Genesys Administrator Extension Help

Genesys Administrator 8.1.4

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Genesys Administrator Extension Help Wiki

Welcome to the Genesys Administrator Extension Help Wiki. This document introduces you to the GUI of Genesys Administrator Extension and describes concepts and procedures relevant to using this software in your contact center.

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

About Genesys Administrator Extension

Genesys Administrator Extension (GAX) 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 chapters are included in this guide:

Core Features

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

- Login and Password
- Preferences
- User Interface

Configuration Object Management

This chapter explains the features and functionality of the Configuration Object Management module.

- Account Management
- Configuration Object Management

Solution Deployment

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

- Installation Packages

Operational Parameter Management

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

- Parameters

Solution Definitions

Audio Resource Management

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

Core Features

The pages in this chapter explain the core features of GAX. Select a topic below to learn more:

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

Adding Links to the Navigation Bar

Plug-In Management

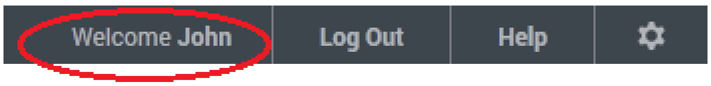
This page explains how to manage plug-ins.

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.



The user's first name displays in the top Header Bar.

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

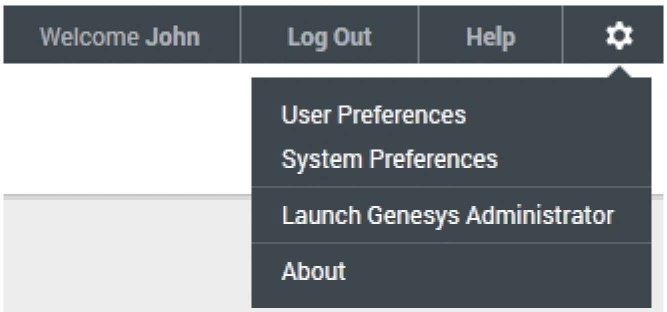
For security purposes, GAX might be configured to lock the application if you have not used the keyboard or mouse for a specified period of time. If inactivity-timeout occurs, all user input is blocked until you provide your login information to unlock the application. This feature ensures that no unauthorized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

> **Important**
> 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.

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 Extension from any browser.

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



Click the gear icon to open the Preferences menu.

Important

To use the last login time feature, you must ensure:

- The date and time of the local computer and the Management Framework computer are synchronized for the last login time to be accurate.
- The following lines are included in the Configuration Server `confserv.cfg` file (located in the installation directory of the machine that hosts Configuration Server):
  - `last-login = true`
  - `last-login-synchronization = true`

The `Preferences` menu contains four options:

- User Preferences
- System Preferences
- About—Click this option to view information about your installation. If your user account has the Read `Deployable and Undeployable IPs and SPDs` privilege, you can also view information about the Configuration Server to which you are connected.
- Genesys Administrator

Important

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

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:

- `Use system settings`—Use the same setting specified in the System menu.
- `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.

Important

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

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 `Use system settings`. You can add more language options by installing localization kit plug-ins. **Important** A browser refresh is required for the changes to take effect.

Preference (field name)	Description
Date Format	The format in which dates are to be displayed in Genesys Administrator Extension. The default is `Use system settings`.
Start of Week	The day on which you consider the week to start, either Sunday or Monday. The default is `Use system settings`.
Number Format	The format in which numbers are to be displayed. The default is `Use system settings`.
Time Zone	The time zone in which times are displayed in GAX. The default is `Use system settings`.

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.

> **Important**
> 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.

Preference (field name)	Description
	Important 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.

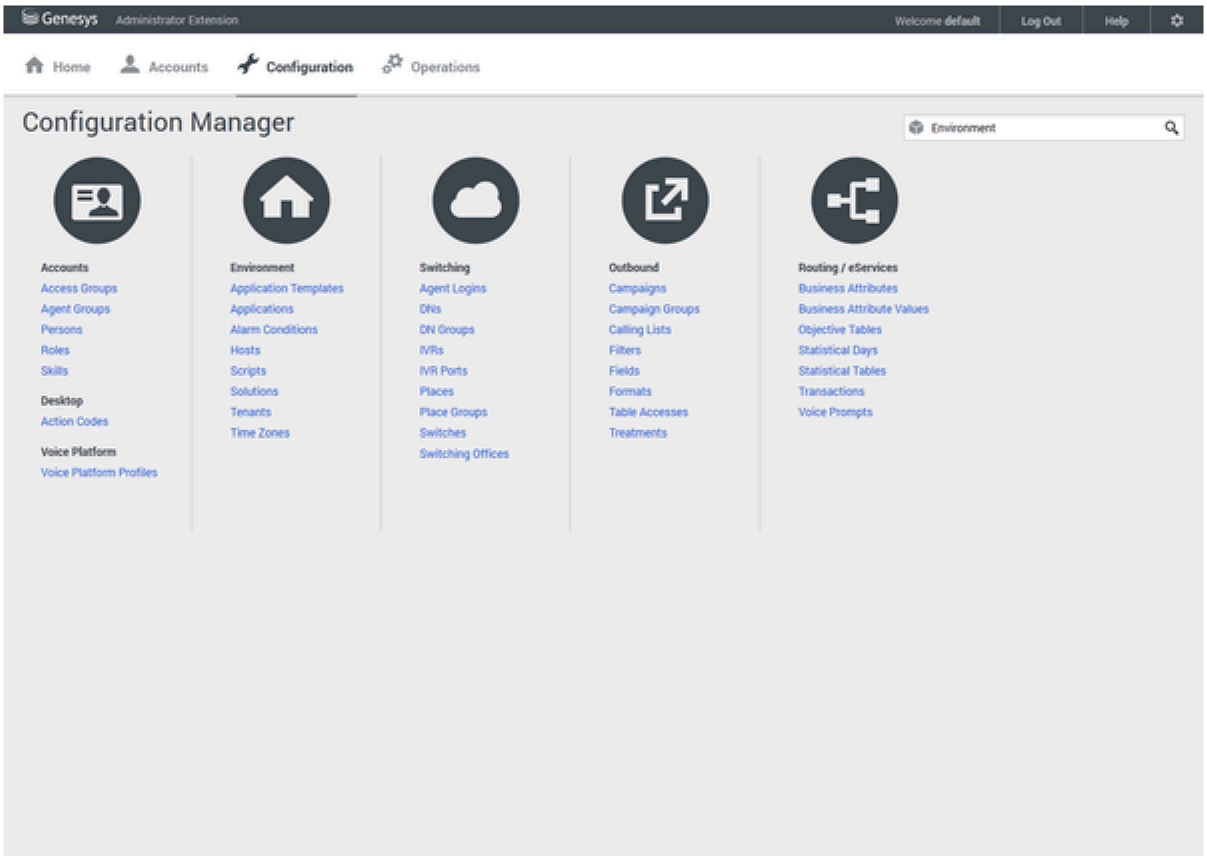
Genesys Administrator

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.



Important

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 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 following fixed headings are always displayed:

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

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. If the plug-in does not specify a menu heading, it is added to the `Configuration` fixed heading.

Users can also add custom links to external websites that appear under the fixed headings. For more information, see Adding Links to the Navigation Bar.

> **Important**
> 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.

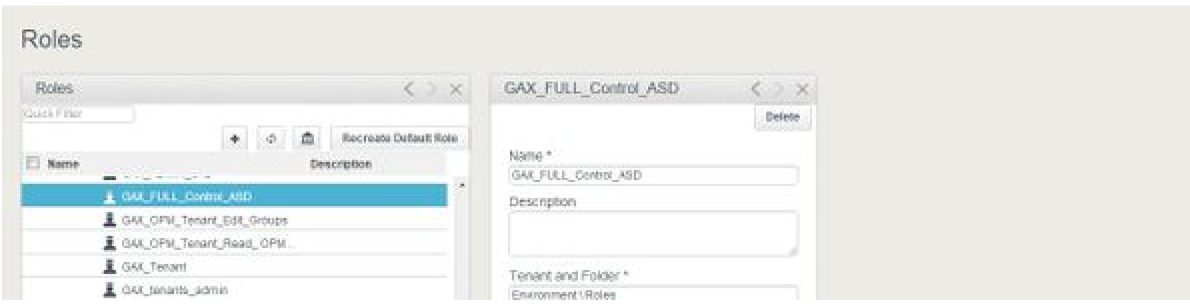
Each submenu heading can contain several items. For example, `Solution Deployment` contains the following items:

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

Layout

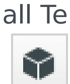
All panels can be collapsed or resized to suit your personal preference.

To collapse a panel, click the `Collapse` button. 

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.

Adding Links to the Navigation Bar

Additional links can be added to the Navigation Bar by editing the configuration options of the default Application object.

Adding Custom Links

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `Applications`. The `Applications` list displays.
3. Click the default client `Application` object in the list to edit the object.

> **Important**
> The default client `Application` name is defined in the options for the GAX `Application` object, in the `General` section. It is typically named `default`, but it might have another name in your environment.

4. Click the `Application Options` tab.
5. Click `Add`.
6. In the pop-up window, enter the following information:
   - `Section`—You must enter the following: `ga_preferences.navigation`
   - `Key`—You must enter the following: `categories`
   - `Value`—Enter the number of additional category items to add to the Navigation Bar. For example, to add one category item, set the value to `1`.

     > **Important**
     > It is possible to enter `0` (zero), if you do not want to add additional category items to the Navigation Bar.

   - Click `OK`.
7. Click `Add`.
8. In the pop-up window, enter the following information:
   - `Section`—You must enter the following: `ga_preferences.navigation`
   - `Key`—You must enter the following: `items`
   - `Value`—Enter the number of additional links to add to the category item that you created in Step 6.

For example, to add one link item, set the value to `1`.

- Click `OK`.

Defining Category Items

For each category item, you must create an additional option that defines the parent category, an ID for the new category item, and a display name. Perform the following steps to define each category item.

1. Click `Add`.
2. In the pop-up window, enter the following information:
    - `Section`—You must enter the following: `ga_preferences.navigation_categories_0`
    - `Key`—You must enter the following: `category`
    - `Value`—Enter the name of the category to add to the Navigation Bar. For example: `custom`. You can also specify existing category items. For example, to add a menu item under the `Configuration` category item, enter `config`.
    - Click `OK`.
3. Click `Add`.
4. In the pop-up window, enter the following information:
    - `Section`—You must enter the following: `ga_preferences.navigation_categories_0`
    - `Key`—You must enter the following: `name`
    - `Value`—Enter an ID for the category to add to the Navigation Bar. For example: `custom`
    - Click `OK`.
5. Click `Add`.
6. In the pop-up window, enter the following information:
    - `Section`—You must enter the following: `ga_preferences.navigation_categories_0`
    - `Key`—You must enter the following: `title`
    - `Value`—Enter the name of the category to add to the Navigation Bar. For example: `Custom Links`
    - Click `OK`.

Important

Repeat the procedure above for additional category items. You must increment the `Section` name for each category item. For example, if you want to define three category items, the `Section` names are:

- `ga_preferences.navigation_categories_0`

- `ga_preferences.navigation_categories_1`
- `ga_preferences.navigation_categories_2`

Defining Link Items

For each link item, you must create an additional option that defines the parent category, privilege, title, and URL. Perform the following steps to define each link item.

1. Click `Add`.
2. In the pop-up window, enter the following information:
   - `Section`—You must enter the following: `ga_preferences.navigation_items_0`
   - `Key`—You must enter the following: `category`
   - `Value`—Enter the name of the category to which to add this link. For example: `custom`. You can also specify existing category items. For example, to add a link item under the `Configuration` category item, enter `config`.
   - Click `OK`.
3. Click `Add`.
4. In the pop-up window, enter the following information:
   - `Section`—You must enter the following: `ga_preferences.navigation_items_0`
   - `Key`—You must enter the following: `privilege`
   - `Value`—Enter the name of the privilege that dictates if the item is shown to a user. For example: `CUSTOM_LINK`

   Important

   Refer to Assigned Privileges to learn more about assigning privileges.

   - Click `OK`.
5. Click `Add`.
6. In the pop-up window, enter the following information:
   - `Section`—You must enter the following: `ga_preferences.navigation_items_0`
   - `Key`—You must enter the following: `title`
   - `Value`—Enter the name of the link item to add to the Navigation Bar. For example: `Genesys`

- Click OK.

7. Click Add.
8. In the pop-up window, enter the following information:
   - Section—You must enter the following: `ga_preferences.navigation_items_0`
   - Key—You must enter the following: `url`
   - Value—Enter the URL to which the link item points. For example: `http://www.genesyslab.com`
   - Click OK.

Important

Repeat the procedure above for additional link items. You must increment the Section name for each link item. For example, if you want to define three link items, the Section names are:

- `ga_preferences.navigation_items_0`
- `ga_preferences.navigation_items_1`
- `ga_preferences.navigation_items_2`

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.

> **Important**
>
> Plug-ins can be managed on the local node only when the GAX `Application` object is of type:
>
> - `Generic Genesys Server` (when using Management Framework releases 8.1.0 or lower).
> - `Generic Administrator Extension Server` (when using Management Framework releases 8.1.1 or higher).

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 `Related` button and select `Plug-ins` 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 `Related` button and select `Plug-ins` 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 `Related` button and select `Plug-ins` 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 `Related` button and select `Plug-in Options`.
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.

Configuration Object Management

Configuration Object Management is responsible for the general management of configuration objects on your system. Configuration objects might include:

- Users and Agents
- Campaigns
- DN Groups
- Tenants
- User Access Groups

User-related functions are described in Account Management.

System-related functions are described in Configuration Management.

Configuration objects that can be configured in the `Accounts` menu can also be configured in Configuration Manager, and vice-versa. For example, to create user accounts, you can choose to use the User Accounts page in the `Accounts` menu, or you can use the Users page in Configuration Manager. Although these processes are different, the created objects are treated the same way in the Configuration Database.

Common Object Properties

All objects have the following configuration properties and elements:

- `Name`—Names uniquely identify objects within a certain range. Therefore, the name, which can be up to 255 characters, is a required parameter for most types of objects. The exceptions are:
  - DNs and Agent Logins—Their unique numbers and codes identify them within a Switch.
  - IVR Ports—Their unique port numbers identify them within an IVR.

  The way you name objects in your environment is important. Consistent and sensible naming conventions make your configuration environment easier to understand and faster to browse, leading to a more maintainable and usable configuration.

  > **Important**
  >
  > Although Genesys Administrator Extension supports the full character set in object names, the use of certain characters can cause problems in the behavior of other Genesys applications. Therefore, avoid spaces, dashes, periods, or special characters in object names. Consider using underscores where you might normally use spaces or dashes.

  The names you set for some types of objects must match the names of the entities that those objects represent elsewhere in an environment. For example, the names of Hosts must match the names given to the computers they represent in the data network environment.

- `State Enabled`—If checked, indicates that the entity represented by an object is in regular operating condition and can be used without any restrictions. If not checked, indicates that the entity represented by an object is being used in a non-production environment. Customer interactions cannot be directed to this target, even if operating information indicates that this object is available.

  Disabling a folder or an object that is a parent to other objects also disables all objects within the folder or all child objects of that parent object.

  For example:

  - Disabling a Switch disables all DNs and Agent Logins defined within this Switch.
  - Disabling an Agent Group folder disables all Agent Groups configured within this folder.

  However, if you disable a group of objects (for example, an Agent Group), the individual members of this group (in this example, Agents) remain enabled.

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.

7. 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

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. 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.

5. 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

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.

Display Options

Display Options

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.

> **Important**
> Agent groups that are disabled will appear grayed out in the list.

Configuration Object 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.

Procedures

Possible Procedures from this Panel

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

You can also perform the following actions:

Creating Agent Groups

[+] Click here to reveal procedure

To create an Agent Group, perform the following actions:

1. Go to `Accounts` > `System` > `Agent 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`—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 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.
4. Click the Save button.

Deleting Agent Groups

[+] Click here to reveal procedure

There are multiple methods to delete an Agent Group. Choose a procedure below:

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

[+] Click here to reveal procedure

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

[+] Click here to reveal procedure

There are multiple methods to enable or disable an Agent Group. Choose a procedure below:

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.

Display Options

Display Options

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

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

Configuration Object 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.

Procedures

Possible Procedures from this Panel

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 actions:

Creating Skills

[+] Click here to reveal procedure

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

[+] Click here to reveal procedure

There are multiple methods to delete a Skill. Choose a procedure below:

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

[+] Click here to reveal procedure

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

[+] Click here to reveal procedure

There are multiple methods to enable or disable a Skill. Choose a procedure below:

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.

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.

Display Options

Display Options

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.

Configuration Object 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.

Details

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

> **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.

Procedures

Possible Procedures from this Panel

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

Creating Bulk Change Sets

[+] Click here to reveal procedure

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.

> **Important**
>
> 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

[+] Click here to reveal procedure

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

[+] Click here to reveal procedure

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.

Viewing Completed Bulk Changes

[+] Click here to reveal procedure

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

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.

> **Important**
> 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.

> **Important**
> This action does not delete the Bulk Change Set; it deletes the record of the Bulk Change Set.

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.

Display Options

Display Options

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.

> **Important**
> Capacity rules that are disabled will appear grayed out in the list.

Configuration Object 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.

Procedures

Possible Procedures from this Panel

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.

You can perform the following actions:

Creating Capacity Rules

[+] Click here to reveal procedure

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—The Tenant and folder to which this Capacity Rule belongs. 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.

Media Types

[+] Click here to reveal procedure

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.

Deleting Capacity Rules

[+] Click here to reveal procedure

There are multiple methods to delete a Capacity Rule. Choose a procedure below:

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

[+] Click here to reveal procedure

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—The Tenant and folder to which this Capacity Rule belongs. 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

[+] Click here to reveal procedure

There are multiple methods to enable or disable a Capacity Rule. Choose a procedure below:

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.

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 8.1 Security Deployment Guide. For a listing of Role privileges for the Genesys Administrator Extension (GAX) application, refer to Role Privileges in 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.

Display Options

Display Options

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

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

Configuration Object 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.

Procedures

Possible Procedures from this Panel

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.

You can perform the following actions:

Creating Roles

[+] Click here to reveal procedure

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

[+] Click here to reveal procedure

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

[+] Click here to reveal procedure

There are multiple methods to delete a Role. Choose a procedure below:

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**
> Once a Role is deleted, there is no method to recover it; the Role is permanently deleted.

