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Genesys Administrator Extension Help

Account Management

Account Management

The Accounts menu 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.

Access Control

Access Control

The Access Control 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:

Creating Access Permissions

[+] Click here to reveal procedure

1. Select an object.
2. Click the Related button and select Access Control. The Access Control panel opens.
3. Click the New button. A new panel opens to the right.
4. In the Object Type field, select the configuration object type to which this access permission applies.
5. In the Configuration Object field, select the configuration object to which this access permission applies.
6. In the Access Permissions list, select the access permissions to apply:

Property	Description
Read (R)	You can view details for this object.
Create (C)	You can create objects of this type.

Property	Description
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.

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

Changing Access Permissions

[+] Click here to reveal procedure

- Select an object.
- Click the Related button and select Access Control. The Access Control panel opens.
- Click an object in the Access Control panel to modify its access permissions. A new panel opens to the right.
- You can change any or all of the following options:

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.

- 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

[+] Click here to reveal procedure

1. Select an object.
2. Click the Related button and select Access Control. The Access Control panel opens.
3. Click an object in the Access Control panel to modify its access permissions. A new panel opens to the right.
4. Click the Delete button.
5. 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.

Options

Options

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

Creating a New Section and Adding an Option

[+] Click here to reveal procedure

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

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

Adding a New Option in an Existing Section

[+] Click here to reveal procedure

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

1. Select an object.
2. Click the Related button, and select Options.
3. Select an option in the section.
4. Click the New button.
5. Correct the section name, if required, and enter an option name and option value.

6. Click the Save button to save the option.

Deleting an Existing Option

[+] Click here to reveal procedure

To delete an option, perform the following actions:

1. Select an object.
2. Click the Related button, and select Options.
3. Select an option.
4. Click the Delete button.
5. Perform one of the following actions:
 - Click the OK button to delete the option.
 - Click the Cancel button to discard the changes.

Important

- 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.

Configuration Objects

Available Configuration Objects

Click on any of the following links to read more about configuration objects that can be configured in the Accounts menu:

- [Agent Groups](#)
- [Bulk Change Sets](#)

- [Capacity Rules](#)
- [Roles](#)
- [Agent Skills](#)
- [User Access Groups](#)
- [User Accounts](#)