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Genesys Pulse Help

[Manage Report Templates](#)

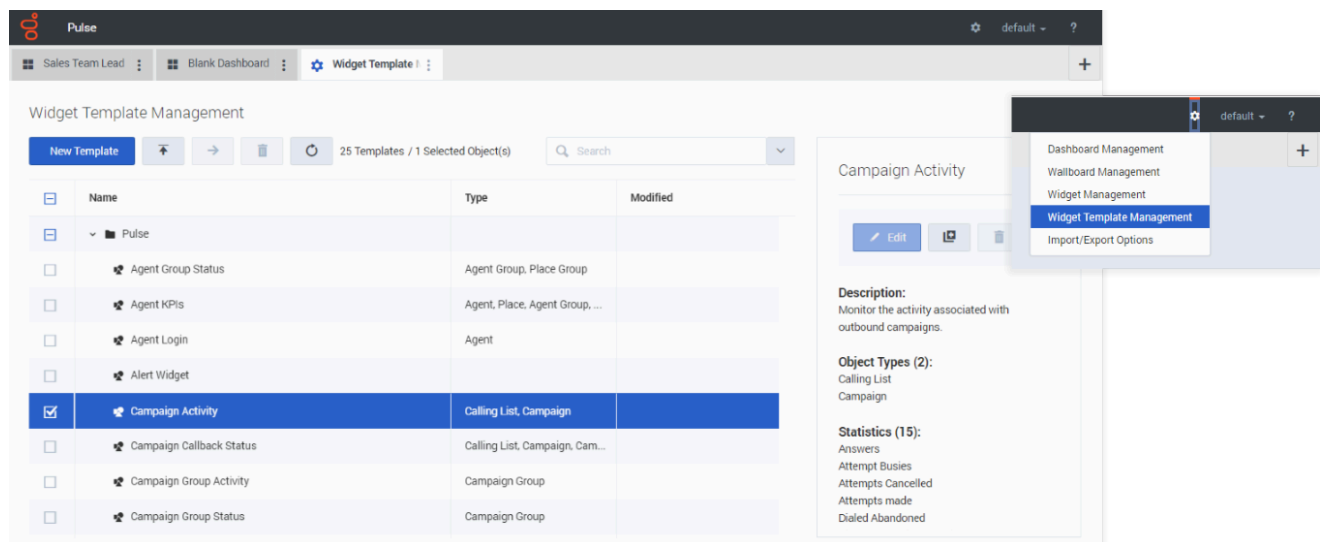
Manage Report Templates

You can create and use templates to simplify widget creation. Any users with the appropriate privileges can create or modify the templates. You can then create various widgets using your report template.

Contents

- [1 Manage Report Templates](#)
 - [1.1 Settings](#)
 - [1.2 Hide templates from other users](#)
 - [1.3 Select statistics](#)
 - [1.4 Select Collectors](#)
 - [1.5 Display options](#)
 - [1.6 Alerts](#)
 - [1.7 Propagate template changes](#)
 - [1.8 What do I do next?](#)

Settings



To manage shared widget templates, select **Manage**.

The easiest way to create a template is to clone and edit an existing widget template within Genesys Pulse. Genesys Pulse provides a basic set of predefined templates, complete with statistics that are typical for reporting activities handled by Genesys solutions. Any users with the appropriate privileges can create or modify the available templates.

To create a widget template, you must add or configure:

- One or more object types.
- One or more statistics (at least one non-string statistic).
- One widget type with specific options to display the information.

You can hide or unhide the statistics and display options when you create or edit widgets.

Tip

You can clone the Text Widget template to create your own presets for further use.

Important

You can edit only user-created templates, unless the **editable_templates** option in the **[pulse]** section of the Genesys Pulse Application object is set to **true**. Genesys

Pulse overwrites any changes made to predefined templates with the original predefined templates every time Genesys Pulse starts, unless you set the **[pulse]/install_templates** option to false.

Hide templates from other users

The screenshot shows the 'Save Widget Template' dialog box and the 'Custom report' template details. The dialog box has fields for 'Widget Template Name' (Custom report) and 'Description' (Optional). It also has a checkbox 'Save to Genesys Configuration Server' which is checked. Below these fields is a table showing the saved location and a 'Save' button.

Widget Template Name	Modified
> Environment	

Saved Location : /Environment/Scripts/Custom report

Buttons: Cancel, Save

The 'Custom report' template details show the name 'Custom report', a modification date 'Modified March 7, 2019 by default', and buttons for 'Edit', 'Copy', and 'Delete'. It also lists 'Access Groups' (Permissions are set via GAX Configuration Manager), 'Object Types (2)' (Agent, Agent Group), and 'Statistics (1)' (Statistic1).

When you create your widget templates you can choose to prevent others from seeing and using your templates.

