic Web Portlet (External website) portlet, page 32
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Interaction Analytics portlet, page 37
Identity Authentication and Fraud Detection widgets, page 39
Workforce Management and Scorecards widgets, page 38

Multiday Group Schedule widget

With the Multiday Group Schedule widget, you view employee schedules for a selected group and for a specific number of days that you configure. At a glance, you can see the scheduling information by employee for the selected group.

The dashboard includes the following:

- **Published schedule**: The published schedule for the group.
- **Name**: Employee name; by default, all employees in the group display. To narrow your view to a single employee, use the **Viewing Person** option at the bottom of the dashboard.
- **Days:** the schedule for each day, corresponding to the number of days you have configured the dashboard to include.
- **View Person x of x**: By default, **All** employees are displayed. Use this feature to select a specific employee schedule that you want to see. If you select a specific employee, use the left arrow and right arrow buttons to advance through the employee list by employee.
- **Refresh**: Click to refresh the display with the latest available information.

Field	Description
Group	Select the group for which you want to display the schedule. Use the lookup button to select a specific group.

Field	Description
Number of Days	Enter in integer for the total number of days of scheduling information you want to display for each employee.
Sort By	Select the primary sort criterion for the data displayed in the dashboard. Options: • Last Name • First Name • Start Time • End Time • Length

After you have completed the configuration of the dashboard, click **Save** to return to the viewing mode and to see the updated dashboard.

Related topics

Dashboard widget setup and parameters, page 30

Configure dashboard widget/portlet content, page 16

Forecasted vs Required vs Actual widget

Use this portlet to track performance for a campaign, which you can configure. With this widget, you can analyze actual performance with forecasted and required values. You can select a single statistic to include on the dashboard, such as activity handling time, backlog, abandons. The portlet displays data for a specific statistic and time period.

Related topics

Forecasted vs Required vs Actual widget parameters, page 31

Dashboard widget setup and parameters, page 30

Forecasted vs Required vs Actual widget parameters

To customize the performance data that is displayed, select the options for the widget.

Field	Description
Statistic Type	Select the performance statistic you want displayed on the dashboard.
Time Period	Set the beginning and ending dates for the performance data you want to view.
Campaigns	Select the campaign for the performance data you want to display.
Work Queues	Displays the work queues associate with the selected campaign.

After you have completed the configuration of the dashboard, click **Save** to return to the viewing mode and to see the updated dashboard.

Related topics

Forecasted vs Required vs Actual widget, page 31
Dashboard widget setup and parameters, page 30
Configure dashboard widget/portlet content, page 16

Generic Web Portlet (External website) portlet

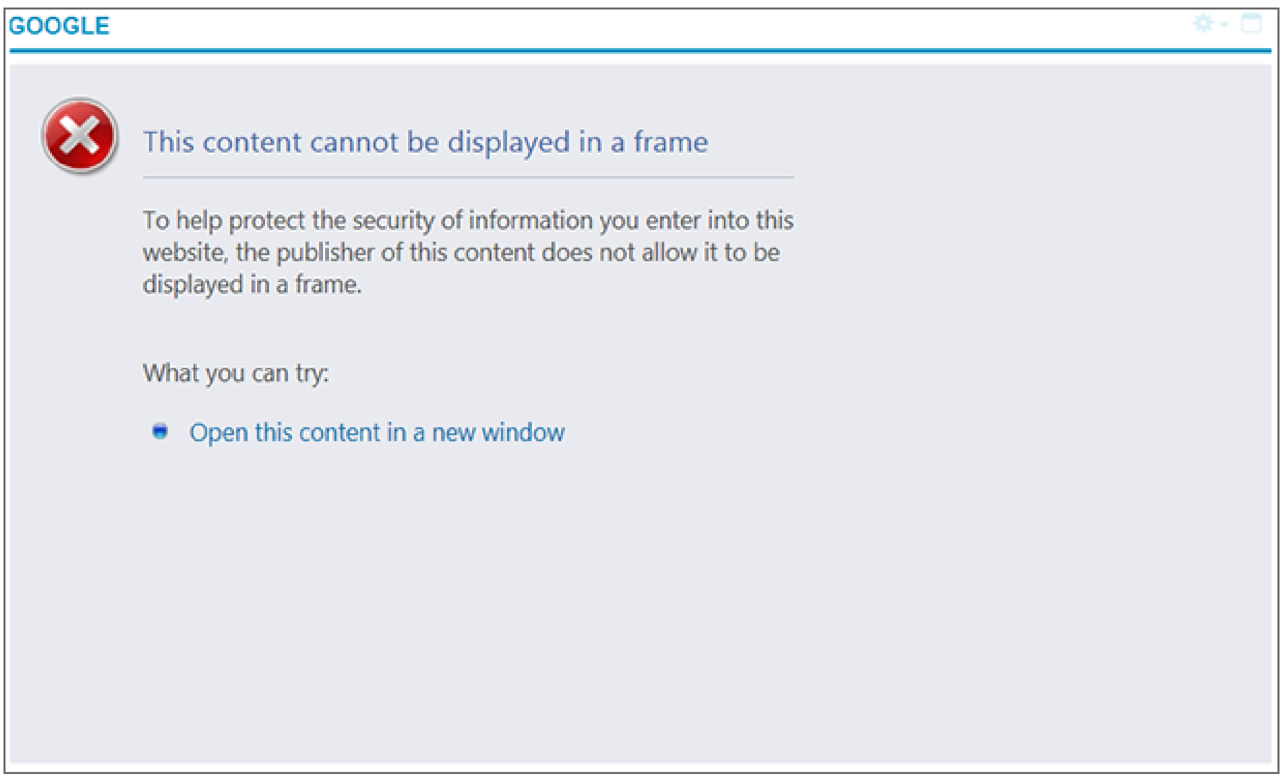
Use this portlet for dashboards created using an external URL, such as the URLs provided by Enterprise Feedback Management (EFM).

Invalid URL in Internet Explorer

If an invalid URL is used, the Configure menu is not accessible. Ask your system administrator to delete the dashboard and recreate it with the valid URL.

URL security settings cause browser error

All external content is displayed inside an iframe within the generic web portlet. If the source URL security settings prevent it from being embedded in an iframe, a browser error is displayed on the dashboard. When sites such as http://www.google.com, http://www.yahoo.com, and http://www.facebook.com are defined in the generic web portlet on a dashboard, this type of error cann occur.



