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Genesys Administrator Extension Help

Genesys Administrator 8.1.3

12/29/2021

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Genesys Administrator Extension Help

Genesys Administrator Extension is a component of the Genesys Administrator product; it can be used in parallel with Genesys Administrator.

Genesys Administrator Extension introduces the next generation user interface for Genesys that reduces both the overall operating costs and the time to deployment, by providing user-friendly interfaces that perform complex operations while at the same time preventing user error. This product is focused on the user experience for both Enterprise and Hosted customers, as well as by system administrators and line of business users.

The following list explains different features of Genesys Administrator Extension:

Core Features

This chapter introduces you to the core features of Genesys Administrator Extension.

- Login and Password
- Preferences
- User Interface

Account Management

This chapter explains the features and functionality of the Account Management module.

- User Accounts
- Roles
- Bulk Change Sets

Solution Deployment

This chapter explains the features and functionality of the Solution Deployment module.

- Installation Packages
- Solution Definitions
- Privileges

Operational Parameter Management

This chapter explains the features and functionality of the Operational Parameter Management module.

- Parameters
- Parameter Groups
- Parameter Group Templates

Audio Resource Management

This chapter explains the features and functionality of the Audio Resource Management module.

License Usage Reporting

This chapter explains the features and functionality of the License Usage Reporting module.

Core Features

The following list explains the core features of GAX:

Login and Password

This page explains how to log in to GAX.

Login and Password

Preferences

This page explains how to set user-level and system-level preferences.

Preferences

User Interface

This page explains how to use the user interface.

User Interface

Plug-In Management

This page explains how to manage plug-ins.

Plug-in Management

Login and Password

Your user's first name is displayed in the top Header Bar of the Genesys Administrator Extension window.

You might be configured to set a new password the first time that you log in, or after a system administrator has reset your password.

Setting A New Password

1. If you are configured to change your password the first time that you log in, or after your system administrator has reset your password, the `Change Password` dialog box is displayed.
2. Enter a new password in the `New Password` field.
3. Enter the same password in the `Confirm Password` field.
4. Click `OK`.

Inactivity Timeout

For security purposes, GAX might be configured to lock the application if you have not used the keyboard or mouse for a specified period of time. If inactivity-timeout occurs, all user input is blocked until you provide your login information to unlock the application. This feature ensures that no unauthorized user can access an unattended terminal that is running GAX.

Note: GAX employs a keep-alive strategy to prevent your session from timing out; this feature ensures that GAX maintains your session even if the inactivity-timeout feature locks the application and requires you to log in.

Modules

Multiple instances of Genesys Administrator Extension might be connected to the same configuration environment, to support load balancing and high availability. Each instance of Genesys Administrator Extension might be configured to use different sets of functional modules. Not all modules might be available for every instance of Genesys Administrator Extension that is installed in your Genesys environment.

Preferences

Genesys Administrator Extension enables you to customize the interface to suit your personal preferences. These preferences take effect each time that you, or anyone using your login credentials, logs in to Genesys Administrator from any browser.

To open the `Preferences` menu, click `Preferences` (gear icon) in the Header Bar of the main Genesys Administrator Extension screen. The menu displays the last time that this user account was logged into Genesys Administrator Extension.

Note: The date and time of the local computer and the Management Framework computer must be synchronized for the last login time to be accurate.

The `Preferences` menu contains three options:

- User Preferences
- System Preferences
- Genesys Administrator

Note: Settings in the `User Preferences` menu take precedence over settings in the `System Preferences` menu. For example, if the `System Preferences` language setting is `English (US)` and the `User Preferences` language setting is different, Genesys Administrator Extension will use the `User Preferences` language setting.

User Preferences

Locale Window

In the `Locale` window, you can set the following preferences by selecting the appropriate radio button:

Preference (field name)	Description
Language	The language to use in the GAX user interface. The default is `English (US)`. You can add more language options by installing localization kit plug-ins. **Note**: A browser refresh is required for the changes to take effect.
Date Format	The format in which dates are to be displayed in Genesys Administrator Extension.
Start of Week	The day on which you consider the week to start, either Sunday or Monday.
Number Format	The format in which numbers are to be displayed.

Preference (field name)	Description
Time Zone	The time zone in which times are displayed in GAX.

Notes

- The Time Zone setting in the User Preferences menu applies for this user account only. To set the time zone that is used by the system, see Locale in the System Preferences menu.
- If no time zone is set in User Preferences, the time zone is determined by the system setting (see Locale in the System Preferences menu). If no system setting exists for time zone, the local client's time-zone setting is used.

Reporting Window

In the Reporting window, you specify how Genesys Administrator Extension paginates License Usage Reports, in terms of the number of lines of data that are displayed per page. You can use the Prev and Next buttons to page through a report if the report length is greater than the value set in Page Size. You can change this value at any time, and it will apply to the next report that you generate.

Advanced Window

In the Advanced window, you can specify the logging level for Genesys Administrator Extension JavaScript logging. You need to set this only if instructed to do so by support personnel. Use the drop-down list to set the level to one of the following:

- Debug—All (error, warning, info, and debug) logs are generated.
- Info—Error, warning, and info logs are generated.
- Warning—Only error and warning logs are generated.
- Error—Only error logs are generated.
- Off—Logging is disabled.

Note: These logs can be viewed in the browser console, and should not be confused with Tomcat logs.

System Preferences

Throttling

Genesys Administrator Extension enables you to throttle how many simultaneous changes are sent to Configuration Server. You can optimize these settings to help ensure consistent performance across your Genesys environment.

Change the Bulk Update Batch Size field to specify how many bulk updates for configuration objects can be executed simultaneously. The default value is 300. A value of 0 indicates that there will be no throttling of changes for configuration objects (all requested operations will be sent to Configuration Server without delay). You can enter 0 or any positive integer in this field.

Note: The maximum `Bulk Update Batch Size` for users who are entering from Genesys Administrator is `300`.

Change the `Bulk Update Batch Timeout` field to specify how long (in seconds) Genesys Administrator Extension should wait between the execution of bulk-update operations. The default value is 1. A value of `0` indicates that there will be no delay between bulk-update operations. You can enter any value between `0` and `300` in this field.

Locale

In the `Locale` window, you can set the following preferences by selecting the appropriate radio button:

Preference (field name)	Description
Language	The language to use in the GAX user interface. The default is `English (US)`. You can add more language options by installing localization kit plug-ins. **Note**: A browser refresh is required for the changes to take effect.
Date Format	The format in which dates are to be displayed in Genesys Administrator Extension.
Start of Week	The day on which you consider the week to start, either Sunday or Monday.
Number Format	The format in which numbers are to be displayed.
Time Zone	The time zone in which times are displayed in GAX. **Note**: This setting is applied for the system.

Genesys Administrator

Click this link to launch the Genesys Administrator application. This link is displayed if you are configured to log in to Genesys Administrator, when you log in to Genesys Administrator Extension.

User Interface

The main screen of Genesys Administrator Extension consists of two parts, as follows:

- The header, at the top of the screen, contains the main controls for the user interface.
- The workspace, under the header, is where you perform all the tasks in Genesys Administrator Extension.

Note: The workspace displays only those objects and options for which the logged-in user has role privileges and object permissions to access.

Header

The Header area is located at the top of the main screen of the interface and contains the main controls for the Genesys Administrator Extension (GAX) interface.

The Header Bar in Genesys Administrator Extension.

The top Header Bar displays the name of the logged-in user in the following format: Welcome, (user's first name). The Header Bar also contains a link to log out of GAX, a link to this help file, and a gear button that, when clicked, presents options to set user preferences.

The lower Navigation Bar contains the menu options for navigating GAX.

The Navigation Bar in Genesys Administrator Extension.

The following fixed headings are always displayed:

- `Home`
- `Accounts`
- `Configuration`
- `Operations`
- `Reports`

Click the `Home` button from any page in GAX to return to the home page.

Installing plug-ins will add submenu headings to the fixed headings. For example, installing the `ASD` plug-in adds `Solution Deployment` to the `Configuration` fixed heading. These submenu headings are listed in alphabetical order.

Note: The available submenu headings are determined by your access permissions and the plug-ins that are installed on your system. For example, the `Solution Deployment` submenu heading does not display if the ASD plug-in is not installed.

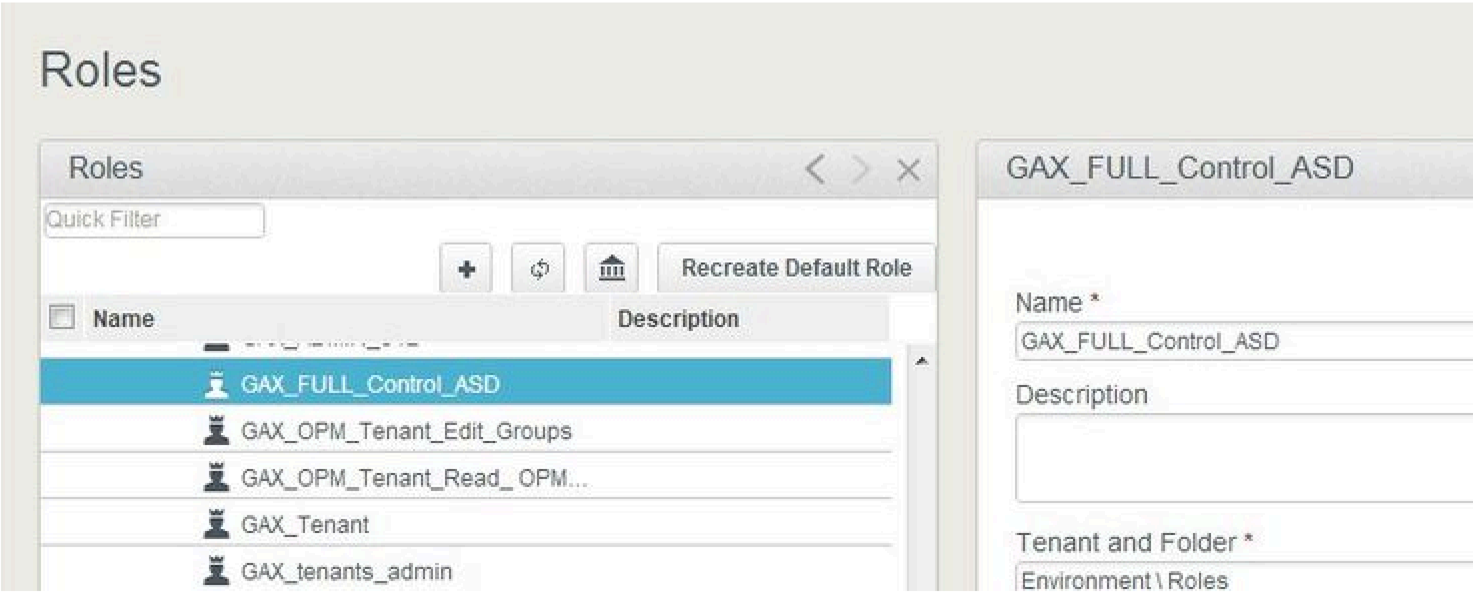
Each submenu heading can contain several items. For example, `Solution Deployment` contains the following items:

- `Installation Packages`
- `Deployed IPs`
- `Solution Definitions`
- `Deployed Solutions`

These items are organized based on priority sequence, as defined in the plug-in.

Workspace

The workspace is located below the header, and is where you perform all tasks in Genesys Administrator Extension. Its length adjusts automatically, depending on what is displayed in it. The workspace displays new panels to the right as new options or functions become available, depending on the choices that you make in the active panel.



The workspace in Genesys Administrator Extension.

The workspace displays only those objects and options for which the logged-in user has role privileges and object permissions to access.

Layout

All panels can be collapsed or resized to suit your personal preference. To collapse a panel, click the

`Collapse` button in the top-right corner. To restore the panel, click the `Fit to Content` button. To resize a panel, move your mouse cursor to the edge of a panel. The mouse cursor will change to a line with a left arrow and a right arrow, which indicates that the panel can be resized. Click and drag the panel to resize the panel. To reset the size of the panel to fit the displayed content, click the `Fit To Content` button.

To close a panel, click the `Close` button.

The left-most panel contains items that correspond to the selected module that you have selected from the Menu in the header area. The list of items are organized by tenant in multi-tenant environments. You can choose to view all tenants, your default tenant, or selected multiple tenants by clicking the `Tenant Filter` button. You can filter the content of the left-most panel by typing the name or partial name of a tenant in the `Quick Filter` field. You can sort by tenant or other criteria by clicking the column heads.

When you click an item in the list of items, or when you click `New` or `Add`, a new panel opens on the right side. This panel contains controls that you can use to view/edit/modify properties and other information related to the selected (or new) item. Genesys Administrator Extension supports auto-completion of forms and fields, to improve efficiency.

Error and information messages are displayed at the top of the workspace. You must close them manually by clicking the `X`, or they will accumulate and fill up space in your workspace.

Auditing History

For some objects, you can view an auditing history. Select the object, such as a Personality, to view information about the object in a new panel. In the object information panel, click the `Related` button and select `History`. The `History` panel is displayed to the right. It contains information about the change history of the object.

Availability of Menu Items

Multiple instances of Genesys Administrator Extension might be connected to the same configuration environment, to support load balancing and high availability. Each instance of Genesys Administrator Extension might be configured to use different sets of functional modules. Not all modules might be available for every instance of Genesys Administrator Extension that is installed in your Genesys environment.

Plug-In Management

This panel enables you to view information about the plug-ins that are installed in your environment. It also enables you to modify the settings of those plug-ins.

Note: Plug-ins can be managed on the local node only when the GAX `Application` object is of type `Generic Genesys Server` (running Management Framework for releases 8.1.0 or lower).

The `Administrator Applications` panel lists the applications that are installed in your environment and the host upon which the applications are stored.

Install plug-ins by using the same process as for installing installation packages. For more information, see Uploading Installation Packages.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the `Quick Filter` field.
- Click the `Tenant Filter` button to open the `Tenant filter` panel. In this panel, select the check box beside each tenant that you want to select. Use the `Quick Filter` field in this panel to filter the tenant list.

Click an application to view details in a new panel that opens to the right. The new panel lists the name of the plug-in and its host. Click the `Plug-ins` button to view additional details:

- `Name`—The name of the plug-in
- `Version`—The version number of the plug-in
- `Language`—The language used by the user interface of the plug-in
- `Provider`—The name of the company or user that provided the plug-in
- `State`—Indicates whether the plug-in is `Enabled` or `Disabled`

Click the name of a plug-in to view additional details about the plug-in in a panel that opens to the right. From this panel, you can perform the following actions:

- Enable or disable the plug-in
- Modify the settings of the plug-in

Enabling or Disabling a Plug-In

1. In the header, go to `Configuration > Administrator > Plug-in Management`.
2. Select an application in the `Administrator Applications` list.
3. A new panel opens to the right. Click the `Plug-ins` button to view which plug-ins are associated with

the application.

4. A new panel opens to the right. Select a plug-in in the `Plug-in Info` list.
5. A new panel opens to the right. Perform one of the following actions:
    - Click the `Enable` button to enable the plug-in.
    - Click the `Disable` button to disable the plug-in.

Modifying the Settings of a Plug-In

1. In the header, go to `Configuration > Administrator > Plug-in Management`.
2. Select an application in the `Administrator Applications` list.
3. A new panel opens to the right. Click the `Plug-ins` button to view which plug-ins are associated with the application.
4. A new panel opens to the right. Select a plug-in in the `Plug-in Info` list.
5. A new panel opens to the right. Click the `Plug-in Options` button.
6. A new panel opens to the right. The panel displays the options that are associated with the plug-in. Click an option to view more information about the option in a separate panel that opens to the right.
7. When you have finished modifying the option(s), perform one of the following actions:
    - Click the `Save` button to save your changes.
    - Click the `Cancel` button to discard your changes.

> **Important**
> You can only modify existing options for each plug-in from the `Plug-in Management` panels. You cannot create new options for the plug-ins.

Account Management

Account Management enables you to create and manage user accounts, agent groups, roles, skills, access groups, and capacity rules. This includes the ability to create user accounts from templates and manage user accounts either one at a time or in bulk. Users can be assigned to agent groups that represent specific areas of the business. You can also add groups of similar users to access groups that share the same set of roles and permissions for manipulating objects, which provides a simplified method for provisioning security. Capacity-rules management enables you to define rules for managing the volume of interactions within a business.

Account Management includes the following sections:

User Accounts

These pages explain how to manage user accounts.

User Accounts

Create or delete user accounts

Set passwords, options, or access control

Enable or disable user accounts

Agent Groups

These pages explain how to manage agent groups.

Agent Groups

Create, delete, or copy agent groups

Enable or disable agent groups

Agent Skills

These pages explain how to manage agent skills.

Agent Skills

Create, delete, or copy agent skills

Enable or disable skills

Access Groups

These pages explain how to manage access groups.

User Access Groups

Create, delete, or copy agent groups

Enable or disable agent groups

Roles

These pages explain how to manage roles.

Roles

Create, update, copy, or delete roles

Enable or disable roles

Re-create the default role

Capacity Rules

These pages explain how to manage capacity rules.

Capacity Rules

Create, copy, or delete capacity rules

Enable or disable capacity rules

Bulk Change Sets

These pages explain how to manage capacity rules.

Bulk Change Sets

Create, delete, or execute a Bulk Change Set

View completed Bulk Change Sets

Access Control

The `Access Permissions` panel lists the access groups and users that have been configured explicitly with permissions for this object. When you are setting permissions, it is normally performed with the user(s) or access group(s) for which you want to grant access. This feature improves the manner in which permissions are set, and the scope is limited to managing permissions for a single database object.

For additional instructions about granting, modifying, and removing permissions, refer to the *Genesys Security Deployment Guide*.

You can perform the following actions:

- Change access permissions
- Delete access permissions

Changing Access Permissions

1. Select an object, and click the `Access Control` button. The `Access Permissions` panel opens.
2. Click an object in the `Access Permissions` panel to modify its access permissions. A new panel opens to the right.
3. You can change any or all of the following options:

Properties of Operational Parameters

Property	Description
Read (R)	You can view details for this object.
Create (C)	You can create objects of this type.
Update (U)	You can change, or modify, this object.
Execute (X)	You can deploy, start, stop, or otherwise activate this object.
Delete (D)	You can delete this object.
Read Object Permissions (RP)	You can view access permissions granted for this object.
Change Object Permissions (CP)	You can change access permissions granted for this object.