Important

To prevent other users from using your widget templates, you must have the GAX permissions: Access Configmanager; Read Scripts; and Create/Full Control of Scripts.

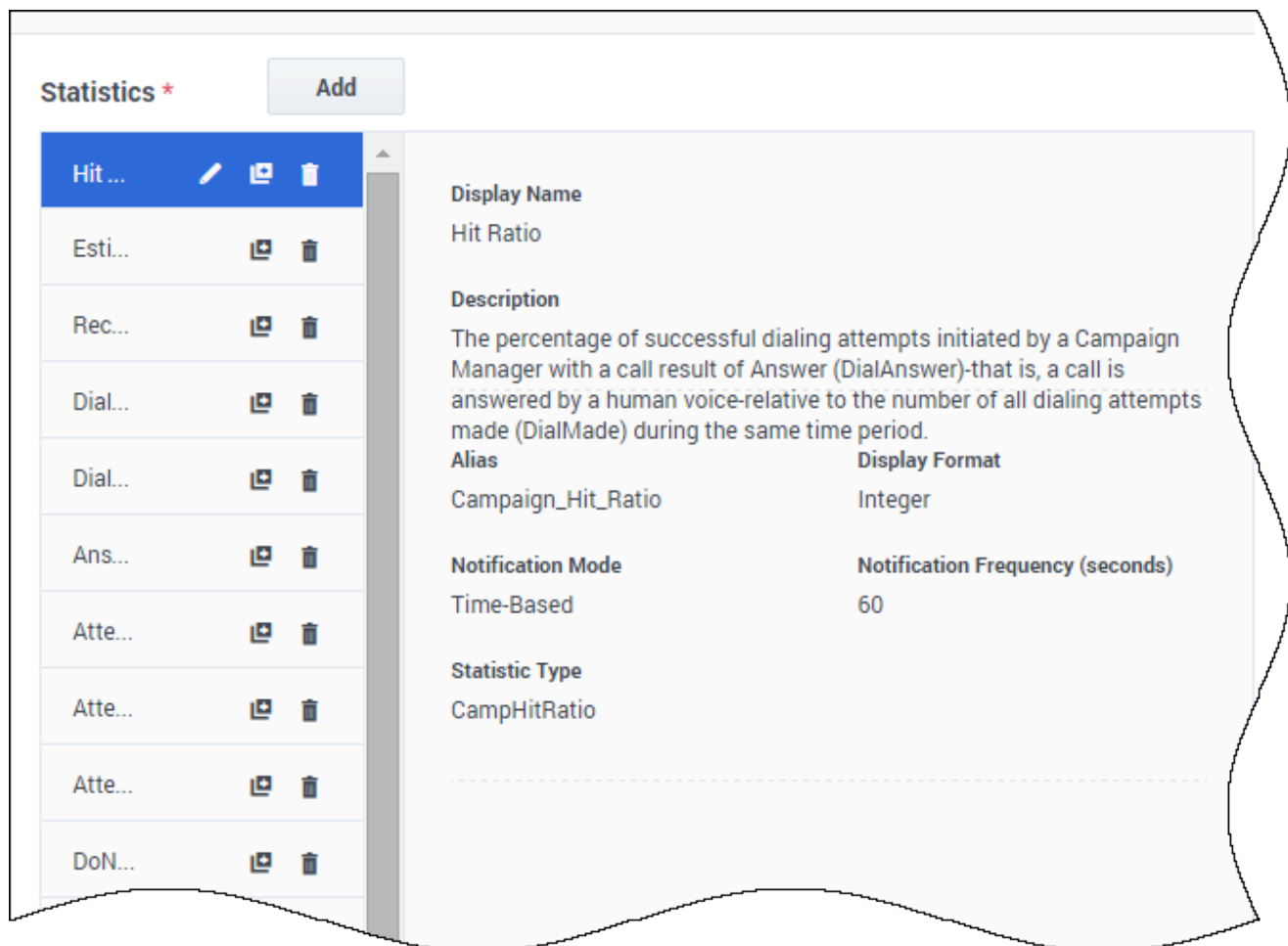
When you save your templates, choose the option **Save to Genesys Configuration Server**.

Then, from the template management, click **Link to Configuration Manager** on the right under

Access Groups.

From here, you can define what permissions people have for your templates.

Select statistics



Within the Genesys Pulse statistic definition, you can specify statistic parameters regardless of whether they are available on any Stat Server in your environment. This means you must also update the Stat Server options to ensure that the Stat Server connected to Genesys Pulse contains the corresponding options (for example, statistic types and filters). You can show or hide statistics as needed.

You must add at least one non-string statistic.

Choose the statistics and **properties** to include in your template. See [report templates and statistics details](#).

Genesys Pulse displays statistic details when you select a statistic. This information includes the

components of the StatType definition and other parameters that form the request that Genesys Pulse sends to Stat Server. You can modify a statistic definition within Genesys Pulse when you create, clone, or edit a template.

