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Deployment Guide

Setting Up Reporting Templates in Pulse

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Setting Up Reporting Templates in Pulse

Use the procedures below to make the Co-browse templates available from Pulse.

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Import Configuration Options for Stat Server

Before working with the templates, you must first import configuration options to the Stat Server application from the following files:

- `StatProfile_Pulse.cfg`—located in the directory <Genesys Co-browse Reporting Templates installation folder>/Pulse. This file is used for the Stat Server application object. It contains the necessary configuration options, statistics, and filters.
- `pulse_statistics.cfg`—located in the directory <Pulse installation folder>/scripts. This file is used for the Pulse application object.

Important

The `pulse_statistics.cfg` file is located in the Pulse installation directory and not in the Co-browse package.

Start of procedure

1. Open Genesys Administrator and navigate to PROVISIONING > Environment > Applications.
2. Select your Stat Server Application and click Edit.
3. In the Options tab, click Import. The Import Options dialog opens.
4. Click Yes. The Click 'Add' and choose a file with configuration options to import dialog opens.
5. Click Add. The Choose File to Upload window opens.
6. Choose the `StatProfile_Pulse.cfg` file from the <Reporting Templates Root Folder>/Pulse directory and click Open. The configuration options for the Co-browse reporting templates are imported.
7. Click Add again. Choose the `pulse_statistics.cfg` file from the <Pulse Installation Folder>/scripts directory and click Open.
8. Click Save & Close.
9. Mandatory: Restart your Stat Server Application.

End of procedure

Next Steps

See [Tune Pulse DB Tool to Allow Template Importing](#).

Tune Pulse DB Tool to Allow Template Importing

Pre-requisite: You have completed [Import Configuration Options for Stat Server](#)

Important

The dbtool folder is located in the Pulse installation directory and not in the Co-browse package.

Start of procedure

1. Open the folder <Pulse installation folder>/dbtool.
2. Save the file sample_dbtool.cfg with the name dbtool.cfg.
3. Now update the file dbtool.cfg. Specify the #<DB type> section. For example:

MSSQL Example

```
# MSSQL
db.type=mssql
db.url=jdbc:jtds:sqlserver://demosrv:1433/pulse
db.user=sa
db.password=<password>
```

POSTGRES Example

```
# POSTGRES
db.type=postgres
db.url=jdbc:postgresql://stage-rds-gax-1.genhtcc.com:5432/pulse851_21_41_db
db.user=pulse851_21_41_db
db.password=<password>
```

4. Save the dbtool.cfg file. Verify that the DB Tool is working with the command dbtool.bat -l. If the DB Tool is correctly configured, your console will show a list of current Layouts.

End of procedure

Next Steps

See [Import Pulse Templates](#).

Import Pulse Templates

Pre-requisites: You have completed [Import Configuration Options for Stat Server](#) and [Tune Pulse DB Tool to Allow Template Importing](#)

Important

The `dbtool` folder is located in the Pulse installation directory and not in the Co-browse package.

Start of procedure

1. Open the folder `<Pulse installation folder>/dbtool` and open the file `dbtool.cfg` for editing.
2. Set `layout.override.layout_id=1` and save the file.
3. From your console, run the command:

- **Pulse 8.5.102:**

- Windows: `dbtool -i <path to template file>`
- Linux: `./dbtool.sh -i <path to template file>`

For example, `dbtool -i C:\templates\21_template.txt`.

- **Pulse 8.5.103+:**

- Windows: `dbtool -ti <path to template file>`
- Linux: `./dbtool.sh -ti <path to template file>`

For example, `dbtool -ti C:\templates\21_template.txt`.

If the import is successful the console displays something similar to the following:

```
Advanced Data Management Utility for Pulse
ver. 8.5.010.04 (2014-12-02), wbrt2.proto ver. 2014.10.29.00
Copyright (c) Genesys Telecommunications Laboratories, 2013-2014. All rights reserved.
Using configuration file 'dbtool.cfg'.
Inserting layouts...
Layout: (114) 'CurrentInteractions'
Inserted 1 record(s).
```

In the example above, Layout: (114) 'CurrentInteractions' has the following meaning:

- 114 is the template db id, the `LAYOUT_KEY` from the `WBRT_LAYOUT` table of the Pulse database.
- `CurrentInteractions` is the template name.

End of procedure

Next Steps

See [Working With Pulse](#) and [Pulse Templates Overview](#)

Working With Pulse

After you have imported the Co-browse templates into Pulse, you can use the templates to create new Pulse widgets.

For more information on creating a widget see [Pulse User Help—Widgets](#).