**GENESYS**™

# GRDT Help

Creating and Editing Templates

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# Creating and Editing Templates

## Contents

Rule Templates are created as Projects in GRDT. The **New Project Wizard** is used to create new templates.

## New Project Wizard

The **New Project Wizard** guides you through the steps to create a new Rule Template Project. This wizard can be accessed in the following ways:

- Select **File > New > Rule Template Project** from the menu bar.
- Right-click within the Project Explorer and select **New > Project** from the context-sensitive menu.

The wizard leads you through the following steps:

1. The first screen prompts you to select which wizard you need that is, which type of project you wish to create. If it is not already selected, navigate to **Genesys Rules System > Rule Template Project** and click **Next**.

2. Enter a name for the new template project. Template names must be unique within a tenant. Either use the default location, or clear the check-box and select a new location. Click **Next**.

3. Verify the type of template you are creating in the drop-down list. The default template type is Stateless. To create an iWD template, select iWD. To create a template for Genesys Web Engagement, select type **CEP**.

> ## Important
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> CEP support requires the presence of GWE to function.

> ## Important
>
> The iCFD template type has been removed. The iWD template type is the only reserved template type. Any other new template types required can be created by using the **Configure Types** link (see step 4).

4. Click the **Configure Types** link to create new template types or maintain existing ones.

5. Use the **Enable event support** check box to indicate whether the template will support events. In templates that support events, the **Fact Model** editor can be used to create both facts and events.

6. Select the appropriate Tenant, and enter a description of the template.

7. Click **Finish**. The new template project will now appear in the Project Explorer.

## Editing and Configuring Rule Templates

Once it is created, the rule template appears in the Project Explorer. Expanding the template displays a list of components that can be configured. Double-click the component type in the Project Explorer to open the appropriate Editor and begin configuring components.

## Renaming Rule Templates

Renaming rule templates does not change the name within the repository. When you publish the renamed rule template, it will be added to the repository as a new template, and the template with the old name will still exist.

You can rename your template by right-clicking the template in the Project Explorer and selecting **Rename** from the context-sensitive menu, by selecting the template and navigating to **File > Rename**, or by selecting the **F2** key on your keyboard. Many features can be accessed in similar ways.

### Important

In release 8.1.2, duplicate template names are not allowed within tenants, but are allowed in different tenants. Creating such a duplicate name will rename the project, but the name as published in GRAT is set via **Project/Properties/Template** Properties**.**

## Copying Rule Templates

Existing rule templates can be copied to be used as a basis for a new template. Right-click the template in the Project Explorer, and select **Copy**. As with renaming, there are multiple ways to access the Copy functionality, such as the **Ctrl + C** keyboard shortcut, **Edit > Copy**, and so on.

## Deleting Rule Templates

Rule templates can be deleted using the GRS Server Explorer, provided that:

- The user has rule template delete permissions, and;
- The rule is not used in any rule package.