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Genesys Pulse Help

Working with Widgets

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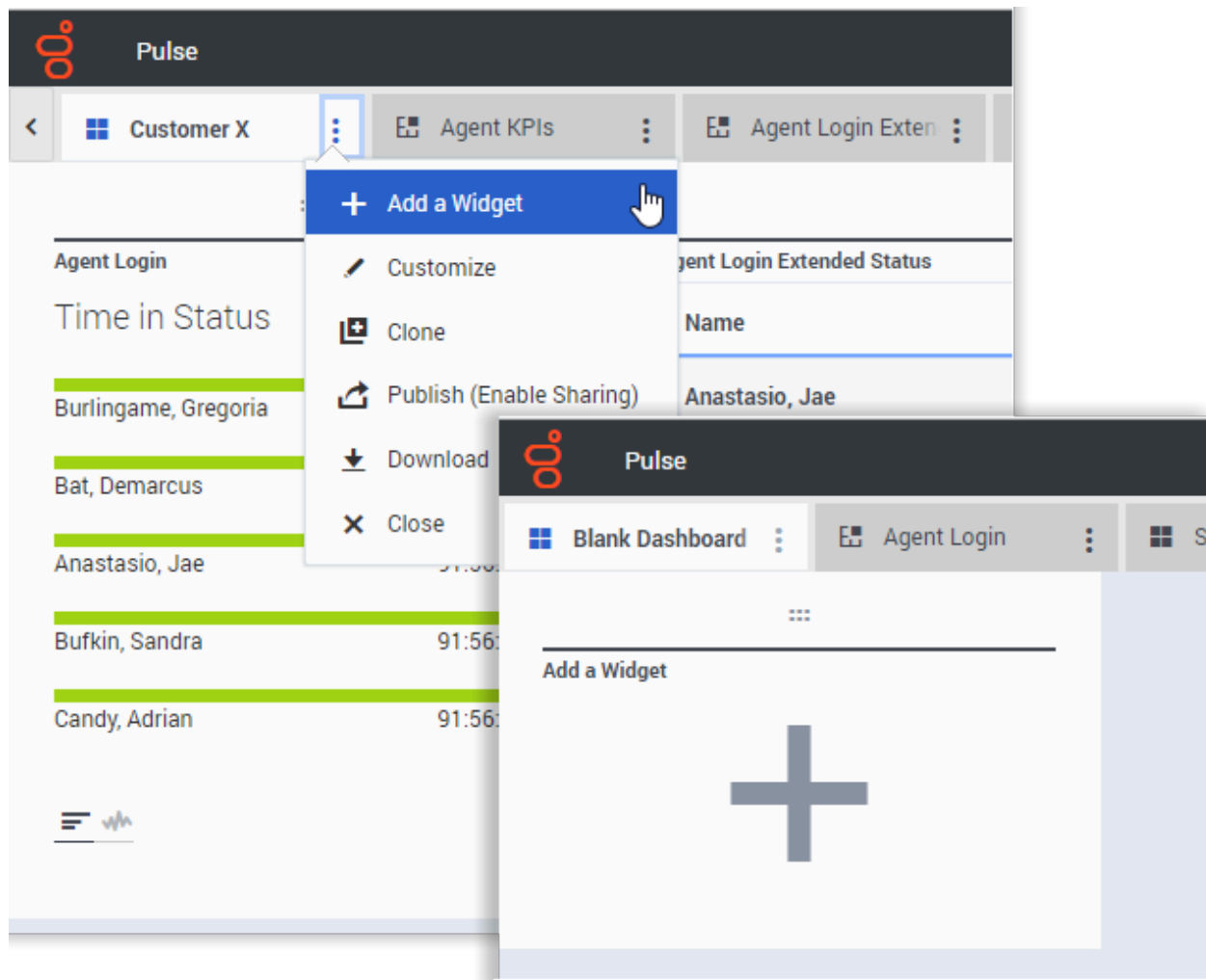
Working with Widgets

It's easy to add a new report widget to your Genesys Pulse dashboard or wallboard. Genesys Pulse provides a basic set of predefined report templates, complete with statistics that are typical for reporting activities handled by Genesys solutions. Any users with the appropriate privileges can create or modify widgets and report templates.