4. Perform one of the following actions:
    - Click the Save button to accept the changes.
    - Click the `Cancel` button to discard the changes.

Deleting Access Permissions

1. Select an object, and click the `Access Control` button. The `Access Permissions` panel opens.
2. Click an object in the `Access Permissions` panel to modify its access permissions. A new panel opens to the right.
3. Click the `Delete` button.
4. A dialog box appears to confirm deletion. Perform one of the following actions:
    - Click the `OK` button to confirm deletion.
    - Click the `Cancel` button to cancel deletion.

User Accounts

The `User Accounts` panel is a central location for creating, provisioning, and managing user accounts.

Users are the contact-center personnel, including agents, who need access to Genesys applications. Agents are users who handle customer interactions directly.

Genesys Framework requires that every user who needs such access be registered in the Configuration Database with an appropriate set of permissions.

Note: To run a particular application, a user must have Read and `Execute` permissions for the object that represents this application in the Configuration Database. New users who are created in Genesys Administrator Extension receive the same set of default permissions and access privileges that Configuration Server grants.

The `User Accounts` list is organized by tenants, configuration units, sites, and folders.

Tenancy Permission Settings

Account Management respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the `Quick Filter` field.
- Click the `Tenant Filter` button to open the `Tenant filter` panel. In this panel, click the check box beside each tenant that you want to select. Use the `Quick Filter` field in this panel to filter the tenant list.

Sorting

You can also sort the list by clicking the `Group By` button. You can choose from among the following criteria:

- Folder—Lists the users by: `Tenant > Application Folder`.
- Agent Group—Lists the users by: `Tenant > Agent Group Folder > Agent Group`.

  Notes:

  - When sorting by agent group, only user accounts that are identified as agents appear in the list.
  - When sorting by agent group, it is possible that some user accounts might be displayed multiple times, if those user accounts belong to multiple agent groups.
  - You can click on the name of a user account and drag it to another agent group within the same tenant to add the user account to that group. A dialog box displays to ask you to confirm the action. Click the `OK` button to execute the action. The user interface refreshes to display the change.

- Role—Lists the users by: `Tenant > Role Folder > Role`.

  Notes:

  - When sorting by role, it is possible that some user accounts might be displayed multiple times, if those user accounts belong to multiple roles.
  - You can click on the name of a user account and drag it to another role within the same tenant to add the user account to that role. A dialog box displays to ask you to confirm the action. Click the `OK` button to execute the action. The user interface refreshes to display the change.

- Access Group—Lists the users by: `Tenant > Access Group Folder > Access Group`.

  Notes:

  - When sorting by access group, it is possible that some user accounts might be displayed multiple times, if those user accounts belong to multiple access groups.
  - You can click on the name of a user account and drag it to another access group within the same tenant to add the user account to that group. A dialog box displays to ask you to confirm the action. Click the `OK` button to execute the action. The user interface refreshes to display the change.

- Skill—Lists the users by: `Tenant > Skills > Access Group`.

  Notes:

  - The `Level` header appears when sorting by skills. The `Level` value is related to the user account's rating for that skill.
  - When sorting by skills, it is possible that some user accounts might be displayed multiple times, if those user accounts have multiple skills.
  - You can click on the name of a user account and drag it to another skill within the same tenant to add the user account to that skill. A dialog box displays to ask you to confirm the action. Click the `OK` button to execute the action. The user interface refreshes to display the change.

- Supervisor—Lists the users by: `Tenant > Supervisors > Folder`.

  Notes:

  - The `Agent Group` header appears when sorting by supervisor.
  - When sorting by supervisor, it is possible that some user accounts might be displayed multiple times, if those user accounts have multiple supervisors.
  - You can click on the name of a user account and drag it to another supervisor's agent group within the same tenant to add the user account to that group. A dialog box displays to ask you to confirm the action. Click the `OK` button to execute the action. The user interface refreshes to display the change.

You can also sort the list by clicking a header at the top of the list.

Agents and non-agents are visually identifiable in the list by different icons.

User accounts that are disabled appear grayed out in the list.

Actions

Clicking a user account will open a new panel on the right. This panel lists additional details about the user account (see Creating User Accounts for more information about this panel). You can also edit options and access control. For more information about options and privileges that are related to user accounts, see the Genesys Administrator Extension Deployment Guide.

The following actions are available from the `User Accounts` panels:

- Create user accounts
- Delete user accounts
- Set and reset passwords
- Set accessible objects
- Enable or disable user accounts

Creating Agents

Creating Agents

To create an agent, perform the following actions:

1. Go to Accounts > System > User Accounts.
2. Click the New button.
3. Follow the steps that are outlined on the Creating User Accounts page, and ensure the Agent check box is selected.
4. After the user account has been saved, select the user account in the User Accounts panel. A new panel opens to the right and displays information about the user account.
5. In the new panel, click the Agent Information button. A new panel opens to the right.
6. Enter the following information. For some fields, you can either enter the name of a value or click the Browse button to select a value from a list:
    - Default Place—The place assigned to this agent by default. This optional parameter applies to a limited number of configurations, in particular those in which a real-time association between a place and an agent cannot be established through a telephony login procedure.
    - Capacity Rule—The name of the script of Capacity Rule type that defines the ability of this agent to handle multiple interactions.
    - Site—The site to which this agent belongs.
    - Cost Contract—The Cost Contract associated with this agent. Refer to the *Universal Routing Application Configuration Guide* for more information about Cost Contracts.
7. Enter skills in the Skill Levels section. Click the New button to open a new panel and add skills. See the Skills section for more information.
8. Click the Save button.

Creating User Accounts

Creating User Accounts

To create a user account, perform the following steps:

1. In the header, go to `Accounts` > `System` > `User Accounts`.
2. In the `User Accounts` panel, click the `New` button.
3. Enter information in the following fields:
   - `User Name`—The user name that will be used to log in.

     > **Important**
     > The `User Name` field must be unique in the environment.

   - `First Name`—The first name of the user.
   - `Last Name`—The last name of the user.
   - `E-mail Address`—The e-mail address of the user.
   - `Tenant and Folder`—The tenant and folder to which this user belongs. You can type the name of a tenant in the `Quick Filter` field, or you can click the `Browse` icon to select a tenant from a list.
   - Agent—A check box that you can select to indicate that this user is an agent.
   - `Employee ID`—The ID number of the employee.

     > **Important**
     > The `Employee ID` field must be unique in the environment.

   - `Password`—The password that will be used to log in.
   - `Confirm Password`—Re-enter the password to confirm accuracy. This value must match the value that is entered in the `Password` field.
   - `Force Password Reset on Next Login`—A check box that, if selected, will prompt the user to enter a new password upon the next login.

     > **Important**

> The `Force Password Reset on Next Login` option displays only if Genesys Administrator Extension connects to Management Framework 8.1.1 or higher. Please see the Genesys 8.5.x Security Deployment Guide for more information about resetting passwords.

- `External ID`—The external ID of the employee.
- Enter application ranks in the `Application Ranks` section. Click the New button to add an application rank. A new panel opens to the right and contains two drop-down menus: `Application Type` and `Application Rank`. Select an application in the `Application Type` drop-down menu, and then select a rank in the `Application Rank` drop-down menu. Click the OK button to add the settings to the `Application Ranks` section.

> ## Important
>
> - The `Application Ranks` functionality allows GUI applications to control which of their functions are available to the currently logged-in user. Consult the manuals for the Genesys GUI applications to see if those applications are using ranks to enable or block certain functions. If a manual does not have any references to ranks, the related applications do not use ranks in any way, and you do not need to specify the user's ranks with respect to the related application.
> - Do not confuse application ranks with Configuration Database permissions. Applications themselves verify ranks, which specify what functionality is available to a user with regard to an application. Configuration Server verifies permissions, which specify a level of access to the objects in the Configuration Database.

4. Click the Save button.

Deleting User Accounts

There are multiple methods to delete a user account:

- Delete a single user account
- Delete multiple user accounts

Deleting a Single User Account

1. In the header, go to `Accounts > System > User Accounts`.
2. In the `User Accounts` panel, click the name of the user to delete. A new panel opens to the right.
3. In the new panel, click the `Delete` button to delete the user account.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Deleting Multiple User Accounts

1. In the header, go to `Accounts > System > User Accounts`.
2. In the `User Accounts` panel, select the check box beside each User Account that you want to delete.
3. Click the `Bulk Change` button. A pop-up menu will appear. Select `Delete`.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Setting and Resetting Passwords

There are multiple methods to change or reset a password:

- Reset a password for a single user
- Specify a new password for a single user
- Reset passwords for multiple users at one time

Resetting a Password for a Single User

1. In the header, go to `Accounts > System > User Accounts`.
2. In the `User Accounts` panel, click the name of the user for whom to reset the password. A new panel opens on the right.
3. In the new panel, select the `Force Password Reset on Next Login` check box.
4. Click the Save button.

Important

- The `Force Password Reset` button is grayed out if the password has already been flagged to be reset by the user. It remains grayed out until the user logs in and clears the flag by resetting the password.
- The `Force Password Reset on Next Login` option displays only if Genesys Administrator Extension connects to Management Framework 8.1.1 or higher. Please see the Genesys 8.0 Security Deployment Guide for more information about resetting passwords.

Specifying a New Password for a Single User

1. In the header, go to `Accounts` > `System` > `User Accounts`.
2. In the `User Accounts` panel, click the name of the user for whom to change the password. A new panel opens on the right.
3. In the new panel, click the `Change Password` button at the bottom of the panel.

4. Type the new password in the `New Password` field.
5. Confirm the new password by retyping it in the `Confirm Password` field.
6. Click the Save button.

Resetting Passwords for Multiple Users

1. In the header, go to `Accounts > System > User Accounts`.
2. In the `User Accounts` panel, select the check box beside each user for whom to reset the password.
3. Click the `Bulk Change` button. A pop-up menu will appear. Select `Reset Password`.
4. A dialog box displays to confirm the action:
   - Click the `OK` button to continue.
   - Click the `Cancel` button to discard the action.

Important

The `Password Reset` button is grayed out for those users whose passwords have already been flagged to be reset. It remains grayed out until the users log in and clear the flag by resetting their passwords.

Accessible Objects

Setting Accessible Objects

To see the objects to which a user account has access, perform the following actions:

1. In the header, go to `Accounts > System > User Accounts`.
2. In the `User Accounts` panel, click the name of a user account. A new panel opens to the right.
3. Click the `Accessible Objects` button. The `Accessible Objects` panel opens to the right.
4. Click the drop-down menu at the top of the `Accessible Objects` panel to view the object types to which the user account has access. Selecting an object type refreshes the list to display only the objects that are related to the object type. See Access Control for more information about the `Accessible Objects` panel.

Enabling or Disabling User Accounts

There are multiple methods to enable or disable a user account:

- Enable or disable a single user account
- Enable or disable multiple user accounts

Enabling or Disabling a Single User Account

1. In the header, go to `Accounts` > `System` > `User Accounts`.
2. In the `User Accounts` panel, click the name of the user to enable or disable. A new panel opens on the right.
3. In the new panel, perform one of the following actions:
   - If the User Account is currently enabled, click the `Disable` button.
   - If the User Account is currently disabled, click the `Enable` button.
4. A dialog box displays to confirm the action:
   - Click the `OK` button to continue.
   - Click the `Cancel` button to discard the action.

Enabling or Disabling Multiple User Accounts

1. In the header, go to `Accounts` > `System` > `User Accounts`.
2. In the `User Accounts` panel, select the check box beside each user account that you want to enable or disable.
3. Click the `Bulk Change` button. A pop-up menu will appear. Select `Enable` to enable the selected user accounts, or `Disable` to disable the selected user accounts.
4. A dialog box displays to confirm the action:
   - Click the `OK` button to continue.
   - Click the `Cancel` button to discard the action.

Options

The Options panel enables you to set options for the object. You can perform the following actions:

- Create a new section, and add an option
- Add a new option in an existing section

Notes:

- The Section and Key fields are required, and the values for these fields must be unique in the environment.
- If you are adding an option for which there is metadata, the option value is validated.
- If an option is selected in the list when you click the New button, the dialog box will have the Section name prefilled with the name of the section containing the selected option (or the option selected first, if more than one option is selected).
- When you are modifying option values, and if there is metadata for the option, a drop-down list (for a finite set of valid values, as defined in the metadata) or edit box appears in which you enter the new value. If there is no metadata for the option, the only editing control is an edit box in which you enter the new value.

Creating a New Section and Adding an Option

To add an option in a new section, perform the following actions:

1. Select an object, and click the Options button.
2. Click the New button.
3. Enter information in the Section, Key, and Value fields.
4. Click the Save button.

Adding a New Option in an Existing Section

To add an option to an existing section, perform the following actions:

1. Select an object, and click the Options button.
2. Select an option in the section.
3. Click the New button.

4. Correct the section name, if required, and enter an option name and option value.
5. Click the Save button to save the option.

Agent Groups

An agent group is a logical grouping of agents. Agent groups are typically set up to provide particular sets of contact-center services.

The `Agent Groups` panel lists the agent groups that are in your environment. It is sorted in a hierarchy by tenants, configuration units, sites, and folders.

Note: Agent groups that are disabled will appear grayed out in the list.

Tenancy Permission Settings

Account Management respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the `Quick Filter` field.
- Click the `Tenant Filter` button to open the `Tenant filter` panel. In this panel, click the check box beside each tenant that you want to select. Use the `Quick Filter` field in this panel to filter the tenant list.

Actions

Click the name of an agent group to view additional information about the object. You can also set options and access control.

You can perform the following tasks from the `Agent Groups` panels:

- Create agent groups
- Delete agent groups
- Copy agent groups
- Enable or disable agent groups

Creating Agent Groups

Creating Agent Groups

To create an agent group, perform the following actions:

- Go to Accounts > System > Agent Groups.
- Click the New button.
- Enter the following information. For some fields, you can either enter the name of a value or click the Browse button to select a value from a list:
    - Name—The name of the agent group. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment).
    - Folder—The folder to which this agent group belongs.
    - Site—The site to which this agent group belongs.
    - Agent Group Members—The members that belong to this agent group.
    - Supervisors—The supervisors for this agent group.
    - Origination DNs—A list of DNs from which calls can be routed or diverted to this agent group. This list can include DNs of the following types: Routing Point, External Routing Point, Service Number, Routing Queue, ACD Queue, Virtual Queue, and Virtual Routing Point.
    - Capacity Table—This field applies only for the Enterprise Routing Solution. It is the Capacity Table that is associated with this agent group. Refer to the Universal Routing 8.1 Reference Manual for more information.
    - Quota Table—This field applies only for the Enterprise Routing Solution. It is the Quota Table that is associated with this agent group. Refer to the Universal Routing 8.1 Reference Manual for more information.
    - Cost Contract—The Cost Contract that is associated with this agent group. Refer to the Universal Routing 8.0 Routing Application Configuration Guide for more information about Cost Contracts.
- Click the Save button.

Deleting Agent Groups

There are multiple methods to delete an agent group:

- Delete a single agent group
- Delete multiple agent groups

Deleting a Single Agent Group

1. Go to `Accounts > System > Agent Groups`.
2. Select an agent group. A new panel opens to the right.
3. In the new panel, click the `Delete` button.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Deleting Multiple Agent Groups

1. In the header, go to `Accounts > System > Agent Groups`.
2. In the `Agent Groups` panel, select the checkbox beside each agent group that you want to delete.
3. Click the `Bulk Change` button. A pop-up menu will appear. Select `Delete`.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Copying an Agent Group

Copying an Agent Group

To copy an agent group, perform the following actions:

1. Go to `Accounts` > `System` > `Agent Groups`.
2. Select an agent group. A new panel opens to the right.
3. In the new panel, click the `Copy` button. A new panel opens to the right.
4. Enter information in the new panel. See Creating Agent Groups for more information.

> **Important**
> The name of the new agent group name must be unique in the environment before you are allowed to save the new agent group.

5. Click the Save button to save the new agent group.

Enabling or Disabling Agent Groups

There are multiple methods to enable or disable an agent group:

- Enable or disable a single agent group
- Enable or disable multiple agent groups

Enabling or Disabling a Single Agent Group

1. Go to `Accounts > System > Agent Groups`.
2. Select an agent group. A new panel opens to the right.
3. In the new panel, do one of the following:
    - If the agent group is currently enabled, click the `Disable` button.
    - If the agent group is currently disabled, click the `Enable` button.

Enabling or Disabling Multiple Agent Groups

1. In the header, go to `Accounts > System > Agent Groups`.
2. In the `Agent Groups` panel, select the check box beside each agent group that you want to enable or disable.
3. Click the `Bulk Change` button. A pop-up menu displays. Select `Enable` to enable the selected agent groups, or `Disable` to disable the selected agent groups.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Agent Skills

The Agent Skills panel provides a streamlined interface for the creation and management of agent skills.

Skills are qualities or abilities that agents possess and that affect the placement of each agent in a contact-center hierarchy. Common skills include abilities in different languages, particular categories of product knowledge, or ability in particular types of sales.

Agents can be associated with a set of skills. For each skill, the agent is also given a skill level, or a level of competency with this skill.

The Agent Skills panel lists the skills in your environment. It is sorted in a hierarchy by tenants, configuration units, sites, and folders.

Note: Skills that are disabled will appear grayed out in the list.

Tenancy Permission Settings

Account Management respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the Quick Filter field.
- Click the Tenant Filter button to open the Tenant filter panel. In this panel, select the check box beside each tenant that you want to select. Use the Quick Filter field in this panel to filter the tenant list.

Actions

Click the name of a skill to view additional information about the object. You can also set options and access control.

You can perform the following tasks from the Skills panels:

- Create skills
- Delete skills
- Copy skills
- Enable or disable skills

Creating Skills

Creating Skills

To create a skill, perform the following actions:

1. Go to Accounts > System > Agent Skills.
2. Click the New button.
3. Enter the following information:
    - Name—The name of the skill

    > **Important**
    > The Name field must be unique in the environment.