Copying Roles

[+] Click here to reveal procedure

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

[+] Click here to reveal procedure

There are multiple methods to enable or disable a Role. Choose a procedure below:

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

[+] Click here to reveal procedure

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.

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.

Display Options

Display Options

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

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

Configuration Object 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.

Procedures

Possible Procedures from this Panel

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

You can perform the following actions:

Creating User Access Groups

[+] Click here to reveal procedure

To create an 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 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 Access Group belongs.
   - `Access Group Members`—The members of this Access Group.
4. Click the `Save` button.

Deleting User Access Groups

[+] Click here to reveal procedure

There are multiple methods to delete an Access Group. Choose a procedure below:

Deleting a Single User Access Group

1. Go to `Accounts > System > User Access Groups`.
2. Select an 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 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

[+] Click here to reveal procedure

To copy an Access Group, perform the following actions:

1. Go to Accounts > System > User Access Groups.
2. Select an 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 Access Group name must be unique in the environment before you are allowed to save the new Access Group.

5. Click the Save button to save the new Access Group.

Enabling or Disabling User Access Groups

[+] Click here to reveal procedure

There are multiple methods to enable or disable an Access Group. Choose a procedure below:

Enabling or Disabling a Single User Access Group

1. Go to Accounts > System > User Access Groups.
2. Select an Access Group. A new panel opens to the right.
3. In the new panel, perform one of the following actions:
    - If the Access Group is currently enabled, click the Disable button.
    - If the 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 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 Access Groups, or `Disable` to disable the selected 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.

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.

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

Display Options

Display Options

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

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 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.

Procedures

Possible Procedures from this Panel

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.

You can also perform the following actions:

Creating Agents

[+] Click here to reveal procedure

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 in the Creating User Accounts section, 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 `Related` button and select `Agent Information`. 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 Objective Tables page for more information about Cost Contracts.

- Agent Logins——The Agent Login that is associated with this agent.

7. Enter Skills in the Skill Levels section. Click the New button to open a new panel and add Skills. See the Agent Skills section for more information.
8. Click the Save button.

Creating User Accounts

[+] Click here to reveal procedure

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 8.1 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.

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

Deleting User Accounts

[+] Click here to reveal procedure

There are multiple methods to delete a User account. Choose a procedure below:

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

[+] Click here to reveal procedure

There are multiple methods to change or reset a password. Choose a procedure below:

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 8.1 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 appears. 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.

Setting Accessible Objects

[+] Click here to reveal procedure

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 `Related` button and select `Accessible Objects`. 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

[+] Click here to reveal procedure

There are multiple methods to enable or disable a User account. Choose a procedure below:

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 a User accountto 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.

Configuration Management

Configuration Manager enables you to create and manage system-level configuration objects such as Alarm Conditions, Business Attributes, Hosts, and more.

Configuration Manager

Overview

Configuration Manager Overview

The `Configuration Manager` page is a central location for viewing and managing the configuration objects used by your system. Genesys Administrator Extension can manage objects in single-Tenant and multi-Tenant configurations.

Configuration objects, also known as Configuration Database objects, contain the data that Genesys applications and solutions require to operate in a particular environment. These objects are all contained in the Configuration Database.

Configuration Manager lists these objects by type. For example, configuration objects related to outbound campaigns are listed under the `Outbound` heading.

Click on a configuration object type to view a list of the related configuration objects on your system. From this list, you can edit or delete the existing configuration objects, or you can create a new configuration object.

To view and manage configuration objects for a specific Tenant, enter the name of the Tenant in the `Tenant Directory` field, or click on the magnifying glass button to view a list of Tenants. By default, Configuration Manager lists configuration objects for the Tenant to which your user account belongs. When viewing objects by Tenant, if you choose to create a new object, that object is created in the directory for that Tenant.

> **Important**
> The `Tenant Directory` field is not shown in a single-Tenant environment.

Click on a topic below to learn more about Configuration Manager.

Object Hierarchy

[+] Click here to reveal section

In Genesys Administrator Extension, objects are stored in folders, usually with one object type per folder.

To help you better manage your configuration environment, you can create a hierarchy by manually creating any combination of the following:

- Folders and subfolders—A folder contains objects of one type. For example, for `Host` objects, you might choose to create subfolders that group hosts by location.
- Business Units/Sites—Unlike folders, Business Units and Sites can contain objects of different types. For example, all configuration objects related to a specific site for your business can be grouped into a `Site`, which then contains configuration objects within folders and subfolders.

In addition, the following objects include their parent objects as part of their hierarcy:

- Campaign Groups—Hierarchy includes Campaigns.
- IVR Ports—Hierarchy includes IVRs.
- Business Attribute Values—Hierarchy includes Business Attributes.
- Agent Logins—Hierarchy includes Switches.
- DNs—Hierarchy includes Switches.

Genesys Administrator Extension displays a navigation path (a set of breadcrumbs) that shows you where the displayed objects reside in your hierarchy. This path appears with all lists of objects, and is located directly above the list. You can click any element of this path to go quickly to that element.

Some object types might only exist under the root tenant or a Business Unit/Site. If you are viewing objects by Tenant, you might not see the following objects:

- Alarm Conditions
- Application Templates
- Applications
- Hosts
- Solutions
- Switching Offices

Importing/Exporting Data

[+] Click here to reveal section

Most configuration objects allow you to import and export data, such as configuration options, by clicking on the `More` button and selecting `Import` or `Export`. Genesys Administrator Extension uses the CFG/CONF file formats.

Refer to the File Formats tab, above, for more information on acceptable file formats for import.

Required Permissions

[+] Click here to reveal section

The minimum permissions required to perform a task in Genesys Administrator Extension depend on the task. For more information about permissions, see the Permissions tab, above.

You must also be granted appropriate Role privileges to perform specific tasks on an object or group of objects.

Permission	Description	Prerequisites
Read	• To view a particular object, you must have Read permission for that object. • In Configuration Manager, you can view the object type. If you do not have Read permission for the object, you cannot see it in Configuration Manager. • In list views, you can view the following button: `Edit`. • You can click on an object to view its details.	None
`Create`	• To create an object under a particular folder, you must have `Create` permission for that folder. The person who creates an object receives `Full Control` permissions for that object. Other accounts have the same access permissions for a newly created object as they do for the folder in which the object is created. • In list views, you can view the following buttons: New, `Clone`, and `Move To`. • In object detail views, you can view the following buttons: `Clone` and `Move to`. You can also view the following tabs: `Options`, `Permissions`, and `Dependencies`.	Read
`Update`	• To modify a particular object,	Read

Permission	Description	Prerequisites
	you must have `Update` permission for that object. • In list views, you can view the following button: `Enable` or `Disable`. • In object detail views, you can view the following buttons: `Enable` or `Disable`, `Save`, and `Apply`.	
`Delete`	• To delete a particular object, you must have `Delete` permission for that object. • In list views, you can view the following button: `Delete`. • In object detail views, you can view the following button: `Delete`.	Read

Manipulating Multiple Objects

[+] Click here to reveal section

Genesys Administrator Extension uses Bulk Change Sets to manipulate several objects at once. For example, you can use Bulk Change Sets to add and/or remove multiple users at once. You can use Bulk Change Sets to replicate the wizard functionality in Genesys Administrator.

Naming Conventions

[+] Click here to reveal section

Because most objects in the Configuration Database mirror physical objects in your contact center (for example, switches, agents, and installed applications), this document uses an initial capital letter for Configuration Database objects. For example, the word switch appears in lowercase when it refers to a physical switch in your contact center, but it is capitalized when it refers to the configuration object that mirrors your physical switch. Similarly, the word application appears in lowercase when it refers to a physical installation in your contact center, but it is capitalized when it refers to the configuration object that mirrors the installed program.

Configuration Objects

Available Configuration Objects

Click on any of the following links to read more about configuration objects that can be configured with Configuration Manager:

- Accounts
  - Access Groups
  - Agent Groups
  - Users
  - Roles
  - Skills
- Environment
  - Application Templates
  - Applications
  - Alarm Conditions
  - Hosts
  - Scripts
  - Solutions
  - Tenants
  - Time Zones
- Switching
  - Agent Logins
  - DNs
  - DN Groups
  - IVRs
  - IVR Ports
  - Places
  - Place Groups
  - Switches
  - Switching Offices
- Routing/eServices
  - Business Attributes
  - Business Attribute Values
  - Objective Tables

    - Statistical Days
    - Statistical Tables
    - Transactions
    - Voice Prompts
- Desktop
    - Action Codes
- Voice Platform
    - Voice Platform Profiles
- Outbound
    - Campaigns
    - Campaign Groups
    - Calling Lists
    - Filters
    - Fields
    - Formats
    - Table Accesses
    - Treatments

Permissions

Permissions

The `Permissions` tab 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 8.1 Security Deployment Guide.

> **Important**
> Some configuration objects, such as Tenants and Folders, are parent objects to one or more child objects. When you access the `Permissions` tab for these parent objects,

> you can use the following additional options to set permissions:
>
> - `Propagate` check box—If `Propagate` is checked, the permission is propagated to every child object under this parent object. If `Propagate` is not checked, the permission is removed from every child object under this parent object, unless the permission has been modified in the child object.
> - `Replace Recursively` button—If Replace Recursively is clicked, the permissions of every child object are removed and replaced with permissions from the parent object.

You can perform the following actions:

Changing Members

[+] Click here to reveal procedure

1. Select an object, and click the `Permissions` tab.
2. Click the `Add User` or `Add Access Group` button.
3. A new window appears to enable you to select a User or Access Group. You can find Users or Access Groups by using one of the following methods:
   - By Hierarchy—Click the `Show Hierarchy` button to see a list of all Users or Access Groups in your environment, sorted by hierarchy.
   - By List—Click the `Show List` to see a list of all Users or Access Groups in your environment.
   - By Quick Filter—Enter the name or partial name of the User or Access Group in the `Quick Filter` field.
4. Perform one of the following actions:
   - Click the `Save` button to accept the changes and return to the object list.
   - Click the `Apply` button to accept the changes and remain in the `Permissions` tab.
   - Click the `Cancel` button to discard the changes.

Changing Access Permissions

[+] Click here to reveal procedure

1. Select an object, and click the `Permissions` tab.
2. You can change any or all of the following options:

Property	Description
Create (C)	You can create objects of this type.
Read (R)	You can view details for this object.
Update (U)	You can change, or modify, this object.
Delete (D)	You can delete this object.

Property	Description
Execute (X)	You can deploy, start, stop, or otherwise activate 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.

3. Perform one of the following actions:
   - Click the Save button to accept the changes and return to the object list.
   - Click the `Apply` button to accept the changes and remain in the `Permissions` tab.
   - Click the `Cancel` button to discard the changes.

Removing Access Permissions

[+] Click here to reveal procedure

1. Select an object, and click the `Permissions` tab.
2. Select an Access Group or User for which to remove permissions.
3. Click the Remove button.
4. A dialog box appears to confirm deletion. Perform one of the following actions:
   - Click the Save button to accept the changes and return to the object list.
   - Click the `Apply` button to accept the changes and remain in the `Permissions` tab.
   - Click the `Cancel` button to cancel deletion.

Options

Options

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

Creating an Option

[+] Click here to reveal procedure

To add an option, perform the following actions:

1. Select an object, and click the `Options` tab.
2. Click the Add button.

3. Enter information in the `Section`, Key, and `Value` fields.
4. Click the OK button.
5. Perform one of the following actions:
    - Click the Save button to accept the changes and return to the object list.
    - Click the `Apply` button to accept the changes and remain in the `Options` tab.
    - Click the `Cancel` button to discard the changes.

Updating an Option

[+] Click here to reveal procedure

To update an option, perform the following actions:

1. Select an object, and click the `Options` tab.
2. Select an option.
3. Edit information in the `Section`, Key, and `Value` fields.
4. Click the OK button.
5. Perform one of the following actions:
    - Click the Save button to accept the changes and return to the object list.
    - Click the `Apply` button to accept the changes and remain in the `Options` tab.
    - Click the `Cancel` button to discard the changes.

Deleting an Option

[+] Click here to reveal procedure

To delete an option, perform the following actions:

1. Select an object, and click the `Options` tab.
2. Select an option.
3. Click the `Delete` button.
4. Perform one of the following actions:
    - Click the Save button to accept the changes and return to the object list.
    - Click the `Apply` button to accept the changes and remain in the `Options` tab.
    - 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.
- You can click the `More` button to import or export options. See the **Importing/Exporting Data** section in the Overview tab, above, for more information.

Dependencies

Dependencies

The `Dependencies` tab displays a list of all objects that are dependent on this object, and by what property they are dependent.

For example, consider a scenario in which an Application object `AppA`, is running on a Host object `HostA`. `AppA` is dependent on `HostA` to function, so the `Dependencies` tab for `HostA` shows `AppA` as a dependent object, with the property being `Host`.

For all Users and Agents, the `Dependencies` tab also lists the Roles to which they have been assigned.

Click any object in the list to view the properties of that dependent object. You can then modify its properties or create another object of the same type.

Security

Assigning Security Certificates

Genesys supports the optional use of the Transport Layer Security (TLS) protocol to secure data exchange between Genesys components. The TLS protocol is implemented using security certificates, which must be configured in the Host objects and the Application objects representing these components.

Important

Before configuring secure data exchange, make sure that certificates are installed on the host computers on which the Genesys components run, and that the certificate information is available to you.

Security certificates are assigned at the Host level, and optionally at the Application and Port levels. The Host certificate is used by Applications and Ports by default, unless the Applications and Ports specify their own certificates. In this case, those specific certificates override the default Host certificate.

For more information about deploying TLS, refer to the Genesys 8.1 Security Deployment Guide.

File Formats

Supported File Formats

The CFG/CONF file format is a plain-text format. The CFG format is for use on Microsoft Windows systems, and the CONF format on UNIX systems.

Both formats support only the import and export of string options. Other types of configuration options are ignored and not imported or exported.

Syntax

The syntax of the .cfg and .conf files is identical. Each section and option appears on a separate line, with section names in square brackets. Each section is followed by a list of options in that section, with the appropriate values:

```
[section_name1]
option-name1=option_value2
...
option_nameN=option_valueN

[section_name2]
option-nameN+1=option_valueN+1
...
```

Example

The following excerpt from a configuration file illustrates the correct syntax in a .cfg or .conf file:

```
[confserv]
port=2520
management-port=2521
server=dbserver
encryption=false
encoding=utf-8

[log]
verbose=standard
all=stderr

[hca]
schema=none
```

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 performing the same tasks often has identical access needs. Two or three people responsible for maintaining a specific site of the contact center may also have identical access needs. You can greatly simplify access control by adding individuals to Access Groups and then setting permissions for those groups.

Important

- The `default` user account is not related to Access Groups and, therefore, does not appear as a member of any Access Group.
- For detailed instructions about managing Roles assigned to Access Groups, refer to the Genesys 8.1 Security Deployment Guide.

Display Options

Display Options

The `Access Groups` list shows the Access Groups 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

Access Groups that are disabled appears 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.

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

Procedures

Possible Procedures from this Panel

To create a new Access Group 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.

> **Important**
> When you delete an Access Group, only the Access Group object itself is removed from the Configuration Database. Its member objects—Access Group and User objects—are not deleted.

Otherwise, select the check box beside one or more objects and click the `More` button to perform the following tasks:

- `Clone`—Copy an Access Group.
- `Move To`—Move an Access Group to another hierarchical structure.
- Enable or disable Access Groups
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Access Group Objects

To create an Access Group object, perform the following actions:

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `Access Groups`. The `Access Groups` 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 of the 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—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. Click the Apply button to save the access group. The Members tab appears.
6. In the Members tab, click the Add button to add a User. In the pop-up window, you can create a new User object by clicking the New button.
7. Perform one of the following actions after you have added a User to the Access Group:
   - Click the Save button to accept the changes and return to the object list.
   - Click the Apply button to accept the changes and remain in the tab.
   - Click the Cancel button to discard the changes.

Action Codes

Action Codes enable agents to report the business results of customer interactions, as well as to explain the reasons for certain operations.

After you select an appropriate code from a menu of predefined Action Codes, the code is passed along with its related request. The code then returns with the event which indicates that the request has been successfully processed. Eventually, the code is stored in the reporting database.

You can supplement each Action Code with a number of Subcodes that more precisely characterize the reasons for a certain action.

Display Options

Display Options

The `Action Codes` list shows the Action Codes 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**
> Action Codes 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Action Code 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 an Action Code.
- Move To—Move an Action Code to another hierarchical structure.
- Enable or disable Action Codes
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

Click on the name of an Action Code to view additional information about the object. You can also set options and permissions.

Creating Action Code Objects

To create an Action Code object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Action Codes. The Action Codes 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 of this Action Code. 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).
   - Type—The Action Code Type. You must specify a value for this property. Once you set the value, you cannot change it. See the **Action Code Types** tab for more information.
   - Code—The Action Code. You must specify a value for this property, and that value must be unique within the Action Code type specified in the Type property.
   - 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. (Optional) You can also set Subcodes to more precisely characterize the reasons for a certain action. To set Subcodes, perform the following steps:
   - Click the Subcodes tab.
   - Click the Add button.
   - Enter the following information:

- Name—The name of the Subcode. You must specify a value for this property, and that value must be unique within the Action Code. Once you set the value, you cannot change it.
- Code—The Subcode value. You must specify a value for this property, and that value must be unique within the Action Code. Once you set the value, you cannot change it.
- Perform one of the following actions:
    - Click the Save button to accept the changes and return to the object list.
    - Click the Apply button to accept the changes and remain in the tab.
    - Click the Cancel button to discard the changes.

6. Click the Save button.

Action Code Types

Types of Action Codes

The following are types of Action Codes:

Type	Description
Busy Off	Selected and sent when an agent cancels the Make Busy function.
Busy On	Selected and sent when an agent activates the Make Busy function.
Conference	Selected and sent when an agent initiates a conference.
Forward Off	Selected and sent when an agent cancels the Call Forwarding function.
Forward On	Selected and sent when an agent activates the Call Forwarding function.
Inbound Call	Selected and sent when an agent releases an inbound call.
Internal Call	Selected and sent when an agent releases an internal call.
Login	Selected and sent when the agent logs in.
Logout	Selected and sent when the agent logs out.
Not Ready	Selected and sent when the agent's status changes to Not Ready.
Outbound Call	Selected and sent when an agent releases an outbound call.
Ready	Selected and sent when the agent's status changes to Ready.
Transfer	Selected and sent when an agent initiates a

Type	Description
	transfer.