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Add Reports



There are two ways you can add a report to your dashboard or wallboard:

- Click the more icon in the right corner and click **Add a Widget**.
- On empty dashboards and wallboards, click **Add a Widget**.

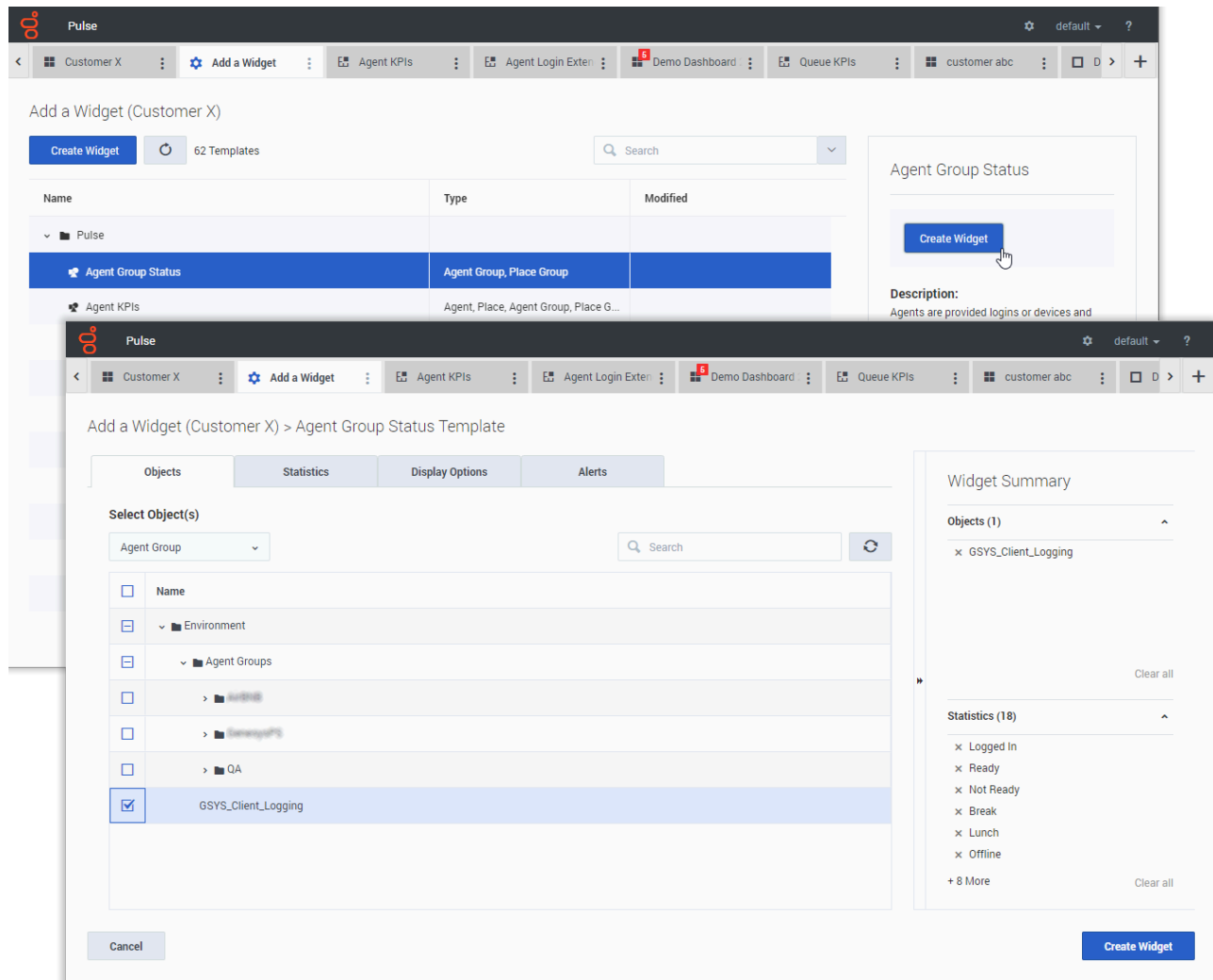
Genesys Pulse opens a report builder to guide you.