    - Tenant and Folder—The tenant and folder to which this skill belongs

    > **Important**
    > The list of displayed folders is based on each tenant's access settings.

4. Click the Save button.

Deleting Skills

There are multiple methods to delete a skill:

- Delete a single skill
- Delete multiple skills

Deleting a Single Skill

1. Go to `Accounts > System > Agent Skills`.
2. Select a skill in the `Skills` list. More information about the skill is displayed in a new panel to the right.
3. In the new panel, click the `Delete` button.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Deleting Multiple Skills

To delete multiple skills simultaneously, perform the following actions:

1. In the `Skills` list, select the check box of each skill to be deleted.
2. Click the `Bulk Change` button, and select `Delete` from the pop-up list of options.
3. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Copying Skills

Copying Skills

To copy a skill, perform the following actions:

1. Go to `Accounts` > `System` > `Agent Skills`.
2. Select a skill to copy. More information about the skill is displayed in a new panel to the right.
3. In the new panel, click the `Copy` button. A new panel opens to the right.
4. Enter the following information:
   - `Name`—The name of the skill

     > **Important**
     >
     > The `Name` field must be unique in the environment.

   - `Tenant and Folder`—The tenant and folder to which this skill belongs

     > **Important**
     >
     > The list of displayed folders is based on each tenant's access settings.

5. Click the Save button.

Enabling or Disabling Skills

There are multiple methods to enable or disable a skill:

- Enable or disable a single skill
- Enable or disable multiple skills

Enabling or Disabling a Single Skill

1. Go to `Accounts > System > Agent Skills`.
2. Select a skill. A new panel opens to the right.
3. In the new panel, perform one of the following actions:
    - If the skill is currently enabled, click the `Disable` button.
    - If the skill is currently disabled, click the `Enable` button.

Enabling or Disabling Multiple Skills

1. In the header, go to `Accounts > System > Skills`.
2. In the `Skills` panel, select the check box beside each skill that you want to enable or disable.
3. Click the `Bulk Change` button. A pop-up menu displays. Select `Enable` to enable the selected skills, or `Disable` to disable the selected skills.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

User Access Groups

Access groups are groups of users who need to have the same set of permissions for Configuration Database objects.

In many cases, users fall into a small number of categories with similar access needs. A team of agents, all of whom are performing the same tasks, often has identical access needs. Two or three people who are responsible for maintaining a specific site of the contact center might also have identical access needs. You can greatly simplify access control by adding individuals to access groups and then setting permissions for those groups.

The `User Access Groups` panel lists the user access groups that are in your environment. It is sorted in a hierarchy by tenants, configuration units, sites, and then folders.

Note: Objects that are disabled will appear grayed out in the list.

Tenancy Permission Settings

Account Management respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the `Quick Filter` field.
- Click the `Tenant Filter` button to open the `Tenant filter` panel. In this panel, click the check box beside each tenant that you want to select. Use the `Quick Filter` field in this panel to filter the tenant list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

Actions

Click the name of a user access group to view additional information about the object. You can also set options and access control.

You can perform the following tasks from the `User Access Groups` panels:

- Create user access groups
- Delete user access groups
- Copy user access groups
- Enable or disable user access groups

Creating User Access Groups

Creating User Access Groups

To create a user access group, perform the following actions:

1. Go to `Accounts` > `System` > `User Access Groups`.
2. Click the `New` button.
3. Enter the following information. For some fields, you can either enter the name of a value or click the `Browse` button to select a value from a list:
    - `Name`—The name of the user access group. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the tenant (in a multi-tenant environment).
    - `Tenant and Folder`—The tenant and folder to which this user access group belongs.
    - `Access Group Members`—The members of this user access group.
4. Click the `Save` button.

Deleting User Access Groups

There are multiple methods to delete a user access group:

- Delete a single user access group
- Delete multiple user access groups

Deleting a Single User Access Group

1. Go to `Accounts > System > User Access Groups`.
2. Select a user access group. A new panel opens to the right.
3. In the new panel, click the `Delete` button.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Deleting Multiple User Access Groups

1. In the header, go to `Accounts > System > User Access Groups`.
2. In the `User Access Groups` panel, select the check box beside each user access group that you want to delete.
3. Click the `Bulk Change` button. A pop-up menu will appear. Select `Delete`.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Copying User Access Groups

Copying User Access Groups

To copy a user access group, perform the following actions:

1. Go to `Accounts` > `System` > `User Access Groups`.
2. Select a user access group. A new panel opens to the right.
3. In the new panel, click the `Copy` button. A new panel opens to the right.
4. Enter information in the new panel. See Creating User Access Groups for more information.

> **Important**
> The name of the new user access group name must be unique in the environment before you are allowed to save the new user access group.

5. Click the Save button to save the new user access group.

Enabling or Disabling User Access Groups

There are multiple methods to enable or disable a user access group:

- Enable or disable a single user access group
- Enable or disable multiple user access groups

Enabling or Disabling a Single User Access Group

1. Go to `Accounts > System > User Access Groups`.
2. Select a user access group. A new panel opens to the right.
3. In the new panel, perform one of the following actions:
    - If the user access group is currently enabled, click the `Disable` button.
    - If the user access group is currently disabled, click the `Enable` button.

Enabling or Disabling Multiple User Access Groups

1. In the header, go to `Accounts > System > User Access Groups`.
2. In the `User Access Groups` panel, select the check box beside each user access group that you want to enable or disable.
3. Click the `Bulk Change` button. A pop-up menu displays. Select `Enable` to enable the selected user access groups, or `Disable` to disable the selected user access groups.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Roles

Roles define what you can do in a given application. In Genesys Administrator Extension, roles and their privileges are controlled by the use of role objects, which are assigned to users (including agents) and access groups.

Roles are application-specific and must be defined for each application that supports them.

For more information about roles, refer to the Genesys 8.0 Security Deployment Guide. For a listing of role privileges for the Genesys Administrator Extension (GAX) application, refer to Appendix A of the Genesys Administrator Extension Deployment Guide.

Role management allows GAX users to configure and distribute roles on a per-tenant basis. Role management provides the following features:

- A single-click model for adding a role privilege to a role
- The ability to define which role privileges can be modified by tenant administrator users, enabling tenant administrators to manage their user accounts and create new roles as necessary

The privileges that are available to each role are determined by the settings in the Solution Deployment module.

A default role is created during the installation package (IP) process. Typically, the default role is an administrator or super user. The default role contains a user name and a list of privileges. You can re-create the default role if a required role is unavailable.

The `Roles` panel lists the roles in your environment. The list is organized in a hierarchy starting with tenants, configuration units, sites, and folders.

Note: Objects that are disabled will appear grayed out in the list.

Tenancy Permission Settings

Account Management respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the `Quick Filter` field.
- Click the `Tenant Filter` button to open the `Tenant filter` panel. In this panel, click the check box beside each tenant that you want to select. Use the `Quick Filter` field in this panel to filter the tenant list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

Actions

Click a role to view more information about the object in a new panel that opens to the right. You can also edit options and access control.

The following functions are available from the `Roles` panels:

- Create roles
- Update roles
- Copy roles
- Delete roles
- Enable or disable roles
- Re-create the default role

Creating Roles

Creating Roles

To create a role, perform the following steps:

1. In the header, go to `Accounts` > `System` > `Roles`.
2. In the `Roles` panel, click on the `New` button. A new panel opens to the right.
3. In the new panel, enter information in the following fields:
    - `Name`—The name of the role.

    > **Important**
    > The `Name` field must be unique in the environment.

    - `Description`—An optional description of the role.
    - `Tenant and Folder`—The tenant and folder to which this role belongs. Click the `Browse` button to select from a list of available folders, or type the name of a folder in the `Quick Filter` field.
    - `Role Members`—The members of this role. Click the `Browse` button to select from a list of available users.
    - `Assigned Privileges`—The privileges that are available to this role. Click the `Browse` button to select from a list of available privileges.
4. Click the `Save` button to save your created role.

Updating Roles

Updating Roles

To update a role, perform the following steps:

1. In the header, go to `Accounts > System > Roles`.
2. In the `Roles` panel, find the role that you want to update, and select it. Information about the role opens in a new panel to the right of the list.
3. In the `Privileges` section, click the `Add` button.
4. The `Privileges` panel opens on the right. This panel lists the available privileges that you can assign to the selected role. Select the check box beside each privilege that you want to add to the role.
5. In the `New` panel, to the left of the `Privileges` panel, click the `Save` button to update the role.

Deleting Roles

There are multiple methods to delete a role:

- Delete a single role
- Delete multiple roles

Deleting a Single Role

1. Go to `Accounts > System > Roles`.
2. Select a role in the `Roles` list. More information about the role is displayed in a new panel to the right.
3. In the new panel, click the `Delete` button.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Deleting Multiple Roles

To delete multiple roles simultaneously, perform the following actions:

1. In the `Roles` list, select the check box of each Role that is to be deleted.
2. Click the `Bulk Change` button, and select `Delete` from the pop-up list of options.
3. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Warning: After a role has been deleted, there is no method to recover it; the role is permanently deleted.

Copying Roles

Copying Roles

To copy a role, perform the following steps:

1. In the header, go to `Accounts` > `System` > `Roles`.
2. In the `Roles` panel, find the role that you want to update, and select it. Information about the role opens in a new panel to the right of the list.
3. Click the `Copy` button. A `New` panel opens to the right for you to select the destination role.
4. In the new panel, enter information in the following fields:
    - `Name`—The name of the role.

      > **Important**
      > This field must be unique in the environment.

    - `Description`—An optional description of the role.
    - `Tenant and Folder`—The tenant and folder to which this role belongs. Click the `Browse` button to select from a list of available folders, or type the name of a folder in the `Quick Filter` field.
    - `Role Members`—The members of this role. Click the `Browse` button to select from a list of available users.
    - `Assigned Privileges`—The privileges that are available to this role. Click the `Browse` button to select from a list of available privileges.
5. Click the `Save` button to save your created role.

Enabling or Disabling Roles

There are multiple methods to enable or disable a role:

- Enable or disable a single role
- Enable or disable multiple roles

Enabling or Disabling a Single Role

1. Go to `Accounts > System > Roles`.
2. Select a role. A new panel opens to the right.
3. In the new panel, perform one of the following actions:
    - If the role is currently enabled, click the `Disable` button.
    - If the role is currently disabled, click the `Enable` button.

Enabling or Disabling Multiple Roles

1. In the header, go to `Accounts > System > Roles`.
2. In the `Roles` panel, select the check box beside each role that you want to enable or disable.
3. Click the `Bulk Change` button. A pop-up menu displays. Select `Enable` to enable the selected roles, or `Disable` to disable the selected roles.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Re-Creating the Default Role

Re-Creating the Default Role

To re-create the default role, perform the following actions:

1. In the `Roles` menu, click the `Recreate Default Role` button. A new panel opens to the right.
2. In the new panel, enter information in the following fields:
    - `Default Role`—Locate the default role by clicking the `Browse` button. Select a default role from the list.
    - `Tenant and Folder`—Select the tenant and folder that will receive the default role by clicking the `Browse` button. Select a tenant from the list.
3. Click the Save button.

Capacity Rules

The Capacity Rules panel enables you to set capacity rules for various operations in your environment. For example, you may choose to set capacity rules for how many voice interactions or email interactions, or a combination of both, can be processed at one time.

The Capacity Rules list displays the capacity rules in your environment. The list is organized in a hierarchy, starting with tenants, configuration units, sites, and folders.

Note: Capacity rules that are disabled will appear grayed out in the list.

Tenancy Permission Settings

Account Management respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the Quick Filter field.
- Click the Tenant Filter button to open the Tenant filter panel. In this panel, click the check box beside each tenant that you want to select. Use the Quick Filter field in this panel to filter the tenant list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

Actions

Click a capacity rule to view more details about the rule in a new panel that opens to the right. In the new panel, you can click the Validate button to validate the capacity rule. From this panel, you can also edit access control.

The following actions are available from the Capacity Rules panels:

- Create capacity rules
- Copy capacity rules
- Enable or disable capacity rules
- Delete capacity rules

Creating Capacity Rules

Creating Capacity Rules

To create a capacity rule, perform the following actions:

1. Go to `Accounts` > `System` > `Capacity Rules`.
2. Click the `New` button.
3. Enter the following information:
    - `Capacity Rule Name`—The name of the capacity rule.

    > **Important**
    > The `Capacity Rule Name` field must be unique in the environment.

    - `Description`—A description of the function of the capacity rule.
    - `Tenant and Folder`—Click the `Browse` button to locate the folder in which the script is stored, or type the name of the folder in the Quick Filter field.

    > **Important**
    > The list of displayed folders is based on each tenant's access settings.

    - `Media Types`—Click the `New` button to select which media types will be monitored by this capacity rule. For more information, see Media Types.
4. Click the `Save` button.

Deleting Capacity Rules

There are multiple methods to delete a capacity rule:

- Delete a single capacity rule
- Delete multiple capacity rules

Deleting a Single Capacity Rule

1. Go to `Accounts > System > Capacity Rules`.
2. Select a capacity rule in the `Capacity Rules` list. More information about the capacity rule is displayed in a new panel to the right.
3. In the new panel, click the `Delete` button.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Deleting Multiple Capacity Rules

To delete multiple capacity rules simultaneously, perform the following actions:

1. In the `Capacity Rules` list, click the check box of each capacity rule that is to be deleted.
2. Click the `Bulk Change` button, and select `Delete` from the pop-up list of options.
3. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Copying Capacity Rules

Copying Capacity Rules

To copy a capacity rule, perform the following actions:

1. Go to Accounts > System > Capacity Rules.
2. Select a capacity rule to copy. More information about the capacity rule is displayed in a new panel to the right.
3. In the new panel, click the Copy button. A new panel opens to the right.
4. Enter the following information:
    - Capacity Rule Name—The name of the capacity rule.

    > **Important**
    > The Capacity Rule Name field must be unique in the environment.

    - Description—A description of the capacity rule.
    - Tenant and Folder—Click the Browse button to locate the folder in which the script is stored, or type the name of the folder in the Quick Filter field.

    > **Important**
    > The list of displayed folders is based on each tenant's access settings.

    - Media Types—Click the New button to select which media types will be monitored by this capacity rule. For more information, see Media Types.
5. Click the Save button.

Enabling or Disabling Capacity Rules

There are multiple methods to enable or disable a capacity rule:

- Enable or disable a single capacity rule
- Enable or disable multiple capacity rules

Enabling or Disabling a Single Capacity Rule

1. Go to `Accounts > System > Capacity Rules`.
2. Select a capacity rule. A new panel opens to the right.
3. In the new panel, perform one of the following actions:
    - If the capacity rule is currently enabled, click the `Disable` button.
    - If the capacity rule is currently disabled, click the `Enable` button.

Enabling or Disabling Multiple Capacity Rules

1. In the header, go to `Accounts > System > Capacity Rules`.
2. In the `Capacity Rules` panel, select the check box beside each capacity rule that you want to enable or disable.
3. Click the `Bulk Change` button. A pop-up menu displays. Select `Enable` to enable the selected capacity rules or `Disable` to disable the selected capacity rules.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Media Types

You can add one or media types to capacity rules to specify how many instances of each media type are allowed simultaneously.

Adding media types to capacity rules

To add media types to capacity rules, perform the following actions:

1. Go to `Accounts` > `System` > `Capacity Rules`.
2. Perform one of the following actions:
    - Click the New button, and create a new capacity rule.
    - Click an existing capacity rule in the `Capacity Rules` panel.
3. In the `Media Types` section, click the New button to add media types to the capacity rule. A new panel opens to the right.
4. In the new panel, click the `Media Type` drop-down menu to select a media type. A new section called `Conditions` displays.
5. Set the conditions for the media type.
6. Click the Save button.

Conditions

By default, the maximum value of the media type is 1. You can click the `[media type] exceeds 1` button to set a new maximum value. For example, if you select `Voice` as a media type, click the `Voice exceeds 1` button to open a new panel, and enter a new value in the `Maximum Capacity` field. Click OK to save the change.

You can also mix media types for the capacity rule. For example, you could set a capacity rule that allows one `Voice` interaction and one `Email` interaction (for a total of two simultaneous interactions). Alternately, you could set a capacity rule that allows one `Voice` or one `Email` interaction, but not both (for a total of one simultaneous interaction).

Adding an **and** condition to a media type

To add an and condition, perform the following steps:

1. In the `Conditions` drop-down menu, click the and button. A new panel opens to the right that allows you to add a condition.
2. Click the `Media Type` drop-down menu, and select a media type.
3. Enter a value in the `Maximum Capacity` field.
4. Click the OK button to add the condition.

Adding an `or` condition to a media type

To add an `or` condition, perform the following steps:

1. In the `Conditions` drop-down menu, click the `or` button. A new panel opens to the right that allows you to add a condition.
2. Click the `Media Type` drop-down menu, and select a media type.
3. Enter a value in the `Maximum Capacity` field.
4. Click the OK button to add the condition.

Bulk Change Sets

Genesys Administrator Extension allows you to perform bulk changes to users. For example, you can create a Bulk Change Set to add or remove multiple users from your system in one action, or to add or remove multiple skills, or both.

The `Bulk Change Sets` panel lists all the Bulk Change Sets in your environment that either have not been executed yet or have failed during execution. To see a list of successful Bulk Change Sets, see the Completed Bulk Changes panel.

Tenancy Permission Settings

Account Management respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the `Quick Filter` field.
- Click the `Tenant Filter` button to open the `Tenant filter` panel. In this panel, click the check box beside each tenants that you want to select. Use the `Quick Filter` field in this panel to filter the tenant list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

Actions

The `Bulk Change Sets` list displays the following information:

- `Change Set Name`—The name of the Bulk Change Set.
- `Creator`—The name of the user that created the Bulk Change Set.
- `Creation Date`—The date on which the Bulk Change Set was created.
- `Last Modified Date`—The date on which the Bulk Change Set was last modified.
- `Change Set Status`—This can be one of the following:
  - `Empty`—No data has yet been entered in the Bulk Change Set.
  - `Incomplete`—Only partial data has been entered in the Bulk Change Set.
  - `Ready to Execute`—The Bulk Change Set is ready to be executed.
- `Execution`—This can be one of the following:
  - `Not Executed`—The Bulk Change Set has not been executed yet.
  - `Completed`—The Bulk Change Set has been executed.
  - `Failed`—The execution of the Bulk Change Set failed.