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.

Display Options

Display Options

The `Agent Groups` list shows the Agent Groups 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**
> Agent Groups 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.

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

Procedures

Possible Procedures from this Panel

To create a new Agent Group 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.

> **Important**
> When you delete an Agent Group, only the Agent Group object itself is removed from the Configuration Database. Its member Agent objects are not deleted.

Otherwise, select the check box beside one or more objects and click the `More` button to perform the following tasks:

- `Clone`—Copy an Agent Group.
- `Move To`—Move an Agent Group to another hierarchical structure.
- Enable or disable Agent Groups
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Agent Group Objects

To create an Agent Group object, perform the following actions:

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `Agent Groups`. The `Agent Groups` 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 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) or within the Tenant (in a multi-tenant environment). You cannot change this value as long as this Agent Group contains at least one User.
    - `Capacity Table`—This field applies only for the Enterprise Routing Solution. It is the Capacity Table associated with this Agent Group. Refer to Enterprise Routing Solution documentation for more information.
    - `Quota Table`—This field applies only for the Enterprise Routing Solution. It is the Quota Table associated with this Agent Group. Refer to Enterprise Routing Solution documentation for more information.
    - `Cost Contract`—The Cost Contract associated with this Agent Group.
    - `Site`—The Site containing this Cost Contract.
    - `Script`—Enter a valid expression on the `Script` tab to define the group as a Virtual Agent Group. The expression must be in Virtual Group Script Language (VGSL) and must define at least one skill (with optionally, a skill level) in the following format:
      `Skill("SkillName")>SkillLevel`

Example
`Skill("Spanish")>5`

- `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. In the `Supervisors` tab, click the `Add` button to add a User. In the pop-up window, you can create a new User by clicking the `New` button.
6. In the `Agents` tab, click the `Add` button to add a User. In the pop-up window, you can create a new User by clicking the `New` button.
7. The `Origination DNs` tab lists DNs from which calls can be routed or diverted to this Agent Group. You can include DNs of the following types into this list: `Routing Point`, `External Routing Point`, `Service Number`, `Routing Queue`, `ACD Queue`, `Virtual Queue`, or `Virtual Routing Point`. Click the `Add` button to add a DN. In the pop-up window, you can create a new object by clicking the `New` button.
8. Perform one of the following actions:
    - Click the `Save` button to accept the changes and return to the object list.
    - Click the `Apply` button to accept the changes and remain in the tab.
    - Click the `Cancel` button to discard the changes.

Virtual Agent Groups

Virtual Agent Groups

A Virtual Agent Group is similar to an Agent Group except that a Virtual Agent Group has no permanent members. Instead, an Agent becomes a member of a Virtual Agent Group if that Agent meets the criteria specified by the script. Agent membership in a Virtual Agent Group can change dynamically based on changes in the Virtual Agent Group criteria or changes in the object properties of the Agent.

When you click a Virtual Agent Group in Genesys Administrator Extension, you see its current member Agents.

> **Important**
> Although you can create and configure them using Genesys Administrator Extension, Virtual Agent Groups are used primarily by Reporting applications. For more information about Virtual Agent Groups, refer to the latest version of the *Framework Stat Server User's Guide*.

Warning

If Genesys Administrator Extension finds Virtual Agent Groups (converted from an earlier installation) that contain illegal script expressions or include permanent members, Genesys Administrator Extension will display an error message. To preserve correct functionality of the Virtual Agent Groups, you must address the problem manually by either correcting the error or converting the Virtual Agent Group to a non-virtual Agent Group by removing the expression from the configuration option script.

Agent Logins

Agent Logins are unique codes defined within a Switch and assigned to agents. They identify which agent is working at which Place during a particular working session.

The configuration of Agent Logins in the Configuration Database must match exactly the configuration of those Agent Logins in the switching system. Before adding or deleting a particular Agent Login, make sure that the same change was made in the database of the switching system.

When you specify Agent Logins as objects in a Switch, they are not associated with any particular agents. For information about how to assign Agent Logins to agents, refer to Creating Agents.

Display Options

Display Options

The `Agent Logins` list shows the Agent Logins 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

- The `Switches` list displays when you select `Agent Logins` in Configuration Manager. To access the `Agent Logins` list, you must first select a Switch object and then an Agent Logins folder.
- Agent Logins 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.

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

Procedures

Possible Procedures from this Panel

To create a new Agent Login 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.

> **Important**
> When you delete an Agent Login, the Agent Login is removed from the Configuration Database and from any Agent to which it is assigned. This might affect the configuration of a particular Agent in the contact center. Before deleting an Agent Login, consider viewing the dependencies tab to identify the Agent to which this Login is assigned. If you want to remove only the Agent Login from the Agent to which it is assigned, but leave it still existing in the Configuration Database and available for assignment to another Agent, open the User Account for the Agent, remove the Agent Login from the Agent, and click the Save button.

Otherwise, select the check box beside one or more objects and click the More button to perform the following tasks:

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

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

Creating Agent Login Objects

To create an Agent Login object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Agent Logins. The Switches list displays.
3. Click the Switch object in which you wish to create an Agent Login.
4. Click the Agent Logins folder in which you wish to create an Agent Login.
5. Click the New button.

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:
   - `Code`—The Agent Login code. You must specify a value for this property, and that value must be unique within the Switch. Once you set the value, you cannot change it.
   - `Switch`—The Switch to which this Agent Login belongs. This value is automatically set, based on the Switch being viewed in the `Agent Logins` list.
   - `Override`—Value to use as the override instead of the Code value for accessing this Agent Login in certain types of routing. You must specify an override value, and it must be unique within the Switch.

     > **Important**
     > To specify a value in the `Override` field, you must ensure the `Use Override` check box is checked.

   - `Switch-specific Type`—An integer that corresponds to a combination of switch-specific settings for this Agent Login. It identifies the device type (for example, Extension, ACD Position, or Trunk) for each switch (PBX) that T-Server supports. It is unique for each switch/DN/T-Server configuration. In essence, it provides a cross-reference for DN Types between T-Server and PBX. You must specify a value for this property, and it must be 1 or greater. For more information, refer to the *Framework T-Server Deployment Guide* for your particular T-Server.
   - `Password`—A security protection key used along with this Agent Login to authenticate a User for contact-center activity. You can associate one User with multiple password-protected Agent Logins.
   - `Confirm Password`—Confirmation of the password entered in the `New Password` field.
   - `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.
7. Click the Save button.

Alarm Conditions

Alarm Conditions specify the events that you might want to know about and manage as soon as they occur, such as if a Host or Solution is unresponsive. Genesys software contains predefined Alarm Conditions, or you can create your own.

Alarm Conditions work with the following Scripts:

- Alarm Detection Scripts, which identify what system variables the Management Layer must monitor to trigger an alarm.
- Alarm Reaction Scripts, which identify what the Management Layer must do when alarms occur in, or are cleared from, the system. Alarm Reaction Scripts that identify what happens when alarms are cleared are referred to as alarm Clearance Scripts.

To associate Alarm Detection and Alarm Reaction Scripts with Alarm Conditions, specify them in the tabs of the Alarm Condition.

Display Options

Display Options

The `Alarm Conditions` list shows the Alarm Conditions 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**
> Alarm Conditions that are disabled will 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.

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

Procedures

Possible Procedures from this Panel

To create a new Alarm Condition 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 an Alarm Condition.
- Move To—Move an Alarm Condition to another hierarchical structure.
- Enable or disable Alarm Conditions
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

Click on the name of an Alarm Condition to view additional information about the object. You can also set options and permissions.

Creating Alarm Condition Objects

To create an Alarm Condition object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Alarm Conditions. The Alarm Conditions 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 of the Alarm Condition. You must specify a value for this property and that value must be unique within the Configuration Database.
    - Description—A brief description of the Alarm Condition.
    - Category—The category of the Alarm Condition: Critical, Major, or Minor. You must specify a value for this property.
    - Detect Script—The Script that describes the logic applied to detect the alarm.
    - Cancel Timeout—The amount of time, in seconds, that the Alarm Condition is registered in the Log Database, unless another event cancels it or a user clears it. When this timeout expires, the Alarm Condition is unconditionally cleared.
    - Detect Log Event ID—The identifier of the event that triggers the alarm. You must specify a value for this property.

- Detect Selection—The mode for event selection that the Management Layer uses for Alarm Condition analysis. The modes are as follows:
  - Select By Any—The specified event from any application results in an alarm.
  - Select By Application—The specified event from a selected application results in an alarm. Select this option to display the Application field. Click the Browse icon to select an item from a list, or type the name or partial name of the item in the Quick Filter field. The list is populated with Application objects that are stored in Configuration Server.
  - Select By Application Type—The specified event from a selected application type results in an alarm. Select this option to display the Type field. Click the drop-down button to select an item from the list. The list is populated with Application objects that have defined subtypes.
- Cancel Log Event ID—The identifier of the event that triggers clearance of the alarm. For alarm clearance, the Management Layer uses the event from the same application(s) as specified for the detect event for this Alarm Condition.
- 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. Click the Save button.

You can also set the Alarm Detection Scripts and Alarm Reaction Scripts.

Predefined Alarm Conditions

Predefined Alarm Conditions

Genesys provides the predefined Alarm Conditions listed in the following table. If required, you can further configure these conditions to meet your requirements.

Alarm Type	Description
Application Failure	Reports that the specified application has either terminated or stopped responding.
Connection Failure	Reports that the specified connection between any two applications has been lost.
CTI Link Failure	Reports that the connection between the specified T-Server and its switch has been lost.
Host Inaccessible	Reports that the Management Layer cannot contact the Local Control Agent (LCA) on the host where Genesys daemon applications are running. LCA is not started, or it is listening on a port other than the one specified in the configuration. A condition of Host Inaccessible is also referred to as being Down.
Licensing Error	Reports that a licensing error has occurred.

Alarm Type	Description
`Service Unavailable`	Reports that a Genesys component cannot provide service for some internal reasons.
`Host Unavailable`	Reports that a host where Genesys daemon applications are running is unavailable (turned off).
`Host Unreachable`	Reports that the Management Layer cannot reach the host where Genesys daemon applications are running (no route to the host).
`Unplanned Solution Status Change`	Reports that the status of a Solution has changed from Started to Pending, but without any requests to stop the Solution. This may indicate a failure of one of the Solution components.
`Message Server Loss of Database Connection`	Reports that Message Server has lost connection to the Centralized Log Database.

For more information about predefined Alarm Conditions, see the Framework 8.1 Management Layer User's Guide.

Scripts

Scripts

Choose one of the following script types to learn more:

- Alarm Detection Scripts
- Alarm Reaction Scripts

Alarm Detection Scripts

Alarm Detection Scripts identify what system variables the Management Layer must monitor to trigger an alarm.

Alarm Detection Scripts are Script objects of type Alarm Detection, and are created in the same way as other Scripts.

The system variables that the Management Layer can monitor (also called advanced alarm detection parameters) include:

- `Host System Variable Threshold`—Enables you to specify the value for an irregular change that might occur over a certain interval, in either CPU or memory use, on a given host.
- `Application System Variable Threshold`—Enables you to specify the value for an irregular change that might occur over a certain interval in either an application's CPU or memory use.
- `Local SNMP Variable Threshold`—Enables you to specify the value for an irregular change that might occur over a certain interval in any SNMP variable retrieved from the Genesys MIB file.

- `Remote SNMP Variable Threshold`—Enables you to specify the value for an irregular change that might occur over a certain interval in any SNMP variable retrieved from a non-Genesys MIB file.

> **Warning**
> The SNMP-related alarm detection capabilities require that you have a Genesys SNMP license for Solution Control Server.

> **Important**
> The Rising Threshold, which triggers an alarm when crossed only if the value is rising, must be a higher number than the Falling Threshold, which clears the alarm when crossed only if the value is falling. For example, if the Rising Threshold is `300`, the Falling Threshold must be less than `300`.

Alarm Reaction Scripts

Alarm Reaction Scripts identify what the Management Layer must do when alarms occur in, or are cleared from, the system. They are Script objects of type Alarm Reaction, and are created in the same way as other Scripts.

The Management Layer supports the following types of Alarm Reaction Scripts:

- Shutdown of a specified application.
- Startup of a specified application.
- Restart of the application that reported the alarm.
- Startup of a specified solution.
- Sending an e-mail message with information about the alarm to specified Internet addresses. You can customize the e-mail with specific details about the alarm. See the Alarm E-mails tab, above, for more information.
- Switchover of operations from the application that reported the alarm to its backup application, for applications running in primary mode, backup mode, or regardless of the mode.
- Sending an SNMP trap with detailed information about the alarm to a general-purpose network management system.
- Execution of an operating system command.

> **Important**
> For a description of the OS commands you can specify in an Alarm Reaction Script, refer to the Framework 8.1 Management Layer User's Guide.

- Changing a configuration option value for the specified application or for the application that reported the alarm.

Alarm E-mails

Customizing Alarm Reaction E-mails

You can customize the Subject line and body of an Alarm Reaction e-mail by creating a template, using plain text, and any of the following reserved variables that represent the specific information about the alarm:

Variable	Description
`$REACT_NAME`	The name of the Alarm Reaction.
`$COND_ID`	The Alarm Condition ID.
`$COND_NAME`	The name of the Alarm Condition.
`$COND_CTGR`	The category of the Alarm Condition.
`$APP_ID`	The Application ID.
`$APP_NAME`	The name of the Application.
`$APP_TYPE`	The Application type.
`$MSG_ID`	The Message ID.
`$MSG_DESCR`	The text of the Message.
`$$`	The dollar sign character ($).

You can then use this Alarm Reaction script as often as appropriate. For each use, the e-mail text is automatically customized for the specific situation.

Example

An example Alarm Reaction e-mail uses the following template:

```
Subject:

$COND_ID detected in $APP_NAME

Message:

CPU Overload has been detected by Genesys Solution Management Layer for Host1.

Alarm Reaction: $REACT_NAME

Alarm Condition:

ID: $COND_ID

NAME: $COND_NAME
```

```
Category: $COND_CTGR

Application:

ID: $APP_ID

Name: $APP_NAME

Type: $APP_TYPE
```

In the following scenario, the system detects that a CPU overload has occurred in the Solution Control Server, an alarm is triggered, and the following e-mail is sent in response. Note how the variable names have been replaced with actual values that are appropriate to the alarm scenario.:

```
Subject:

CPU_overload detected in Solution_Control_Server_760

Message:

CPU Overload has been detected by Genesys Solution Management Layer for Host1.

Alarm Reaction: cpu_overload_mail

Alarm Condition:

ID: 118

NAME: CPU_overload

Category: Major

Application:

ID: 105

Name: Solution_Control_Server_760

Type: SCS
```

Applications

Applications are the various Genesys software programs that serve the contact center. There are two types of applications: graphical user interface (GUI) applications and daemon applications. Most daemon applications are servers to other applications.

You must register each instance of a daemon application separately. Configuration Server does not allow two daemon applications with the same name to be connected at the same time. By contrast, one object in the Configuration Database can represent any number of GUI applications of the same type and configuration parameters.

Display Options

Display Options

The `Applications` list shows the applications 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**
> Applications 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Application 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 an Application.
- Move To—Move an Application to another hierarchical structure.
- Enable or disable Applications.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Application Objects

To create an Application object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Applications. The Applications 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 of the Application. You must specify a value for this property, and that value must be unique within the Configuration Database. Genesys does not recommend that you use symbols (including single and double quotation marks) in Application names; doing so may cause Applications to malfunction.
    - Template—The Application Template on which this Application is based. This value is set automatically when you select the Application Template.
    - Type—The type of the Application. This value is set automatically, based on the selected Application Template.
    - Version—The version of the Application. This value is set automatically, based on the selected Application Template version.
    - Is Application Server—This field is checked for all daemon Applications and not checked for all GUI Applications. It is set automatically, based on the Type field.
    - 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.

The following fields apply only to daemon Applications, not to GUI Applications:

- `Working Directory`—The full path to the directory where this Application is installed. This field is mandatory. When creating a new Application, Genesys recommends inserting a period (.). The path will be filled in automatically when the new Application is installed and connects to Configuration Server.
- `Command Line`—The command line that is used to start this Application, specifying the name of the Application's executable file. This field is mandatory. When creating a new Application, Genesys recommends inserting a period (.). The command line will be filled in automatically when the new Application is installed and connects to Configuration Server.
- `Command Line Arguments`—Additional command-line parameters that are used to start this Application. When creating a new Application, Genesys recommends leaving this field blank. Any arguments will be filled in automatically when the new Application is installed and connects to Configuration Server.
- `Startup Timeout`—The time interval, in seconds, during which the Management Layer expects this Application to start. If the Application has been configured with the autostart configuration option set to `true`, this is also the amount of time that Solution Control Server should wait to start this Application after initialization or after a system reboot. This field is mandatory.
- `Shutdown Timeout`—The time interval, in seconds, during which the Management Layer expects this Application to shut down. This field is mandatory.
- `Auto-Restart`—Indicates whether the Management Layer automatically restarts the Application after it shuts down unexpectedly.
- `Host`—The host computer on which the Application is running.

> **Important**
>
> To support specific HA configurations, more than one server can be registered on the same port within the same host.

Otherwise, do not assign the port number to any other server on the same host.

- `Backup Server`—The server that Client Applications contact if the connection to the primary server fails. You cannot associate one backup server with more than one primary server. You must use the same Application Template for the backup server that you use for the primary server, and you must associate the servers with the same user account.

> **Important**
>
> When you designate an Application as a backup server for another server, the Application's Connections, Tenants, and Switch (for T-Server Applications) are automatically changed to match the corresponding values for the primary server. As long as this Application is associated with the primary server, its Connections are treated as read-only, and they are changed only when you apply changes to the Connections of the primary server.

- `Redundancy Type`—The type of redundancy with which this Application is running.
- `Timeout`—The amount of time, in seconds, that the client Application waits between reconnection attempts after a connection failure with the server.

- `Attempts`—The number of attempts to reconnect to this server before trying to connect to the backup server. This value must be 1 or higher. This property is used only if you specify a Backup Server for this server.