Video: Add a widget to a wallboard or dashboard

[Link to video](#)

This video describes how to add a widget to a wallboard or dashboard.

Build a Report



Genesys Pulse guides you through the process of creating or changing report widgets. Click the **standard report template** you want to use and then click **Create Widget**.

Select the **Objects** and **Statistics** that you want to see in your report.

Your report widget must have:

- One or more objects to measure. Your widgets must contain fewer than 100 objects.
- Add at least one non-string statistic.
- One widget type with specific display options.

Click the **Display Options** tab to define how you want to display your report.

Display Options

The screenshot shows the 'Add a Widget' configuration page in Genesys Pulse. The breadcrumb is 'Add a Widget (Customer X) > Agent Group Status Template'. The 'Display Options' tab is selected. The configuration includes:

- Widget Title:** 'Agent Group Status' (with a 'Show Title in Widget' checkbox checked).
- Widget Type:** 'List Widget' (with icons for list, pie, bar, gauge, and map).
- Size:** A 2x2 grid of size selection boxes.
- Headline Type:** 'Statistics' (with an 'Objects' tab also visible).
- Headline Statistic:** 'Logged In' (selected from a dropdown).
- Sort:** 'Low to high' (selected from a dropdown).
- Widget refresh rate:** '60 seconds' (selected from a dropdown).

A preview window titled 'Preview in Presentation Mode (live data not shown here)' displays the widget's output as a table:

Agent Group Status	
Logged In	
Portland Agents	7
CPM NonTrip - French	19
CPM Trip - German	36
CPM Trip - English	41
Team Suzanne Ogawa	48

You need to define the default display settings for your widget. Users can change these options on their own dashboard.

- Provide a name for report title.
- Select from the available **Widget Types** to display.
- Select the Widget refresh rate.
- Select options associated with the visualization (for example, size).
- Optional: For templates configured to use changes-based statistics (CurrentStatus and ExtendedCurrentStatus), set **enable quick updates**. See **Deploying RabbitMQ for Quick Widget**

Updates.

Important

Confirm your environment can handle the number of widgets and refresh rate you plan to use. A shorter refresh rate increases demands on the CPU, memory, disk, and network.

Alerts

The screenshot shows the 'Add a Widget (Demo Dashboard) > Agent Login Template' configuration page in the Genesys Pulse interface. The page has a top navigation bar with 'Pulse' and 'Advisors' tabs, and a dashboard menu with 'Demo Dashboard', 'Add a Widget', 'Agent KPIs Ran...', 'UX Testing', and 'Blank Dashboard'. The main content area is divided into four tabs: 'Objects', 'Statistics', 'Display Options', and 'Alerts'. The 'Alerts' tab is active, showing 'Alerts for Statistic (1)' and 'Advanced Alerts (1)'. The 'Alerts for Statistic (1)' section includes a table with three alert conditions: 'Time in Status' (Lower is better, green checkmark, 'if equal or greater than...', value 900), 'if equal or smaller than...' (yellow warning triangle, value 900), and 'if equal or smaller than...' (red exclamation mark, value 600). Below this is a 'Add Alerts for Statistic' dropdown. The 'Advanced Alerts (1)' section shows a single alert condition with a 'Builder' toggle, 'or' logic, and two conditions: 'Login Time' (Equal or smaller than, 560) and 'Continuous Login Time' (Greater than, 1200). The 'Actions' section shows 'Conditions must be true for 10 seconds', 'Send Email' action, 'Login Alert' to 'john.smith@example.com'. At the bottom are 'Cancel' and 'Create Widget' buttons.

Pulse Advisors demo ?

