Genesys Administrator Extension Help

User Accounts

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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