



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

# Genesys Engage cloud Reporting Guide

How can I use templates to simplify widget creation?

# How can I use templates to simplify widget creation?

## Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to [Reporting in Genesys Engage cloud](#).

Did you know that you can create and use Genesys Pulse templates to simplify widget creation? Any users with the appropriate privileges can create or modify templates. You can then create various widgets using your template.

The easiest way to create a template is to clone and edit an existing 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.

## [+] List of Genesys-provided templates

Template	Description
Agent Group Status	Presents the current number of agents in various states to help supervisors monitor their available workforce to handle the current workload.
Agent KPIs	Presents reports with KPIs of agent group in a contact center.
Agent Login	Presents agent properties, login information, and specific call-related attributes (for example, ANI and DNIS).
Campaign Activity	Monitors the activity associated with outbound campaigns.
Campaign Callback Status	A report presenting information related to campaign initiated callbacks.
Campaign Group Activity	Monitor the activity associated with outbound Campaign Groups.
Campaign Group Status	Monitor the current state and durations associated with outbound campaign group activity.
Email Agent Activity	A report presenting agent or agent group activity as it relates to the processing of Email type

Template	Description
	contacts.
Email Queue Activity	A queue report presenting an overview of current or near real-time activity in the individual email queues.
eServices Agent Activity	Monitors agent group KPIs related to eServices (chat, email, SMS) media see if there are issues that you need to address.
eServices Queue KPIs	A queue report presenting an overview of current or near real-time activity for eServices channels.
IFRAME	Provides a template for creating a simple IFRAME widget.
IWD Agent Activity	A report presenting agent or agent group activity as it relates to the processing iWD work items type contacts.
IWD Queue Activity	A queue report presenting an overview of current or near real-time activity associated with the iWD queues.
Queue KPIs	Presents KPIs for group of queues but also queues in contact center to help supervisors monitor their service levels and determine if the contact center is meeting established operational targets.
Queue Overflow Reason	Presents reasons why calls were cleared from queues.

### Important

You can edit only user-created templates. Genesys Pulse overwrites any changes made to predefined templates with the original predefined templates every time Genesys Pulse starts, unless you set the `install_templates` configuration option in the `[pulse]` section of the GAX Application object to `false`.