Demo Dashboard Add a Widget Agent KPIs Ran... UX Testing Blank Dashboard +

Add a Widget (Demo Dashboard) > Agent Login Template

Objects Statistics Display Options Alerts

Alerts for Statistic (1)

Time in Status	<input type="checkbox"/> Lower is better	<input checked="" type="checkbox"/> if equal or greater than...	<input type="checkbox"/> if equal or smaller than...	<input type="checkbox"/> if equal or smaller than...	<input type="checkbox"/>
		900	900	600	

Add Alerts for Statistic

Advanced Alerts (1)

1 Conditions ☒ Builder ☒ or ☐ and

Login Time	Equal or smaller than	560	x	+
Continuous Login Time	Greater than	1200	x	+

Actions

Conditions must be true for 10 seconds

Send Email Login Alert to john.smith@example.com

Cancel Done

Cancel Create Widget



Starting with release 9.0.000, Alerts can be used to specify thresholds (red, orange, and green) for each numerical statistic (Time, Integer, Percentage, or Number format) in the **Alerts for Statistic**. Decimal values can be specified as threshold values for Number/Percentage statistics, and integer values for other statistics.

Warning

Only numerical non-formula-based statistics (Time, Integer, Percentage, or Number format) with the **Time-Based** or **Reset-Based** notification mode are available in the **Advanced Alerts**.

Specify the complex condition in the **Advanced Alerts** section when you need to use more than one statistic or send email notifications. The **Advanced Alerts** section has the following two modes:

- **Builder.** Simplifies building basic conditions.
- **Advanced.** Allows to build complex condition by assigning the boolean, number or string value to the Result variable using any valid JavaScript expressions.

The **Advanced Alerts** section might be unavailable in certain Genesys Pulse configurations. See [Advanced Alerting Capabilities](#) for more information.

Tip

- **Advanced Alerts** do not affect the widget view, only email notifications are sent.
- Email addresses and subjects that you configure in the **Advanced Alerts** section are not preserved when you share or export the dashboard that contains the widget.

Important

Advanced Alerts are not supported for Widgets with the **By Group** object selection for the following object types:

- Queue
- Route Point

- Campaign Calling List
- Campaign Group

Only Widgets with the **By Group** object selection of types **Agent** and **Place** are supported.

Select Collectors

Add a Widget (Blank Dashboard) > Chat Service Level Performance Template

The screenshot displays the configuration interface for a widget. On the left, under 'Select Statistic(s)', a list of statistics is shown with checkboxes: Service Level, Requested, Answered, Abandoned, Requested (15min), Answered (15min), Abandoned (15min), Wait Time, Service Level (10sec), Service Level (30sec), Service Level (60sec), and Answered (10sec). The 'Service Level' statistic is selected. To the right of this list, details for the selected statistic are shown: Display Name (Service Level), Description (The ratio of chats accepted to chats requested.), Alias (Service_Level), Notification Mode (Time-Based), Notification Frequency (second) (60), Display Format (Percent), and Group by Columns (PageTitle, Referrer). On the far right, a 'Collectors Setup' dialog is open. It has a toggle for 'Auto' and two sections for Site 1 and Site 2. Each section has a dropdown menu for selecting a collector. For Site 1, 'collector1' is selected. For Site 2, 'collector2' is selected. Below the Site 2 dropdown, a list of available collectors is shown: collector2, collector3, and collector4.

Starting with release 8.5.108, Genesys Pulse allows users to assign specific Pulse Collectors for a particular widget. To enable this functionality, you need to set the **enable_manual_collector_binding** option to true in Genesys Pulse configuration and assign the role with the Pulse Manually Bind Collectors privilege to selected users.

On the screenshot you can see Site 1 and Site 2 as it is a multisite configuration. For a singlesite configuration there will be only one site.

What do I do next?

You might want to learn more about:

- [Popular real-time reports](#)
- [Editing standard report templates](#)
- [Widget Types](#)
- [Displaying external content using an IFRAME widget](#)
- [Statistic properties](#)
- [Report formulas](#)