> **Important**
> Setting this parameter to any value other than 1 may not take effect for some types of Applications.

- `Login as SYSTEM`—If checked, indicates that this Application logs into Configuration Server on behalf of the SYSTEM account.
- `Login As Account`—Identifies the account that applications must use to log in to Configuration Server. If `Login as SYSTEM` is checked, this field is disabled. For Configuration Server type applications, this field defaults to `Environment\default`.

> **Important**
> If you are configuring Configuration Server Proxy, Genesys strongly recommends that you use the default value (`Environment\default`).

- `Certificate`—The security certificate value. In Windows, select the certificate value from the list of installed certificates. In UNIX, enter the full path to the <serial_#>_<host_name>_cert.pem file.
- `Certificate Description`—An optional description of the Certificate.
- `Certificate Key`—The full path to the <serial_#>_<host_name>_priv_key.pem file of the security certificate key. This field is used only if Genesys Security is deployed on UNIX; otherwise this field is empty.
- `Trusted CA`—The full path to the `ca_cert.pem` file of the CA that issued the default security certificate. This field is used only if Genesys Security is deployed on UNIX; otherwise this field is empty.

> **Important**
> Refer to the Genesys 8.1 Security Deployment Guide for more information about deploying Genesys TLS Security.

5. The `Connections` tab lists the connections that this Application has to other Applications. Click the `Add` button to add a connection.
6. Enter the following information in the pop-up window that displays on your screen:
   - `Server`—The server application that this application connects to as a client when it starts.
   - `Port ID`—The port of the server to which the application connects. If you want to use a secure connection, be sure to select a secure port.
   - `Connection Protocol`—The name of the connection control protocol.

> ### Important
> Set the ADDP protocol between Local Control Agent and Solution Control Server in the `Options` tab of the Host object.

- `Local Timeout`—This value is required only if you specified addp in `Connection Protocol`. This value specifies the heartbeat polling interval, measured in seconds, on a client side. This indicates how often the client application sends polling signals to the server application. To enable this functionality, specify any integer as the value.

> ### Warning
> To avoid false disconnect states that might occur because of delays in the data network, Genesys recommends that you set the ADDP timeouts to values greater than 10 seconds.

- `Remote Timeout`—This value is required only if you specified addp in `Connection Protocol`. This value specifies the heartbeat polling interval measured, in seconds, on a server side. This indicates how often the server application sends polling signals to the client application. To enable this functionality, specify any integer as the value.

> ### Warning
> To avoid false disconnect states that might occur because of delays in the data network, Genesys recommends that you set the ADDP timeouts to values greater than 10 seconds.

- `Trace Mode`—The connection trace mode used between a server and its client.
    - `Trace Is Turned Off`—Select if you do not want either the client or the server application to print ADDP-related messages in its log.
    - `Trace On Client Side`—Select if you want the client application to print ADDP-related messages in its log.
    - `Trace On Server Side`—Select if you want the server application to print ADDP-related messages in its log.
    - `Trace On Both Sides`—Select if you want both the client and server applications to print ADDP-related messages in their log.
- `Connection Mode`—Specifies whether this port is secured or not by Genesys Security using the TLS protocol. This field is disabled if the client does not use Genesys Security.
- `Transport Protocol Parameters`—Any text, usually key=`value` pairs, separated by a semicolon (;). This property is application-specific. Refer to the documentation for the particular application to determine the appropriate values for this field, if any.
- `Application Parameters`—Any text, usually key=`value` pairs, separated by a semicolon (;). This property is application-specific. Refer to the documentation for the particular application to determine the appropriate values for this field, if any.

7. Click the `Apply` button to save the information in the `Connections` tab.

8. The Ports tab lists communication ports used by the clients of an application to connect to a server. To support specific high-availability configurations, more than one server can be registered on the same port within the same host. Otherwise, do not assign the port number to any other server on the same host. Click the Add button to add a connection.
9. Enter the following information in the pop-up window that displays on your screen:
   - Port ID—The identifier of the port.
   - Communication Port—The port associated with the specified port ID.
   - Connection Protocol—The protocol used for the connection.
   - HA Sync—If selected, an HA backup server will use this port to establish a connection to the primary server.
   - Listening Mode—The listening mode configured for this port
   - Certificate—The security certificate value. In Windows, select the certificate value from the list of installed certificates. In UNIX, enter the full path to the <serial_#>_<host_name>_cert.pem file.
   - Description—An optional description of the Certificate.
   - Certificate Key—The full path to the <serial_#>_<host_name>_priv_key.pem file of the security certificate key. This field is used only if Genesys Security is deployed on UNIX; otherwise this field is empty.
   - Trusted CA—The full path to the ca_cert.pem file of the CA that issued the default security certificate. This field is used only if Genesys Security is deployed on UNIX; otherwise this field is empty.

   > **Important**
   >
   > Refer to the Genesys 8.1 Security Deployment Guide for more information about deploying Genesys TLS Security.

   - Transport Parameters—Any text, usually key=value pairs, separated by a semicolon (;). This property is application-specific. Refer to the documentation for the particular application to determine the appropriate values for this field, if any.
   - Application Parameters—Any text, usually key=value pairs, separated by a semicolon (;). This property is application-specific. Refer to the documentation for the particular application to determine the appropriate values for this field, if any.
10. Click the Apply button to save the information in the Ports tab.
11. The Tenants tab functional meaning only in a multi-Tenant environment. It specifies a list of Tenants that this application serves. The information specified in this list does not restrict the access privileges of the daemon applications with respect to the configuration data. Click the Add button to add a Tenant to this Application object.

> **Important**
>
> T-Server and High Availability (HA) Proxy applications do not display the Tenant property. A T-Server can serve only one Tenant, which is specified in the T-Server's

> `General` properties. An HA Proxy can serve only the same Tenant as the corresponding T-Server, and this Tenant is also specified in the HA Proxy's `General` properties.

12. Click the Save button.

Application Templates

An Application Template is the model you use for registering a new application in the Configuration Database. An Application Template describes the set of options that applies to an application of a particular type and version.

Before installing a new Genesys application, an Application Template must be available for that application. You can import the generic Application Template that is supplied with every Genesys application, or you can create a new Application Template.

> **Important**
> When upgrading previously installed releases of Genesys applications, you must register new Application Templates for the new releases, if the Release Notes indicate that these releases contain new configuration options that are essential for your environment.

Display Options

Display Options

The `Application Templates` list shows the Application Templates 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**
> Application Templates 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Application Template 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.

> **Important**
> You cannot delete an Application Template, if it has already been used to create an Application.

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

- `Clone`—Copy an Application Template
- `Move To`—Move an Application Template to another hierarchical structure.
- Enable or disable Application Templates
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.
- `Import Application Template`—Import an Application Template.

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

Creating Application Template Objects

To create an Application Template object, perform the following actions:

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `Application Templates`. The `Application Templates` 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 of the Application Template. You must specify a value for this property, and that value must be unique within the Configuration Database. Once you set the value, you cannot change it.
- Type—The type of application to which the Application Template relates. Once you set the value, you cannot change it.
- Version—The version of the application to which the Application Template relates. You must specify a value for this property. Once you set the value, you cannot change it. Genesys recommends that you specify the first three digits of the application version.
- 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. Click the Save button.

Importing Application Template Objects

Genesys provides generic templates for all Genesys applications. You can find the .apd files for Application Templates, which come with every version of Genesys software, in the Templates folder on a product CD.

To import an Application Template from the .apd file, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Application Templates. The Application Templates list displays.
3. Click the More button, then select Import Application Template.
4. A new window displays. Click the Browse button to select an Application Template .apd file to import.
5. Click the OK button to upload the Application Template.
6. Refer to Creating Application Template Objects to finish creating the Application Template object.

Business Attributes

Business Attributes are objects that serve as containers of a particular type for Attribute Value objects. Instances of this object are available enumerations (classifications), such as Media Type, Service Type, and others.

> **Important**
> Business Attribute names and values may be stored using UTF-8. This enables the attributes and their values to be entered and displayed in any language, including non-ASCII languages such as Japanese. If required, two or more languages can be combined for a single Business Attribute.

For more information about Business Attributes, refer to the following documents:

- Universal Routing 8.1 Business Process User's Guide
- Universal Routing 8.1 Reference Manual
- User's Guide

Display Options

Display Options

The `Business Attributes` list shows the Business Attributes 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**
> Business Attributes 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Business Attribute 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 Business Attribute.
- `Move To`—Move a Business Attribute to another hierarchical structure.
- Enable or disable Business Attributes
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Business Attribute Objects

To create a Business Attribute object, perform the following actions:

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `Business Attributes`. The `Business Attributes` 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 of the Business Attribute. 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). Once you set the value, you cannot change it.
   - `Display Name`—The localized name of the Business Attribute under which this object is to be

displayed on graphical user interface elements such as dialog boxes. By default, this value is the same as for the `Name` property.

- `Description`—A brief description of the Business Attribute.
- Type—The type of the Business Attribute. You must specify a value for this property. Once you set the value, you cannot change it.
- `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. Click the Save button.

Business Attribute Values

A Business Attribute Value is an object which represents a single value within the range of values for a given Business Attribute object.

Display Options

Display Options

The `Business Attribute Values` list shows the Business Attribute Values 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**
>
> - The `Business Attributes` list displays when you select `Business Attribute Values` in Configuration Manager. To access the `Business Attribute Values` list, you must first select a Business Attribute object and then a Business Attribute Value folder.
> - Business Attribute Values 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Business Attribute Value 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 Business Attribute Value.
- Move To—Move a Business Attribute Value to another hierarchical structure.
- Enable or disable Business Attribute Values.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

Click on the name of a Business Attribute Value to view additional information about the object. You can also set options and permissions.

Creating Business Attribute Value Objects

To create a Business Attribute Value object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Business Attribute Values. The Business Attributes list displays.
3. Click the Business Attribute object in which you wish to create a Business Attribute Value.
4. Click the Business Attribute Value folder in which you wish to create a Business Attribute Value.
5. Click the New button.
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:
   - Name—The name of the Business Attribute Value. You must specify a value for this property, and that value must be unique within the Business Attribute to which this Business Attribute Value belongs. Once you set the value, you cannot change it.
   - Display Name—The localized name of the Business Attribute Value under which this object is to be displayed on graphical user interface elements such as dialog boxes. By default, this value is the same as for the Name property.
   - Business Attribute—The Business Attribute to which this Business Attribute Value belongs. You must specify a value for this property. Once you set the value, you cannot change it.
   - Description—A brief description of the Business Attribute Value.
   - Default—If selected, indicates that this value is the default value for the Business Attribute to which it belongs. After you select this check box for one Business Attribute Value, you cannot select it for any other value that belongs to the same Business Attribute.
   - 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.

7. Click the Save button.

Calling Lists

Calling Lists are database tables with records that store a collection of phone numbers and other customer and business-related data. Calling Lists are created in Genesys Administrator Extension, and inherit their structure from the assigned format. See Formats in the Outbound Contact Deployment Guide. See additional information about Calling Lists in the Outbound Contact 8.1 Reference Manual.

A Calling List must contain Genesys mandatory fields, such as `contact_info` and `contact_info_type`, and can also contain user-defined, custom fields. The campaign name, for example, is stored in a user-defined field, which is specified by the `campaign_name_field` option. A user-defined field may also serve as a customer identifier for Do Not Call requests, as an alternative to the DNC restriction on a customer's phone number.

An unlimited number of Calling Lists can be added to one Campaign, and a Calling List can be added to or deleted from a running Dialing Session for a Campaign. A Campaign can be assigned to multiple Campaign Groups.

Display Options

Display Options

The `Calling Lists` list shows the Calling Lists 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**
> Calling Lists that are disabled will 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. You can add or remove columns by clicking the `Select Columns` button.

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 Calling List 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 Calling List.
- `Move To`—Move a Calling List to another hierarchical structure.
- Enable or disable Calling Lists.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Calling List Objects

To create a Calling List object, perform the following actions:

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `Calling Lists`. The `Calling Lists` 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 of the Calling List. 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).
    - `Description`—A brief description of the Calling List.
    - `Table Access`—The Table Access to which the Calling List refers. You must specify a value for this property.

- Log Table Access—The Table Access of the Log Table type. Genesys recommends dedicating a single Log Table Access to all Calling Lists associated with one campaign.
- Filter—The Filter to be applied to this Calling List. If you specify the Filter, associate it with the same format as the Table Access.
- Calling Time From—Not used at the list level at this time. The default is 8:00:00 AM.
- Calling Time To—Not used at the list level at this time. The default is 6:00:00 PM.
- Script—The Script Property defines the Script Object, which contains all of the attributes that are required by Agent Scripting. For more information, see the section, "Attaching Script Information to OCS User Events and Telephony Events" in the *Outbound Contact Reference Manual*.
- Maximum Attempts—The maximum number of attempts to call a single record in this Calling List during one campaign if a Treatment associated with this campaign results in re-dialing a particular record. You must specify a value for this property, and that value must be other than zero. The default value is 10.
- 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. In the Treatments tab, click the Add button to add a Treatment. In the pop-up window, you can create a new object by clicking the New button.
6. In the Campaigns tab, click the Add button to add a Campaign. In the pop-up window, you can create a new object by clicking the New button.
7. In the Formats tab, click the Add button to add a Format. In the pop-up window, you can create a new object by clicking the New button.
8. Click the Save button.

Campaigns

A Campaign is a flexible master plan that organizes Calling Lists and Agent Groups (or Place Groups) for dialing calls and handling call results. A Campaign can be assigned to multiple Campaign Groups. See additional information in the Outbound Contact Deployment Guide.

Display Options

Display Options

The `Campaigns` list shows the Campaigns 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**
> Campaigns 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Campaign 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 Campaign.
- Move To—Move a Campaign to another hierarchical structure.
- Enable or disable Campaigns.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

Click on the name of an Campaign to view additional information about the object. You can also set options and permissions.

Creating Campaign Objects

To create a Campaign object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Campaigns. The Campaigns 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 of the Campaign. 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).
   - Description—A brief description of the Campaign.
   - Script—Defines the Script object that contains all of the attributes that are required by Agent Scripting.
   - 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. In the Calling Lists tab, click the Add button to add a Calling List. In the pop-up window, you can create a new object by clicking the New button.
6. Perform one of the following actions after you have added a Calling List to the Campaign:
   - Click the Save button to accept the changes and return to the object list.

   - Click the `Apply` button to accept the changes and remain in the tab.
   - Click the `Cancel` button to discard the changes.
7. Click the Save button.

Campaign Groups

Campaign Groups are structures for organizing and managing an automated process of making outbound calls to the destinations specified in Calling Lists.

Display Options

Display Options

The `Campaign Groups` list shows the Campaign Groups 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

- The `Campaigns` list displays when you select `Campaign Groups` in Configuration Manager. To access the `Campaign Groups` list, you must first select a Campaign object and then a Campaign Groups folder.
- Campaign Groups 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.

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

Procedures

Possible Procedures from this Panel

To create a new Campaign Group 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 Campaign Group.
- Move To—Move a Campaign Group to another hierarchical structure.
- Enable or disable Campaign Groups.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Campaign Group Objects

To create a Campaign Group object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Campaign Groups. The Campaigns list displays.
3. Click the Campaign object in which you wish to create a Campaign Group.
4. Click the Campaign Group folder in which you wish to create a Campaign Group.
5. Click the New button.
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:
   - Name—The name of the Campaign Group, in the format [Campaign@CampaignGroup]. This value is set automatically, based on the content of the fields Campaign and Group.
   - Description—A brief description of the Campaign Group.
   - Group Type—The type of Campaign Group, Agent, or Place.
   - Group—The name of the Agent Group or Place Group that is associated with this Campaign Group. This value is set automatically and you cannot change it.
   - Dialing Mode—The name of the Dialing Mode for this Campaign Group.
   - Voice Transfer Destination—Identifies where calls are to be delivered for handling.

Important

In addition to the Voice Transfer Destination DN, any ACD Queue, Virtual Queue, Routing Point, or Service Number DN that may be part of a call flow involving this group of agents or places must be specified as an Origination DN of the Agent Group or Place Group objects. Outbound Contact Server (OCS) needs to monitor these DNs to identify "r;foreign" inbound or outbound calls that are delivered to agents but were not issued by OCS on behalf of the Campaign Group, or if the ACD Queue DN is configured as an "r;overflow" DN.

- `Operation Mode`—An operation mode: `Manual` or `Scheduled`. This property applies only to the Preview dialing mode.
- `Optimization Method`—A method to optimize direct dialing algorithms in the predictive dialing modes. These methods include: `Agent Busy Factor`, `Average Distribution Time`, `Average Waiting Time`, `Overdial Rate` and `Maximum Gain`.

Important

`Average Distribution Time` can be set only for the Predictive GVP Dialing Mode.

- `Optimization Target %`—The target value for the optimization method. The unit of measure depending on the optimization method selected in the preceding field. The default value is `80`.
- `Maximum Queue Size`—The number of records to keep in the dialer's queue. It is an internal counter that is used when OCS performs with Power GVP or Push Preview modes. OCS tries to always keep the dialer's buffer full with the specified Maximum Queue Size. The default value is `0` (zero).
- `IVR Profile`—The IVR Profile DBID that is specified in the GVP EMPS IVR Profile. The OCS `ivr-profile-name` option uses the value specified in this field.
- `Interaction Queue`—A configuration object that is created in the Scripts section by Interaction Routing Designer when developing a Business Process to process outbound Preview mode interactions.
- `Trunk Group DN`—Required only if you are using Outbound Contact in an Outbound VoIP environment. If specified, OCS uses this DN as the DN on behalf of which outbound and engaging calls originate.
- `Script`—The Script object that contains all of the attributes that are required by Agent Scripting.
- `Minimum Record Buffer Size`—The minimum record buffer size that acts as a multiplier, along with the optimal record buffer size, for the number of agents that are available for a campaign. The default value is `4`.
- `Optimal Record Buffer Size`—The optimal record buffer size that acts as a multiplier, along with the minimum record buffer size, for the number of agents that are available for a campaign. The default value is `6`.
- `Number of Channels`—Identifies the maximum number of ports that a Campaign Group can use to place calls. This max number is used in: Progressive, Predictive, Progressive with seizing, Predictive with seizing, and Progressive GVP dialing modes. The default value is `10`.
- `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.