#### Related Topics

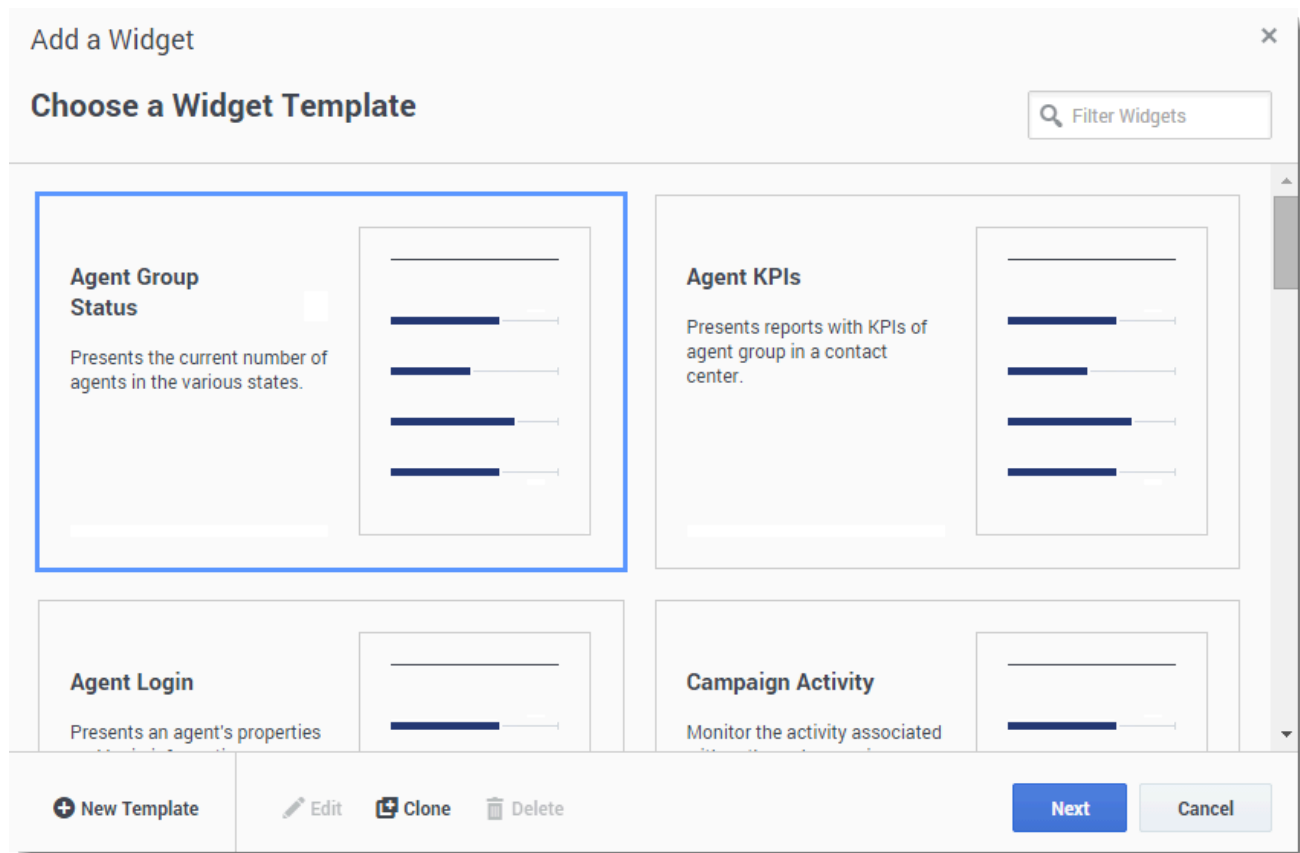
## Contents

- [1 How can I use templates to simplify widget creation?](#)
  - [1.1 How do I Add, Clone, or Edit a template?](#)
  - [1.2 What template details do I need?](#)
  - [1.3 How do I select statistics?](#)
  - [1.4 How do I configure the display options?](#)

How can I use templates to simplify widget creation?

---

How do I Add, Clone, or Edit a template?



The template wizard guides you through the process of creating, changing, and deleting templates. To open the template wizard, click **Add Widget** and select **New Template**. The **Choose a Widget** screen displays an alphabetical list of Genesys Pulse templates.

To create a Genesys Pulse template, you must add or configure:

- One or more object types.
- One or more statistics.
- One widget type with specific options to display the information.

How can I use templates to simplify widget creation?

---

What template details do I need?

The screenshot shows a 'Clone a Template' dialog box with a 'Details' tab. On the left, there is a 'Template Name' field containing 'Agent KPIs' and a 'Description' text area containing 'Presents reports with KPIs of agent group in a contact center'. On the right, under 'Allowed Object Types', there are two columns of checkboxes. The first column has 'Agent' and 'Place' checked, while the others are unchecked. The second column has 'Agent Group' and 'Place Group' checked, while the others are unchecked. At the bottom right are 'Next' and 'Cancel' buttons.

Allowed Object Types *	
<input checked="" type="checkbox"/> Agent	<input checked="" type="checkbox"/> Agent Group
<input type="checkbox"/> Calling List	<input type="checkbox"/> Campaign
<input type="checkbox"/> Campaign Calling List	<input type="checkbox"/> Campaign Group
<input type="checkbox"/> DN	<input type="checkbox"/> DN/Queue Group
<input checked="" type="checkbox"/> Place	<input checked="" type="checkbox"/> Place Group
<input type="checkbox"/> Queue	<input type="checkbox"/> Routing Point
<input type="checkbox"/> Routing Strategy	<input type="checkbox"/> Staging Area
<input type="checkbox"/> Switch	<input type="checkbox"/> Tenant
<input type="checkbox"/> Work Bin	

On the **Details** screen, you:

- Define the name of the new template
- Describe the scope of this template
- Select one or more object types from the selection based on what you might want to monitor.