Select Collectors

Widget Template Management > Agent KPIs Random Template

The screenshot displays the 'Widget Template Management > Agent KPIs Random Template' interface. It features two tabs: 'Objects/Statistics' and 'Display Options'. The 'Objects/Statistics' tab is active, showing a list of 'Object Type' on the left and a table of 'Statistics' in the center. The 'Object Type' list includes 'Select All', 'Agent', 'Agent Group', 'Place', 'Place Group', 'DN', and 'DN/Queue Group'. The 'Statistics' table lists various time-based metrics like 'Lunch Time', 'Offline Time', 'Ringing Time', 'Dialing Time', 'Handle Time', 'In Time', 'Out Time', and 'Hold Time'. A detailed view of the 'Lunch Time' statistic is shown on the right, including its 'Display Name', 'Description', 'Alias', 'Notification Mode', and 'Statistic Type'. A 'Collectors Setup' dialog is open, showing a configuration for 'Site 1' and 'Site 2'. 'Site 1' is set to 'collector1', and 'Site 2' is set to 'collector3' from a dropdown menu. The dialog also includes an 'Auto' toggle, a 'Time' field set to 60, and a 'Filter' field.

Starting with release 8.5.108, Genesys Pulse allows users to assign specific Genesys Pulse Collectors to handle all widgets based on this template. To enable this functionality, you need to set the **enable_manual_collector_binding** option to true in the **[pulse]** section of the Genesys Pulse Application object 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.

Display options

Widget Template Management > Campaign Activity Custom Template

Objects/Statistics | **Display Options** | Alerts

Template Name
Campaign Activity Custom

Description
Monitor the activity associated with outbound campaigns.

Widget Type: List Widget

Size

Headline Statistic
Hit Ratio

Sort
Low to high

Widget refresh rate
60 seconds

Preview in Presentation Mode (live data not shown here)

Campaign Activity Custom

Hit Ratio

Object 1	60
Object 4	98
Object 3	345
Object 2	682
Object 0	940

Cancel Save

Define the display options of your report widget to validate your template. This is what users see, but they can then **change the options on their own dashboard** while they **create** or edit widgets.

- Name the report widget and provide title.
- Select the **Widget Type** to display.
- Select additional available options.

Note: The maximum value for the bar charts in List and KPI widgets is the maximum value of all the objects selected for the statistic in this widget or the maximum value of the alert configured for this

widget.

- 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.

Tip

The Line widget type is not available in the Template Wizard. You can choose this type when you create a widget with individually (not By Group) selected objects.

Alerts

The screenshot shows the Pulse interface for configuring alerts. The top navigation bar includes 'Pulse', 'Advisors', and a 'demo' dropdown. The main menu has options like 'Demo Dashboard', 'Add a Widget', 'Agent KPIs Ran...', 'UX Testing', 'Blank Dashboard', and 'Widget Templat...'. The current view is 'Widget Template Management > Agent Login Template'.

Under the 'Alerts' tab, there are two sections: 'Alerts for Statistic (1)' and 'Advanced Alerts (1)'.

Alerts for Statistic (1)

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

Below this table is a button 'Add Alerts for Statistic' with a dropdown arrow.

Advanced Alerts (1)

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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 username@example.com

Buttons: Cancel, Done, Save

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 not be available in certain Genesys Pulse configurations. See [Microservices](#) for more information.

Propagate template changes

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Save Widget Template "Custom report"

Select the widgets to update:

<input checked="" type="checkbox"/>	Widget Name	User
<input checked="" type="checkbox"/>	Custom report	default
<input checked="" type="checkbox"/>	Custom report	Shared Widget
<input checked="" type="checkbox"/>	Custom report	ezpulse2

☒ Overwrite Display Options and Alerts for selected widgets.

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 Based on the template changes, Genesys recommends you overwrite the Display Options for the selected widgets.

Cancel

Save and Propagate

Save Only

When editing is finished and you click **Save**, Genesys Pulse displays a list of all user widgets that use

the template. Genesys Pulse lists the titles and owners of the widgets.

- Select which widgets should be updated.
- If needed, Genesys Pulse provides the **Overwrite Display Options and Alerts** for selected widgets checkbox.
 - If you select the checkbox, Genesys Pulse updates the widget type, headline, all other display options in the widgets (except refresh rate) and configuration of Alerts for statistics, as well as the statistic definitions and allowed object types.
 - If you do not select the checkbox, Genesys Pulse updates only the statistic definitions and allowed object types.

Important

Changes in Advanced Alerts are not propagated.

What do I do next?

You might want to learn more about:

- [Widget Types](#)
- [Popular real-time reports](#)
- [Displaying external content using an IFRAME widget](#)
- [Statistic properties](#)
- [Report formulas](#)
- [Template function library](#)