Required parameters

Field	Description
Title	A name for the portlet.
Web Location	The URL for the website. To change the website shown in this portlet, edit the URL

Example: Creating an EFM portlet

If you are creating an EFM portlet, the EFM URL will be similar to:

http://xxx.sample.location.com/ReportWidget.ashx?wid=ksMaqx0jxU&w=480&h=360&htmlwrap=1

- *xxx.sample.location.com* = The location from which the URL is generated.
- *ReportWidget.ashx?* = The file name automatically generated by EFM.
- *w=480&h=360&htmlwrap=1* = The dimensions for the portlet.
  Adjust the portlet dimensions by editing the URL address and replacing the value provided for the width (*w=480*), height (*h=360*) and for number of rows (*htmlwrap=1*).

Related topics

Dashboard widget setup and parameters, page 30
Configure dashboard widget/portlet content, page 16

Interactions and Analytics report widget

To display reports that help you analyze interactions and analytics data, use the Interactions and Analytics report widgets. For each report, you can configure a set of parameters so that only relevant data is displayed in the report.

The procedure for configuring the various reports is discussed in a separate guide.

Related topics

Dashboard widget setup and parameters, page 30

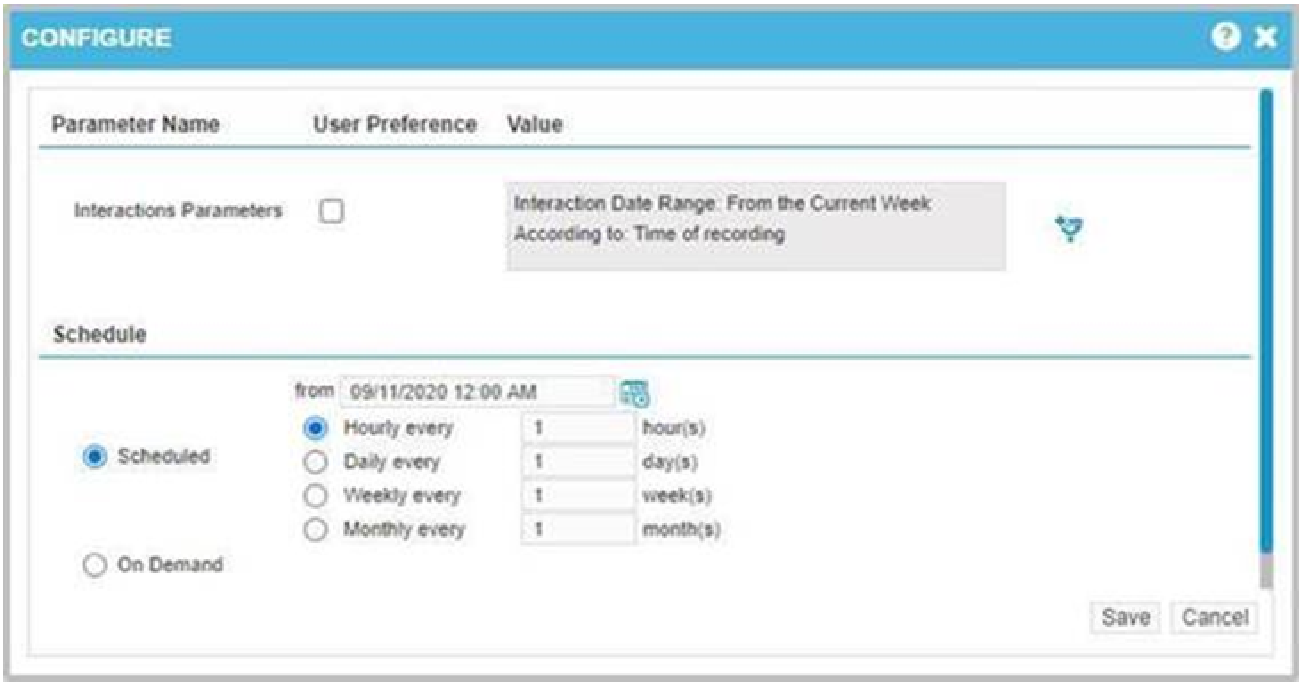
Related information

Reports Guide

Interactions report portlets

The Interaction report settings allow the owner of portlet to schedule the running of the report or to run the report on demand. The Interactions report settings also allow the owner of the dashboard to specify that users who share the portlet can configure some of the report properties.

For example, each user can have an employee filter configured. In this case, if there is a parameter to use the employee filter, this must be configured by the shared user. The owner will have their own property configured.



Setting	Description
User Preference check box	Select this option to allow shared users of the portlet to configure their own report properties.
Scheduled	Use the Scheduled setting to schedule when the report runs. • In the **from** setting, specify the date and time from which the report will run • Specify whether the report runs hourly, daily, weekly, or monthly, and the frequency with which the report runs.
On Demand	Select the **On Demand** option and click **Save** to run the report on demand.

Customer Feedback Mini Dashboard portlet

The Customer Feedback Mini Dashboard parameters determine the metrics that are displayed.

Field	Description
Organization	Organization for which you want to display Customer Feedback metrics. The Organization Selector icon shows the organizational hierarchy that you have access to.

Field	Description
Date	Determines the aggregation of the data displayed on the mini dashboard. Options: • **Today**: Data for the current day only is displayed. • **Week to Date**: Data for the current week only is displayed. (First day of the week until the current day and time. The first day of the week is set at the Organizational level.) • **Month to Date**: Data for the current month only is displayed. (First day of the month until the current day and time.)
Date Type	Specifies which date is used for aggregating data. Options: • **Interaction Date**: Date of the interaction between the agent and the customer. This date could be the date of the recorded phone conversation or the case closing time if the agent worked offline. • **Survey Invite Date**: Date the customer is invited to take a survey. • **Survey Response Date**: Date the customer starts the survey.
Performance Metrics	Determines which metrics display on the mini-dashboard. Two types of metrics are available: • **Performance Metrics** - *individual scale questions*: Average score for a specific scale question. - *individual comment questions*: Number of comments made for a specific comment question. - *individual business objective*: Average score for a specific business objective. • **Participation Metrics** - Answered Survey Count - Survey Transfer Rate - Survey Response Rate - Survey Completion Rate - Question Response Rate - Question Completion Rate

Related topics

Dashboard widget setup and parameters, page 30

Configure dashboard widget/portlet content, page 16

Scorecards Performance Map portlet

The portlet shows a Google map with bank branch addresses. When you click an address, a pop-up shows various Scorecards-based performance metrics.