7. In the `Connections` tab, add all connections to all server needed (except T-Server or SIP Server) to run this Campaign Group. Click the Add button to add a connection. In the pop-up window, you can create a new object by clicking the New button.
8. Click the Save button.

Dialing Modes

Dialing Modes

Outbound Contact has many dialing modes which are listed in the table below.

You can switch between Progressive and Predictive dialing modes at any time, and change the optimized parameter. Changing the dialing mode and optimized parameter in Genesys Administrator Extension is temporary. It lasts only until the Campaign is stopped or you change the setting. To change from Predictive or Progressive Dialing mode to Preview Dialing mode, the Campaign must be stopped and restarted.

A Preview Only license limits the use of OCS to this one dialing mode. A full license is required in order to run Campaigns in all dialing modes.

> **Important**
> The Campaign needs to be loaded in order to change the dialing mode and optimized parameter.

The dialing mode is used in conjunction with the values in the `Optimization` parameters and `Optimization Target` value fields.

Dialing Mode	Description
`Power GVP`	Dial calls by issuing call requests. For more information, see the Outbound Contact Deployment Guide.
`Predictive`	Dials calls from a calling list and predicts agent availability. Recommended for high-volume, low-value Campaigns.
`Predictive GVP`	Pacing is based on optimizing agent workloads in deployments where outbound calls first arrive to GVP for self-service. A portion of these outbound calls (for customers who selected the agent-assisted service option in GVP) is then passed to an agent group. In this dialing mode, it is assumed that outbound calls passed for agent-assisted service wait in the queue for some time for the

Dialing Mode	Description
	next available agent. This dialing mode requires SIP Server for placing outbound calls, rather than T-Server, and uses GVP Voice XML applications for self-serviced call processing. Important This dialing mode is supported by OCS starting in release 8.1.2.
`Predictive with seizing`	Used only with the Active Switching Matrix mode. Calls are dialed automatically, similar to Predictive mode.
`Preview`	Dials calls from a calling list only when an agent previews a calling list record and manually requests a call to be dialed. Recommended for low-volume, high-value applications, where individual ownership of accounts is the highest priority.
`Progressive`	Dials calls from a calling list only when an agent is available. Recommended for low-volume, high-value Campaigns.
`Progressive GVP`	Dials calls from a Calling List when a GVP port is available. This dialing mode requires SIP Server for placing outbound calls, rather than T-Server, and uses Voice XML applications for call processing.
`Progressive with seizing`	Used only with the Active Switching Matrix mode. Calls are dialed automatically, similar to Progressive mode.
`Push Preview`	Dials calls that are "pushed" to the agent's desktop using Interaction Server.

DNs

DNs are communication devices, uniquely identified by their directory numbers (DNs), where customer interactions (for example, telephone calls or e-mails) reside and are handled.

Because most types of DNs represent the actual devices of the telephone system, their specification in the Configuration Database must always correspond to their Switch settings. Remember that Genesys Administrator Extension has no way of verifying this correspondence.

As a general rule, changes made to DN configurations in the Configuration Database must always follow the changes made to DNs within the telephone system, and never the other way around.

Display Options

Display Options

The `DNs` list shows the DNs 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**
>
> - The `Switches` list displays when you select `DNs` in Configuration Manager. To access the `DNs` list, you must first select a Switch object and then a DN folder.
> - DNs 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. You can add or remove columns by clicking the `Select Columns` button.

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 DN 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.

> **Important**
> When you delete a DN, it is removed from the Configuration Database and from any DN Group of which it is a member. If you want to remove only the DN from a DN Group of which it is a member, but leave it still existing in the Configuration Database and available for assignment to another DN Group, you must remove it from the DNs tab of the DN Group.

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

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

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

Creating DN Objects

To create a DN object, perform the following actions:

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `DNs`. The `Switches` list displays.
3. Click the Switch object in which you wish to create a DN.
4. Click the DN folder in which you wish to create a DN.

5. Click the `New` button.
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:
   - `Number`—A directory number assigned to this DN within the Switch. You must specify a value for this property, and that value must be unique within the Switch for all DN types except the `Destination Label` type. Once you set the value, you cannot change it. Genesys Administrator Extension does not verify the correspondence between the numbers assigned to DNs and the switch's numbering plan defined by the `DN Range` property of the Switch. If, according to T-Server specifications, such correspondence is important in an environment, make sure that the specified `DN Range` covers all DN numbers that are defined within the Switch in question.
   - `Type`—The type of the DN. Once you set the value, you cannot change it.
   - `Switch`—The Switch to which this DN belongs. You must specify a value for this property. Once you set the value, you cannot change it.
   - `Association`—An entity permanently associated with this DN (for example, an IVR port number, channel name, or access number). For DNs of `External Routing Point` type, this number may be required to substitute for the actual DN directory number and may be used when placing calls to this routing point from another Switch.
   - `Register`—Indicates whether T-Server must register this DN within the Switch. You must specify a value for this property. From the drop-down menu, select one of the following values:
     - `False`—T-Server should never register the DN in question on the Switch, but process it locally.
     - `True`—T-Server should always register the DN on the Switch during T-Server startup or reconnection.
     - `On-Demand`—T-Server should register the DN only when a T-Server client requests the registration. Consult T-Server documentation for more information.

     > **Warning**
     >
     > The last two values force T-Server to register this DN regardless of whether it is enabled or disabled.

   - `Alias`—An alternative name for this DN. You must specify a value for this property if the DN is used as a target in routing instructions. If you specify this value, it must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
   - `Route Type`—The type of routing that applies to this DN. You must specify a value for this property.
   - `DN Group`—The DN Group to which this DN belongs.
   - `Override`—Value to use as the override instead of the number or name value for accessing this DN in certain types of routing. You must specify an override value, and it must be unique within the Switch.

     > **Important**
     >
     > To specify a value in the `Override` field, you must ensure the `Use Override` check box is checked.

- `Login ID`—The login identifier used to activate this DN. Some types of switching systems require that the login code used to activate a particular DN be permanently associated with this DN. In that case, the Login ID may be applicable to the following types of DNs: `ACD Position`, `Extension`, `Voice Treatment Port`, `Voice Mail`, or `Mixed`.
- `Switch-specific Type`—An integer that corresponds to a combination of switch-specific settings for this DN. It identifies the device type (for example, `Extension`, `ACD Position`, or `Trunk`) for each switch (PBX) that T-Server supports. It is unique for each switch/DN/T-Server configuration. In essence, it provides a cross-reference for DN Types between T-Server and PBX. You must specify a value for this property, and it must be 1 or greater. For more information, refer to the *Framework T-Server Deployment Guide* for your particular T-Server.
- `Number of Trunks`—The number of trunks associated with this DN. It applies only if the Type property has a `Network Destination` value. The default value is `0`.
- `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.

7. Click the Save button.

DN Types

Types of DNs

DN Type	Description
`Access Resource`	A Switch access resource to be used in a multi-site environment for external routing.
`ACD Position`	An extension designated for customer interactions only.
`ACD Queue`	A device in a Switch, typically associated with a number of targets, where customer interactions wait while the control system is looking for an available target.
`Call Processing Port`	An extension connected to a call-processing equipment port.
`Chat`	A Chat address.
`CoBrowse`	A Co-Browse address.
`Communication DN`	A virtual device that applications use to communicate with each other through the User Event mechanism.
`E-mail Address`	An e-mail address.
`Extension`	A regular extension line.
`External Routing Point`	An ISCC (Inter Server Call Control) resource

DN Type	Description
	dedicated to supporting the external routing and call overflow functions.
`Fax`	An extension connected to a fax machine.
`Mixed`	An extension line that can be used as both an Extension and an ACD Position.
`Mobile Station`	A mobile station.
`Modem`	An extension connected to data communication equipment.
`Music Port`	A music source.
`Network Destination`	A destination number in network routing.
`Routing Point`	A device in a Switch, not associated with any particular target, where customer interactions wait while a routing application is making routing decisions.
`Routing Queue`	A telephony device that can be used as both a Routing Point and an ACD Queue.
`Service Number`	A service number used as a Routing Point in network routing.
`Tie Line`	A direct communication channel between two Switches of a private telephone network.
`Tie Line Group`	A group of tie lines forming one route.
`Trunk`	A communication channel between the public telephone network and a private telephone network.
`Trunk Group`	A group of trunks forming one route.
`Video over IP Port`	A video channel.
`Virtual Queue`	A virtual device, created and maintained by the switch, with activity identical to an ACD Queue.
`Virtual Routing Point`	A virtual device, created and maintained by the switch, with activity identical to a Routing Point.
`Voice Mail`	A voice mail channel.
`Voice over IP Port`	A Voice over IP (VoIP) Port.
`Voice over IP Service`	A VoIP Service.
`Voice Treatment Port`	An extension connected to an electronic audio equipment port (for example, IVR).
`Workflow`	A Workflow resource.

DN Groups

DN Groups are logical groupings of DNs. You can use DN Groups in network-level routing algorithms and in some types of statistics. To determine if you need to set up DN Groups, refer to your solution-specific documentation.

When you are specifying a DN Group, remember that the DNs in each DN Group must have the same telephony event model.

Although a DN Group can contain DNs that belong to a number of different Switches, you can receive correct statistical information about this DN Group only if the reporting applications connect to the servers associated with those Switches.

Display Options

Display Options

The `DN Groups` list shows the DN Groups 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**
> DN Groups 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new DN Group 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.

> **Important**
> When you delete a DN Group, only the DN Group object itself is removed from the Configuration Database. Its member DN objects are not deleted.

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

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

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

Creating DN Group Objects

To create a DN Group object, perform the following actions:

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `DN Groups`. The `DN Groups` 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 of the DN 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). You cannot change this value as long as this DN Group contains at least one DN.
    - `Type`—The type of the DN Group. Once you set the value, you cannot change it.
    - `Capacity Table`—This field applies only for the Enterprise Routing Solution. It is the Capacity Table

associated with this DN Group. Refer to Enterprise Routing Solution documentation for more information.

- Quota Table—This field applies only for the Enterprise Routing Solution. It is the Quota Table associated with this DN Group. Refer to Enterprise Routing Solution documentation for more information.
- 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. The Origination DNs tab lists DNs from which calls can be routed or diverted to this Agent Group. You can include DNs of the following types into this list: Routing Point, External Routing Point, Service Number, Routing Queue, ACD Queue, Virtual Queue, or Virtual Routing Point.
6. In the DNs tab, click the Add button to add a DN to this DN Group. In the pop-up window, you can create a new object by clicking the New button.
7. Perform one of the following actions after you have added a DN to the DN Group:
   - Click the Save button to accept the changes and return to the object list.
   - Click the Apply button to accept the changes and remain in the tab.
   - Click the Cancel button to discard the changes.
8. Click the Save button.

DN Group Types

Types of DN Groups

The following are DN Group types and types of DNs that you can include in a group:

DN Group Type	Compatible DN Types
ACD Queues	ACD Queue, Routing Queue, and Virtual Queue
Network Ports	Network Destination
Routing Points	Routing Point, External Routing Point, Routing Queue, and Virtual Routing Point
Service Numbers	Service Number
Single Ports	Extension, ACD Position, Call Processing Port, Music Port, Communication DN, E-mail Address, Modem, Fax, Chat, CoBrowse, Voice over IP Port, Video over IP Port, Voice Treatment Port, and Voice Mail

Fields

A Field object defines a field in a Calling List database table. Fields are single pieces of data (for example, a phone number) within a record.

There are two types of fields in a Calling List:

- Genesys mandatory fields—These fields must exist in all Calling List tables.
- User-defined fields—These custom fields contain business-related data.

Display Options

Display Options

The `Fields` list shows the fields 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**
> Fields 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Field 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.

> **Important**
> You can delete a Field only if there is no Filter associated with it.

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

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

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

Creating Field Objects

To create a Field object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Fields. The Fields 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 of the Field.
    - Description—A brief description of the Field.
    - Data Type—The data type for the data stored in this Field.
    - Length—(Required for char and varchar data types only) The length of the Field in the database.
    - Field Type—Outbound business-specific information for this Field.
    - Default—The default value for the Field. All formats that include the Field use this default value. The value should be consistent with the data type of the Field. For example, if the data type is integer, the default value should be an integer value only. When Genesys Administrator Extension

imports records from an ASCII file in which a Field is missing or has no value, Genesys Administrator Extension populates the Field with this default value—if the check box `Nullable` is not checked. If the Field is nullable, Genesys Administrator Extension accepts a blank value.

- `Primary Key`—This check box indicates whether the Field is a primary key in a database table. In Outbound Contact, the only primary key Fields are `chain_id` and `chain_n`.
- `Unique`—This check box indicates whether the Field value is unique within the table.
- `Nullable`—The checkbox indicates whether the Field value can be set to `NULL`.
- `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. Click the Save button.

Field Types

Field Types

Field Type	Description
`Agent`	A field containing a login ID of the last agent who handled an outbound call associated with this record.
`ANI`	A field containing an Automatic Number Identification.
`Application`	A field containing a Genesys application. An Application is: any of the executable programs that are installed and configured during a Framework installation, and which has a particular function within Framework. Examples: Configuration Server, Solution Control Server (SCS), Message Server, Local Control Agent (LCA).
`Call Time`	A field containing the time of the actual dialing attempt.
`Campaign`	A field containing the campaign with which this record is associated.
`Chain`	A field containing the special ID of records that should be linked in a chain. Each record that is associated with one customer account, for example, has the same chain ID.
`Contact Info`	A field containing a destination telephone number.
`Contact Info Type`	A field containing the type of telephone number, such as home or work.
`Country Code`	A field containing the country code.

Field Type	Description
`Dialing Result`	A field containing the result of a dialed call.
`E-mail Subject`	A field containing the text in the subject line of an e-mail interaction.
`E-mail Template ID`	A field containing the template ID of an email interaction.
`From`	A field containing the time a record is scheduled for dialing.
`Group`	A field containing the name of a configuration object that groups person objects.
`Info Digits`	A field containing the Information Indicator-Digits, which indicate the originating line type of the caller.
`LATA`	A field containing the number of the Local Access and Transport Area.
`Media Reference`	A field containing the Configuration Server API reference to media body to be sent in case of treatment.
`NPA`	A field containing the number of the Numbering Plan Area.
`NPA-NXX`	A field containing the number of the Numbering Plan Area with an identifier of the specific telephone company central office serving that number.
`Number in Chain`	A field containing the priority assigned to a given record in the chain. The smallest number is processed first.
`Number of Attempts`	A field containing the number of attempts. (It does not include redialing attempts in the event of errors.)
`Record ID`	A field containing the unique ID number for the current record.
`Record Status`	A field containing the status of the record.
`Record Type`	A field containing the type of record.
`Scheduled Time`	A field containing the time of a scheduled personal callback or a rescheduled call (from a treatment).
`State Code`	A field containing State or International code, for example, a U.S. or Canadian postal code such as CA for California.
`Switch ID`	A field containing a configuration database object that represents a physical or virtual switch.
`Time Zone`	A field containing the time zone offset of the record.
`To`	A field containing the time the dialing attempts should conclude.
`Treatments History`	A field containing the record of treatments that have been applied to a customer.

Field Type	Description
`User-Defined Field`	A user-defined field.

Filters

A Dialing Filter restricts Calling Lists so that only certain numbers are dialed during a Campaign.

> **Important**
> Creating Dialing Filters requires using Enumeration values in place of text values for some mandatory fields. An Enumeration value is a numeric representation of a Genesys mandatory field value. For more information about Enumeration values, see "Genesys Enumeration Tables" in the Outbound Contact 8.1 Reference Manual.

Display Options

Display Options

The `Filters` list shows the filters 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**
> Filters that are disabled will 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Filter 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 Filter.
- Move To—Move a Filter to another hierarchical structure.
- Enable or disable Filters.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Filter Objects

To create a Filter object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Filters. The Filters 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 of the Filter.
   - Description—A brief description of the Filter.
   - Format—The format to which this filter is applied. Once it is specified, it cannot be changed. You assign a Filter object to a Calling List object with the same format.
   - 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. Click the Save button.

Formats

A Format is a user-customized template for Calling Lists. It is created in Genesys Administrator Extension and consists of Fields that form a data structure (for example, a database table); each Field has properties that describe its characteristics. A Calling List must contain Genesys mandatory fields and can also contain user-defined custom Fields. See additional information in the Outbound Contact Deployment Guide.

Mandatory Fields are necessary in order to process records properly. They identify each customer and the status of each customer record. Genesys mandatory fields are described in the Mandatory Fields tab, below. See additional information in the Outbound Contact Deployment Guide.

Custom/user-defined Fields, typically containing business-related data, can be created and added to a Format in Genesys Administrator Extension. Custom fields define customer information that is available to the agent during a call. See Fields in the Outbound Contact Deployment Guide about how to send customer data to an agent.

After custom/user-defined fields are added, the Format is finished and is ready to be used to create Calling Lists. A Calling List must be created from a Format, and inherits mandatory and custom fields from the assigned format. Each Calling List can have only one corresponding Format.

When database records are imported into a Calling List, data fills the mandatory and custom fields, conforming to properties established in the finished Format.

Display Options

Display Options

The `Formats` list shows the formats 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**
> Formats 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. You can add or remove columns by clicking the Select Columns button.

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

Procedures

Possible Procedures from this Panel

To create a new Format 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 Format.
- Move To—Move a Format to another hierarchical structure.
- Enable or disable Formats.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Format Objects

To create a Format object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Formats. The Formats 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 of the Format.
    - Description—A brief description of the Format.
    - 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. In the `Fields` tab, click the Add button to add a Field. In the pop-up window, you can create a new object by clicking the New button.
6. Perform one of the following actions after you have added a Field to the Format:
   - Click the Save button to accept the changes and return to the object list.
   - Click the `Apply` button to accept the changes and remain in the tab.
   - Click the `Cancel` button to discard the changes.
7. Click the Save button.

Mandatory Fields

Mandatory Fields in Formats

The following mandatory fields are required in all Calling List Formats. This list is sorted alphabetically by field name. Default values for these fields are defined in the Fields objects during configuration.

