Genesys Administrator Extension Help

Roles

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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.