To edit this portlet, select a single KPI, person or organization rollup, and the periodicity (for example, a week, month).

Related topics

Editing the Scorecards Performance Map, page 36

[Dashboard widget setup and parameters], page 30
[Configure dashboard widget/portlet content], page 16

Editing the Scorecards Performance Map

To edit this portlet, select a single KPI, person or organization rollup, and the periodicity (for example, a week, month).

Related topics

[Configure dashboard widget/portlet content], page 16

Speech Analytics portlets

Speech Analytics portlets provide a quick glance at how speech data is trending. The portlets reveal emerging business phenomena and provide critical information on category and term trends.

Two Speech Analytics portlets are available: Analytics Category Trends and Analytics Term Trends. You can configure these portlets to show data that is relevant to your Speech projects.

! To be able to configure Term Trends portlets, you need the Advanced Speech Analytics license.

Field	Description
Enable configuration by user	When selected, users can configure the portlet in a shared dashboard.
Project	Provides a list of the Speech projects to which you have access rights.
Source	If your system is integrated with other products, you can set the dashboard to show data from different sources: • **Speech** (default): Show trends based on speech-only data. • **<name of text data source>**: Show trends for the selected text data source. Depending on how your system is configured, this source can include data from sources such as chats, social media, or email. • **All**: Show trends based on speech and text data.
Recent Changes	Sets the dashboard to show trends that happened in the last day or week.
Long-Term Volatility	Sets the dashboard to show trends that happened in the last month, three, six, nine or 12 months.
Period	The options available under **Period** vary according to your previous selection: • **Recent Changes**: Day and Week • **Long-Term Volatility**: 1, 3, 6, 9, 12 months

Related topics

Dashboard widget setup and parameters, page 30

Interaction Analytics portlet

Interaction Analytics portlets provide a quick glance at trending data for categories and terms, revealing emerging business phenomena and providing critical information.

Configure the settings for the Interaction Analytics projects for which to view Category Trends and Term Trends.

To configure Term Trends portlets, you need the Interaction Analytics license.

Field	Description
Enable configuration by user	When selected, users can configure the portlet in a shared dashboard.
Project	The list of Interaction Analytics projects to which you have access rights.
Source	By default, trends are shown from all the source types associated with the Interaction Analytics project. You can toggle between viewing trends for a specific source or all sources. The source type for which to show trends for the selected project, and can be one of the following: • **All**: The default, to show trends from all sources. • **Speech** : Show trends only from Speech Analytics. • **Text**: Show trends only from Text Analytics.
Recent Changes	Show short-term trends, for the selected Period.
Long-Term Volatility	Show long-term trends, for the selected Period.
Period	The time-frame for which to show Recent Changes or Long-Term Volatility: • **Recent Changes**: Past one Day or Week • **Long-Term Volatility**: Past 1, 3, 6, 9, or 12 months

Related topics

Dashboard widget setup and parameters, page 30

Workforce Management and Scorecards widgets

The configuration page for each Workforce Management and Scorecards report portlet includes parameters to configure related reports in the suite. In the configuration, you can specify whether the portlet is updated on a schedule or on demand.

The schedule parameters allow you to specify the starting date for the updates and whether the updates need to occur daily, weekly, or monthly. You can also modify the frequency to skip certain times. For example, you can specify that the update take place every two days, rather than every day.

Custom Reports widget

When Custom Reports are deployed correctly and have access rights defined, they are available to add to a Dashboard. To configure a Custom Reports widget for the Dashboard, open the widget configuration page. Select the report to be displayed from the **Select a Report** drop-down menu.

The reports are listed alphabetically by topic, such as Activity Reports, Adherence Reports, and Performance Reports. You can select a report; you cannot select a report topic.

Like the Workforce Management and Scorecards widgets, Custom Reports widgets can be updated on a schedule or on demand. You can set and modify the frequency of the report updates as required.

If no custom reports exist, the message **There are no custom reports** appears at the top center of the page.

Related topics

Dashboard widget setup and parameters, page 30

Available dashboard widgets/portlets, page 13

Related information

Creating a report (*Workforce Management Administration Guide)*

Deploying custom reports (*Workforce Management Administration Guide)*

Parameters for each report type (*Framework Reports Guide)*

Edit Workforce Management and Scorecards widgets

The edit page for the Workforce Management and Scorecards portlets contain the parameters used to configure related reports in the suite. Depending on the type of portlet, you can select items such as organizations, campaigns, date ranges, or KPIs.

Like the Workforce Management and Scorecards widgets, Custom Reports widgets can be updated on a schedule or on demand. You can set and modify the frequency of the report updates as required.

If there are no custom reports, you see the message **There are no custom reports** at the top center of the page.

Related topics

Dashboard widget setup and parameters, page 30

Available dashboard widgets/portlets, page 13

Related information

Creating a report (*Workforce Management Administration Guide)*

Deploying custom reports (*Workforce Management Administration Guide)*

Parameters for each report type (*Framework Reports Guide)*

Identity Authentication and Fraud Detection widgets

Identity Authentication and Fraud Detection (IAFD) widgets visualize trends in voice biometric activity. Widgets are available for average handle time, enrollments, and verification rates.

You can configure parameters for each widget to aggregate and report the relevant data of interest to you. To learn about configuring the widget parameters, see the related information section.

> ! To configure and use the widgets, you need a license for Identity Authentication and Fraud Detection.

Average Handle Time

The Average Handle Time widget shows how IAFD can reduce the time an employee spends handling interactions. Voice biometrics verification assists the employee with authentication of the customer identity, thus eliminating costly handling time.

- Line graphs plot average handle time for enrolled customers, unenrolled customers, and all customers across a date range by the requested period.
- To see a plotted figure as a tooltip, rest on a data point on the line graph.

Enrollments

The Enrollments widget illustrates the rate of enrollments by period relative to cumulative enrollments to date for the organization. Set the enrollment type to see customers, employees, or targets.

- A bar chart shows enrollments for each time period.
  - The left, vertical axis charts enrollment volume for the bar chart. You typically see an initial spike in enrollments as people (customers, employees, or targets) are first enrolled.
  - To see an enrollment figure as a tooltip, rest on a bar for a period.