Field Name	Data Type	Description
agent_id	varchar(32)	Login identifier of the agent who handled the record.
app_id	integer	Empty, not used at this time.
attempt	integer	Number of attempts made to reach the customer.
call_result	integer	Final outcome of the record processing. See the Call Results table in the Defined Constants chapter of the Outbound Contact 8.1 Reference Manual.
call_time	integer	Latest date and time at which the record was processed (dialed), in UTC format.
campaign_id	integer	Configuration DBID of the Outbound Dialing Campaign, as a part of which the record has been processed.
chain_id	integer	Unique identification number of the chain to which the record belongs.
chain_n	integer	Unique identification number of the record within the chain.

Field Name	Data Type	Description
contact_info	varchar(128)	Customer's contact information; phone number in the voice campaign.
contact_info_type	integer	Type of the contact information; phone type in the voice campaign. See the Phone Types table in the Defined Constants chapter of the Outbound Contact 8.1 Reference Manual.
daily_from	integer	Earliest time of the day at which a customer can be contacted (seconds since midnight).
daily_till	integer	Latest time of the day at which a customer can be contacted (seconds since midnight).
dial_sched_time	integer	Date and time for which the processing of the record has been scheduled or rescheduled, in UTC format (seconds since midnight 01/01/1970).
email_subject	varchar(255)	Empty, not used at this time.
email_template_id	integer	Empty, not used at this time.
group_id	integer	Empty, not used at this time.
media_ref	integer	Empty, not used at this time.
record_id	integer	Unique identification number of a calling record.
record_status	integer	Current status of the record. See the Record Types table in the Defined Constants chapter of the Outbound Contact 8.1 Reference Manual.
record_type	integer	Type of the record. See the Record Types table in the Defined Constants chapter of the Outbound Contact 8.1 Reference Manual.
switch_id	integer	DBID of the Switch where the agent who handled the record had logged in.
treatments	varchar(255)	Treatments application history. For more information, see Treatments in the Outbound Contact Deployment Guide.
tz_dbid	integer	Configuration DBID of the Time Zone object associated with the calling record.

Hosts

Hosts are the computers that run the various server applications in the environment.

Register only those hosts on which you will install and run Genesys servers or third-party servers that you configure in the Configuration Database.

Display Options

Display Options

The `Hosts` list shows the hosts 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**
> Hosts 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Host 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.

> **Important**
> You can delete a Host only if there are no server applications currently assigned to it.

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

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

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

Creating Host Objects

To create a Host object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Hosts. The Hosts 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 of the host. You must specify a value for this property, and that value must be unique within the Configuration Database. Because applications use this host name to establish connections with the servers running on this host, make sure that the name exactly matches the name of this host in the data network configuration.

    > **Important**
    > You cannot change this host name if any server applications are assigned to this host.

    - IP Address—The IP address of the host. This value must be unique within the Configuration Database. Because applications may be using the specified IP address to establish connections with the servers running on this host, make sure that the value that you enter exactly matches the IP address of this host in the data network configuration.

Tip

Click the magnifying glass in the Name field to have GAX automatically enter the IP address for the host.

- OS Type—The type of the operating system of this host. You must specify a value for this property.
- Version—The version of the operating system.
- LCA Port—The port number on which Local Control Agent (LCA) for this host is running. The LCA port must be set to a value between 2000 and 9999, inclusive. When the LCA port is specified as less than 2000, LCA starts on port number 4999 (the default value).

Important

Do not change the value of the LCA port if any application has already connected to LCA or if Solution Control Server (SCS) has already started to control LCA.

- Solution Control Server—The SCS that monitors and controls this host. This property is valid only if you enable distributed SCS functionality. See the Framework 8.1 Management Layer User's Guide for details.
- Certificate—The security certificate value. In Windows, select the certificate value from the list of installed certificates. In UNIX, enter the full path to the <serial_#>_<host_name>_cert.pem file.
- Certificate Description—An optional description of the Certificate.
- Certificate Key—The full path to the <serial_#>_<host_name>_priv_key.pem file of the security certificate key. This field is used only if Genesys Security is deployed on UNIX; otherwise this field is empty.
- Trusted CA—The full path to the ca_cert.pem file of the CA that issued the default security certificate. This field is used only if Genesys Security is deployed on UNIX; otherwise this field is empty.

Important

Refer to the Genesys 8.1 Security Deployment Guide for more information about deploying Genesys TLS Security.

- 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. Click the Save button.

ADDP

Setting Up ADDP Connections

To configure the Advanced Disconnect Detection Protocol (ADDP) protocol between the LCA of a given host and SCS, use the `Options` tab of the Host object.

If you are using the Management Layer for application failure management, set up ADDP parameters for the host as described.

1. Open the `Options` tab of the Host.
2. Create a section called addp.
3. In the addp section, specify the following configuration options:

Option Name	Option Value	Option Description
`addp-timeout`	Any integer	Sets the ADDP timeout in seconds. If one application in the connection does not receive messages from the other application in the connection within this interval, the first application sends a polling message. If the first application does not receive a response to the polling message within this time interval, it interprets the lack of response as a loss of connection. The recommended setting for this option is 3 seconds for a LAN connection or 10 seconds for a WAN connection.
`addp-trace`	local	LCA prints ADDP-related messages into its log.

Important

You configure ADDP between servers by using the Application's `Connections` tab.

IVRs

IVRs (Interactive Voice Responses) are telephony objects consisting of IVR Ports; they are controlled through IVR interface drivers.

When you register a new IVR in the Configuration Database, an IVR Ports folder is automatically created under this IVR.

IVR Ports are telephony objects uniquely identified by the numbers within IVRs at which telephone calls may reside and be handled.

Display Options

Display Options

The `IVRs` list shows the IVRs 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**
> IVRs 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new IVR 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.

> **Warning**
> When you delete an IVR, this also deletes all IVR Ports specified within the IVR. Their deletion might in turn cause modifications in other objects.

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

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

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

Creating IVR Objects

To create an IVR object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click IVRs. The IVRs 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 of the IVR. 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).
   - Description—A brief description of the IVR.
   - Type—The type of this IVR. You must specify a value for this property.
   - Version—The version of the IVR. You must specify a value for this property.
   - IVR Server—The name of the Application of the IVR Interface Server type that serves this IVR.
   - 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. In the `IVR Ports` tab, click the Add button to add an IVR Port.
6. Click the Save button.

> **Important**
>
> IVR Ports are configured as separate objects. They can be created and configured only after the associated IVR has been created.

IVR Ports

IVR (Interactive Voice Response) Ports are telephony objects uniquely identified by the numbers within IVRs at which telephone calls may reside and be handled.

When you register a new IVR in the Configuration Database, an IVR Ports folder under this IVR is automatically created. An IVR Port can, therefore, be created only when the associated IVR is created.

Display Options

Display Options

The `IVR Ports` list shows the IVR Ports 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**
>
> - The `IVRs` list displays when you select `IVR Ports` in Configuration Manager. To access the `IVR Ports` list, you must first select an IVR object and then an IVR Ports folder.
> - IVR Ports 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new IVR Port 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.

> **Warning**
> When you delete an IVR Port, this might affect some objects in the configuration. To see associations between an IVR Port and other objects, use the Dependencies tab.

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

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

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

Creating IVR Port Objects

You can create IVR Ports only after you have created the IVR with which these Ports are associated.

To create an IVR Port object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click IVR Ports. The IVRs list displays.
3. Click the IVR object in which you wish to create an IVR Port.
4. Click the IVR Ports folder in which you wish to create an IVR Port.
5. Click the New button.
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:
   - Port Number—The number associated with a channel on an IVR. You must specify a value for this property, and that value can be equal to 0 (zero) or any positive integer. It must be unique within the IVR with which it is associated.
   - Description—A brief description of the IVR Port.
   - IVR—The IVR to which this IVR Port belongs. This value is automatically set, and you cannot change it.

- `Associated DN`—The DN associated with this IVR Port.
- `Associated Switch`—The Switch associated with this IVR Port.
- `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.

7. Click the Save button.

Objective Tables

Objective Tables are collections of Objective Records that define the correspondence between interaction attributes (such as media type, service type, and customer segment) and service objectives.

If you are using Cost-Based Routing, use a Cost Contract. A Cost Contract is a special type of Objective Table, and contains the information required for calculating the cost of an interaction to be routed. Cost Contracts contain Objective Records, each of which is associated with an IT Contract. For information about working with Cost Contracts, see the Cost Contracts section in the Procedures tab, below.

Refer to the Universal Routing 8.0 Routing Application Configuration Guide for more information about Objective Tables.

Display Options

Display Options

The `Objective Tables` list shows the Objective Tables 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**
> Objective Tables 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Objective Table 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 an Objective Table.
- Move To—Move an Objective Table to another hierarchical structure.
- Enable or disable Objective Tables.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Objective Table Objects

To create an Objective Table object, choose one of the following types:

- Objective Table
- Cost Contract

Objective Table

1. Go to Configuration > System > Configuration Manager.
2. Click Objective Tables. The Objective Tables 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 of the Objective Table. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or the Tenant (in a multi-tenant environment).
   - Description—A brief description of the Objective Table.
   - Type—Select default to create an Objective Table that is not a Cost Contract
   - 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. Click the Save button.

Cost Contract

1. Go to Configuration > System > Configuration Manager.
2. Click Objective Tables. The Objective Tables 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 of the Objective Table. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or the Tenant (in a multi-tenant environment).
   - Description—A brief description of the Objective Table.
   - Type—Select Contract to create an Objective Table that is a Cost Contract.
   - Total Prepaid Cost—The prepaid contract cost, for Volume Rate Contracts only.
   - Time Zone—The Time Zone for this Cost Contract and the Interaction Types specified in the General tab.
   - Start—The date on which to start the Cost Contract.
   - End—The date on which to end the Cost Contract.

   > **Important**
   > Refer to the Universal Routing 8.0 Routing Application Configuration Guide for more information.

5. Click the Apply button to save the Cost Contract. The Objective Records tab displays.
6. In the Objective Records tab, click the Add button.
7. Enter the following information in the pop-up window that displays on your screen:
   - Media Type—The type of media technology used for information exchange, for example voice, e-mail, and fax. The range of Attribute Values for this field is defined within Media Type Business Attribute.
   - Service Type—The service that a customer is requesting. The range of Attribute Values for this field is defined within Service Type Business Attribute.
   - Customer Segment—Categorizes a customer based on their revenue potential to the enterprise relative to a business line. The range of Attribute Values for this field is defined within Customer Segment Business Attribute.
   - Service Objective Goal—Service Objective Goal defined for this Record. For voice interactions, this is the target time for the voice call to be answered by a live agent.

- `Service Objective Delta`—Service Objective Delta defined for this Record. Defines the step for Service Objective Goal deviation.
- Click the OK button.

> **Important**
> Refer to the Universal Routing 8.0 Routing Application Configuration Guide for more information.

8. Click the Save button.

Places

A Place is a location that has one or more DNs operated by a single agent.

You configure Places and assign individual DNs to them in order to monitor performance and availability of Agents, Agent Groups, and Place Groups, and to provide this information to call-processing applications.

A typical Agent Place consists of two DNs: one DN that an Agent uses to take customer calls, and one DN that the Agent uses to make consultation calls and transfers.

If you are using the multimedia options of the Genesys products, Places may need to be equipped with DNs of other types, such as an e-mail address.

Display Options

Display Options

The `Places` list shows the Places 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**
> Places 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.

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

Procedures

Possible Procedures from this Panel

To create a new Place 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.

> **Important**
> When you delete a Place, it is removed from the Configuration Database and from any Place Group of which it is a member. If you want to remove the Place from a Place Group of which it is a member, but leave it in the Configuration Database and available for membership in another Place Group, remove the Place from the Place Group.

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

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

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

Creating Place Objects

To create a Place object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Places. The Places 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 of this Place. 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).

- Capacity Rule—The Capacity Rule Script associated with this Place.
- Cost Contract—The Cost Contract associated with this Place.
- Site—The Site with which the Capacity Rule and/or Cost Contract is associated. If the Capacity Rule or Cost Contract are associated with a Site, this field is set to that Site.
- 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. In the DNs tab, click the Add button to add a DN. In the pop-up window, you can create a new object by clicking the New button.
6. Perform one of the following actions after you have added a DN to the Place:
    - Click the Save button to accept the changes and return to the object list.
    - Click the Apply button to accept the changes and remain in the tab.
    - Click the Cancel button to discard the changes.
7. Click the Save button.

Place Groups

Place Groups are logical groupings of Places. You can group Places if, according to the call-processing algorithms, the calls must be distributed among a set of Places under the control of applications instead of through the ACD mechanisms of the Switch.

As an example, consider a call-parking service: A Routing application transfers a call to a port that is assigned to a call-parking Place Group; then, while the call is parked, the application attaches information about the treatment to be applied to it.

Display Options

Display Options

The `Place Groups` list shows the Place Groups 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**
> Place Groups 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.

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

Procedures

Possible Procedures from this Panel

To create a new Place Group 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.

> **Important**
> When you delete a Place Group, only the Place Group object itself is removed from the Configuration Database. Its member Place objects are not deleted.

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

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

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

Creating Place Group Objects

To create a Place Group object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Place Groups. The Place Groups 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 of the Place 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). You cannot change this value as long as this Place Group contains at least one Place.
   - Capacity Table—This field applies only to the Enterprise Routing Solution. It is the Capacity Table associated with this Place Group. Refer to Enterprise Routing Solution documentation for more information.
   - Quota Table—This field applies only to the Enterprise Routing Solution. It is the Quota Table associated with this Place Group. Refer to Enterprise Routing Solution documentation for more information.
   - Cost Contract—The Cost Contract associated with this Place Group.

- Site—The Site containing this Cost Contract.
- 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. The Origination DNs tab lists DNs from which calls can be routed or diverted to this Place Group. You can include DNs of the following types into this list: Routing Point, External Routing Point, Service Number, Routing Queue, ACD Queue, Virtual Queue, or Virtual Routing Point. Click the Add button to add a DN. In the pop-up window, you can create a new object by clicking the New button.
6. Perform one of the following actions after you have added a DN:
    - Click the Save button to accept the changes and return to the object list.
    - Click the Apply button to accept the changes and remain in the tab.
    - Click the Cancel button to discard the changes.
7. In the Places tab, click the Add button to add a Place. In the pop-up window, you can create a new object by clicking the New button.
8. Perform one of the following actions after you have added a Place to the Place Group:
    - Click the Save button to accept the changes and return to the object list.
    - Click the Apply button to accept the changes and remain in the tab.
    - Click the Cancel button to discard the changes.
9. Click the Save button.

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.

In a hierarchical multi-Tenant configuration, only those Roles defined in the Environment Tenant can be used to allow Users to access all screens in Genesys Administrator Extension. Users cannot include Genesys Administrator Extension-specific privileges in Roles from other Tenants.

For more information about Roles, refer to the Genesys 8.1 Security Deployment Guide. For a listing of Role Privileges for the Genesys Administrator Extension application, refer to Role Privileges in the Genesys Administrator Extension Deployment Guide.

Display Options

Display Options

The `Roles` list shows the Roles 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**
> Roles that are disabled will 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.

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

Procedures

Possible Procedures from this Panel

To create a new Role 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 Role.
- Move To—Move a Role to another hierarchical structure.
- Enable or disable Roles.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Role Objects

To create a Role object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Roles. The Roles 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 of this Role. 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).
   - Description—A brief description of this Role.
   - 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. In the Role Members tab, click the Add Access Group button to add an Access Group, or the Add User button to add a User.
6. Click the Save button.

Scripts

Scripts identify processing scenarios or treatments that can be applied to customer interactions.

> **Important**
> Depending on the application type, a scenario or treatment itself might be part of the Script object, in which case it is listed in the annex of the Script object. Special GUI applications—not Genesys Administrator Extension—create such Script objects. Because these applications use their own formats for data storage, viewing the contents of a Script's annex through Genesys Administrator Extension might not be of help. For more information about this subject, refer to the application-specific documentation that discusses the creation and execution of relevant Script objects.

For more information about Scripts, refer to the Framework 8.1 Management Layer User's Guide or to the documentation specific to your product.

Display Options

Display Options

The `Scripts` list shows the Scripts 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**
> Scripts that are disabled will 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Script 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.

When you delete a Script, it is removed from the Configuration Database and from the Alarm Condition with which it is associated.

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

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

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

Creating Script Objects

To create a Script object, perform the following actions:

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `Scripts`. The `Scripts` 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 of the Script. 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).
    - `Script Type`—The type of the Script. You must specify a type. Once you set the type, you cannot change it.
    - `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. Click the Save button.

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.

Display Options

Display Options

The `Skills` list shows the Skills 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**
> Skills that are disabled will 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.

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

Procedures

Possible Procedures from this Panel

To create a new Skill 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.

Important

When you delete a Skill, it is removed from the Configuration Database and from any Agent to which it is assigned. If you want to remove only the Skill from an Agent to which it is assigned, but leave it in the Configuration Database and available for assignment to another Agent, remove the Skill from the Agent.

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

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

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

Creating Skill Objects

To create a Skill object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Skills. The Skills 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 of this Skill. 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—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. Click the Save button.

Solutions

Solutions are sets of applications that accomplish particular business tasks in contact centers.

Display Options

Display Options

The `Solutions` list shows the Solutions 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**
> Solutions that are disabled will 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Solution 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 Solution.
- `Move To`—Move a Solution to another hierarchical structure.
- Enable or disable Solutions.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Solution Objects

Before creating a Solution, you must create the Applications that will be a part of the Solution.

To create a Solution object, perform the following actions:

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `Solutions`. The `Solutions` 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 of the Solution. You must specify a value for this property, and that value must be unique within the Configuration Database.
    - `Assigned to Tenant`—In a multi-tenant environment, the Tenant to which this Solution is assigned.
    - `Solution Type`—The type of the Solution. You must specify a value for this property. Once you set the value, you cannot change it. This value is automatically set, based on the type of the imported Solution.

    > **Important**
    > A Solution of type `Default Solution Type` or `Framework` cannot be started and stopped with Solution Control Interface unless they have been created using a solution wizard. See the Framework 8.1 Management Layer User's Guide for more information.

    - `Solution Control Server`—The name of the Solution Control Server that controls this Solution.
    - `Version`—The version of the Solution. You must specify a value for this property.
    - `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. In the `Application Definitions` tab, click the `Add` button to add an Application object to this Solution.

> **Important**
> The same Solution Control Server must control all Solutions that use the same Solution component.