- `Progress`—During execution, this field displays a progress bar for the Bulk Change Set.
- `Executed by Tenant`—Indicates which tenant last executed the Bulk Change Set.
- `Executed by User`—Indicates which user last executed the Bulk Change Set.
- `Previously Executed Date`—Indicates the date and time at which the Bulk Change Set was last executed.

Click a Bulk Change Set in the list to view more information about the item. The following fields are displayed:

- `Change Set Name`—The name of the Bulk Change Set
- `Deletions`—The objects that will be deleted by the Bulk Change Set
- `Additions`—The objects that will be added by the Bulk Change Set
- `Updates`—The objects that will be updated by the Bulk Change Set

You can perform the following actions from the `Bulk Change Set` panels:

- Create a Bulk Change Set
- Delete a Bulk Change Set
- Execute a Bulk Change Set

Note: A Solution Definition file is created when a Bulk Change Set is executed. See the Completed Bulk Changes panel for instructions on how to download the Solution Definition file.

Creating Bulk Change Sets

Creating Bulk Change Sets

To create a Bulk Change Set, perform the following steps:

1. In the header, go to `Operations` > `System` > `Bulk Change Sets`.
2. In the `Bulk Change Sets` panel, click the New button.
3. Enter information in the following fields:
   - `Change Set Name`—The name of the Bulk Change Set.

   > **Important**
   > The `Change Set Name` field must be unique in the environment.

   - `Deletions`—Enter any Configuration Object that is to be deleted with the Bulk Change Set. If there are deletions, perform the following actions. Otherwise, move on to the next step.
     a. Click the Add button. The `New Deletion Item` panel appears to the right.
     b. Click the `Browse` button. A list of Configuration Objects appears to the right.
     c. Objects that appear in the list are determined by the currently selected category. Click the drop-down menu at the top of the panel to change the category type.
     d. You can use the `Quick Filter` or `Tenant Filter` field to find specific objects. Click the checkbox beside an object to add the object to the Deletions list.
     e. The name of the object appears in the `New Deletion Item` panel. Click the OK button to add it to the Deletions list.
     f. Repeat the steps in this list to add more objects to the Deletions list.
   - `Additions`—Enter any Configuration Object that is to be added with the Bulk Change Set. If there are additions, perform the following actions. Otherwise, move on to the next step.
     a. Click the Add button. A new panel appears to the right.
     b. Click the `Browse` button. A list of Configuration Objects appears to the right.
     c. Select an object type in the Type drop-down menu.
     d. Click the `Browse` button to select an object to use as a template. A panel opens to the right. Click the checkbox beside an object to select it.

> ### Important
> When an object is used as a template, all aspects of the template object are used for the Addition objects, including connections and permissions.

e. Click the `Next` button.

f. In the `Number to Create` field, enter the number of objects to create with the template. The value must be an integer between `1` and `100`

g. In the `CSV File` field, perform the following actions:

- Click the `Choose File` button to select a CSV file from which to acquire the new data.
- In the window that opens, navigate to the location in which the CSV file is stored. Select the CSV file to use.

> ### Important
> The following is an example of an acceptable format for contents that are stored in the CSV file:
>
> ```
> employeeid, folderid, tenantdbid, state, lastname, firstname, password, username, skilllevels
> bulkuser1,105,1, CFGEnabled, Tamblyn, Ericm, password, bulkuser1, "{skilldbid:102, level:10},
> {skilldbid:106, level:6}"
> ```
>
> bulkuser2,106,2, CFGEnabled, Tamblyn, Ericm, password, bulkuser1, "{skilldbid:102, level:10},{skilldbid:107, level:7}"

- Click the `Open` button.

h. Click the `Finish` button.

- `Updates`—Enter any update that is to be performed on Configuration Objects with the Bulk Change Set. If there are updates, perform the following actions. Otherwise, move on to the next step.

  a. Click the `Add` button. The `New Update Item` panel appears to the right.

  b. Click the `Browse` button. A list of Configuration Objects appears to the right.

  c. Objects that appear in the list are determined by the currently selected category. Click the drop-down menu at the top of the panel to change the category type.

  d. You can use the `Quick Filter` or `Tenant Filter` field to find specific objects. Click the check box beside an object to add it to the Updates list.

  e. The name of the object appears in the `New Update Item` panel. Click the `OK` button to add it to the Update list.

  f. Repeat the steps in this list to add more objects to the Update list.

4. In the Bulk Change Set creation panel, you can reorder the objects within the `Deletions`, `Additions`, or `Updates` lists.

   Note: Bulk Change Set actions are executed in the following order : Deletions, Additions, and then Updates.

5. Click the Save button to save the Bulk Change Set.

Important

This action does not execute the Bulk Change Set. To execute the Bulk Change set, follow the instructions for executing a Bulk Change Set.

Deleting Bulk Change Sets

Deleting Bulk Change Sets

To delete a Bulk Change Set, perform the following steps:

1. In the header, go to `Operations > System > Bulk Change Sets`.
2. Click the check box beside each Bulk Change Set that is to be deleted.
3. Click the `Delete` button.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Executing Bulk Change Sets

Executing Bulk Change Sets

To execute a Bulk Change Set, perform the following steps:

1. In the header, go to `Operations` > `System` > `Bulk Change Sets`.
2. Select a Bulk Change Set in the `Bulk Change Sets` list. A new panel with more information about the Bulk Change Set opens to the right.
3. You can choose to validate the Bulk Change Set before execution. Click the `Validate` button to ensure that the Bulk Change Set is ready to be executed.

> **Important**
> The `Validate` button is useful in determining whether the Bulk Change Set is ready to be executed or whether it is dependent on other Bulk Change Sets to be executed first. For example: Some Additions depend on other objects to be added. You might want to update several agents with a new skill. However, the skill must be created first, before the agents can be updated. In this scenario, clicking the `Validate` button will verify that the skill has been created.

4. Click the `Execute` button to execute the Bulk Change Set. You can view the status of the Bulk Change Set in the Completed Bulk Changes panel.

> **Important**
> A Solution Definition file is created when a Bulk Change Set is executed. See the Completed Bulk Changes panel for instructions on how to download the Solution Definition file.

Completed Bulk Changes

The `Completed Bulk Changes` panel lists the successfully executed bulk changes in your environment.

Tenancy Permission Settings

Account Management respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the `Quick Filter` field.
- Click the `Tenant Filter` button to open the `Tenant filter` panel. In this panel, click the check box beside each tenant that you want to select. Use the `Quick Filter` field in this panel to filter the tenant list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

Actions

The `Completed Bulk Changes` list displays the following information:

- `Change Set Name`—The name of the Bulk Change Set
- `Creation Date`—The date on which the Bulk Change Set was created
- `Executed by Tenant`—Indicates which tenant last executed the Bulk Change Set
- `Executed by User`—Indicates which user last executed the Bulk Change Set
- `Started`—Indicates the date and time at which the execution of the Bulk Change Set was started
- Ended—Indicates the date and time at which the execution of the Bulk Change Set was completed

To delete records of Bulk Change Sets, click the check box beside each Bulk Change Set that is to be deleted, and then click the `Delete` button.

Note: This action does not delete the Bulk Change Set; it deletes the record of the Bulk Change Set.

Click a Bulk Change Set in the list to view more information about the item. The following fields are displayed:

- `Change Set Name`—The name of the Bulk Change Set
- `Deletions`—The objects that were deleted by the Bulk Change Set
- `Additions`—The objects that were added by the Bulk Change Set
- `Updates`—The objects that were updated by the Bulk Change Set

Click the `Export` button to download the solution definition file that was used during execution of the Bulk Change Set.

Click the `Delete` button to delete the record of the Bulk Change Set.

Note: This action does not delete the Bulk Change Set; it deletes the record of the Bulk Change Set.

Solution Deployment

Solution Deployment enables the user to fully deploy solution definitions and installation packages (IPs) to local and remote locations. This includes installation and configuration of all necessary applications and updates to existing multi-tenant applications, where appropriate.

A solution definition consists of an XML file that dictates the steps to install, upgrade, or configure IPs and system configurations to deploy a solution successfully.

Solution Deployment includes the following sections:

Installation Packages

These pages explain how to manage installation packages (IPs).

Installation packages

Upload, copy, deploy, download, or delete IPs

Use the Deployment Wizard

View Deployed IPs

Solution Definitions

These pages explain how to manage solution definitions.

Solution definitions and prerequisites

Create, delete, copy, modify, deploy, or export solution definitions

View history and list of deployed solutions

Privileges

This page explains how to manage privileges.

Privileges

Installation Packages

This panel enables you to manage installation packages (IPs) by uploading IPs to a repository in GAX and deploying the IPs to hosts.

The `Installation Packages` panel on the left of the screen displays a list of IPs that you have permission to see in your environment. The list is sorted by groups. You can expand a group to see its list of IPs.

Notes:

- Installation packages are stored in the database and not on the local file system.
- If the component metadata XML file contains questions that must be answered during the installation of an IP, the user is prompted to answer those questions during installation.
- IP deployment does not require the use of an SPD file.

Tenancy Permission Settings

Solution Deployment respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the `Quick Filter` field.
- Click the `Tenant Filter` button to open the `Tenant filter` panel. In this panel, click the checkbox(es) beside the tenants that you want to select. Use the `Quick Filter` field in this panel to filter the tenant list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

Installation Packages Panel

The `Installation Packages` panel list displays the following information:

- `Name`—The name of the IP.
- `Version`—The version number of the IP.
- `Locale ID`—Indicates the language used by the plug-in.
- `Operating System`—The operating system and bit version that are required by the IP.
- `Status`—Indicates the current status of the IP. For example, a status of `Complete` indicates that the IP deployed successfully.
- `Update Time`—A timestamp that indicates when the IP was last updated.

Additional Details

Click an IP to reveal more details in a panel that opens to the right. This panel displays the following information about the IP:

- `Name`—The name of the IP.
- `Nickname`—The nickname for the IP.
- `Description`—An optional description of the IP; this can be modified, as required.
- `Version`—The version number of the IP.
- `Locale ID`—Indicates the language used by the plug-in.
- `Operating System`—The operating system that is required by the IP.
- `Status`—Indicates the current status of the IP For example, a status of `Complete` indicates that the IP deployed successfully.
- `Update Time`—A timestamp that indicates when the IP was last updated.
- `Group`—The group to which this IP belongs. If you change the group name, the IP is relocated to that group. If the group name you enter does not exist, it will be created. These actions take effect immediately in the `Installation Packages` list.

Other Actions

You can perform the following actions from this panel:

- Upload Installation Packages—Upload an IP to the repository.
- Copy to Tenants—Copy the IP to tenant(s).
- Deploy—Deploy the IP to host(s).
- Download—Download a copy of the IP.
- Delete—Delete the IP.

Copying Installation Packages to Tenants

Copying Installation Packages to Tenants

To copy an IP to the repository of a tenant or tenants, perform the following steps:

1. In the header, go to `Configuration > Solution Deployment > Installation Packages`.
2. Click the name of an installation package to select it. A new panel opens to the right.
3. In the `Installation Package` details panel, click the `Copy to Tenants` button. A new panel called `Copy to Tenants` opens to the right.
4. In the `Copy to Tenants` panel, type the name of a tenant in the `Quick Filter` field, or click the `Browse` button to browse a list of tenants in your environment. A new panel called `Tenants` opens to the right.
5. Click the check box beside each tenant that is to receive the IP. The name of the tenant will appear in the `Copy to Tenants` panel, in the `Targeted Tenants` section.
6. Click the `Next` button at the bottom of the `Copy to Tenants` panel.
7. Click the `Finish` button to copy the IP to the tenant(s).

Deleting Installation Packages

Deleting Installation Packages

To delete an IP from the repository, perform the following steps:

1. In the header, go to `Configuration > Solution Deployment > Installation Packages`.
2. Click the name of an installation package to select it. A new panel opens to the right.
3. In the `Installation Package` details panel, click the `Delete` button.
4. A dialog box appears to confirm deletion. Perform one of the following actions:
    - Click the `OK` button to delete the IP permanently.
    - Click the `Cancel` button to cancel deletion of the IP.

Important

This action is available only if the user has the `Delete IPs and SPDs` privilege.

Deploying Installation Packages

Deploying Installation Packages

To deploy an IP to a host or hosts, perform the following steps:

1. In the header, go to `Configuration > Solution Deployment > Installation Packages`.
2. Click the name of an installation package to select it. A new panel opens to the right.
3. In the Installation Package details panel, click the `Deploy Profile:` button. A new panel called `Service Deployment Wizard` opens to the right.
4. Follow the steps in the Deployment Wizard.

Important

- You cannot upload an IP to the repository if a version of the IP already exists in the repository. You must have the `Replace IPs and SPDs` privilege enabled to overwrite an IP in the repository.
- IP deployment does not require the use of an SPD file.

Deployment Wizard

The `Service Deployment Wizard` deploys an installation package (IP) or solution definition to the specified hosts and installs and configures the service as directed by the Service Package Definition.

While you are using the `Service Deployment Wizard`, take note of the following:

- Most of the fields in the Wizard are auto-complete fields. You can enter only part of the value in the field, and then you are presented with a list of all entries that contain the text that you entered; you can then select the appropriate item.
- The Wizard verifies the IPs, based on the operating system of the intended hosts. When you are selecting hosts, make sure that you select those that are running the required operating system.
- If an IP is already installed on a host, by default the Wizard will reinstall the IP. All parameters entered during the previous deployment are saved by Genesys Administrator Extension and automatically prepopulated in the Wizard.
- When upgrading an existing IP, the IP's permissions and connections are updated to the new `Application` object.

Items that can be merged

For scenarios in which the existing IP and the new IP have conflicting values, the existing IP's values are maintained. If the existing IP does not contain a value, the value of the new IP is used. The following values are available to be merged:

- options
- annex
- connections
- ports
- timeout
- autorestart
- commandlinearguments
- commandline
- state
- shutdowntimeout
- attempts
- redundancytype
- isprimary
- startuptimeout

The following are two possible scenarios that you may perform by using the `Service Deployment Wizard`:

- Upgrading an Installation Package
- Rollback an Installation Package

Upgrading an Installation Package

To upgrade an installation package (IP), perform the following actions:

1. In the `Deployed IPs` panel, select the IP to use for the upgrade.
2. A new panel with additional information about the IP appears to the right. Click the `Deploy Profile:upgrade to (version number)` button.
3. The `Service Deployment Wizard` panel displays to the right. Click the `Next` button.
4. The panel updates to show the `Host set selection` list. Select the host to receive the IP. By default, the host that received the previous version of the IP is already selected. Click the `Next` button.
5. The panel updates to show the `Application Parameters` list. Values from the previous version of the IP deployment may be displayed in the following fields:
    - `Application object for host`—This field is generated by Genesys Administrator Extension per host. Generally, there is no need to modify this field.
    - `Existing Application Object`—This field is automatically generated by Genesys Administrator Extension for each host to which an IP is targeted. This is the Application object in Configuration Server for which Genesys Administrator Extension will update connections.
    - `New Application Object Creation Details`—Select an option for merging the old IP `Application` object values into the new IP `Application` object. Refer to the list of items to merge for more information.
        - `Merge with Precedence to the Old Application Object`—This option will merge in values from the old `Application` object. If there is a conflict with values in the new `Application` object, this option gives precedence to the values in the old `Application` object.
        - `Merge with Precedence to the New Template`—This option will only merge in values from the old `Application` object that do not exist in the new `Application` object.
        - `No Merging`—No values are merged from the old `Application` object.
    - `Tenant Object`—This is the tenant that is set on an IP `Application` object. Click the `Browse` button to select a tenant from a list.
    - `App port`—Specify a port number for the `Application` object to use.
    - `Primary Configuration Server`—Click the `Browse` button to select the Primary Configuration Server to use. This field defaults to a Genesys Administrator Extension `Application` object.
    - `Backup Configuration Server`—Click the `Browse` button to select the Backup Configuration Server to use. This field defaults to a Genesys Administrator Extension `Application` object.
    - `Skip IP Re-install`—Choose one of the following options:

    - `True`—Reinstall the IP only if the Application object does not exist in Configuration Server.
    - `False`—Always reinstall the IP.

6. Click the `Next` button.
7. The panel updates to display the `Silent.ini Parameters` list. These values are prepopulated from the previous version of the IP, but the settings can be modified, if necessary.
8. The panel updates to display the `Deployment Summary` report. Review the settings, and perform one of the following actions:
    - Click the `Finish` button to upgrade the IP.
    - Click the `Previous` button to return to a previous panel and modify settings.
9. The panel updates to display a progress bar of the upgrade deployment. This information also displays in the `Deployed IPs` panel.

Important

If a deployment fails, you can review a log of the deployment by selecting the IP from the `Deployed IPs` panel. A new panel displays with additional information about the IP. Click the `Deployment Action Log`.

Rolling Back an Installation Package

To roll back an IP, perform the following actions:

1. In the `Deployed IPs` panel, select the IP to roll back.
2. A new panel with additional information about the IP appears to the right. Click the `Deploy Profile:rollback to (version number)` button.
3. The `Service Deployment Wizard` panel displays to the right. Click the `Next` button.
4. The panel updates to show the `Host set selection` list. Select the host to receive the IP. By default, the host that previously received the IP is already selected. Click the `Next` button.
5. The panel updates to show the `Application Parameters` list. Values from the previous IP deployment may be displayed in the following fields:
    - `Application object for host`—This field is generated by Genesys Administrator Extension per host. Generally, there is no need to modify this field.
    - `Existing Application Object`—This field is automatically generated by Genesys Administrator Extension for each host to which an IP is targeted. This is the `Application` object in Configuration Server for which Genesys Administrator Extension will update connections.
    - `New Application Object Creation Details`—Select an option for merging the old IP `Application` object values into the new IP `Application` object. Refer to the list of items to merge for more information.