- For the same period, a line graph plots cumulative enrollments for the organization.
    - The right, vertical axis charts enrollment totals for the line graph. Cumulative enrollments typically rise sharply and then flatten out gradually over time.
    - To see a plotted figure as a tooltip, rest on a data point on the line graph.

Verifications

The Verifications report provides a visual representation of verification success and failure rates for interactions by period. Configure the threshold to determine the minimum score required for a successful verification.

- A bar chart shows verified and unverified interactions for each time period based on the verification score threshold that is configured for the dashboard. You can also view the total number of interactions, which is the sum of the verified and the unverified.
- To see the impact of different minimum verification scores on verification rates, adjust the threshold score in the widget.
- To see a figure for verified, unverified, or totals as a tooltip, rest on a bar for a period.

Related topics

Dashboard widget setup and parameters, page 30

Related information

IAFD (Identity Authentication and Fraud Detection) reports (*Workforce Optimization Reports Guide*)

IAFD reports and widgets (*Real-Time Analytics Framework Configuration and Administration Guide*)

Recorder Health Summary widget

Administrators use the Recorder Health Summary widget to visualize the health for Recorder-related components and to see a summary of related alarms. The widget updates automatically every 60 seconds.

Recorder-related categories

The Recorder Health Summary categorizes Recorder-related alarms into three categories. The categories are used for the health summary.

- **Recording**: Identifies the health and alarm status for recording components. For example: Consolidator, Content Server, Recorder Ingestion Web Service, Screen Capture, Recorder Integration Service.
- **Archive**: Identifies the health and alarm status for Archiver and the Archive Web Service.
- **Recorder Analytics**: Identifies the health and alarm status for Identity Authentication and Fraud Detection (IAFD), metadata detection, and Real-time Speech Analytics (RTSA). For example: Biometrics Engine, Metadata Engine, Analytics Framework.

Features and configuration

- **View scope**

  Use the **View** drop-down list to set the scope for the summary information displayed. The list includes all servers in the enterprise to which you have access. Select a specific server, a single site, or the entire enterprise (default).

> When you change the scope for the widget, the category tiles and the alarm list update automatically based on the scope selected.

- **Health category tiles**

  Category tiles are color-coded to indicate the health of each of the categories. Each tile also displays the total number of active alarms for the category.

  Health color is defined as:

  - **Green**: All components in the category are operating normally. No administrator action is required.
  - **Amber**: Operation is not optimal; functionality of category components is potentially diminished. For example, recording of contacts or archive operation could be impacted. The administrator needs to review the alarms and investigate the cause.
  - **Red**: A critical failure of one or more components is detected for the category. Immediate attention from the administrator is required. For example, a red status likely impacts multiple contact recordings or the archiving of multiple contacts.

- **Alarm list**

  The alarm list summarizes the active alarms for all categories. Sort the list in ascending or descending order by clicking a column heading, Reorder the sequence of the columns by dragging and dropping a column heading.

  To see corrective action for an alarm, acknowledge an alarm, or learn more about the alarm, use the Alarm Dashboard.

Related topics

Dashboard widget setup and parameters, page 30

Related information

Recorder Health Summary (*System Monitoring, Logs, and Alarms Reference Guide*)

Active alarms and the Alarm Dashboard (*System Monitoring, Logs, and Alarms Reference Guide*)

Troubleshooting for WFM, Operations, and Scorecards SSRS report-based portlets

Use the troubleshooting steps found here to resolve issues you encounter with SSRS report-based portlets.

Portlet does not display on the dashboard of user with whom it was shared

Symptom	A WFM, Operations, or Scorecards report-based portlet was added to a dashboard and the dashboard was shared. However, the portlet does not display on the dashboard of the user with whom it was shared.
Possible cause	The role assigned to the shared user does not have the general View Report privilege. This privilege is not associated with a specific report.
Action	Verify the role assigned to the shared user has the required report privilege. To check the Report privileges for the role of the shared user, go to **User Management > Security > Roles Setup**. Report privileges are located under Framework. For all relevant WFM, Operations, and Scorecard reports, the role must have the following Report privilege: - View Report

Dashboard indicates that the user does not have the privilege to view a specific report

Symptom	A WFM, Operations, or Scorecards report-based portlet was added to a dashboard. However, the dashboard only displays a message that indicates the user does not have the privilege to view that specific report. This problem can occur for shared dashboard users and dashboard owners.
Possible cause	The role assigned to the user has the general View Report privilege, but does not have the View Report privilege for the specific report.
Action	Verify that the user has the required report privilege for the report. 1 Go to **Reports > Setup > Access Rights**. 2 In the left pane, select the report. 3 In the right pane, locate the user role and make sure that the **View Privilege** check box is selected.

Shared dashboard indicates that user does not have the privilege to configure a specific report

Symptom	A WFM, Operations, or Scorecards report-based portlet was added to a dashboard and the dashboard was shared. When the shared user configures the portlet and clicks Save, a message indicates that the user does not have the privilege to configure the report.
Possible cause	The role of your shared user does not have the correct combination of general report privileges. These privileges are not associated with specific reports.
Action	Make sure that the role for the shared user has the required general report privileges. To check the Report privileges for the role of the shared user, go to **User Management > Security > Roles Setup**. Report privileges are located under Framework. • For all relevant WFM, Operations, and Scorecard reports, the role must have the following Report privileges: - View Report - Run Report (for ad hoc reports) • For all relevant WFM and Scorecards *scheduled* reports, the role must have the following Report privileges: - Administer Report Schedules - Delete Report Schedules

Related topics

My Dashboards, page 7

Available dashboard widgets/portlets, page 13

Share a dashboard, page 27

Related information

Information about default roles and their privileges (*Roles and Privileges Reference*)

Chapter 2

Manage Dashboards

From the Manage Dashboards page, you can view dashboard lists and their owners, change dashboard ownership, and delete dashboards.

Show Me

Topics

Manage Dashboard features

A dashboard gathers information from different sources, and displays the data in a unified view on the My Dashboard page. With a dashboard, a user can see data plotted on graphs, aggregate statistics, open reports, and summarize activity from different systems in the suite.

After one or more dashboards are created using My Dashboards, you can perform management tasks using Manage Dashboards.

Managing dashboards tasks

With the proper role, privileges, and scope, you can:

- View a list of dashboards owned by an employee or organization.
- Sort the order of the dashboard information.
- Delete a dashboard.
- Change ownership of a dashboard.