6. Enter the following information in the pop-up window that displays on your screen:
   - `Application Type`—The type of Application used as a Solution component.
   - `Version`—The version of the Application used as a Solution component.
   - `Startup Priority`—The default position of the Solution component in the component startup sequence within the Solution.
   - `Optional`—Specifies whether this Solution component is optional.
   - Click the `OK` button.
7. Click the `Apply` button to save the information in the `Application Definitions` tab.
8. In the `Applications` tab, click the `Add` button to add an Application to this Solution.

> **Important**
> The same Solution Control Server must control all Solutions that use the same Solution component.

9. Enter the following information in the pop-up window that displays on your screen:
   - `Application`—The type of Application used as a Solution component.
   - `Startup Priority`—The default position of the Solution component in the component startup sequence within the Solution.
   - `Optional`—Specifies whether this Solution component is optional.
   - Click the `OK` button.
10. Click the `Save` button.

Statistical Days

A Statistical Day is a numerically expressed workload that a particular Agent Group is expected to handle during a particular business day.

If you are using Cost-Based Routing, use a Day Contract. A Day Contract is a special type of Statistical Day. If you are using Cost-Based Routing, a Day Contract is a Statistical Day that also includes base rates, and penalties for processing a volume over or below the expected workload. Day Contracts apply only to Volume Rate IT Contracts. Day Contracts allow the base rate to vary to accommodate volume fluctuations that may occur on different days of the week, weekends, and exception days such as holidays. Refer to the Universal Routing 8.0 Routing Application Configuration Guide for more information about Day Contracts.

Statistical Days represent the definition of a point in time, and is interpreted by the Genesys server applications that are designed with these objects and coordinate them with the actual timeline that the server is running. Depending on the behavior of the server, the definition is applied to either the local time in the server's time zone, or UTC time. The Statistical Day itself does not indicate any particular time zone.

Refer to the Universal Routing 8.0 Routing Application Configuration Guide for more information about Statistical Days.

Display Options

Display Options

The `Statistical Days` list shows the Statistical Days 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**
> Statistical Days 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Statistical Day 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 Statistical Day.
- `Move To`—Move a Statistical Day to another hierarchical structure.
- Enable or disable Statistical Days.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Statistical Day Objects

To create a Statistical Day object, choose one of the following types:

- Statistical Day
- Day Contract

Statistical Day

To create a Statistical Day, perform the following actions:

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `Statistical Days`. The `Statistical Days` 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 of the Statistical Day. 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).
    - `Type`—Select `Default` to create a Statistical Day that is not a Day Contract.
    - `Day Type`—These fields identify the calendar days to which the statistical values of the Statistical Day apply. If `Date` is selected, you can modify the following fields: `Year`, `Month`, `Day`. If `Day of Week` is selected, you can modify the `Day of Week` field.

    ## Important

    Do not set any properties in the following section when a Statistical Day object is configured for use in a Statistical Table of the Special Day Table type.

    - `Start Time`—Start time of the Business Day. The value must be a positive number expressed in hours, minutes, and seconds from `00:00:00 AM/PM`.
    - `End Time`—End time of the Business Day. The value must be a positive number expressed in hours, minutes, and seconds from `00:00:00 AM/PM`..

    ## Warning

    Do not configure a Business Day that spans midnight as a single day, because it may be misinterpreted by the Routing Solution. If your Business Day starts on one day and ends on the next, you must configure it as two days, as follows:

    The first Business Day starting at the overall start time and ending at `11:59 PM` of that day; and
    The second Business Day starting at starting at `00:00 AM` of the next calendar day and ending at the overall end time.

    ### Example

    Assume you wish to track activity from Monday at `8:00 PM` to Tuesday at `2:00 AM`. You must explicitly create two Business Days, as follows:
    The first Business Day on Monday, starting at `8:00 PM` and ending at `11:59 PM`; and

    The second Business Day on Tuesday, starting at `00:00 AM` and ending at `2:00 AM`.

    - `Min Value`—A statistical value that represents the minimum expected workload for the whole day.
    - `Max Value`—A statistical value that represents the maximum expected workload for the whole day. This value cannot be less than the setting for `Statistical Values Minimum`.
    - `Target Value`—A statistical value that represents the target workload for the whole day. The Target Value cannot be less than the setting for the Statistical Values Minimum or greater than the setting for the Statistical Values Maximum. This property is reserved for future use.
    - `Interval Length (Min)`—The Statistical Interval in minutes. This parameter is used to break up the Statistical Day into smaller time slots that allow a model for load distribution throughout the day.

This value must be a multiple of 5. Once you set the value, you cannot change it.

- 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. In the Intervals tab, specify the statistical intervals. Refer to the Statistical Intervals tab, above, for more information.
6. Click the Save button.

Day Contract

To create a Day Contract, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Statistical Days. The Statistical Days 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 of the Statistical Day. 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).
   - Type—Select Day Contract to create a Statistical Day that is a Day Contract.
   - Day Type—These fields identify the calendar days to which the statistical values of the Statistical Day apply. If Date is selected, you can modify the following fields: Year, Month, Day. If Day of Week is selected, you can modify the Day of Week field.
   - Start Time—Start time of the Business Day. The value must be a positive number expressed in hours, minutes, and seconds from 00:00:00 AM/PM.
   - End Time—End time of the Business Day. The value must be a positive number expressed in hours, minutes, and seconds from 00:00:00 AM/PM.
   - Interval Length (Min)—A list of statistical intervals.
   - Forecast Allowance (%)—The percentage of the forecasted volume of routed interactions for this Volume Period that can be over- or underestimated without incurring a penalty. This allowance applies throughout the whole day, including intervals. The value must be a positive value.
   - Under Forecast Allowance (%)—The percentage of the forecasted volume of routed interactions for this Volume Period that must be exceeded to avoid a penalty for forecasting too high.
   - Over Forecast Allowance (%)—The percentage of the forecasted volume of routed interactions for this Volume Period that cannot be exceeded to avoid a penalty for forecasting too low.
   - Flat Rate—If selected, the Flat Rate to be applied during this Volume Period.
5. In the Volume Period tab, click the Add button. In the pop-up window, enter the following information:
   - Volume Period—The interval number. The first interval is numbered 1 and is always counted from the start time of the Business Day.
   - Forecasted Volume—The volume of interactions expected within the time period.

- `Base Rate`—The total cost of all interactions expected within the time period.
- `Penalty For Interaction For Over Forecast`—The additional cost, per interaction, for exceeding the forecasted interaction volume beyond that allowed by the Forecast Allowance Penalty. In effect, this is a penalty for forecasting too low.
- `Penalty For Interaction For Under Forecast`—The additional cost, per interaction, for not achieving the forecasted interaction volume beyond that allowed by the Forecast Allowance Penalty. In effect, this is a penalty for forecasting too high.

> **Important**
> Refer to the Universal Routing 8.0 Routing Application Configuration Guide for more information.

6. Click the Save button.

Statistical Intervals

Statistical Intervals

Use a Statistical Interval to associate each Statistical Interval with certain Statistical Values.

For each interval, specify values representing the expected load during that interval. The value must be numeric and unique within the statistical field.

When you are configuring a Statistical Day object for use in a Statistical Table of the Capacity Table type, specify:

- Statistical Value 1—A number of agents.
- Statistical Value 2—An average handling time.

When you are configuring a Statistical Day object for use in a Statistical Table of the Quota Table type, specify:

- Statistical Value 1—A statistical value that represents the minimum expected workload for the interval.
- Statistical Value 2—A statistical value that represents the target workload for the interval. This value cannot be less than the setting for the Statistical Value 1 or greater than the setting for the Statistical Value 3.
- Statistical Value 3—A statistical value that represents the maximum expected workload for the interval. This value cannot be less than the setting for the Statistical Value 1.

Statistical Tables

Statistical Tables are groups of Statistical Days that represent statistically modeled performances of Agent Groups over a calendar period of up to one year. Call-processing applications can use Statistical Tables to provide load balancing between Agent Groups when the real-time statistics for those groups are unavailable.

Display Options

Display Options

The `Statistical Tables` list shows the Statistical Tables 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**
> Statistical Tables 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Statistical Table 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 Statistical Table.
- Move To—Move a Statistical Table to another hierarchical structure.
- Enable or disable Statistical Tables.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Statistical Table Objects

To create a Statistical Table object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Statistical Tables. The Statistical Tables 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 of the Statistical Table. 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).
    - Type—The type of Statistical Table. Once you set the value, you cannot change it. The five types of Statistical Tables are:
        - Capacity Table—The call-processing applications compare the values specified in the Intervals list of the Statistical Days object.
        - Quota Table—The call-processing applications compare the Minimum, Maximum, and Target values specified in the Statistical Days object.
        - Special Day Table—The call-processing applications can identify certain days (for example, holidays).
        - Variable Rate Contract Table—The call-processing applications calculate the interaction cost based on forecasted volume, and a rate for that volume.
        - Volume Contract Table—The call-processing applications calculate the interaction cost based on a predefined call cost or agent cost.

- 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. In the Statistical Days tab, click the Add button to add a Statistical Day. In the pop-up window, you can create a new object by clicking the New button.
6. Click the Save button.

Switches

A Switch is an aggregate of telephony resources within a Switching Office.

Most enterprise-level configurations have a one-to-one match between the Switches and the Switching Offices. However, there may be instances when it is desirable to partition the office into more than one Switch or to create a more efficient and secure numbering plan. In that case, you must define a Switch within a Switching Office.

In the event of the loss of all components at a single site, a Disaster Recovery (DR) strategy is required to ensure that there is a minimal disruption in service. The central part of this strategy is the existence of synchronized switches located at separate sites, and configured with identical sets of Agent extensions and Agent Logins. An agent can log in to either switch at any time.

The Disaster Recovery strategy implemented by Genesys for Genesys components applies to Switches of type `SIP Switch`. To configure Disaster Recovery for Genesys components, at least one Switch must exist in the Configuration Database.

For additional information about Disaster Recovery, refer to the SIP Server High-Availability Deployment Guide or the Genesys Administrator 8.1 Help.

Display Options

Display Options

The `Switches` list shows the Switches 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**
> Switches that are disabled will 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.

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

Procedures

Possible Procedures from this Panel

To create a new Switch 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 Switch.
- `Move To`—Move a Switch to another hierarchical structure.
- Enable or disable Switches.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Switch Objects

To create a Switch object, perform the following actions:

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `Switches`. The `Switches` 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 of the Switch. You must specify a value for this property, and that value must be unique within this Tenant (in a multi-tenant environment).
    - `Switching Office`—The Switching Office to which this Switch belongs. You must specify a value for this property. Once you set the value, you cannot change it.
    - `Switch Type`—The type of Switching Office to which this Switch belongs. This value is set automatically.
    - `T-Server`—The T-Server Application object through which the telephony objects of this Switch are

controlled. Once you establish the association, it cannot be broken as long as the specified T-Server has at least one client application.

- DN Range—The internal numbering plan of the Switch. Use a hyphen to specify a range of numbers, and use commas to specify a series of stand-alone numbers or ranges—for example, 1100-1179, 1190-1195, 1199. Although this parameter is optional, it may be important for T-Server operation with certain types of Switches.
- 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. The Access Codes tab displays a list of Access Codes that are used to place, route, or transfer calls from this Switch to other Switches in a multi-site installation. Depending on the structure of a numbering plan, you may or may not need access codes to reach DNs that belong to different Switches of a multi-site telephone network. Click the Add button to add an Access Code to this Switch.
6. Enter the following information in the pop-up window that displays on your screen:
   - Switch—The Switch to which you assign this Access Code.
   - Code—The prefix used to reach DNs of the Switch specified in the Switch property when placing or transferring calls from DNs of the Switch to the object for which you are configuring. You must specify a value for this property. You must specify an Access Code in full accordance with the numbering plan of the contact center telephone network, and you must make any changes to the Access Codes only after the corresponding changes have been made to the telephone network.
   - Target Type—The type of target within the Switch for which you are specifying all routing parameters.

   > **Important**
   >
   > The combination of values for the first three properties—Switch, Code, and Target Type—defines the uniqueness of the Switch Access Codes. You may specify multiple Access Codes with the same code to the same Switch, provided that they have different target types.

   - Route Type—The type of routing for the target specified in the Target Type for this Switch.
   - DN Source—An informational source that specifies the origination point in routing instructions.
   - Destination Source—An informational source that specifies the destination in routing instructions.
   - Location Source—An informational source that specifies the location in routing instructions.
   - DNIS Source—An informational source that specifies the DNIS in routing instructions.
   - Reason Source—An informational source that specifies the reasons in routing instructions.
   - Extension Source—An informational source that specifies the extensions in routing instructions.
   - Click the OK button.
7. Click the Apply button to save the information in the tab.
8. The Default Access Codes tab displays a list of Access Codes that can be used by default to place, route, or transfer calls to this Switch from any other Switches in a multi-site installation. Depending on the structure of a numbering plan, you may or may not need access codes to reach DNs that belong to different Switches of a multi-site telephone network. Click the Add button to add a Default Access Code

to this switch.

9. Enter the following information in the pop-up window that displays on your screen:
   - `Code`—The prefix used to reach DNs of the Switch specified in the Switch property when placing or transferring calls from DNs of the Switch to the object for which you are configuring. You must specify a value for this property. You must specify an Access Code in full accordance with the numbering plan of the contact center telephone network, and you must make any changes to the Access Codes only after the corresponding changes have been made to the telephone network.
   - `Target Type`—The type of target within the Switch for which you are specifying all routing parameters.

     ## Important

     The combination of values for the first three properties—`Switch`, `Code`, and `Target Type`—defines the uniqueness of the Switch Access Codes. You may specify multiple Access Codes with the same code to the same Switch, provided that they have different target types.

   - `Route Type`—The type of routing for the target specified in the Target Type for this Switch.
   - `DN Source`—An informational source that specifies the origination point in routing instructions.
   - `Destination Source`—An informational source that specifies the destination in routing instructions.
   - `Location Source`—An informational source that specifies the location in routing instructions.
   - `DNIS Source`—An informational source that specifies the DNIS in routing instructions.
   - `Reason Source`—An informational source that specifies the reasons in routing instructions.
   - `Extension Source`—An informational source that specifies the extensions in routing instructions.
   - Click the `OK` button.
10. Click the Save button.

Important

Switch Access Codes are codes used by other Switches. Default Access Codes are codes used by this Switch.

Switching Offices

Switching Offices are the actual telephone switches that provide telephone service to contact centers.

You must register a Switching Office before you configure a Switch with DNs and Agent Logins.

Display Options

Display Options

The `Switching Offices` list shows the Switching Offices 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**
> Switching Offices 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Switching Office 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. You cannot delete a Switching Office if it has at least one Switch associated with it.

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

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

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

Creating Switching Office Objects

To create a Switching Office object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Switching Offices. The Switching Offices 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 of the Switching Office. You must specify a value for this property, and that value must be unique within this Switching Office (in either an enterprise or a multi-tenant environment) or within this Tenant (in a multi-tenant environment).
   - Switch Type—The type of the Switching Office. You must specify a type. Once you set the type, you cannot change it.
   - 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. Click the Save button.

Table Access

Table Access objects describe database tables of a specified Format and explain how to access these tables through Database Access Points (DAPs).

You cannot delete a Table Access object while it is associated with at least one Calling List.

Display Options

Display Options

The `Table Access` list shows the Table Access objects 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**
> Table Access objects 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.

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

Procedures

Possible Procedures from this Panel

To create a new Table Access 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 Table Access object.
- Move To—Move a Table Access object to another hierarchical structure.
- Enable or disable Table Access objects.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Table Access Objects

To create a Table Access object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Table Accesses. The Table Accesses 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 of this Table Access object. It can contain up to 254-characters. 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).
   - Description—A brief description of the Table Access object.
   - Table Type—The type of Table Access object in the database. You must specify a value for this property. Once you set the value, you cannot change it.
   - DB Access Point—The Database Access Point through which to access the Table. You must specify a value for this property. The Database Access Point must serve the Tenant to which this Table Access object belongs.
   - Format—The Format of this Table. You must specify a value for this property for all Table types except Log Table. Once you set the value, you cannot change it.
   - Database Table—The name of this table as specified in the database. You must specify a value for this property. The name length depends on the DBMS type. Genesys recommends that you do not exceed the following vendor-defined limitations:
     - 18 characters—for DB2 and Informix databases
     - 128 characters—for Microsoft SQL databases

    - 30 characters—for Oracle and Sybase databases

- Update Every (seconds)—The number of seconds an application waits before updating the table data in application memory. This value is required only if the Cacheable check box is checked.
- Cacheable—Indicates whether the Table Access data is mirrored in application memory.
- 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. Click the Save button.

Table Access Types

Table Access Types

Table Access Type	Description
ANI	An Automatic Number Identification table.
Calling List	A calling list table.
Country Code	A country code table.
Customer Defined Table	A user-defined table.
Do Not Call List	In Outbound, a list of customers who request not to be called is known as a Do Not Call (DNC) list. The DNC data in a Do Not Call list file includes the customer's phone number or a customer ID.
E-mail Contact List	In Outbound, a list of customers who are to be contacted.
Info Digits	An Information Indicator-Digits table.
LATA	A Local Access and Transport Area table.
Log Table	A log table.
NPA	A Numbering Plan Area table.
NPA-NXX	A table of a Numbering Plan Area with an identifier of the specific telephone company central office that serves that number.
State Code	A State or International code, for example, a U.S. or Canadian postal code, such as CA for California.

Tenants

Tenants are businesses whose customer interactions are enabled or enhanced through services offered by a third party, typically a telecommunications service provider. From an architectural standpoint, however, most of the hardware and software that Tenants use to enable or enhance those interactions belong to the service provider.

From a functional standpoint, each Tenant in a hierarchical multi-tenant environment is a contact center (single or multi-site) completely equipped to process customer interactions. In a hierarchical multi-tenant environment, at any given time, Genesys Administrator Extension displays only those hardware and software resources belonging to a particular Tenant within that environment.

> **Important**
> To create Tenants, a user must have the appropriate permissions and role privileges to log in to Genesys Administrator Extension and create Tenants. However, the Tenant Creators Access Group must exist for the user to create a Tenant.

Allocation of Resources

Some of these hardware and software resources are allocated to each Tenant separately (for example, the telephony extensions and queues of a switching system).

Other resources are shared by the Tenants; these resources process customer interactions for some or all of the Tenants simultaneously (for example, the control and signaling devices of a switching system, and service control points of the public telephone network).