    - `Merge with Precedence to the Old Application Object`—This option will merge in values from the old `Application` object. If there is a conflict with values in the new `Application` object, this option gives precedence to the values in the old `Application` object.
    - `Merge with Precedence to the New Template`—This option will only merge in values from the old `Application` object that do not exist in the new `Application` object.
    - `No Merging`—No values are merged from the old `Application` object.
  - `Tenant Object`—The tenant that is set on an IP `Application` object. Click the `Browse` button to select a tenant from a list.
  - `App port`—Specify a port number for the `Application` object to use.
  - `Primary Configuration Server`—Click the `Browse` button to select the Primary Configuration Server to use. This field defaults to a Genesys Administrator Extension `Application` object.
  - `Backup Configuration Server`—Click the `Browse` button to select the Backup Configuration Server to use. This field defaults to a Genesys Administrator Extension `Application` object.
  - `Skip IP Re-install`—Choose one of the following options:
    - `True`—Reinstall the IP only if the Application object does not exist in Configuration Server.
    - `False`—Always reinstall the IP.

6. Click the `Next` button.
7. The panel updates to display the `Silent.ini Parameters` list. These values are prepopulated from the previous deployment of the IP, but the settings can be modified, if necessary.
8. The panel updates to display the `Deployment Summary` report. Review the settings, and perform one of the following actions:
   - Click the `Finish` button to upgrade the IP.
   - Click the `Previous` button to return to a previous panel and modify settings.
9. The panel updates to display a progress bar of the deployment. This information also displays in the `Deployed IPs` panel.

> **Important**
>
> If a deployment fails, you can review a log of the deployment by selecting the IP from the `Deployed IPs` panel. A new panel displays with additional information about the IP. Click the `Deployment Action Log`.

Downloading Installation Packages

Downloading Installation Packages

To download an IP from the repository, perform the following steps:

1. In the header, go to `Configuration > Solution Deployment > Installation Packages`.
2. Click the name of an installation package to select it. A new panel opens to the right.
3. Click the `Download` button. Genesys Administrator Extension initiates the download procedure in your browser.

Uploading Installation Packages

Uploading Installation Packages

To upload an IP to the repository, perform the following steps:

1. In the header, go to `Configuration` > `Solution Deployment` > `Installation Packages`.
2. In the `Installation Packages` panel, click the New button. A new panel called `Software Import Wizard` opens to the right.
3. In the `Software Import Wizard` panel, select a method for importing the IP:
    - Installation Package Upload (includes templates)—Upload a .zip file containing an installation package and its associated templates. These files are typically provided by Genesys Technical Support.
    - Installation Package Upload (template uploaded separately)—Upload an installation package and its associated templates.
    - UNC Path to Mounted CD or Directory—Upload an IP stored on a mounted CD or network directory.
    - UNC Path to an Existing Administrator Repository—Upload an IP from an existing Genesys Administrator repository.
4. The file(s) upload from your file system to Genesys Administrator Extension, and a progress bar displays to show the upload progress. The progress of the upload also displays in the Status column in the Installation Packages panel.

Installation Package Upload (includes templates)

1. In the `Software Import Wizard` panel, select `Installation Package Upload (includes templates)` and click the `Next` button.
2. The panel updates. Click the `Choose File` button to select the file to upload.
3. Click the `Finish` button.
4. The file begins uploading from your file system to Genesys Administrator Extension. When the upload is complete, the IP will be displayed in the `Installation Packages` list.

Installation Package Upload (template uploaded separately)

1. In the `Software Import Wizard` panel, select `Installation Package Upload (template uploaded separately)` and click the `Next` button.
2. The panel updates and displays three boxes: `Upload a package`, `Upload an XML template`, and

`Upload an APD template`. Click the `Choose File` button in each field to select the file to upload.

- Upload a package—A .zip file that contains the installation package.
- Upload an XML template—The XML template file for this installation package. This is the template that is referenced by the installation package description file. This file should not be modified from the version in the template directory.
- Upload an APD template—The APD template file for this installation package. This is the template that is referenced by the installation package description file. This file should not be modified from the version in the template directory. The panel updates.

3. Click the `Finish` button.
4. The file begins uploading from your file system to Genesys Administrator Extension. When the upload is complete, the IP will be displayed in the `Installation Packages` list.

UNC Path to Mounted CD or Directory

1. In the `Software Import Wizard` panel, select `UNC Path to Mounted CD or Directory`.
2. In the text field, type the path for where the IP is stored.
3. Click the `Next` button to open the path.
4. The panel updates to display the IP(s) found at the specified location. Click the check box(es) beside the IP(s) to upload.
5. Click the `Finish` button.
6. The panel updates to display a progress bar for the upload process. You can click the `Close` button at any time to close the panel without interrupting the upload procedure. The status of the IP upload will be displayed in the `Installation Packages` list.

UNC Path to an Existing Administrator Repository

1. In the `Software Import Wizard` panel, select `UNC Path to an Existing Administrator Repository`.
2. In the text field, type the path for the existing Genesys Administrator repository.
3. Click the `Next` button to open the path.
4. The panel updates to display the IP(s) found at the specified location. Click the check box(es) beside the IP(s) to upload.
5. Click the `Finish` button.
6. The panel updates to display a progress bar for the upload process. You can click the `Close` button at any time to close the panel without interrupting the upload procedure. The status of the IP upload will be displayed in the `Installation Packages` list.

Important

- A green progress bar represents a successful upload of the installation package. A red progress bar represents a failed upload of the installation package. You can review which step failed in the `Status` field in the `Installation Packages` list.
- You cannot upload an IP to the repository if a version of the IP already exists in the repository. You must have the `Replace IPs and SPDs` privilege enabled to overwrite an IP in the repository.

Deployed IPs

The Deployed IPs panel displays a list of Installation Packages (IPs) that have been deployed and that you have the required role privileges to view. This list provides the following information about each deployed IP:

- Name—The name of the IP.
- Version—A version number that is assigned by the person who deployed the IP.
- Current—Indicates the IP is the latest successful deployment for the tenant.
- Profile—The profile type of the IP.
- State—Indicates whether the deployment succeeded or failed.
- Deployed by Tenant—The name of the tenant that deployed the IP.
- Deployed by User—The login name of the person who deployed the IP.
- Started—The date and time at which the deployment of the IP was started.
- Ended—The date and time at which the deployment of the IP finished.
- Key—The tenant that received the deployed IP.

Tenancy Permission Settings

Solution Deployment respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the Quick Filter field.
- Click the Tenant Filter button to open the Tenant filter panel. In this panel, click the check box(es) beside the tenants that you want to select. Use the Quick Filter field in this panel to filter the tenant list.

You can sort the IPs in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

Other Actions

To view additional information, click an IP in the list. A new panel opens to the right. The following actions are available:

- To remove a deployment instance from the list, click Delete. This does not delete the IP from the database; it just removes the corresponding history item from the list that is displayed in this screen.
- To redeploy an already deployed IP or restart a previously run deployment, click Redeploy. This launches the deployment wizard and populates its fields with the values that were used to deploy the IP. You can alter these values, as required. You will have to provide your credentials for the deployment; these values are not populated.

- To export a file that contains the properties, summary, and actions of an IP for auditing purposes, select an IP and click `Export`.
- View the change history of the deployment in the `Deployment Log` panel by clicking the `Related` button and selecting `Deployment Log`.

Some IPs might have additional versions available that allow you to upgrade or roll back the currently deployed IP. If so, you will see additional buttons called `Deploy Profile:upgrade to (version number)` and/or `Deploy Profile:rollback to (version number)`. Clicking these buttons will activate the deployment wizard to complete the action.

During a deployment, the `Actions` panel is displayed to the right of the `Deployed IPs` list. During the deployment, actions are listed as they are completed. After the deployment is complete, you can view the list in its entirety by scrolling through it.

Solution Definitions

This screen displays a list of all solution definition files for which you have the required role privileges to view. To refresh the list at any time, click Refresh. Click a solution definition in the list, and the Details panel is displayed to the right of the list. Actions that are available for each solution definition are applied from the Details panel.

You can filter the contents of this list in several ways:

- Type the name or partial name of an object in the Quick Filter field.
- Click the Tenant Filter button to open the Tenant Filter panel. In this panel, click the check box(es) beside the tenants that you want to select. Use the Quick Filter field in this panel to filter the tenant list.
- You can sort the solution definitions in the list by clicking on a column head. Clicking a column head a second time reverses the sort order.

Properties of Solution Definition Files

A solution definition file defines the Genesys component installation packages (IPs) that are required to provide the service, and how they are to be deployed and configured.

The IPs that are deployed as part of the solution are the actual software that provide the solution.

When you select a solution definition, a new panel is displayed to the right an displays additional information:

- Name—The name of the solution definition.
- Version—The version of the solution definition
- Description—An optional description of the solution definition; this can be modified, as required.
- Notes—An optional field for notes about the solution definition; this can be modified, as required.
- Deployable—Indicates whether the solution definition can be deployed.

Note: When you are creating a solution definition file, you must give it a unique name and version number. Genesys Administrator Extension will not allow you to import a solution definition if its name or version number is the same as an existing one. Likewise, if you modify a solution definition that is already uploaded, you must increment the version number.

The IP Availability area is where you verify that the IPs have been uploaded into the IP repository.

Solution Definitions

A solution definition is an XML file that describes what is being deployed, how the deployment is to be executed, as well as any necessary pre- and post-installation procedures.

The Hosted Provider Edition software CD includes four Service Package Definitions for use by Genesys Administrator Extension. They are for the basic deployment of four services: eServices, Inbound

Voice, Outbound Voice, and Workforce Management. These files are located in the following folder:

`\service\asd\spdFiles\`

Prerequisites

Before you start deploying a Solution Package by using Genesys Administrator Extension, make sure that you have performed the following tasks:

- Install the latest version of Local Control Agent (LCA) on the target hosts. This also installs and configures the Genesys Deployment Agent on each host. Refer to the *Framework 8.x Deployment Guide* for instructions.
- Install Java SDK on the target hosts to enable them to process the deployment instructions.
- Upload the necessary IPs into the IP Repository.

Refer to the *Genesys Administrator Extension 8.1 Deployment Guide* for a complete list of prerequisites requires for Genesys Administrator Extension and Solution Deployment.

Creating Solution Definitions

Before you create a solution definition file by using Genesys Administrator Extension, you must perform the following tasks:

- Prepare the solution definition file.
- Upload all of the Genesys-component installation packages (IPs) that are required to provide the solutions into an IP repository to which Genesys Administrator Extension has access.

Note: When you create a solution definition file, you must give it a unique name and version number. Genesys Administrator Extension will not allow you to a import a solution definition if its name or version number is the same as the name or version number of an existing one. Likewise, if you modify a solution definition that is already uploaded, you must increment the version number.

Creating a Solution Definition

1. In the `Solution Definitions List` screen, click New.
2. In the `Upload Solution Definition` area that is displayed to the right of the `Solution Definition List`, click Browse to browse to and select the solution definition for this solution definition file.
3. Click `Upload`. The name of the solution definition file, as defined in the solution definition, is displayed in the list.
4. To verify that the solution definition file can be deployed, perform the following steps:
    a. In the list of solution definition files, click the solution definition file that you imported in the previous steps.
    b. Verify that the solution definition file can be deployed by selecting `Check IP Availability` from the `Related` menu.
    c. The required IPs that were found in the IP repository and those that are missing are displayed in the `IP Availability` area that is displayed. Missing IPs must be uploaded to the IP repository before this solution definition file can be deployed. When all IPs are found, the solution definition file is complete and can be marked as `Deployable`.
    d. If there are no missing IPs, in the `Properties` area of the `Details` panel, check the `Deployable` check box.
5. Click Save to save your changes or `Cancel` to leave the solution definition file unchanged.

Copying Solution Definitions to Tenants

Copying Solution Definitions to Tenants

1. In the header, go to `Configuration > Solution Deployment > Solution Definitions`.
2. Click the name of a solution definition to select it. A new panel opens to the right.
3. In the new panel, click the `Copy to Tenants` button. A new panel called `Copy to Tenants` opens to the right.
4. In the `Copy to Tenants` panel, type the name of a Tenant in the `Quick Filter` field, or click the `Browse` button to browse a list of tenants in your environment. A new panel called `Tenants` opens to the right.
5. Click the check box beside each tenant that is to receive the solution definition. The name of the Tenant appears in the `Copy to Tenants` panel, in the `Targeted Tenants` section.
6. Click the `Next` button at the bottom of the `Copy to Tenants` panel.
7. Click the `Finish` button to copy the solution definition to the tenant(s).

Modifying Solution Definitions

You can modify only the description and deployability of a solution definition.

Modifying a Solution Package

1. In the `Solution Definition List` screen, select the solution definition that you want to modify.
2. In the `Properties` area that is displayed to the right of the `Solution Definition List`, modify the `Description` and `Deployable` fields, as required.
3. Click Save to save your changes or `Cancel` to leave the solution definition unchanged.

Deleting Solution Definitions

When you delete a solution definition file, the solution definition file is not deleted from the database, nor are the IPs deleted from the IP repository.

Deleting a Solution Definition

1. In the `Solution Definition List` screen, select the solution definition file that you want to delete.
2. In the `Properties` area that is displayed to the right of the `Solution Definition List`, click `Delete`.
3. In the Confirm Deletion dialog box, do one of the following:
    - To remove the solution definition file from the database, click `OK`.
    - To keep the solution definition file and not remove it from the database, click `Cancel`.

Deploying Solution Definitions

Deploying a solution installs and configures the solution at a local or remote location, as directed by the solution definition.

Deploying a Solution Definition File

1. In the `Solution Definition List` screen, select the solution definition file that you want to deploy.
2. In the `Properties` area that is displayed to the right of the `Solution Definition List`, click `Deploy`.
3. Follow the steps in the Deployment Wizard.

Important

The Deploy Profile type varies, depending on the profile specified in the solution definition file. For example, if `profile name="upgrade"` is present, a `Deploy Profile: upgrade` button displays.

Exporting Solution Definitions

You can view a solution definition or save it to a file. This action does not remove the solution definition from the list.

Exporting the Solution Definition

1. In the header, go to `Configuration > Solution Deployment > Deployed Solutions`.
2. Select the solution package for which you want to export the solution definition. A new panel opens to the right.
3. Click `Export`. Genesys Administrator Extension initiates the download procedure in your browser.

In the application in which you chose to view the solution definition, you can take any action that the application allows.

> **Important**
> The solution definition is also listed in the Downloads window. Double-click the file name to view the file in your default browser. To remove the file from the window, click `Clear List` to remove all listed files, or right-click the file and select `Remove From List` to remove the selected file.

Viewing the History of Solution Definition Files

Solution packages might change over time. They might be upgraded (up-versioned) to include both minor and major changes in the solution definition. New solutions might be added, removed, or retired. Genesys Administrator Extension enables you to generate reports to track these changes.

Generating a Report on the Solution

1. Select a solution from the `Deployed Solution List`.
2. Click `History`. The `History` panel is displayed to the right of the `Deployed Solutions List`. You can filter reports by one or more of the following criteria: `Time`, `User`, `Tenant`, and `Change`.

Deployed Solutions

The Deployed Solutions screen displays a list of solution packages that have been deployed and that you have the required role privileges to view. The Deployed Solution List table provides the following information about each deployed solution:

- Name—The name of the solution package.
- Version—A version number that is assigned by the person who deployed the solution.
- Progress—A graphical indicator of the progress of each deployment.
- Current—Indicates the solution package is the latest successful deployment for the tenant.
- Profile—The profile type of the solution.
- State—Indicates whether the deployment succeeded or failed.
- Deployed by Tenant—The name of the tenant that deployed the solution.
- Deployed by User—The login name of the person who deployed the solution.
- Started—The date and time at which the deployment of the solution was started.
- Ended—The date and time at which the deployment of the solution finished.
- Key—The tenant that received the deployed solution.

Tenancy Permission Settings

Solution Deployment respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the Quick Filter field.
- Click the Tenant Filter button to open the Tenant filter panel. In this panel, click the check box(es) beside the tenants that you want to select. Use the Quick Filter field in this panel to filter the tenant list.

Sort the solutions in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

Other Actions

The Deployed Solutions screen also features the following actions:

- To refresh the list at any time, click Refresh.
- To view deployment information for a deployment instance, click a solution definition file in the list. Deployment information for that deployment instance is displayed to the right of the list.
- To remove a deployment instance from the list, click Delete. This does not delete the solution definition file from the database; it just removes the corresponding history item from the list that is displayed in

this screen.

- To redeploy an already deployed solution definition file or to restart a previously run deployment, click Redeploy. This launches the deployment wizard and populates its fields with the values that were used to deploy the solution definition file. You can alter these values, as required. You will have to provide your credentials for the deployment; these values are not populated.
- To export a file that contains the properties, summary, and actions of a deployed solution for auditing purposes, select a Deployed Solution and click Export.
- View the change history of the Deployment in the Deployment Log panel by clicking the Related button and selecting Deployment Log.

During a deployment, the Actions panel is displayed to the right of the Deployed Solution List. During the deployment, actions are listed as they are completed. After the deployment is complete, you can view the list in its entirety by scrolling through it.

Note: You cannot use the Redeploy button to redeploy a solution definition that has been deleted.

Privileges

The Privileges section displays a list of all privileges that are stored in Genesys Administrator Extension (GAX).

Roles and their privileges define what you can do in a given application. In GAX, roles and their privileges are controlled by the use of Role objects, which are assigned to Users (including Agents) and Access Groups.

For a sectioning of role privileges for GAX, refer to Appendix A of the Genesys Administrator Extension Deployment Guide. For more information about role privileges specifically, and role-based access control in general, refer to the *Framework 8.x Security Deployment Guide*.

Privileges are imported into GAX during the upload of an installation package (IP). All privileges defined in the metadata of the IP are imported into the GAX database. Privileges are defined as "task" elements in the metadata XML of the IP.

Click the Browse button to add privileges from the Privileges panel. To remove a privilege from the Assigned Privileges list, highlight the item, and click the Remove button.