Dashboard rules

- A dashboard must be shared before you can change its owner.
- A dashboard belongs to the organization in which it is created. If the publisher who created the dashboard switches organizations, the dashboard remains with the organization.
- When an employee is terminated from an organization, dashboards owned by that employee in that organization are no longer owned. This status is designated with an exclamation point (!) in the icon:

   (private/not owned) or
   (shared/not owned)

Display rules

- Only the dashboards belonging to organizations that you have scope to view appear in the workspace.
- When changing a dashboard's owner, only the employees (including you) that meet all conditions appear in the drop-down list of available dashboard owners:
  - Assigned to a role that has **Share Dashboard** privilege
  - Assigned to a role that has scope to the organization that the dashboard belongs to
  - Is not terminated within the (optional) time range designated in the view filter

Audited actions

Audited actions can be viewed in the Audit Viewer under **Audit Viewer** on the **System Monitoring** menu. The audited actions are:

- Change Owner
- Create
- Delete
- Duplicate
- Redistribute
- Rename
- Revert
- Share
- Update

Related topics

Manage Dashboards page, page 58
View dashboards, page 47
Use the employee filter to search for employees, page 48
Sort dashboard information, page 49
Change the owner of a dashboard, page 50
Create a dashboard, page 55

View dashboards

You can view the dashboards within your scope, according to the organization that it belongs to or by the employee that owns it.

Show Me

Quick information lookup

You can view additional information about an employee or organization by pointing the cursor over the name of the employee or the organization in the left pane.

Procedure

1 On the **Organization Management** menu, select **Manage Dashboards** under **Dashboards & Gadgets**.

2 In **Employees** pane, select the way to find the dashboard owner:

Employees. Displays the complete list of employees that are in your assigned scope, listed alphabetically.

Employees (listed by organization). Displays a hierarchy of organizations and employees that are in your assigned scope, listed alphabetically by organization.

Employees (listed by group). Displays a hierarchy of groups and employees that are in your assigned scope, listed alphabetically by group.

Organizations. Displays the organization hierarchy, listed alphabetically. Either an organization or a child organization (not both) own a dashboard. Ownership differs between parent and child organizations.

A dashboard created for a child organization stays with the child organization and a dashboard created for a parent organization stays with the parent organization.

3 Expand the organization or group as appropriate to find and select the employee or organization whose list of dashboards you want to view.

The list of dashboards owned by the selected entity is displayed in the Dashboards pane. By default, the list of dashboards is sorted in ascending order by last updated date.

Related topics

Use the employee filter to search for employees, page 48

Manage Dashboards page, page 58

Use the employee filter to search for employees

To search for a list of dashboards for an employee or organization, run a search in the Employees pane or Organizations pane. To narrow your search targets, use the employee filter. This feature is helpful in systems with a large number of employees and organizations.

Procedure

1 On the **Organization Management** menu, select **Manage Dashboards** under **Dashboards & Gadgets**.

2 *Optional*. To use an employee filter to narrow your search targets:

   a. In the Employees or Employee Tree Display panes, click the Create New Filter icon beside the filter list box.

   b. In the **Employee Filter** page, enter the parameters you want to use.

   c. Run filter.

3 In the Employees pane or Organizations pane, in the search field, type the first few characters of the employee or organization to search for and press **Enter**.

   The list of dashboards owned by the selected employee or organization appears in the Dashboards pane. By default, the list of dashboards are sorted in ascending order by last updated date.

4 To expand or collapse the hierarchy, click the arrow icon, and do one of the following:

   - To expand all organization or employee hierarchies, click **Expand All**.
   - To collapse all organization or employee hierarchies, click **Collapse All**.
   - To clear all employee or organization results selected, click **Select None**.
   - To refresh the selected results, click **Refresh**.

5 After running the filter, perform your search as described in steps 2 and 3.

Related topics

View dashboards, page 47

Manage Dashboards page, page 58

Related information

Employee filters (*Getting Started Guide)*

Sort dashboard information

To sort the order that the dashboard information appears on the workspace, select a specific column and the sort order from the list.

> After you set the sort order and leave the page or application, when you return, the dashboard information displays in the last saved sort order.

Procedure

1. On the **Organization Management** menu, select **Manage Dashboards** under **Dashboards & Gadgets**.
2. Determine the column that you want to sort by.
3. Click the sort arrow within the column on the workspace.
4. To sort the rows for the selected column, select the sort order (**Sort Ascending** or **Sort Descending**).

Related topics

Change the owner of a dashboard, page 50

Manage Dashboards page, page 58

Change the owner of a dashboard

You can change the owner of a shared dashboard to yourself or another employee. The Change Owner icon is available only if the selected dashboard is shared (not private).

Show Me

Eligible owners

Only names of employees (including yourself) who are assigned a role that meets all of these conditions appear in the list:

- Is assigned the Share Dashboard privilege
- Has scope to all the organizations that the current owner has scope to
- Has scope to the organization to which the current dashboard belongs

The name of the current owner does not appear in the list.

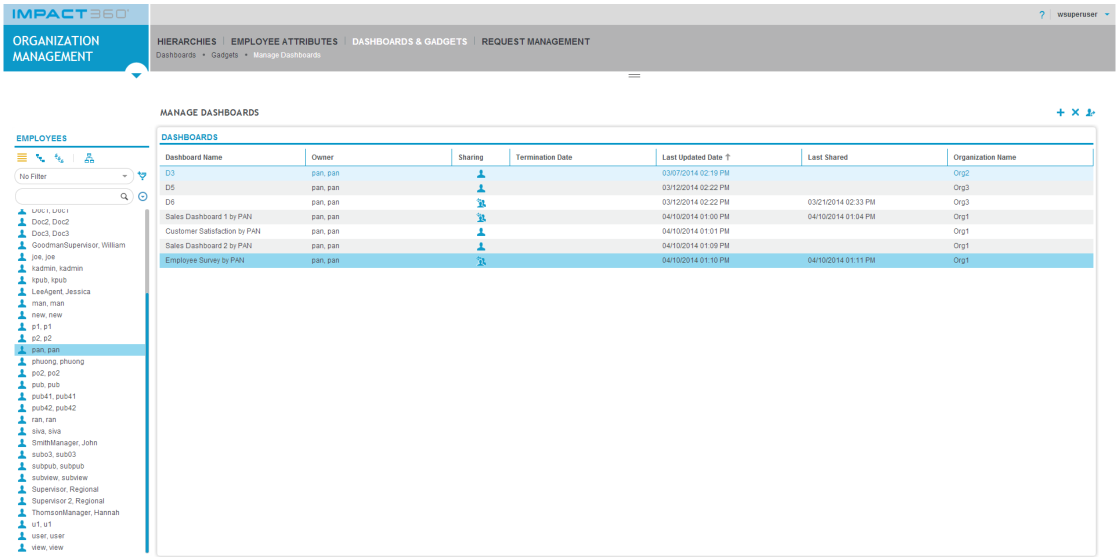
After ownership is changed

Once the dashboard owner is changed:

