# Genesys Administrator Extension Help

## Users

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# Users

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.

> **Important**
>
> 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 created in Genesys Administrator Extension receive the same set of default permissions and access privileges that Configuration Server grants.

## Display Options

## Display Options

The `Persons` list shows the Users that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

> **Important**
>
> Users that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 magnifying glass button to open the `Tenant Directory` filter panel. In this panel, click the 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.

Click the Group By button to group objects by various criteria.

To select or de-select multiple objects at once, click the Select button.

# Procedures

## Possible Procedures from this Panel

To create a new User object, click the New button. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click the Edit button.

To delete one or more objects, click the check box beside the object(s) in the list and click the Delete button. You can also delete individual objects by clicking on the object and then clicking the Delete button.

Otherwise, click the More button to perform the following tasks:

- Clone—Copy a User.
- Move To—Move a User to another hierarchical structure.
- Enable or disable Users.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

Click on the name of a User to view additional information about the object. You can also set options and permissions, and view dependencies.

### Creating User Objects

To create a User object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Users. The Persons list displays.
3. Click the New button.
4. 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 that this User should use to log into the environment. You must specify a value for this property, and that value must be unique within the Configuration Database.
   - Agent—Indicates whether this User is an Agent. If checked, additional fields appear. Once you set this flag, you cannot change it.
   - First Name—The first name of this User.
   - Last Name—The last name of this User.

- E-mail Address—The e-mail address of this User.
- Employee ID—A code of up to 64-characters that identifies this User within the contact-center staff. 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).
- Password—A password no longer than 64-characters that this User must use to log in to the environment. You cannot view the existing password. When creating a new user, this field is always enabled. When editing an existing user, this field is enabled only if Reset Password is not selected.

  ## Important

  Passwords can be subject to format rules. Refer to the Genesys 8.1 Security Deployment Guide for more information.

- Confirm Password—Confirmation of the password entered. When creating a new user, this field is always enabled. When editing an existing user, this field is enabled only if Force Password Reset on Next Login is not selected.

  ## Important

  Do not copy-and-paste the value from the Password field. You must retype the password.

- Force Password Reset on Next Login—A check-box that, if selected, prompts 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. See the Genesys 8.1 Security Deployment Guide for more information about resetting passwords.

- External ID—This setting applies only if your environment is using external authentication, either LDAP or RADIUS. This may be the user name in the external authentication system. For LDAP, it might be a whole, or partial, LDAP URL corresponding to RFC 2255. For more information, refer to the Framework 8.1 External Authentication Reference Manual.
- Tenant—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the Tenant Directory field in the object list.
- State Enabled—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

5. If Agent is selected, 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 the following list:
   - Default Place—The Place assigned to this Agent, by default. This optional parameter applies to a limited number of configurations, in particular those where 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. Refer to Reporting documentation for more information.

- `Cost Contract`—The Cost Contract associated with this Agent.
- `Site`—The Site containing this Cost Contract.

6. In the `Member Of` tab, click the Add button to add an Access Group.
7. In the Ranks tab, click the Add button to add a Rank.
8. Enter the following information in the pop-up window that displays on your screen:
   - `Application Type`—The type of Application to which a User needs access. Consult the manuals for a GUI application to see if this application is using Ranks to enable or block certain functions. If a manual does not contain any references to Ranks, this application does not use Ranks, and you do not need to specify the Person's Ranks with respect to this application.
   - `Application rank`—The Rank with respect to Applications of the specified type.
9. If `Agent` is selected, click the `Apply` button to display the following tabs.
   - In the `Skills` tab, click the Add button to add a Skill.
   - Enter the following information in the pop-up window that displays on your screen:
     - `Skill`—The Skill assigned to this Agent.
     - `Level`—The relative measure of the Agent's proficiency in this Skill.
   - In the `Agent Logins` tab, click the Add button to add an Agent Login.
   - Enter the following information in the pop-up window that displays on your screen:
     - `Agent Login`—The Agent Login code assigned to this Agent. You cannot assign an Agent Login to more than one Agent.
     - `Wrap-up Time`—Some switches do not support transfer of information about an agent's postcall work status through the CTI-link. However, when this operation is supported, consider specifying the wrapup time, in seconds, for the Agent Logins that belong to such switches. This specification must match the corresponding switch setting.
10. Click the Save button.

> **Important**
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> Users automatically receive Read and `Update` permissions for their User object. These permissions allow the user to save their user preferences in GUI-based programs, such as GAX or Interaction Workspace.