The Privileges section contains the following information:

- Display Name—The name of the privilege
- IP Version—The version of the installation package that uses this privilege
- Prerequisite—Any other privilege that might be required

Operational Parameter Management

Operational Parameter Management (OPM) enables the creation of parameters (called Operational Parameters) that are stored in the Configuration Database as part of Transaction objects. Operational Parameters can be used in parameterized Routing Strategies and other applications that are capable of reading Transaction objects, in which the values of the parameters are defined at runtime and integrated into the call flow.

In the case of Universal Routing Server type routing, Operational Parameter Management proceeds as follows—however, OPM also works in a similar way with other routing types, such as voice applications and Genesys Orchestration:

- The Service Provider defines the Operational Parameter by specifying its type and a name by which it is referenced in a strategy, voice application, or other routing strategy.
- The Service Provider groups Operational Parameters into a Parameter Group Template. One Operational Parameter can be associated with one or more templates.
- The Service Provider deploys Parameter Group Templates to Tenants, at which time each Parameter Group Template becomes a Parameter Group for the Tenant. One Parameter Group Template can be deployed to more than one Tenant. Each Parameter Group in a Tenant is unique.
- The Tenant administrator, or a user with the appropriate permissions and role privileges, enters values for the Operational Parameters in the Parameter Group, enabling control of active strategies. Genesys Administrator Extension stores those values in the Configuration Database as part of a Transaction object.
- The Universal Routing Server Application executes a Routing Strategy, which reads the values of the Operational Parameters in the Parameter Groups with which it is associated, and integrates them into the call flow.

Operational Parameter Management respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

This chapter includes the following sections:

Parameters

These pages explain how to manage operational parameters.

Parameters and their types

Define, modify, and delete parameters

Parameter Groups

These pages explain how to manage parameter groups.

Parameter groups

Set and modify values, change templates, and delete parameter groups

Parameter Group Templates

These pages explain how to manage parameter group templates.

Parameter Group Templates and their properties

Create, modify, delete, manage, and distribute parameter group templates

Parameters

Operational Parameters are parameters used to customize Routing Strategies. In Operational Parameter Management, the Service Provider defines Operational Parameters and groups them into Parameter Group Templates. Tenants to whom the Parameter Group Templates are subsequently deployed customize the values of the Operational Parameters, which are then read by a Routing Strategy and incorporated into the call flow.

This screen displays a list of all defined Operational Parameters for which you have the required role privileges to view. To refresh the list at any time, click `Refresh`. Click an Operational Parameter in the list. Its properties, including its type, is displayed to the right of the list.

You can filter the contents of this list in several ways:

- Type the name or partial name of the Parameter, Key, Type, or Tenant in the Quick Filter field.
- Click the `Tenant Filter` button (the icon with the circle and horizontal bar) to open the Tenant filter panel. In this panel, click the checkbox(es) beside the tenants that you want to select. Use the Quick Filter field in this panel to filter the tenant list.
- You can sort the Parameter in the list by clicking on a column head. Clicking a column head a second time reverses the sort order.

You can perform the following tasks in this screen:

- Define new parameters
- Modify parameters
- Delete parameters

Parameter Properties

Properties of Operational Parameters

Property	Description
Display Name	The name of the parameter. It must be unique in the system.
Key Name	The name of the parameter as it would be entered in the Annex/Options tab of the Transaction object in Genesys Administrator. If this field is left blank, the name that is displayed under Display Name is used.
Type	The parameter.
Object Type	This field appears only for parameters of Type Configuration Object, and specifies the type of configuration object. Optionally, when Configuration Object is selected, you can check the checkbox named `Multiple Types` to select multiple configuration objects to add to this parameter. If the checkbox named `Global` is checked, a separate panel will open to allow you to select which tenants will receive the parameter.
DN Type	This field appears only for parameters of Type Configuration Object and Object Type DN, and specifies the type of DN.
Custom List Custom Value	These properties apply only to parameters of type Custom List and specify the members of the Custom List. Define the list, as follows: • To add an item to the list, enter it in the Custom Value edit box, and click Add. • To modify an item in the list, select the value, make the change, and click OK. **Note**: If you want the display value of an item in the Custom List to be different from the actual value stored in the transaction object, enter that information in the Key field. • To remove an item from the list, select it, and click Delete. • To reorder the items in the list, select an item in the list and use the Up and Down arrow buttons to move it up or down in the list. • For integers, dates, and times, you can define minimum and/or maximum values (limits).
Mandatory	Specifies whether the parameter is mandatory or optional. If checked, a value must be entered for this parameter before it is saved. If not checked,

Property	Description
	the parameter is considered optional and can be saved without a value. This property can be modified later (for example, to change a mandatory parameter to an optional parameter).
Global	If checked, this parameter is unique in the entire system and is shared across all tenants. Its actual value must be defined at the time of creation, and can be changed only by the Service Provider.
Value	If this parameter is Global, this is the actual value of the parameter and cannot be changed. A default value can be set that is not propagated to deployed Parameter Group instances. Providing of a default value is optional.
Help Text	Optional text describing the parameter or providing additional information.

Parameter Types

The Operational Parameter type appears in the Type field of the properties of a parameter.

<table>
<tr><th>Type</th><th>Description</th></tr>
<tr><td>Audio Resource</td><td>The ARID of an Audio Resource.</td></tr>
<tr><td>Boolean</td><td>True or false only.</td></tr>
<tr><td>Configuration Object</td><td>The type of a configuration object, which is specified in the Object Type field of the parameter's properties. Optionally, when Configuration Object is selected, you can check the checkbox named <code>Multiple Types</code> to select multiple configuration objects to add to this parameter. If the checkbox named <code>Global</code> is checked, a separate panel will open to allow you to select which tenants will receive the parameter. The following types are supported:
Agent Group
DN
Person (more often referred to as User)
Place
Place Group
Skill
Stat Server
Transaction</td></tr>
<tr><td>Custom List</td><td>Valid values are limited to the values that are specified in a user-defined list, specified in the Custom List/Custom Value field of the properties of the parameter.</td></tr>
<tr><td>Date</td><td>A date value, in the format yyyy-mm-dd.</td></tr>
<tr><td>Integer</td><td>A 0 (zero), negative, or positive number with no decimal value.</td></tr>
<tr><td>Personality</td><td>The name of a Personality, given by the Personality Identifier value that is specified in the list of Personalities.</td></tr>
<tr><td>Schedule</td><td>Enables users to configure date and time ranges.</td></tr>
<tr><td>String</td><td>A string of characters, both alphanumeric and symbols.</td></tr>
<tr><td>Time</td><td>A time value, in the format hh:mm.</td></tr>
</table>

Schedule Parameter

The Schedule parameter enables users to specify a series of date and time ranges for parameter groups. For example, the Schedule parameter can specify opening and closing hours for each Tenant.

Creating Schedule Parameters

To create a Schedule parameter:

1. In the header, go to `Operations` > `Operational Parameters` > `Parameters`.
2. On the `Parameter List` panel, click the New button.
3. On the New panel that is displayed to the right of the `Parameter List` panel, define the properties of the new parameter.
4. In the Type field, select `Schedule`. A new section called `Schedule` appears below the Type field.
5. In the `Schedule` section, click the Add button.
6. In the `Date` panel that appears to the right, select the `Schedule` type. You can select `Date`, to select a specific date, or you can select `Day of Week`, to select a day of the week. If you select `Date`:
   a. You must select the `Year, Month, Day, and Time Zone` (optional) to apply the Schedule parameter. If you do not select a `Time Zone`, the system's local time zone will be used.
   b. The `Time Ranges` field is optional. This field graphically represents the time range for the Schedule parameter, based on a 24-hour clock. If the `Time Ranges` field is empty, the Schedule parameter will apply to the entire day.
   c. To specify a time range, move your mouse cursor to the time for which you want this Schedule parameter to begin.
   d. Click and drag the mouse cursor to the end time for this Schedule parameter. A box will appear to visually display the times for which this Schedule parameter will apply.
   e. Click the Save button.

   If you select `Day of Week`:

   a. You must select the `Day of Week` and `Time Zone` (optional) to apply the Schedule parameter. If you do not select a `Time Zone`, the system's local time zone will be used.
   b. The `Time Ranges` field is optional. This field graphically represents the time range for the Schedule parameter, based on a 24-hour clock. If the `Time Ranges` field is empty, the Schedule parameter will apply to the entire day.
   c. To specify a time range, move your mouse cursor to the time for which you want this Schedule parameter to begin.
   d. Click and drag the mouse cursor to the end time for this Schedule parameter. A box will appear to visually display the times for which this Schedule parameter will apply.

e. Click the Save button.

7. In the `New` panel, do one of the following:
    - To save the new parameter, click the Save button.
    - To cancel the new parameter and not save it in the database, click the `Cancel` button.

Defining Operational Parameters

Defining Operational Parameters

Normally, the Service Provider defines new operational parameters. Tenant administrators can also define their own, but these can be added only to Parameter Group Templates in the same tenant.

1. In the header, go to `Operations > Operational Parameters > Parameters`.
2. On the `Parameter List` panel, click `New`.
3. On the `New` panel that is displayed to the right of the `Parameter List` panel, define the properties of the new parameter.
4. Do one of the following:
    a. To save the new parameter, click `Save`.
    b. To cancel the new parameter and not save it in the database, click `Cancel`.

Modifying Operational Parameters

Modifying Operational Parameters

> **Important**
>
> Follow the instructions in this topic to modify any property of an Operational Parameter except Value. To set or change the actual value of an Operational Parameter in a Parameter Groups, see the topic Setting and Modifying Values in Parameter Groups.

When you modify an Operational Parameter, the changes are propagated to any Parameter Group Templates that contain the modified parameter. However, the changes are not propagated to any deployed Parameter Groups.

1. In the header, go to `Operations > Operational Parameters > Parameters`.
2. On the `Parameter List` panel, select the parameter that you want to modify.
3. On the <parameter name> panel that is displayed to the right of the `Parameter List` panel, modify the properties of the parameter, as required.
4. Click Save to save your changes, or click `Cancel` to leave the parameter unchanged.

Deleting Operational Parameters

Deleting Operational Parameters

You can delete only Operational Parameters that are not assigned to Parameter Group Templates.

1. In the header, go to `Operations > Operational Parameters > Parameters`.
2. On the `Parameter List` panel, select the parameter that you want to delete.
3. On the <parameter name> panel that is displayed to the right of the `Parameter List` panel, click `Delete`.
4. In the Confirm Deletion dialog box, do one of the following:
    a. To remove the Operational Parameter from the database, click `OK`.
    b. To keep the Operational Parameter and not remove it from the database, click `Cancel`.

Parameter Groups

Parameter Groups are sets of Operational Parameters that are associated with a Routing Strategy. They are deployed as Parameter Group Templates by the Service Provider to the tenant. The tenant administrator then assigns values to the Operational Parameters in the Parameter Group. When the URS application executes a Routing Strategy, the values of the Operational Parameters in the associated Parameter Group are incorporated into the call flow.

This screen displays a list of all Parameter Groups for which the tenant that is associated with the logged-in user is associated, and for which you have the required role privileges to view. To refresh the list at any time, click Refresh.

You can filter the contents of this list in several ways:

- Type the name or partial name of the Parameter Group, Parameter Group Template, Flag, or Tenant in the Quick Filter field.
- Click the `Tenant Filter` button (the icon with the circle and horizontal bar) to open the Tenant filter panel. In this panel, click the checkbox(es) beside the tenants that you want to select. Use the Quick Filter field in this panel to filter the tenant list.
- You can sort the Parameter Groups in the list by clicking on a column head. Clicking a column head a second time reverses the sort order.

Access to each Parameter Group is based on the access control settings of the Configuration Transaction object. The following are general guidelines:

- If a user has `Update` permission to the Transactions folder, where the related Configuration Transaction object will be saved, the user can create a new Parameter Group.
- If a user has Read permission to the related Configuration Transaction object, the user can view the Parameter Group.
- If a user has `Update` permission to the related Configuration Transaction object, the user can save the Parameter Group.
- If a user has `Delete` permission to the related Configuration Transaction object, the user can delete the Parameter Group.

Click on the name of a Parameter Group to display more information about the Parameter Group in a new panel that opens to the right. Users can click the `Access Control` button to change the permissions for the Parameter Group, provided that they have `Update` permission for the object.

It is possible to modify values of Parameter Groups from applications other than GAX (for example, Genesys Administrator or the Configuration Layer). When this occurs, a message appears on the Parameter Group details panel to alert you that the Parameter Group is out of synchronization. You are asked to choose a value from one of the following options:

- `Value from Database`—The value stored in the Genesys Administrator Extension database will be used.
- `Value from Transaction Object`—The external value will be used.

Click the Save button to synchronize the Parameter Group.

You can perform the following tasks in this screen:

- Set or modify the values of the Operational Parameters in the Parameter Group
- Change the template that a Parameter Group uses to another Template as its basis
- Delete a Parameter Group

Setting and Modifying Values in Parameter Groups

Setting and Modifying Values in Parameter Groups

The Operational Values in Parameter Groups might be assigned default values. It is the responsibility of the tenant administrator, or someone with the appropriate role privileges, to assign values to these Operational Parameters that are applicable to the tenant.

1. In the header, go to `Operations > Operational Parameters > Parameter Groups`.
2. On the `Parameter Group List` screen, select the Parameter Group that you want to modify.
3. On the `Parameters` panel that is displayed to the right of the `Parameters Group List` screen, enter or modify values for each of the Operational Parameters, as required.
4. Click Save to save the changes, or click `Cancel` to cancel the changes and leave the Parameter Group unchanged.

It is possible to modify values of Parameter Groups from applications other than GAX (for example, Genesys Administrator or the Configuration Layer). When this occurs, a message appears on the Parameter Group details panel to alert you that the Parameter Group is out of synchronization. You are asked to choose a value from one of the following options:

- `Value from Database`——The value stored in the Genesys Administrator Extension database will be used.
- `Value from Transaction Object`—The external value will be used.

Click the Save button to synchronize the Parameter Group.

Changing the Template of a Parameter Group

Changing the Parameter Group Template of a Parameter Group

You can change the Parameters that are associated with a Parameter Group and which designated applications the group uses. This cannot be done directly in the Parameter Group, nor in the Parameter Group Template that was used to deploy the Parameter Group.

1. Create a new Parameter Group Template by copying the current Parameter Group Template of the Parameter Group that you want to change. Select the Parameter Group Template.
2. In the `<Parameter Group name>` panel that is displayed to the right, click `Change Template`.
3. In the `Change Template` panel that is displayed to the right, select the new Parameter Group Template from the `Targeted Parameter Group Template` field.
4. Click `Next`.
5. Review the Summary in the `Change Template` panel.
6. Click `Finish`.
7. Click `Close`.

If the existing parameters and/or the designated applications are in the new Parameter Group Template that you want to change them to, then they will be reused. The following content is removed from the changed Paramter Group:

- Parameters that are not in the new Parameter Group Template to which you want to change
- Designated Applications that are not in the new Parameter Group Template to which you want to change

The transaction object that represents the Parameter Group is updated with new parameter set.

Deleting Parameter Groups

Deleting Parameter Groups

When you delete a Parameter Group from the database, the Parameter Group Template and its Operational Parameters are not removed from the database. Likewise, the Routing Strategy with which it is associated is not deleted. The main impact of this action is that when URS executes this Routing Strategy for this Tenant, the Operational Parameter values in the Group will not be incorporated in the call flow.

1. In the header, go to `Operations > Operational Parameters > Parameter Groups`.
2. On the `Parameter Group List` screen, select the Parameter Group that you want to delete.
3. On the <Parameter Group name> panel that is displayed to the right of the Parameter Group List panel, click `Delete`.
4. In the Confirm Deletion dialog box, do one of the following:
    a. To remove the Parameter Group from the database, click `OK`.
    b. To keep the Parameter Group and not remove it from the database, click `Cancel`.

Parameter Group Templates

Parameter Group Templates are sets of Operational Parameters that can be deployed to one or more tenants, and are defined by the Service Provider. A parameter can be grouped into more than one Group Template. You can also group sets of parameters into sections within a Parameter Group Template to enable you to create Parameter Group Sections within your parameter groups.

This screen displays a list of all defined Parameter Group Templates for which you have the required role privileges to view. To refresh the list at any time, click Refresh. Click a Parameter Group Template in the list, and its properties are displayed to the right of the list.

You can filter the contents of this list in several ways:

- Type the name or partial name of the Parameter Groupt Template, In Use, or Tenant in the Quick Filter field.
- Click the Tenant Filter button (the icon with the circle and horizontal bar) to open the Tenant filter panel. In this panel, click the checkbox(es) beside the tenants that you want to select. Use the Quick Filter field in this panel to filter the tenant list.
- You can sort the Parameter Group Templates in the list by clicking on a column head. Clicking a column head a second time reverses the sort order.

You can perform the following tasks in this screen:

- Create Parameter Group Templates
- Modify Parameter Group Templates
- Delete Parameter Group Templates
- Manage the list of Operational Parameters in a Parameter Group Template
- Distribute Parameter Group Templates
- Associate applications
- Determine where a Parameter Group Template is used and then change the Parameter Group Template that a Parameter Group uses to a different Parameter Group Template
- View the change history of the Parameter Group Template in the History panel by clicking the Related button and selecting History

Parameter Group Template Properties

Properties of Parameter Group Templates

Property	Description
Name	The name of the Parameter Group Template. It must be unique in the system.
Description	Optional text describing the Parameter Group Template or providing additional information.
Parameters	A list of Operational Parameters that have been added to the Parameter Group Template. The Section(s) to which this Parameter Group Template belongs is also displayed here. **Note**: Sections can be deleted. Deleting a section only deletes the section grouping, and does not delete the set of parameters previously within that section.
Used	(Read-only) Used to deploy a parameter group.

Creating Parameter Group Templates

Creating Parameter Group Templates

The Service Provider creates Parameter Group Templates, and assigns Operational Parameters to them.