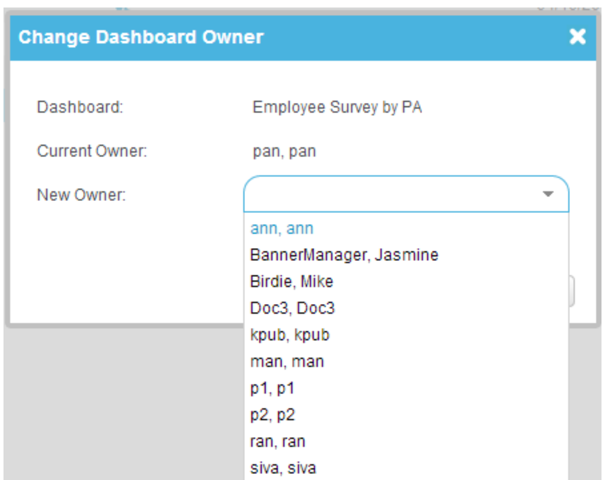
- The dashboard is assigned to the new owner.
- The new owner is able to see the dashboard in My Dashboards.
- The dashboard remains shared with all previously shared employees.
- The initial owner who created the dashboard is not able to view this dashboard because it belongs to a new owner.
- The assignment of a new dashboard owner is included in the audit trail.
- The new owner needs to reconfigure any SSRS report portlets included on the dashboard to assume ownership of the reports.

Procedure

1. From the **Organization Management** menu, select **Manage Dashboards** under **Dashboards & Gadgets**.
2. Find and select a dashboard.
3. Click the Change Owner icon.



The **Change Owner** page displays the list of employees to whom you can assign ownership of the dashboard.



4 Select a new owner from the list, and click **Save**.

Related topics

[Examples of changing dashboard ownership](), page 52
[User scope change and dashboard ownership](), page 54
[Deleting a dashboard that includes report portlets](), page 57
[Manage Dashboards page](), page 58

Examples of changing dashboard ownership

The scenarios below show how changing dashboard ownership works under special circumstances.

In each scenario, all required role, privilege, and scope conditions are met except where indicated.

Example: Change ownership without administrator scope to all organizations

As ADMIN in the following table, you have view scope to all organizations except Organization 4. Adam Smith has view scope to Organizations 1, 2, 3, and belongs to Organization 4. Other employees belong to and have view scope to organizations as follows:

Employee (in Org)	Has Scope to these Orgs				
	Org 1	Org 1A	Org 2	Org 3	Org 4
John Smith (Org 3)	X	X	X	X	
Jay Smith (Org 3)		X	X	X	
Janet Smith (Org 2)		X	X	X	
Ron Smith (Org 2)	X	X	X		
Adam Smith (Org 4)	X	X	X	X	X
ADMIN (you)(Org 2)	X	X	X	X	

You perform these steps:

1 Go to **Organization Management** > **Dashboards & Gadget** > **Manage Dashboards**.

2 Select a shared dashboard that belongs to Organization 3 that Jay Smith owns.

3 Click **Change Owner**.

- The Change Owner page displays a list of employees that are eligible to be the owner of the dashboard. John Smith and Janet Smith are listed. Adam Smith is not listed because you do not have visibility to the organization to which Adam Smith belongs (Org 4). Ron Smith is not listed because Ron Smith does not have visibility to all organizations that the current owner, Jay Smith, has scope to.
- ADMIN appears in the list and is selected by default because you are logged in as this user.

Example: Change ownership to dashboard publisher scheduled to start on a future date

Sunny Smith is scheduled with a start date of 3/17, and the date today is 3/12. As an administrator, you want to change ownership for your (ADMIN) dashboards that belong to Organization 3 to Sunny Smith. Other employees belong to and have view scope to organizations as follows:

Employee (in Org)	Has Scope to these Orgs			
	Org 1	Org 1A	Org 2	Org 3
John Smith (Org 3)	X	X	X	X
Jay Smith (Org 3)		X	X	X
Janet Smith (Org 2)		X	X	X
Ron Smith (Org 2)	X	X	X	
Sunny Smith Starts on 3/17 (Org 3)	X	X	X	X
ADMIN (you) (Org 2)	X	X	X	X

If you change the owner on 3/12, before Sunny Smith starts, the eligible owners for the dashboards within the scope of organization 3 is John Smith. Sunny Smith is not on the list until 3/17.

Example: Change ownership for an employee with a scheduled termination date

Murphy Smith is scheduled for termination on 4/17. You, the administrator want to change ownership of the Organization 3 dashboard that Janet Smith currently owns. Other employees belong to and have view scope to organizations as follows:

Employee (in Org)	Has Scope to these Orgs			
	Org 1	Org 1A	Org 2	Org 3
John Smith (Org 3)	X	X	X	X
Jay Smith (Org 3)		X	X	X
Janet Smith (Org 2)		X	X	X
Ron Smith (Org 2)	X	X	X	
Murphy Smith to be terminated on 4/17 (Org 3).	X	X	X	X
ADMIN (you) (Org2)	X	X	X	X

- If you change the dashboard owner on 4/17, the day of termination, the eligible owner list includes John Smith, Jay Smith, Murphy Smith, and ADMIN.
- If you change the dashboard owner on 4/18, the day *after* termination, John Smith, Jay Smith, and ADMIN are listed as eligible owners. Murphy Smith has been terminated, so his name is no longer listed.

Related topics

Change the owner of a dashboard, page 50

User scope change and dashboard ownership, page 54
Manage Dashboards page, page 58

User scope change and dashboard ownership

When the organization or group scope of a user changes, review the ownership of all dashboards that the user has shared. The purpose of the review is to determine whether dashboard ownership requires reassignment.