The configuration objects that describe both types of resources are allocated to Tenants accordingly.

Viewing Tenants

Normally, the Tenants that are visible depends on which Tenant is selected in the `Tenant Directory` of Configuration Manager. When set to Environment, the User is able to see all Tenants. If another Tenant is selected, the User can view only that Tenant and any existing child Tenants.

If the User is using the `Quick Filter` field, all Tenants to which the User has access are searched. If the User does not have access to the Environment (root) Tenant, it is not displayed.

Display Options

Display Options

The `Tenants` list shows the Tenants that are in your environment.

> **Important**
> Tenants 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 by typing the name or partial name of an object in the `Quick Filter` field.

Procedures

Possible Procedures from this Panel

To create a new Tenant 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.

You must click a Tenant to access functions to copy the Tenant, delete the Tenant, or to enable or disable the Tenant.

> **Important**
> When you delete a Tenant from the Configuration Database, all of its child Tenants are also deleted, and recursively, all of their child Tenants.

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

Creating Tenant Objects

To create a Tenant object, perform the following actions:

1. Go to `Configuration` > `System` > `Configuration Manager`.
2. Click `Tenants`. The `Tenants` 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 of the Tenant. You must specify a value for this property, and that value must be unique within the Configuration Database.
   - `Password`—A password that must be used to access this Tenant.
   - `Confirm Password`—A confirmation of the password.
   - `Parent Tenant`—The parent Tenant of this Tenant. By default, the parent Tenant is the Tenant in which you are creating the new Tenant. If you change this field, the new Tenant will be created as a new child Tenant under the specified parent Tenant. To subsequently change the parent Tenant, refer to the Structure tab, above..
   - `Chargeable Number`—The account number to which activities for this Tenant are charged, for cost-tracking purposes.
   - `Default Capacity Rule`—The name of the Script of Capacity Rule type that defines the ability of this Tenant to handle multiple interactions. For more information, refer to Reporting documentation.
   - `Default Contract`—The default cost contract applied to resources of this Tenant. For more information, refer to the Routing Solutions chapter of the Universal Routing 8.0 Routing Application Configuration Guide.
   - `State Enabled`—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
5. Click the Save button.

> **Important**
>
> If you are not logged in as the default User, or are not a member of the `SuperAdministrators` Access Group, you must have special permissions and role privileges to create a Tenant. Refer to the Genesys 8.1 Security Deployment Guide for details about the security requirements for creating a Tenant.

Structure

Hierarchical Multi-Tenant Structure

The structure of a hierarchical multi-tenant structure can contain an unlimited number of levels. This configuration environment serves the needs of every company in the hierarchy.

In any multi-tenant environment, when you run Genesys Administrator Extension for the first time after the Configuration Database initialization, you can only view the Environment Tenant. When you register a new Tenant in the Configuration Database, the Configuration Layer automatically creates all the folders necessary to support resource allocation and configuration data entry for this Tenant.

Refer to the Genesys 8.1 Security Deployment Guide for information about how permissions are inherited in a hierarchical multi-tenant structure.

Modifying the Hierarchical Multi-Tenant Structure

To rearrange Tenants between parent Tenants in the structure, modify the Parent Tenant field for the Tenant object that you want to move.

Time Zones

Time Zones are predefined objects that provide Genesys applications with information about international time zones.

When you first open the list of Time Zone objects, you will see a list of international time zones.

Display Options

Display Options

The `Time Zones` list shows the Time Zones 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**
> Time Zones 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Time Zone 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 Time Zone.
- Move To—Move a Time Zone to another hierarchical structure.
- Enable or disable Time Zones.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Time Zone Objects

To create a Time Zone object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Time Zones. The Time Zones 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 of the Time Zone. 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).
    - Description—A brief description of the Time Zone.
    - Name in Mozilla—The name of the Time Zone used in the Mozilla Firefox browser. You must specify a value for this property.
    - Name in Explorer—The name of the Time Zone used in the Microsoft Internet Explorer browser. You must specify a value for this property.
    - DST Observed—Indicates whether Daylight Saving Time (DST) is used.

      Note: The following fields display only if the DST Observed check box is selected.
    - Daylight Saving Time Type—Select one of the following to define when DST starts and ends:
        - Current Year or Fixed Date (local)—DST begins and ends on a specific date and time. This setting covers only one year, and must be reset every year.
            - Start Date—The date at which DST begins.

        - End Date—The date at which DST ends.
        - Start Time—The time at which DST begins.
        - End Time—The time at which DST ends.
    - Daylight Saving Time definition (GMT)—DST begins and ends on a specific month/day/time. These settings are carried forward over many years, until changed or DST is no longer used.
        - Start Year—The year that DST started to be observed or will start to be observed. If DST is currently in use, you can also select Not Observed.
        - End Year—The year that DST is to be discontinued. If there are no plans to discontinue DST, select Not Observed.
        - Start Month—The month in which DST starts.
        - End Month—The month in which DST ends.
        - Start Day Type—Specifies whether the Start Day value is Fixed, in which DST starts on the same date every year, or Variable, in which you must define the variables to be used to determine the Start Day.
        - End Day Type—Specifies whether the End Day value is Fixed, in which DST ends on the same date every year, or Variable, in which you must define the variables to be used to determine the End Day.
        - (If Start Day Type is set to Fixed) Start Day—The date at which DST begins.
        - (If End Day Type is set to Fixed) End Day—The date at which DST ends.
        - (If Start Day Type is set to Variable) Start Week—The week number in which DST begins.
        - (If End Day Type is set to Variable) End Week—The week number in which DST ends.
        - (If Start Day Type is set to Variable) Start Day of Week—The day of the week in which DST begins.
        - (If End Day Type is set to Variable) End Day of Week—The day of the week in which DST ends.
        - Start Time—The time at which DST begins.
        - End Time—The time at which DST ends.
- 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. Click the Save button.

International Time Zones

International Time Zones

Genesys Administrator Extension includes the following international time zones:

Abbreviation	Time Zone
ACT	Australia Central Time
AET	Australia Eastern Time
AGT	Argentina Standard Time
AtlST	Atlantic Standard Time
ART	(Arabic) Egypt Standard Time
AST	Alaska Standard Time
BET	Brazil Eastern Time
BST	Bangladesh Standard Time
CAT	Central Africa Time
CNT	Canada Newfoundland Time
CST	Central Standard Time
CTT	China Taiwan Time
EAT	Eastern Africa Time
ECT	European Central Time
EET	Eastern European Time
EST	Eastern Standard Time
GMT	Greenwich Mean Time
HST	Hawaii Standard Time
IET	Indiana Eastern Standard
IST	India Standard Time
JST	Japan Standard Time
KST	Korea Standard Time
MET	Middle East Time
MIT	Midway Islands Time
MST	Mountain Standard Time
NET	Near East Time
NST	New Zealand Standard Time
PLT	Pakistan Lahore Time
PNT	Phoenix Standard Time
PRT	Puerto Rico and US Virgin Islands Time
PST	Pacific Standard Time
SST	Solomon Standard Time
VST	Vietnam Standard Time

Transactions

Transactions define how applications calculate customer-defined statistics.

For more information about specifications and use of Transactions, consult the Universal Routing documentation.

Display Options

Display Options

The `Transactions` list shows the Transactions 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**
> Transactions 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Transaction 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 Transaction.
- Move To—Move a Transaction to another hierarchical structure.
- Enable or disable Transactions.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Transaction Objects

To create a Transaction object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Transactions. The Transactions 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 of the Transaction. You must specify a value for this property, and that value must be unique. A combination of the name and type specified in the Type property determines the uniqueness within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
   - Alias—An alternative name for this Transaction. If you specify this value, it must be unique within the object type specified in the Type property for the given contact center.
   - Transaction Type—The type of this Transaction. You must specify a value for this property. Once you set the value, you cannot change it.
   - Recording Period (min.)—A time period, in minutes, indicating how often to report the current status of the Transaction or to record it in the database.
   - Format—An application-specific format or script that defines how the Transaction is processed.
   - 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. Click the Save button.

Treatments

A Treatment defines what Outbound Contact Server (OCS) should do with a call that does not reach the intended party. For example, the Treatment could instruct OCS to redial a number that returns a Busy call result.

Treatment objects are assigned to Calling List objects. If no Treatments are assigned to a call result, OCS changes the record status to Updated.

You can add or remove Treatments from a Calling List object while a Dialing Session for a Campaign is running. However, once a Treatment is in progress, it cannot be interrupted. Changes made to that Treatment are applied to the next record that receives the call result that prompts the Treatment.

Display Options

Display Options

The `Treatments` list shows the Treatments 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**
> Treatments 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Treatment 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 Treatment.
- Move To—Move a Treatment to another hierarchical structure.
- Enable or disable Treatments.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Treatment Objects

To create a Treatment object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Treatments. The Treatments 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—(Required) The name of the Treatment.
   - Description—(Optional) A brief description of the Treatment.
   - Call Result—(Required) The call result associated with this Treatment.
   - Apply to Record—(Required) The action to apply to a Calling List record, based on the call result.
   - Apply to Call—(Optional) An alternate way to handle a call when a dialing attempt is answered or reaches an answering machine or a fax machine.
   - Destination DN—(Required, if Apply to Call is specified) The DN to which the call is connected or transferred. If Apply to Callis specified but Destination DN is not, OCS ignores the Treatment.
   - Number in sequence—(Required) The order in which this treatment is applied in a Treatment sequence. If it is a stand-alone treatment, specify a value of 1.

- `Cycle Attempt`—(Required with value of greater than `0` (zero), when `Apply to Record` is set to `Next in chain`, `Next in chain after`, and `Next in chain at specified date`, or `Redial`) The maximum number of consecutive attempts to execute the Treatment on the record.
- `Interval (Days:Hours:Minutes)`—(Required when `Apply to Record` is set to `Next in chain`, `Next in chain after`, `Redial`, or `Retry in`) A time interval, in minutes, that OCS waits between the first dialing attempt and the first Treatment attempt.
- `Increment (minutes)`—(Required when `Apply to Record` is set to `Next in chain`, `Next in chain after`, `Redial`, or `Retry in`) The number of minutes added to the previous redial time interval.
- `Date`—(Required when `Apply to Record` is set to `Next in chain at specified date`, or `Retry at specified date`) The date when another Treatment attempt is performed.
- `Time`—(Required when `Apply to Record` is set to `Next in chain at specified date`, or `Retry at specified date`) The time of day that another Treatment attempt is performed.
- `Range (Days:Hours:Minutes)`—Reserved for future use.
- `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. Click the Save button.

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

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.

Voice Platform Profiles

Voice Platform Profiles are voice (VoiceXML), call control (CCXML), announcement, or conference applications that specify the unique service information required as this application executes within the Genesys Voice Platform. Each profile contains prerequisites, parameters, and policies for each type of service.

Display Options

Display Options

The `Voice Platform Profiles` list shows the Voice Platform Profiles 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**
> Voice Platform Profiles 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Voice Platform Profile 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 Voice Platform Profile.
- Move To—Move a Voice Platform Profile to another hierarchical structure.
- Enable or disable Voice Platform Profiles.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

Click on the name of a Voice Platform Profile to view additional information about the object. You can also set options and permissions.

Creating Voice Platform Profile Objects

To create a Voice Platform Profile object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Voice Platform Profiles. The Voice Platform Profiles 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 of the Voice Platform Profile. 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). Once you set the value, you cannot change it.
   - Display Name—The name of the Voice Platform Profile as displayed in GVP reports and on the console.
   - Description—A brief description of this Voice Platform Profile.
   - 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. Click the Save button.

Voice Prompts

Voice Prompts are call treatment objects that may include a set of actions to be applied to a called party.

Display Options

Display Options

The `Voice Prompts` list shows the Voice Prompts 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**
> Voice Prompts 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. You can add or remove columns by clicking the `Select Columns` button.

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

Procedures

Possible Procedures from this Panel

To create a new Voice Prompt 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 Voice Prompt.
- Move To—Move a Voice Prompt to another hierarchical structure.
- Enable or disable Voice Prompts.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

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

Creating Voice Prompt Objects

To create a Voice Prompt object, perform the following actions:

1. Go to Configuration > System > Configuration Manager.
2. Click Voice Prompts. The Voice Prompts 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 of the Voice Prompt. 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). Once you set the value, you cannot change it. If the Voice Prompt is used for a parked-call treatment, this value must correspond to the voice prompt identifier that the switch provides.
    - Description—A brief description of the Voice Prompt. For Text-to-Speech synthesis, a parking platform or a switch can use this property to generate the Voice Prompt.
    - Switch—The Switch to which this Voice Prompt belongs. Once you set the value, you cannot change it.
    - Script—A unique identifier of the Script for this Voice Prompt.
    - 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. Click the Save button.

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.

> **Important**
> Installation packages are stored in the database and not on the local file system.

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.

Important

- 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.

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 `Related` button and select `Copy to Tenants`. 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

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

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 `Related` button and select `Install`. A new panel called `IP 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 `Automated 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.

Before You Begin

While you are using the `Automated 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

Plug-ins are installed using the same procedures as IPs, but take note of the following:

- The plug-in install profile automatically fetches GAX Application objects for selected Host objects.
- Plug-in options are merged into the affected GAX Application objects.
- Some input fields do not appear, such as those relating to `Application Object`, `App Port`, and `Tenant Object`.

Procedures

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

- Installing an Installation Package
- Upgrading an Installation Package
- Rollback an Installation Package

Installing an Installation Package

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

1. In the `Installation Packages` panel, select the IP to use for the install.
2. A new panel with additional information about the IP appears to the right. Click the `Related` button, then select `Install`.
3. The `Automated 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. Click the `Next` button.
5. The panel updates to show the `Application Parameters` list. In the`GAX Application object for host` field, select the Genesys Administrator Extension Application object.
6. Click the `Next` button.
7. The panel updates to display the `Installation Parameters (silent.ini)` list. You can set the target installation path in the field.
8. Click the `Next` button.
9. The panel updates to display the `Deployment` report. Review the settings, and perform one of the following actions:
   - Click the `Finish` button to install the IP.
   - Click the `Previous` button to return to a previous panel and modify settings.
10. 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.

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 Automated 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:
    - 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.
    - 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 `Automated 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:
   - `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.
   - `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

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

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 Installation Wizard` opens to the right.
3. In the `Software Installation Wizard` panel, select a method for importing the IP:

    > **Important**
    >
    > If your installation package contains two or more templates, you must use the **Installation Package Upload (includes templates)** procedure.

    - Installation Package Upload (includes templates)—Upload a file containing an installation package and its associated templates. These files are typically provided by Genesys Customer Care.
    - Installation Package Upload (template uploaded separately)—Upload an installation package and its associated template.
    - 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.
    - UNC Path to Zipped IPs through Support—Upload a .zip file provided by Genesys Customer Care that is stored on a mounted CD or network directory. This file contains an installation package and its associated templates.
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.

> **Important**
>
> When you upload a plug-in, GAX uses the template file (.tpl) to create an Application Template and extracts the default options for the plug-in. GAX stores these options in the database and merges them with the core GAX Application object upon deployment. During this merge, only new options are added—existing key value pairs are not overwritten.

Installation Package Upload (includes templates)

1. In the `Software Installation 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 Installation 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 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 Installation 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 Installation 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.

UNC Path to Zipped IPs through Support

1. In the `Software Installation Wizard` panel, select `UNC Path to Zipped IPs through Support`.
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.

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.
- `Ended`—The date and time at which the deployment of the IP finished.

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.

> **Important**
> 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 8.1 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 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.

> **Important**
> 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`.
5. If there are no missing IPs, in the `Properties` area of the `Details` panel, check the `Deployable` check box.
6. Click `Save` to save your changes or `Cancel` to leave the solution definition file unchanged.

Copying Solution Definitions to Tenants

To copy a solution definition to a Tenant or Tenants, perform the following steps:

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 `Related` button and select `Copy to Tenants`. 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, notes, and deployability of a solution definition.

To modify 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 following fields, as required:
    - `Description`
    - `Notes`
    - `Deployable`
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.

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.

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 the `Related` button and select `Install` or `Deploy Profile`.
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, `profile name="upgrade"` would produce a `Deploy Profile: upgrade` button.

Exporting Solution Definitions

To export 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 `Download`. 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.

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.

To view the history of a solution, perform the following steps:

1. Select a solution from the `Deployed Solution List`.
2. Click `Related` and select `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.

Important

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). It is sorted in a hierarchy by application and privilege grouping.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order. You can add or remove columns by clicking the Select Columns button.

The `Privileges` section contains the following information:

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

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 the *Genesys Administrator Extension Deployment Guide*. For more information about role privileges specifically, and role-based access control in general, refer to the *Genesys 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.

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. Important 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

Property	Description
	optional. If checked, a value must be entered for this parameter before it is saved. If not checked, 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.

Type	Description
Audio Resource	The ARID of an Audio Resource.
Boolean	True or false only.
Configuration Object	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 `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. The following types are supported: • Agent Group • DN • Person (more often referred to as User) • Place • Place Group • Skill • Stat Server • Transaction
Custom List	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.
Date	A date value, in the format yyyy-mm-dd.
Integer	A 0 (zero), negative, or positive number with no decimal value.
Personality	The name of a Personality, given by the Personality Identifier value that is specified in the list of Personalities.
Schedule	Enables users to configure date and time ranges.
String	A string of characters, both alphanumeric and symbols.
Time	A time value, in the format hh:mm.

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.

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.

6. 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

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

> **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

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

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.

To set or modify the values of the Operational Parameters for a Parameter Group, perform the following steps:

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

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.

Use the following procedure to change the template that a Parameter Group uses to a different Parameter Group Template:

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

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.

To delete a Parameter Group:

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. Important 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

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

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

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

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

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 deploy 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

Important

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

To create an Audio Resource:

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

To modify an Audio Resource:

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 `Description` properties can be modified.)
4. Click Save.

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.

To delete an Audio Resource:

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

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

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 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

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 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

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

To create an Audio Resource File and assign it to an Audio Resource:

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>

<table>
<tr><th>Property</th><th>Mandatory</th><th>Description</th></tr>
<tr><td></td><td></td><td>
<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>
</td></tr>
</table>

Creating Personalities

To create a Personality:

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

To modify a Personality:

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

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

To delete a personality:

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`.