To create a Parameter Group Template:

1. In the header, go to `Operations` > `Operational Parameters` > `Group Templates`.
2. On the `Parameter Group Template List` panel, click New.
3. On the New panel that is displayed to the right of the `Parameter Group Template List` panel, enter the properties (including adding parameters) of the new template.
4. Optionally, you can click the `Add Section` button to add the Parameter Group Template to a section in the `Parameter Group Template` list. A new panel opens to the right. Perform the actions below:
   - In the new panel, type the name for the new section in the Name field.
   - Type the key name for the new section in the `Key Name` field.

   > **Important**
   > These fields must be unique in the Parameter Group Template.

5. Click Save to save the new Parameter Group Template, or click `Cancel` to cancel the new template and not save it in the database.

Modifying Parameter Group Templates

Modifying Parameter Group Templates

Changes that you make to a Parameter Group Template are not propagated to Parameter Groups that use that template.

1. In the header, go to `Operations > Operational Parameters > Group Templates`.
2. On the `Parameter Group Template List` panel, select the Parameter Group Template that you want to modify.
3. On the <Parameter Group Template name> panel that is displayed to the right of the `Parameter Group Template List` panel, modify the properties of the Parameter Group Template, as required.
4. When you are finished modifying the Parameter Group Template, click Save to save your changes, or click `Cancel` to cancel your changes and leave the Parameter Group Template unchanged.

Deleting Parameter Group Templates

Deleting Parameter Group Templates

You cannot delete a Parameter Group Template that is currently deployed.

1. In the header, go to `Operations > Operational Parameters > Group Templates`.
2. On the `Parameter Group Template List` panel, select the Parameter Group Template that you want to delete.
3. On the <Parameter Group Template name> panel that is displayed to the right of the Parameter Group Template List panel, click `Delete`.
4. In the Confirm Deletion dialog box, do one of the following:
    a. To remove the Parameter Group Template from the database, click `OK`.
    b. To keep the Parameter Group Template and not remove it from the database, click `Cancel`.

Managing Parameter Group Templates

Managing the List of Operational Parameters in a Parameter Group Template

In a Parameter Group Template, you can manage the list of Operational Parameters in the following ways:

[+] Adding Operational Parameters to a Parameter Group Template

To add an Operational Parameter to a Parameter Group Template:

1. Select the Parameter Group Template to which the Operational Parameter is to be added in the list of Parameter Group Templates.
2. In the `Parameters` list, click Add.
3. In the `Parameters` panel that is displayed to the right, select the Operational Parameter(s) that you want to add. The selected Operational Parameter(s) are now displayed in the `Parameters` list.
4. Click Save.

[+] Change the order of the Operational Parameters in the list of Selected Parameters

To change the order of Operational Parameters in a Parameter Group Template:

1. Select the Parameter Group Template in which the order of Operational Parameters is to be changed.
2. In the `Parameters` list, select a parameter that you want to move, and click the up or down arrow to change its order in the list. You can also drag the parameter and drop it into a new position in the order.
3. Click Save.

[+] Removing Operational Parameters from a Parameter Group Template

To remove an Operational Parameter from a Parameter Group Template:

1. Select the Parameter Group Template from which the Operational Parameter is to be removed.
2. In the `Parameters` list, select a parameter that you want to remove and click Remove.
3. Click Save.

Distributing Parameter Group Templates

Deploying Parameter Group Templates

The Service Provider deploys Parameter Group Templates to tenants. At this point, the Parameter Group Template becomes a Parameter Group and is associated with a Routing Strategy.

1. In the header, go to `Operations > Operational Parameters > Group Templates`.
2. On the `Parameter Group Template List` panel, select the Parameter Group Template that you want to deploy.
3. On the <Parameter Group Template name> panel that is displayed to the right of the `Parameter Group Template List panel`, click `Deploy`.
4. In the `Parameter Group Deployment` panel, provide the following information:
    a. Parameter Group Name — The name that is assigned to this Parameter Group.
    b. Tenant — The tenant to which this Parameter Group belongs.
    c. Application — The Routing Strategy that will be used by this tenant and is associated with this Parameter Group. Click `Search` to select from a list of Routing Strategies.
5. Click `Next`.
6. In the `Tenant` panel, select the name of the tenant(s) to which you want to deploy the Parameter Group.
7. Click `Next`.
8. In the `Parameter Group Deployment` panel, specify the application(s) that you want to enable on this parameter group by clicking `Add`.
9. In the `Designated Applications` panel, select the name of the application(s) that you want to add.
10. Click `Next`.
11. Preview the deployment in the Summary. If you are satisfied with the deployment, click `Finish`. To make changes, click `Previous`.
12. Click `Close`.

Important

You can modify a Parameter Group Template after it has been deployed. For example, you can add, remove, re-order, and/or modify the parameters in an already deployed Parameter Group Template. Once saved, you can synchronize the changes and all Parameter Groups of the Parameter Group Template will be updated to the current structure.

Audio Resource Management

Genesys Administrator Extension provides an interface for Audio Resource Management (ARM). This enables a user to manage audio resources for both announcements and music files.

ARM is integrated with Operational Parameters Management (OPM) to allow users to dynamically select managed audio resources by using the Audio Resource name. It can also be used with a parameterized strategy or orchestration application, or a parameterized routing or voice applications.

Access to ARM is based on both role privileges and tenant access control permissions, as follows:

- User access to screens or certain ARM functionality is managed by role privileges.
- Access control permissions define which audio resources can be viewed or modified by an authenticated user. Access to audio resources is granted by tenant. Users have access to all audio resources for each tenant to which they have access.

Audio Resources are collections of Audio Resource Files that have the following properties:

- Each Audio Resource can contain one or more Audio Resource Files
- Each Audio Resource File is associated with a Personality
- Personalities are unique within an Audio Resource; therefore, one Personality can be used only once in each Audio Resource
- Personalities may be used in more than one Audio Resource

When audio files are added to an Audio Resource, they are automatically encoded to the following formats: µ-law, A-law, and GSM.

- The encoded files are written to a file server that is defined in the Genesys Administrator Extension configuration settings.
- The name of the Audio Resource File is a concatenation of the following strings:

Tenant ID (tenantDBID) + Audio Resource ID (ARID) + Personality ID (personalityID)

  - For deployed Audio Resources, the Tenant ID is the ID of the tenant that deployed the audio resources.
  - The ARID is a unique 4-digit integer on a per tenant basis.
  - The Environment tenant may have up to 8000 owned Audio Resources with the following ID range: 1000-8999
  - All other tenants may have up to 1000 owned Audio Resources with the following ID range: 9000-9999
  - Each tenant may have additional shared Audio Resources as described in the following section.
  - The personalityID is a unique 2-digit integer on a per tenant basis with the following ID ranges.
  - Environment Tenant : 10-29 (for shared) and 30-99 (for private)
  - All other Tenants: 30-99

Example: the concatenated name of an Audio Resource File might be 102902531. The names of the resulting encoding files for µ-law, A-law, and GSM would then be `102902531_pcmu.wav`, `102902531_pcma.wav`, and `102902531_gsm.wav`.

Sharing Audio Resources

The Environment tenant can share Audio Resources with other tenants. This sharing is called deploying an Audio Resource. It is limited to the Environment tenant only. Deployed Audio Resources have the following properties:

- A new Audio Resource is created for each shared Audio Resource (one per tenant).
- If the tenant does not have matching personalities, new personalities are automatically created.
- The Personality IDs and Audio Resource IDs match the IDs of the files that are being deployed.
- The Audio Resource File names are shared through the new Audio Resource. New files are not created on the file server. Audio Resources provide a mechanism to make the encoded file names visible to other tenants so that they can be used with Operational Parameter Management.
- Only the Environment tenant can depoy an Audio Resource to another tenant. It is not possible for a tenant to re-deploy an Audio Resource to another tenant.
- Changes that are made by the Environment tenant in Audio Resource Files of the deployed Audio Resources are propagated automatically. This includes adding, updating, and removal of Audio Resource Files of deployed Audio Resources.

In This Chapter

This chapter includes the following sections:

Audio Resources

These pages explain how to manage audio resources.

Audio Resources and their properties

Create, modify, delete, and deploy audio resources

Audio Resource Files

These pages explain how to manage audio resource files.

Audio Resource Files and their properties

Create and assign, modify, remove, delete, and reprocess audio resource files

Personalities

These pages explain how to manage personalities.

Personalities and their properties

Create, modify, and delete personalities

Audio Resources

An Audio Resource is a resource that can be referenced by a Routing Strategy and played back by a Media Server. It consists of one or more Audio Resource Files, each of which consists of one audio file associated to one Personality.

This screen displays a list of all Audio Resources for which you have role privileges to view. To refresh the list, click Refresh. Click an Audio Resource in the list to display its properties in the <audio resource name> panel that is displayed to the right of the Audio Resources screen.

You can filter the contents of this list in several ways:

- Type the name or partial name of the Audio Resource, Type, ARID, or Tenant in the Quick Filter field.
- Click the `Tenant Filter` button to open the Tenant filter panel. In this panel, click the checkbox(es) beside the tenants that you want to select. Use the Quick Filter field in this panel to filter the tenant list.
- You can sort the Audio Resources in the list by clicking on a column head. Clicking a column head a second time reverses the sort order.

You can perform the following tasks in this screen:

- Create Audio Resources
- Modify Audio Resources
- Delete Audio Resources
- Manage Audio Resource Files
- Deploy Audio Resources
- View the change history of the Audio Resource in the History panel by clicking the Related button and selecting History

Audio Resources Properties

When you select an Audio Resource, a panel that contains the properties of the audio resource is displayed to the right of the Audio Resource screen. The panels are:

- The <audio resource name> properties panel
- The Audio Resource File List panel
- The Bulk Audio Resource Deployment panel (applies only to the Service Provider)

<audio resource name> Properties Panel

The `<audio resource name> Properties` panel shows the basic properties of the selected Audio Resource.

Properties of Audio Resource Files

Property	Mandatory	Description
Name	Yes	The name of this Audio Resource.
Description	No	A description of this Audio Resource.
Type	No	The type of Audio Resource, either: • Music—Plays music; any text is recorded as part of the music. • Announcement—Plays an Announcement; any music is recorded as part of the Announcement.
Owner Tenant	Yes	The name and numeric identifier of the tenant in which this Audio Resource was created. This value is assigned automatically, and you cannot change it. All possible values for the numeric identifier of this field are available for an Audio Resource that were configured by the Service Provider; but only a subset of those values are available for an Audio Resource that was configured by a tenant.
Creator Tenant	Yes	The name and numeric identifier of the tenant that created this Audio Resource. This value is

<table>
<tr><th>Property</th><th>Mandatory</th><th>Description</th></tr>
<tr><td></td><td></td><td>assigned automatically, and you cannot change it.</td></tr>
<tr><td>Private</td><td>No</td><td>This field appears only for a Service Provider, and indicates if an Audio Resource is deployable. It also affects the value that is assigned to the numeric identifier part of the Owner Tenant field.
<table>
<tr><th>Private option</th><th>Deployable</th><th>Owner tenant numeric identifier</th></tr>
<tr><td>False</td><td>Yes</td><td>Range of values limited to Service Providers.</td></tr>
<tr><td>True</td><td>No</td><td>Same range of values as tenants.</td></tr>
</table>
</td></tr>
</table>

Audio Resource Files Panel

Display the Audio Resource Files panel by selecting `Audio Resource Files` from the `Related` menu.

This panel contains a list of all Audio Resource Files that comprise the selected Audio Resource. To refresh the list, click Refresh. Click an Audio Resource File to display its properties in the panel that is displayed to the right.

In this panel, you can:

- Create a new Audio Resource File and add it to this Audio Resource.
- Modify an Audio Resource File that is already a part of this Audio Resource.
- Reprocess an Audio Resource File.
- Remove an Audio Resource File from an Audio Resource.
- Delete an Audio Resource File from the database.

Bulk Audio Resource Deployment Panel

Note: This panel applies only to the Service Provider.

This panel is where the deployment of the selected Audio Resource is managed. The Bulk Audio Resource Deployment panel displays the tenants to which this Audio Resource has been deployed, and the tenants to which this Audio Resource can be deployed.

Creating Audio Resources

Creating Audio Resources

1. In the header, go to `Operations> Audio Resources > Audio Resources`.
2. Click `New`.
3. In the `New` panel that is displayed to the right, enter the general properties of the new Audio Resource.
4. Click `Save` to save the new Audio Resource. You can now continue to configure it.
5. Select the Audio Resource Files for this Audio Resource by selecting `Files` from the `Related` menu.
6. Deploy the Audio Resource to tenants by selecting `Deployments` from the `Related` menu. To bulk-deploy Audio Resources, click the check boxes that are displayed beside the Audio Resources that you want to deploy, and click `Deploy`.

Modifying Audio Resources

Modifying Audio Resources

1. In the header, go to `Operations > Audio Resources > Audio Resources`.
2. Select the Audio Resource that you want to modify.
3. Modify the properties of the Audio Resource, as required. (Note: Only the Name and Descriptions properties can be modified.)
4. Click Save.

Deleting Audio Resources

Deleting Audio Resources

Warning

- If you delete an Audio Resource, all Audio Resource Files that are associated with it are also deleted.
- If you are deleting an Audio Resource that is being used by Operational Parameter Management, and this Audio Resource being used by one or more parameters or Parameter Groups, a message is displayed that indicates this fact. When this happens, you can either cancel the deletion or force the deletion.

1. In the header, go to `Operations > Audio Resources > Audio Resources`.
2. Select the Audio Resource that you want to delete.
3. In the <audio resource name> panel, click Delete.
4. In the Confirm Deletion dialog box, do one of the following:
    a. To delete the Audio Resource and its Audio Resource Files, click `OK`.
    b. To not delete the Audio Resource and its Audio Resource Files, click `Cancel`.

Deploying Audio Resources

Deploying Audio Resources

The `Deployment` tab consists of two lists, as follows:

- Tenants with deployment — Shows tenants to whom this Audio Resource has been deployed.
- Tenants available — Shows the available tenants to whom this Audio Resource has not been deployed.

> **Important**
> Audio Resources marked as Private cannot be deployed.

To deploy Audio Resource to tenants, complete the following steps:

1. In the `Audio Resource List` screen, select the Audio Resource that you want to deploy.
2. In the <audio resource name> panel, select `Deployments` from the `Related` menu.
3. In the `Audio Resource Deployment` panel that is displayed to the right of the `Audio Resource List` screen, click `Add`.
4. In the `Tenants` panel, click the check boxes that are displayed beside the tenant names, to specify one or more target tenants to which you want to deploy the selected audio resources.
5. In the `Audio Resource Deployment` panel, click `Next`. The audio resources are deployed.
6. Review the summary, and click `Finish`.
7. Click `Close`.

To bulk deploy Audio Resource to tenants, complete the following steps:

1. In the `Audio Resource List` screen, click the check boxes that are displayed beside the Audio Resources that you want to deploy.
2. Click `Deploy`.
3. In the `Bulk Audio Resource Deployment` panel that is displayed to the right of the `Audio Resource List` screen, click `Add`.
4. In the `Tenants` panel, click the check boxes that are displayed beside the tenant names, to specify one or more target tenants to which you want to deploy the selected audio resources.
5. In the `Bulk Audio Resource Deployment` panel, click `Next`. The audio resources are deployed.
6. Review the summary, and click `Finish`.
7. Click `Close`.

To remove the selected Audio Resource from a tenant to which it was deployed, complete the following steps:

1. In the `Audio Resource List` screen, find the tenant that is using the audio resource that you want to remove.
2. Select the audio resource.
3. In the <audio resource name> panel, select the tenant in the `Tenants who Currently see this AR` list.
4. Click `Remove`.
5. In the `Audio Resource Deployment` panel, click `Next`. The audio resource is removed.
6. Review the summary, and click `Finish`.
7. Click `Close`.

Audio Resource Files

Audio Resource Files are contained in Audio Resources, and consist of an audio file and a unique Personality. You create and manage Audio Resource Files by using the <audio resource name> panel that is displayed to the right of the Audio Resources screen after you have selected an audio resource.

Audio Resource Files are created when an audio file—such as a WAV (.wav) file—and a Personality are combined and assigned to an Audio Resource. Therefore, all composite audio files, Personalities, and Audio Resources, must have been created before you can create the Audio Resource Files.

To view Audio Resource Files, complete the following steps:

1. On the header, go to `Operations > Audio Resources > Audio Resources`.
2. In the `Audio Resource List` screen, select an audio resource.
3. Click the `Files` button or select `Files` from the `Related` menu. The `Audio Resource Files List` panel is displayed.

The `Audio Resource Files List` panel displays a list of Audio Resource Files that are already associated with the selected Audio Resource. For each Audio Resource File, the name of its underlying audio file, Personality, size, ID, and status are displayed.

On this panel, you can:

- View the properties of an Audio Resource File.
- Create and assign an Audio Resource File to this Audio Resource.
- Modify an Audio Resource File.
- Remove (unassign) an Audio Resource File from this Audio Resource.
- Reprocess (or recreate) the selected Audio Resource File.

To refresh the list, click `Refresh`.

To display the properties of the audio file, click an audio file in the list. The properties of the associated Audio Resource File is diplayed in the <audio file name> panel that will be displayed to the right of the `Audio Resource Files List` panel.

Audio Resource File Properties

Properties of Audio Resource Files

Property	Mandatory	Description
Name	No	The name of this Audio Resource File.
Language	No	The language that is attributed to this Audio Resource File by the Personality
Personality	Yes	The personality that is assigned to this Audio Resource File.
Size	No	The size of the Audio Resource File, in bytes. This field appears only after the Audio Resource File is created, and it cannot be changed.
Status	Yes	Information about the availability of the Audio Resource File.

Modifying Audio Resource Files

Modifying Audio Resource Files

The only way that you can modify an existing Audio Resource File is by replacing it with another Audio Resource File, or by changing the name of the audio file on which it is based. You cannot change the Personality. Whichever method you choose, you are removing the old Audio Resource File and replacing it with a new one.