For example, the owner has shared a dashboard with entities for which the organization or group scope of the owner no longer applies. The owner loses the ability to manage the sharing of the dashboard for those entities.

To prevent the loss of previously defined sharing for the dashboard, do one of the following when the scope of a user changes:

- Assign dashboard ownership to a different user who has scope membership for the shared organization or group.
- Create a new, replacement dashboard with a new owner who has scope membership for the shared organization or group. Share the new dashboard with the same entities as the original dashboard.

  When creating a replacement dashboard, the following steps are optional for the original dashboard:

  - Leave the dashboard with the original owner, which can be shared with the new scope membership.
  - Delete the dashboard from the system.

Related information

Assigning roles and scopes (*User Management Guide*)

Create a dashboard

You can add a dashboard while in Manage Dashboards. The + New Dashboard icon takes you directly to My Dashboards where this function is available.

> After you access My Dashboards, you cannot return to Manage Dashboards by clicking the back arrow. Use the main menu and select **Manage Dashboards** from the **Organization Management** menu.

Procedure

1 Select **Manage Dashboards** from the **Organization Management** menu.

2 Click the **New Dashboard** icon.

Related topics

Sort dashboard information, page 49

Change the owner of a dashboard, page 50

Manage Dashboards page, page 58

Delete a dashboard

You can delete a dashboard when a dashboard is no longer required.

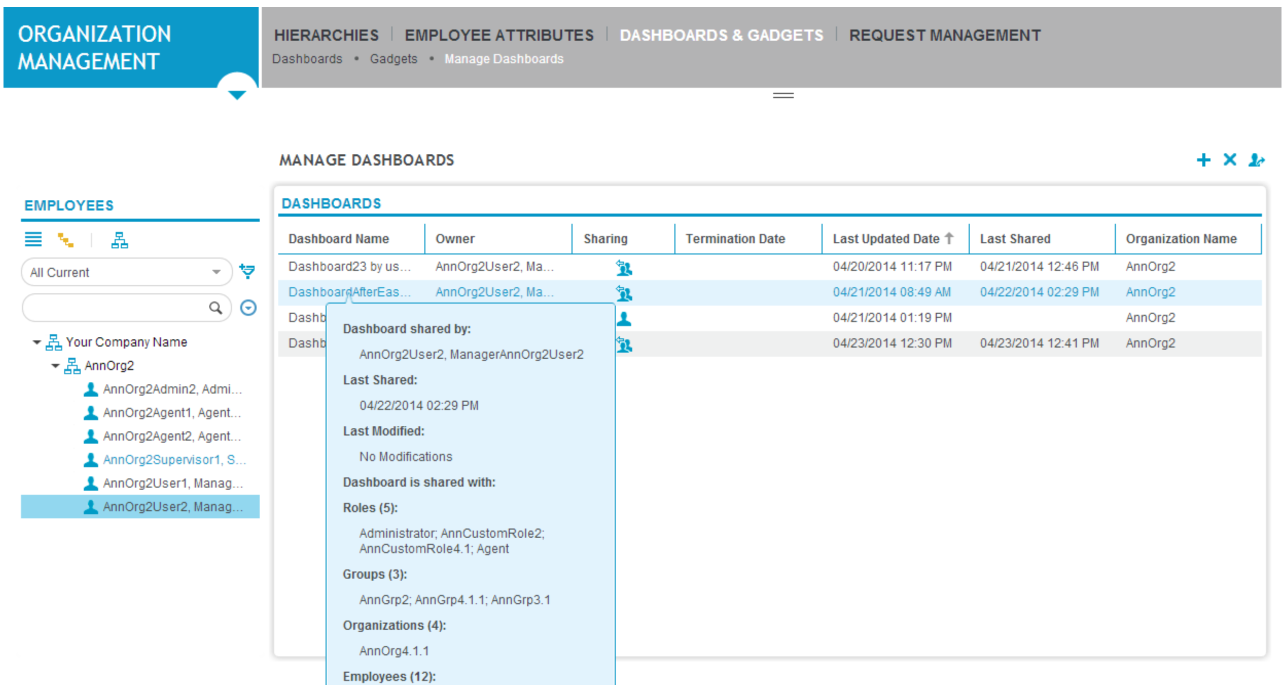
When you delete a dashboard, all shared instances of the dashboard are also deleted.

Validate your view scope before deleting

To validate your view scope of shared entities, select the dashboard, click the Information icon, and review the section, **Dashboard is shared with**.

If the number in the parentheses for the roles, groups, organizations, or employees does not match the count of actual names provided, it means that the dashboard is shared with other entities that you do not have view scope to. Deleting the dashboard removes the dashboard from those entities too.

Example: Roles (5) contain 3 entities outside your scope (only 2 roles listed)



After you delete a dashboard, validate the dashboard information to ensure that there are no items missing from your view scope.

To optimize application performance, you can delete up to 25 dashboards at a time.

Procedure

1 From the **Organization Management** menu, select **Manage Dashboards** under **Dashboards & Gadgets**.

2 Search for and select the dashboard that you want to delete.

3 Click the Delete Dashboard icon.

You can select several dashboards to delete simultaneously.

To delete dashboards that appear sequentially in the list, select the first dashboard in the range, hold the **Shift** key, and select the last dashboard in the range. All dashboards in between are also selected.

To delete individual dashboards that are *not* in a range, hold the **Ctrl** key and select the individual dashboards you want to delete. Only those dashboards are selected.

4 At the confirmation message, select **Yes** to delete the dashboard(s).

Related topics

Sort dashboard information, page 49

Change the owner of a dashboard, page 50

Deleting a dashboard that includes report portlets, page 57

Manage Dashboards page, page 58

Deleting a dashboard that includes report portlets

In certain circumstances, deleting a dashboard that includes SSRS portlets can cause the system to "hang."

