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# Genesys Knowledge Management User Guide

Defining an Access Role

5/7/2025

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# Defining an Access Role

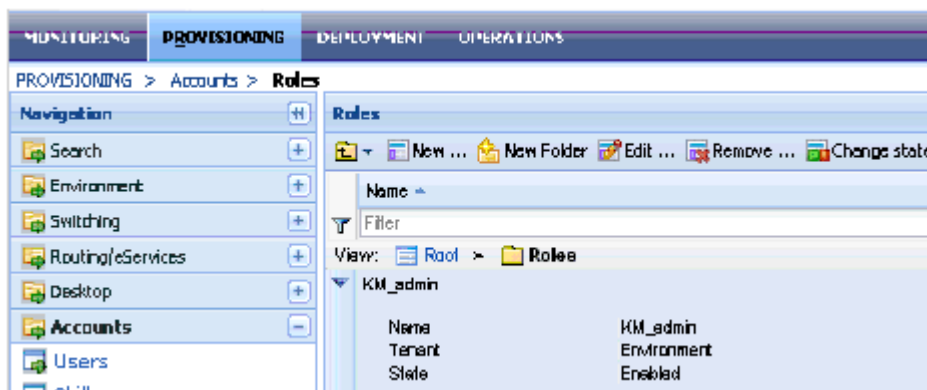
## Prerequisites

- The Knowledge Manager disable-rbac option has its default value false.
- Genesys Administrator is running.
- You have imported the Knowledge Manager metadata template into Knowledge Manager Application object.

## Important

For information on using Genesys Administrator, see the [Genesys Administrator Help](#).

1. In Genesys Administrator, navigate to PROVISIONING > Accounts > Roles, as shown in "Roles in Genesys Administrator." Be sure that the correct tenant shows in the drop-down list.



## Roles in Genesys Administrator

2. Click New. On the Configuration tab:
  - a. In the General section, enter a name, as shown in "Configuration: General."

The screenshot shows the 'New Role' configuration window with the 'General' tab selected. The window has a title bar 'Roles > New Role' and a toolbar with 'Cancel', 'Save and Close', 'Save', 'Save & New', and 'Reload'. Below the toolbar are three tabs: 'Configuration', 'Role Privileges', and 'Permissions'. The 'General' tab contains the following fields:

- Name:** Overseer
- Description:** (empty text box)
- State:** ☒ Enabled

### Configuration: General

- b. In the Members section, click Add for either Users or Access Groups, as shown in "Configuration: Members."

The screenshot shows the 'Members' section of the configuration window. It has a title bar 'Members' and a 'Users:' label. To the right of the label is a toolbar with 'Add', 'Edit', and 'Remove' buttons. Below the toolbar is a table with three columns: 'User Name', 'Agent', and 'Last Name'.

User Name	Agent	Last Name
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### Configuration: Members

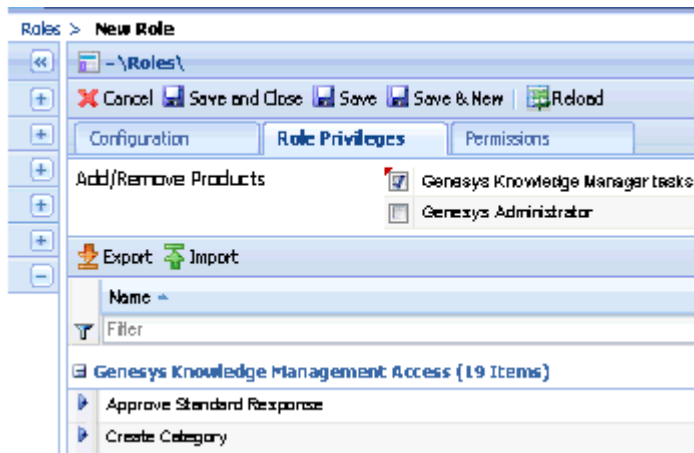
- c. In the resulting Browse window, select Users or Access Groups to add to the list of members. The figure "Browse for Users" shows the Browse window for Users.

The screenshot shows the 'Browse for Users' window. It has a title bar 'Browse' and a yellow instruction box that says 'Instructions: Choose the Users from the list below.' Below the instruction box is a 'Users' section with a toolbar containing 'New ...' and 'New Folder' buttons. Below the toolbar is a table with six columns: 'User Name', 'Agent', 'Last Name', 'First Name', 'Employee ID', and 'State'. Each column has a 'Filter' button below it. At the bottom of the window, there is a 'View' button and a list of items: 'MCR 801' and 'PERSONS'.

User Name	Agent	Last Name	First Name	Employee ID	State
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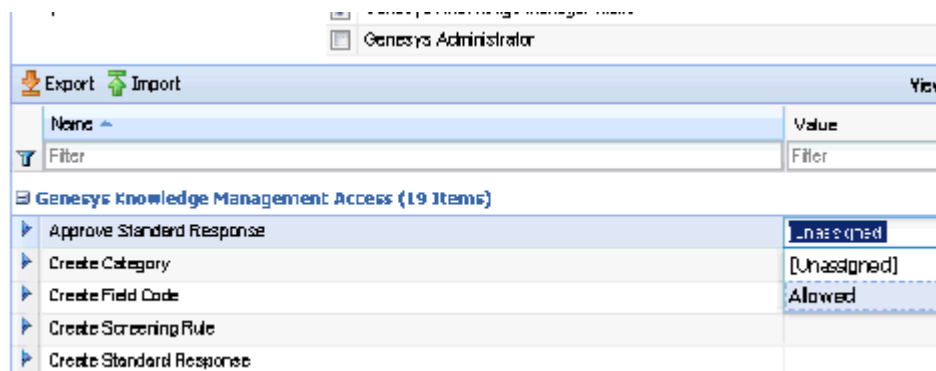
### Browse for Users

- On the Role Privileges tab, select the Genesys Knowledge Manager tasks box, as shown in "Knowledge Management Tasks." If this box does not appear, you must import the metadata template into your Knowledge Manager Application.



### Knowledge Management Tasks

- A list of tasks appears. To enable this new role to perform one of them, select the task and change its value to Allowed, as shown in "Assigning a Task."



### Assigning a Task

### Important

The value [Unassigned] means that this Role cannot perform this task. But if multiple Roles are assigned to the same User or Access Group, this setting is overridden if another Role sets this privilege as Allowed.

- On the Permissions tab, add Users or Access Groups, as described in [Genesys Administrator Help](#).