1. In the header, go to `Operations > Audio Resources > Audio Resources`.
2. Select the Audio Resource that contains the Audio Resource File that you want to modify.
3. In the <audio resource name> panel that is displayed to the right, in the `Tools` menu, click `Files`.
4. In the `Audio Resource Files List` panel that is displayed to the right, select the audio file that you want to modify.
5. In the <audio file name> panel that is displayed to the right, click `Browse` to find a new audio that you want to associate with the selected Audio Resource File.
6. Click `Upload`. The file is uploaded to the database.
7. The properties of the new Audio Resource File are displayed in the `Audio Resource Files List` panel. If you select the file name in the list of Audio Resource Files, the <audio file name> panel is displayed to the right. This panel enables you to download, play, reprocess, or delete (remove) the audio file, or to view and download the encodings in which the file is available.

Removing Audio Resource Files

Removing Audio Resource Files from Audio Resources

Removing an Audio Resource File from an Audio Resource does not delete the associated Personalities, but it does delete the original audio files.

An Audio Resource File can only be removed if the Audio Resource to which it has been assigned has not been deployed. However, if the user performing this operation is a Service Provider, the Audio Resource file can only be removed if the Audio Resource File was not created by a tenant. Removing an Audio Resource File from an Audio Resource does not delete the associated Personalities and audio files.

1. In the header, go to `Operations > Audio Resources > Audio Resources`.
2. Click the check box that corresponds to the Audio Resource from which the Audio Resource File is to be removed.
3. In the <audio resource name> panel, from the `Tools` menu, select `Files`. The `Audio Resource Files List` panel is displayed to the right.
4. Select the Audio Resource File that you want to remove from the selected Audio Resource File.
5. Click `Delete`.
6. In the Confirm Deletion dialog box, do one of the following:
    a. To remove the Audio Resource File from the database, click `OK`.
    b. To keep the Audio Resource File and not remove it from the database, click `Cancel`.

Deleting Audio Resource Files

Deleting Audio Resource Files

Unless you are a Service Provider, you cannot delete an Audio Resource File that is part of a deployed Audio Resource. If you are a Service Provider and want to delete such a file, you must first delete the Audio Resource File from the original Audio Resource that was deployed. This will delete the Audio Resource File from all deployed Audio Resources.

To delete an Audio Resource File:

1. In the header, go to `Operations > Audio Resources > Audio Resources`.
2. Select the Audio Resource that contains the Audio Resource File that you want to delete.
3. In the `<audio resource name>` panel that is displayed to the right, from the `Tools` menu, select `Files`.
4. In the `Audio Resource Files List` panel that is displayed to the right, select the Audio Resource File that you want to delete.
5. Click `Delete`.

Reprocessing Audio Resource Files

Reprocessing Audio Resource Files

Reprocessing recreates an Audio Resource File from the original audio file that was uploaded (if it has not been deleted from the database and/or target storage). It also performs any necessary conversion between audio formats.

1. In the header, go to `Operations > Audio Resources > Audio Resources`.
2. In the <audio resource name> panel, select the Audio Resource that contains the Audio Resource File that you want to reprocess.
3. From the `Tools` menu, select `Files`. The `Audio Resource Files List` panel is displayed to the right.
4. Select the Audio Resource File that you want to reprocess. The <audio resource file name> panel is displayed to the right.
5. Click `Reprocess`.

Creating and Assigning Audio Resource Files

Creating and Assigning Audio Resource Files to Audio Resources

> **Important**
> You must create the audio files and Personalities that comprise the Audio Resource Files before you create the Audio Resource Files.

1. In the header, go to `Operations > Audio Resources > Audio Resources`.
2. Select the Audio Resource to which you want to assign the Audio Resource File.
3. In the <audio resource name> panel, select `Files` from the `Tools` menu. The `Audio Resource Files List` panel is displayed to the right.
4. On the `Audio Resource Files List` panel, click `New`. The `Upload Audio` panel is displayed to the right.
5. In the `Personality` list, click the magnifying glass to find a Personality. The `Personalities` panel is displayed to the right.
6. Click a radio button to choose a Personality.
7. In the `Upload Audio` panel, click `Browse` to locate and select an audio file on your workstation or network.
8. Click `Upload`. The file is uploaded to the database.
9. The properties of the new Audio Resource File are displayed in the `Audio Resource Files List` panel. If you select the file name in the list of Audio Resource Files, the <audio file name> panel will be displayed to the right. This panel enables you to download, play, reprocess, or delete (remove) the audio file, or view and download the encodings in which the file is available.

Personalities

A Personality contains a set of attributes. Each Audio Resource File is associated with one Personality, the attributes of which provide the characteristics of the Audio Resource File. The Personality describes the audio file that the user wants to use as an Audio Resource File.

The attributes of a Personality are name, description, personality identifier, tenant, private, gender, and language.

The Personality List screen displays a list of all Personalities for which you have the required role privileges to view. To refresh the list at any time, click `Refresh`. Click a Personality in the list; its properties are displayed on the <personality name> panel to the right of the personalities screen.

You can filter the contents of this list in several ways:

- Type the name or partial name of the Personality, Gender, Language, or Tenant in the Quick Filter field.
- Click the `Tenant Filter` button to open the Tenant filter panel. In this panel, click the checkbox(es) beside the tenants that you want to select. Use the Quick Filter field in this panel to filter the tenant list.
- You can sort the Personalities in the list by clicking on a column head. Clicking a column head a second time reverses the sort order.

You can perform the following tasks in this screen:

- Create Personalities
- Modify Personalities
- Delete Personalities

View the change history of the Personality in the `History` panel by clicking the `Related` button and selecting `History`.

Properties

Properties of Audio Resource Files

<table>
<tr><th>Property</th><th>Mandatory</th><th>Description</th></tr>
<tr><td>Name</td><td>Yes</td><td>A name for this Personality.</td></tr>
<tr><td>Description</td><td>No</td><td>A description of this Personality.</td></tr>
<tr><td>Gender</td><td>No</td><td>The gender of this Personality.</td></tr>
<tr><td>Language</td><td>No</td><td>The language in which any text will be spoken.</td></tr>
<tr><td>Personality Identifier</td><td>Yes</td><td>A numeric identifier for this Personality. This identifier is unique in the tenant in which this Personality was created, and it is created and assigned automatically when the Personality has been created. You cannot change this value. This value also occurs in the file name of the Audio Resource File with which the Personality becomes associated.

All possible values for this field are available for a Personality that is configured by the Service Provider; however, only a subset of those values are available for a Personality that is configured by a tenant.</td></tr>
<tr><td>Tenant</td><td>Yes</td><td>A numeric identifier that indicates the tenant in which this Personality was created. You cannot change this value.</td></tr>
<tr><td>Private</td><td>No</td><td>This field appears only for a Service Provider, and it indicates whether a Personality is deployable; that is, it is intended to be part of an Audio Resource that you want to deploy. It also affects the value that is assigned to the Personality Identifier field.<table>
<tr><th>Private option</th><th>Deployable</th><th>Personality Identifier value</th></tr>
<tr><td>False</td><td>Yes</td><td>Range of values limited to service</td></tr>
</table></td></tr>
</table>

Property	Mandatory	Description
		<table><tr><th>Private option</th><th>Deployable</th><th>Personality identifier value</th></tr><tr><td></td><td></td><td>providers.</td></tr><tr><td>True</td><td>No</td><td>Same range of values as tenants.</td></tr></table>

Creating Personalities

Creating Personalities

1. In the header, go to `Operations > Audio Resources > Personalities`.
2. Click `Add`.
3. On the `New` panel that is displayed to the right, enter the properties of the new Personality.
4. Click `Save` to save the new Personality or `Cancel` to cancel the new Personality.

Modifying Personalities

Modifying Personalities

1. In the header, go to `Menu > Audio Resources > Personalities`.
2. Select the Personality that you want to modify.
3. On the <personality name> panel that is displayed to the right, modify the properties of the Personality, as required.
4. Click Save to save your changes or `Cancel` to leave the Personality unchanged.

Deleting Personalities

Deleting Personalities

> **Important**
> You cannot delete a Personality that is a part of one or more Audio Resource Files.

1. In the header, go to `Operations > Audio Resources > Personalities`.
2. Select the Personality that you want to delete.
3. In the <personality name> panel that is displayed to the right, click `Delete`.
4. In the Confirm Deletion dialog box, do one of the following:
    a. To remove the Personality from the database, click `OK`.
    b. To keep the Personality and not remove it from the database, click `Cancel`.

License Reporting

License Reporting is a graphical user interface (GUI) application that is hosted by Genesys Administrator Extension. It accesses data from a central License Reporting Manager (LRM) database to provide on-demand reporting to Tenant and Solution Provider Administrators. Two types of reports are available:

- Tenant Report — Available to both tenant and Solution Provider Administrators, this report displays the license usage per tenant and extracts concurrent license usage data for billing customers.
- System Report — Available to only Solution Provider Administrators, this report allows Administrators to monitor system usage directly from the Genesys system. It is an historical system usage report that displays aggregated results for the system as a whole.

Click here to see the information that is provided by each type of report.

The information that is presented in these reports is collected from the central LRM database, which contains data collected from all local LRM databases. Collection of this data is done by the LRM system by using an automated nightly process. If the data is not collected for some reason, such as a network outage, contact the LRM System Administrator.

Before you begin to create on-demand reports by using Genesys Administrator Extension, you should:

- Configure your Business Week Start day.
- Provision limits for application licenses. The values of these limits are displayed in the Provisioned column of the License Utilization Report for the specified application.

You can perform the following tasks in the License Utilization Report (Filters) screen:

- Create an on-demand report — either a Tenant Report or a System Report.
- Change the granularity of a report.
- Export a report in CSV (.csv) file format.

This chapter includes the following sections:

License Reporting

These pages explain how to manage the License Reporting module.

Choose report formats and granularity, and configure the Start of Week option

Provisioning

These pages explain how to provision the product.

Provisioning

Generate and export on-demand reports

Add, modify, or delete sellable items

Report Formats

Report Type	Column	Description
Tenant only	Tenant	Displays the tenants (and tenant IDs in brackets) that you have selected to appear in the report. **For example: ABC Telecom** **Note:** The System report does not display the Tenant header, because system-wide usage data comes from all tenants.
Tenant and System	Sellable Item	For the Tenant report, displays sellable items for each tenant. For the System report, the column displays the sellable items for the entire System. If the name of the sellable item is not known, the sellable item ID is displayed instead.
Tenant and System	Start of Period (GMT)	Displays the first day for which data in this report applies. This date is normalized for the granularity that you have chosen for the report. **For example: 2010-09-13**
Tenant and System	Day	For daily reports only, displays the day of the week to which data in this report applies. **For example: Wednesday**
Tenant and System	Peak	Displays the actual peak time (hh:mm) or date (yyyy-mm-dd hh:mm) that peak usage occurred for the license of this sellable item. **For example: 2010-09-13 13:24 for a daily report, or 13:24 for other reports.**
Tenant and System	Peak Value	Displays the number of peak concurrent seats for the license of this sellable item. **For example: 4**
Tenant	Provisioned	Displays the number of concurrent seats that are provisioned for the license of this sellable item. **For example: 4**
Tenant	Provisioned Effective Date	Displays the dates that are provisioned for the license of this sellable item.

Generating On-Demand Reports

License Reporting in Genesys Administrator Extension generates two types of reports:

- Tenant Report — For one or more selected tenants
- System Report — An aggregated report on the entire system. Note: This is not the same as adding all of the tenants in the system together.

Each report includes the current date and time, so that you know when you last ran the report. Each time that a report is generated, this information is updated.

Note: Before you generate any reports, you should configure the `Business Week Start` option and other formatting options under `Preferences` in the header.

Generating a Tenant Report

1. In the header, go to `Reports > License Reporting > Concurrent Seats`. The `Filters` screen is displayed. This is where you define the parameters of the report.
2. Click in the `Start Date` field to open a calendar control from which you can select a starting date for the report.
3. Click in the `End Date` field to open a calendar control from which you can select an ending date for the report.
4. Select the granularity for the report from the `Granularity` drop-down list.

> **Important**
> If you select `Week` or `Month`, the dates that are selected in the `Start Date` and `End Date` fields are normalized.

5. Select the Tenant type for the report from the Type drop-down list:
   - `System` — Generates a report on all license utilizations at the system level.
   - `Tenant` — Generates a license-utilization report for the selected tenant(s).

   a. In the `Tenants` field, click Add. The `Tenants` panel is displayed to the right.
   b. Click the check box that is displayed beside each tenant for which you want to generate a report.

Important
If you do not select any tenants, the report will be generated for all tenants.

3. Click `Generate` to generate the Tenant Report. The report is displayed in the panel that is displayed on the right.

Generating a System Report

You must be a Service Provider Administrator to generate a System Report.

1. In the header, go to `Reports > License Reporting > Concurrent Seats`. The `Filters` screen is displayed. This is where you define the parameters of the report.
2. Click in the `Start Date` field to open a calendar control from which you can select a starting date for the report.
3. Click in the `End Date` field to open a calendar control from which you can select an ending date for the report.
4. Select the granularity for the report from the `Granularity` drop-down list.

Important
If you select `Week` or `Month`, the dates that are selected in the `Start Date` and `End Date` fields will be normalized.

5. Select the System type for the report from the `Type` drop-down list:
   - `System` — Generates a report on all license utilizations at the system level.
   - `Tenant` — Generates a license-utilization report for the selected tenant(s).
6. Click `Generate` to generate the System Report. The report is displayed in the panel that is displayed to the right.

Changing Report Granularity

After you create a Report, you can change its granularity, then create a new report and the new results display instantly on the screen. The date range for the new report is based on the previous report's latest time stamp. If you changed the granularity from Daily to Weekly or Monthly, it automatically updates to the latest week or month of that time stamp. The Report Header is updated to display the adjusted interval. When you generate the new report, the records with the correct level of aggregation display. When you change the granularity from either Monthly or Weekly to Daily, all records display.

Note: Each time that you generate a report, the current date and time will be updated.

To change the granularity:

1. From the `Granularity` drop-down list in the `Filters` screen, select a level of granularity that is different from that which is in the current report.
2. Click `Generate`.

Exporting On-Demand Reports

After you have created the reports, you can export both Tenant and System reports in CSV format.

Exporting a Report

1. Create the report that you want to export.
2. (Optional) If you want a different granularity for the report, change the granularity of the report, and regenerate it. Note: Genesys Administrator exports only the report that is displayed on the screen. If you change the report and do not regenerate it, the original report is exported.
3. Click `Export`.
4. The report file automatically exports in CSV (.csv) file format and downloads to the default download location for your Internet browser.

> **Important**
> This download location is browser-specific, and it is not a function of Genesys Administrator Extension.

Configuring the Start of Week Option

License Reporting uses a calendar for its date ranges and granularity. For accurate reporting, the `Start of Week` option must indicate if your business week starts on Sunday or Monday. After it has been configured, the License Utilization Reporting calendar will adjust automatically to your business week for all reports.

Configuring the Start of Week Option

1. In the header, click `Preferences`, and then click `System Preferences`.
2. In the `Category` drop-down list, select `Locale`.
3. In the `Start of Week` option, select the day on which your business week begins (Sunday or Monday).
4. Click `Save` to save your changes, or click `Cancel` to cancel your changes and leave the option unchanged.

Provisioning

Genesys Administrator Extension enables you to configure, maintain, and report on the maximum concurrent sellable items (service bundles) that a tenant is entitled (contracted) to use. You use the `Provisioning` screen to configure the value for each application. The value is stored in the License Reporting Manager database. You can report this value as part of a License Utilization Report.

To display the `Provisioned Sellable Items List` screen, in the header, go to `Reports > License Reporting > Provisioning`. This screen contains a table that lists the following items, by tenant:

Property	Description
Sellable Item	Sellable Genesys application name, sorted by tenant.
Provision Effective Date (GMT)	The date at which the sellable item can be utilized. The license is presumed to begin at 12:00am (000h) GMT on the date that is specified.
Provision Usage Limit	The number of available (provisioned) seats for the application.

The `Provisioned Sellable Items List` screen enables you to perform the following functions:

- Add (provision) a new sellable item to a tenant
- Modify the effective date or provision count of a sellable item that has been provisioned to a tenant
- Delete a sellable item from the Provisioned Sellable Items List for tenant

Adding a New Sellable Item

Adding a New Sellable Item

1. In the `Provisioned Sellable Items List` screen, click New. The New panel is displayed to the right.
2. In the New panel, specify the following properties:
    a. The tenant to which you want to provision the application. Click the magnifying glass in the tenant field to open the Tenant panel. Click the radio button that is displayed beside the name of the tenant to which you want to provision the application.
    b. The name of the Genesys application that you want to provision. Click the magnifying glass in the `Sellable Item` field to open the `Sellable Items` panel. Click the radio button that is beside the name of the application that you want to provision.
    c. The date at which the sellable item can be utilized (the Provision Effective Date). Click in the `Provision Effective Date (GMT)` field, and either enter the date or use the calender picker to specify the date. Note: The date and time must be in the future.
    d. The number of provisioned seats for the application (the Provision Usage Limit). Click in the `Provision Usage Limit` field, and enter the number of licenses that are available for sale to the tenant.
3. Click Save to add the sellable item to the tenant.

Modifying a Sellable Item

Modifying a Sellable Item

1. In the `Provisioned Sellable Items List` screen, select a provisioned item. The <provisioned item name> panel is displayed to the right.
2. In the <provisioned item name> panel, modify one or more of the following properties:
   a. The name of the Genesys application that you want to provision. Click the magnifying glass in the `Sellable Item` field to open the `Sellable Items` panel. Click the radio button that is displayed beside the name of the application that you want to provision.
   b. The date at which the sellable item can be utilized (the Provision Effective Date). Click in the `Provision Effective Date (GMT)` field, and either enter the date or use the calender picker to specify the date.
   c. The number of provisioned seats for the application (the Provision Usage Limit). Click in the `Provision Usage Limit` field, and enter the number of licenses that are available for sale to the tenant.
3. Click Save to commit the changes to the sellable item to the tenant.

Deleting a Sellable Item

Deleting a Sellable Item

1. In the `Provisioned Sellable Items List` screen, select a provisioned item. The <provisioned item name> panel is displayed to the right.
2. In the <provisioned item name> panel, click `Delete`.
3. In the Confirm Deletion dialog box, do one of the following:
    a. To remove the sellable item from the database, click `OK`.
    b. To keep the sellable item and not remove it from the database, click `Cancel`.