

Transcript: Dashboard Management

Introduction

With the dashboard feature, privileged users can oversee representatives of a lower role, both monitoring their desktops as well as superintending their support sessions. This functionality provides administrative oversight to help manage support staff.

Setting Up Team Roles

From your **/login** interface, go to the **Configuration** tab and then the **Support Teams** page. Click **Add New Team**, and then create a name for this team.

When adding users to this team, note that there are three separate roles. A team manager has the highest role and can supervise both team leads and team members of this same team. Next are team leads, who can supervise team members. Finally come team members, who have no privileges linked with their role.

Dashboard Settings

Once you have added your team, set how the dashboard feature should operate. If the monitoring option is set to **Entire Screen**, a team manager or team lead can view the entire desktop of a logged-in teammate of a lower role. If **Only Representative Console** is selected, nothing but the representative console will be visible, with the rest of the remote screen view blacked out. If monitoring is disabled, team managers and team leads will be entirely unable to view team members' screens.

If monitoring is fully or partially enabled, check **Enable Monitor Indicator** to display an icon on the remote representative's screen when his screen is being viewed. If this box is unchecked, the remote representative will not receive any notification when he is being monitored.

Enable Session Transfer and Take Over permits a team manager or lead to join and become the primary representative in a session belonging to a teammate of a lower role. Alternatively, the manager or lead could transfer that session to another representative or team.

Representative Console

If you are a team manager or team lead of one or more support teams, you will see the dashboard tab in the main interface of your representative console. Double-click a team name to view all logged-in team members of a lower role and any sessions they may be running. You can also search for a specific representative or session based on any of the columned information.

To view a team member's screen, select the representative and then click the **Monitor** button. This will open a new tab displaying the representative's computer. To gain control of the representative's mouse and keyboard, click the mouse button. Because we checked the **Enable Monitor Indicator** box in the **/login** interface, the representative will see an icon in the corner of his screen. If this option were disabled, the representative would receive no indication that his screen is being monitored.

To take ownership of a session, select the session and then click the **Take Over** button. To transfer a team member's session to another representative or team, select the session, click the **Transfer** button, and then select a destination for the session. In both cases, the original representative will remain in the session as a participant, though he will no longer be the primary representative.