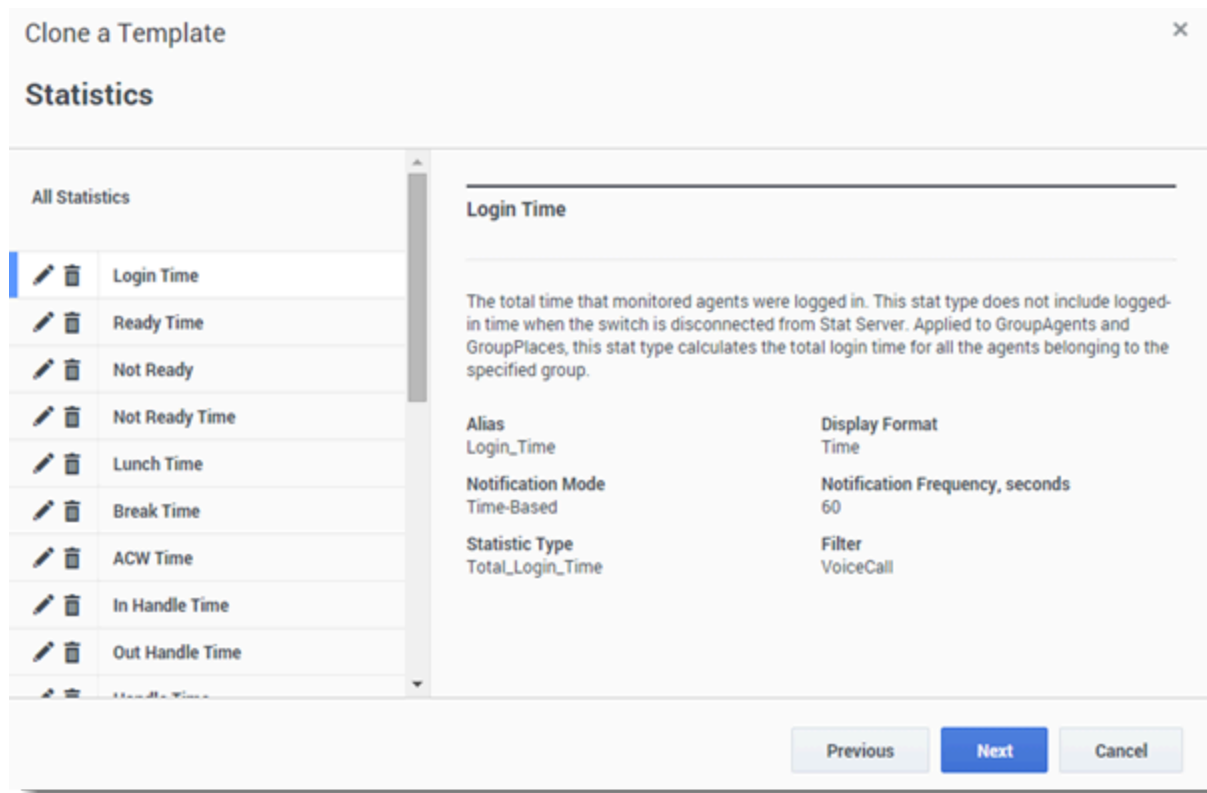
Genesys Pulse allows you to select objects that are compatible with your template. For example:

- The **Agent KPI** template includes the **Agent**, **Agent Group**, **Place**, and **Place Group** objects.
- The **Agent Group Status** template includes the **Agent Group** and **Place Group** objects.

How can I use templates to simplify widget creation?

---

How do I select statistics?



Within the Genesys Pulse statistic definition, you can specify statistic parameters regardless of whether or not they are available on any StatServer in your environment. This means you must also update the StatServer options to ensure that the StatServer connected to Genesys Pulse contain the corresponding options (for example, statistic types and filters).

You must add at least one non-string statistic.

Choose the statistics and properties to include in your template. Genesys Pulse statistics are described in detail in the [templates.xls](#) file.

Genesys Pulse displays statistic details when you select a statistic. This information includes the components of the stat type 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.

How can I use templates to simplify widget creation?

---

How do I configure the display options?

**Clone a Template**

**Display Options**

**Widget Options**

Widget Title \*  
Queue Distribution

Widget Type  
List Widget

Size  
☒ 1x2 ☐ 1x3 ☐ 1x4

Headline Type  
☒ Statistics ☐ Objects

Headline Statistic \*  
Calls Waiting

Sort  
Ascending

**Widget Preview**

Queue Distribution

Calls Waiting

VQ_Waiting_for_agent@SI...	914
Billing_Gold@SIP_Switch	609
VQ_CallCenter@SIP_Switch	473
SIP_VQ@SIP_Switch	336
Billing_Platinum@SIP_Switch	64

Previous Finish Cancel

The final step before validating your template is to define what should be the default display of your widget on the main dashboard. This setting is the one displayed to Genesys Pulse users, but they can then modify the widget options on their own dashboard.

1. Name the widget title
2. Select the **Widget Type** to display.  
**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 maximum value of the alert configured for this widget.
3. Select the Widget refresh rate.
4. Select options associated with the visualization (for example, thresholds and size).
5. If needed, select the statistics for alerts and define the alert values (from 1 to 3).