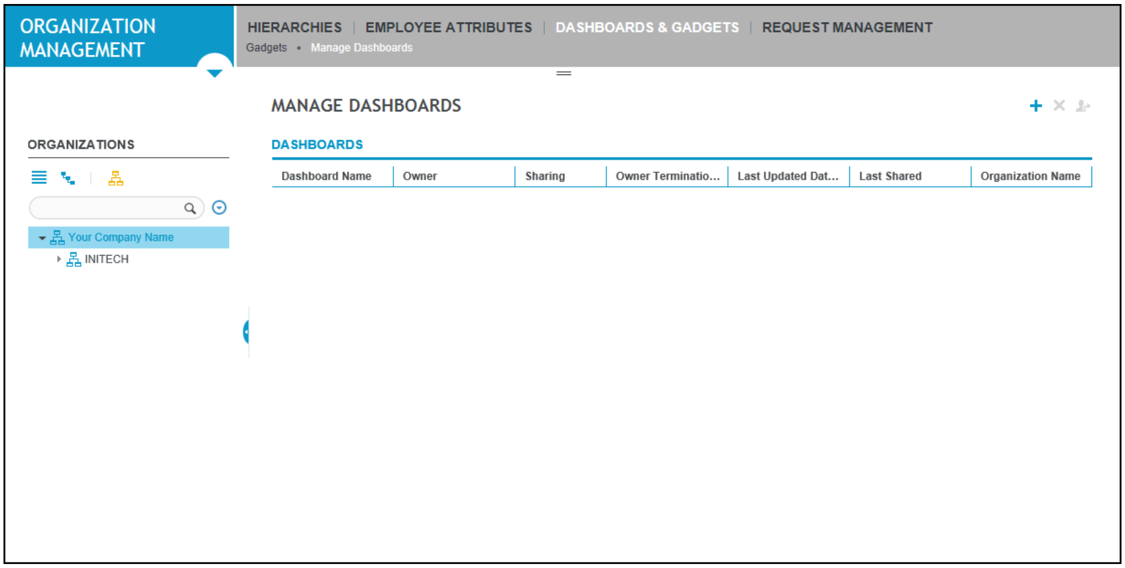
When the ownership of a dashboard that includes SSRS portlets is changed, the new owner needs to access the dashboard and reconfigure it. Reconfiguring any included SSRS portlets transfers the ownership of properties (such as the employee filter), to the new dashboard owner. Once the new dashboard owner becomes owner of the requests in the SSRS portlets, the dashboard can successfully be deleted.

Manage Dashboards page

Use this page to view dashboard lists and their owners, change dashboard ownership, and delete dashboards.

The page has two sections:

- On the left is the Selection pane.
- On the right is the Dashboard pane.



Related topics

Manage Dashboards, page 44

View dashboards, page 47

Dashboards pane, page 59

Dashboards pane

The Dashboards pane displays dashboard, owner, and organization information related to each dashboard owned by the selected employee or organization.

How it works

When you select an employee or organization on the left pane (Employees pane or Organizations pane), the resulting information appears on the right in the Dashboards pane.

Related topics

Sort dashboard information, page 49

Change the owner of a dashboard, page 50

Dashboard column descriptions

Column	Definition
Dashboard Name	Name of dashboard.
Owner	Name of the owner of the dashboard.
Sharing	• The dashboard is private (not shared).
	• The dashboard is shared.
	• The dashboard is private and no longer owned.
	• The dashboard is shared and no longer owned.
Owner Termination Date	Date that the owner left the job position if applicable.
Last Updated Date	Date that the dashboard was last updated. By default, the workspace is sorted by this column in ascending order.
Last Shared	Date that the dashboard was last shared.
Organization Name	Name of the owner organization that the dashboard was created for.

Related topics

Quick lookup information, page 60

Manage Dashboard page actions, page 60

Manage Dashboard page navigation keys, page 62

[Action icons], page 62
[Search view icons], page 63

Quick lookup information

When you place your cursor over a dashboard name, information appears.

Column	Definition
Last shared: (when applicable)	Date that the dashboard was last shared.
Last modified:	Date when the dashboard was last modified by the user.
Dashboard is shared with: (when applicable)	List of the entities with whom the dashboard has been shared and that you have view scope to. If more than five entities exist for a category, click the Share Dashboard link to see all entities.

Related topics

Dashboard column descriptions, page 59
Manage Dashboard page actions, page 60
Manage Dashboard page navigation keys, page 62
Action icons, page 62
Search view icons, page 63

Manage Dashboard page actions

On the Dashboards pane, you can perform the following actions:

- **Choose columns to display in the workspace:** In the column heading, click the arrow, select **Columns.** To show a column, click the name. To hide a column, clear the selection.
- **Rearrange columns:** Select, drag, and drop column names to the right or left of other column names to rearrange the column order.
- **Sort rows:** Sort the rows by clicking the arrow in the column heading by which you want to sort and selecting either **Sort Ascending** or **Sort Descending**.

Related topics

Dashboard column descriptions, page 59
Quick lookup information, page 60
Manage Dashboard page navigation keys, page 62

Manage Dashboard page navigation keys

To move your cursor to the top or bottom of the workspace while either keeping or clearing your current dashboard selections, use these navigation keys.

Column	Definition
Home	Selects the first row
End	Selects the last row
Ctrl + Home	Moves cursor to the first row while keeping your current selections highlighted
Ctrl + End	Moves cursor to the last row while keeping your current selections highlighted

Related topics

Dashboard column descriptions, page 59
Quick lookup information, page 60
Manage Dashboard page actions, page 60
Action icons, page 62
Search view icons, page 63

Action icons

To perform dashboard management tasks, use these icons.

Item Name	Description
+ New Dashboard	Takes you to My Dashboards to add a dashboard
✕ Delete Dashboard	Delete a dashboard
Change Owner	Change ownership of the dashboard from one employee to another

Related topics

Dashboard column descriptions, page 59
Quick lookup information, page 60
Manage Dashboard page actions, page 60
Manage Dashboard page navigation keys, page 62
Search view icons, page 63

Search view icons

To search for the dashboards you want to manage, use these icons.

Item Name	Description
Employees	Displays a list of all employees that you have scope to view: Only those employees who belong to the organization that the administrator has scope to are displayed.
Employees by Organization	Displays a hierarchy of organizations and employees that you have scope to view. Only those employees who belong to the organization that the administrator has scope to are displayed.
Employees by Group	Displays a hierarchy of Groups and employees that you have scope to view. Only those employees who belong to the Groups that the administrator has scope to are displayed.
Organizations	Displays a list of all organizations that you have scope to view
Create New Filter	Create a search filter to search quickly using frequently used search parameters

Related topics

Dashboard column descriptions, page 59
Quick lookup information, page 60
Manage Dashboard page actions, page 60
Manage Dashboard page navigation keys, page 62
Action icons, page 62