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Genesys Administrator Extension Help

Capacity Rules

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Capacity Rules

The **Capacity Rules** window 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.

Viewing Capacity Rules

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.

This list 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 **Tenant Filter** to open the **Tenant Filter** window. In this window, 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.

Working with Capacity Rules

Click a Capacity Rule to view more details about the rule in a new panel that opens to the right. From this panel, you can also edit Access Control. You can perform the following actions:

Creating Capacity Rules

[+] Show Procedure

This short video demonstrates how to create Capacity Rules using GAX. Alternatively, you can refer to the procedure below the video.

Link to video

Procedure: Creating Capacity Rules

Steps

1. Click **New**.
2. 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 **Browse** 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 **New** to select which media types will be monitored by this Capacity Rule. For more information, see Media Types.
3. Click **Save**.

Media Types

[+] Show Procedure

You can add one or media types to Capacity Rules to specify how many instances of each media type are allowed simultaneously.

Procedure: Adding Media Types to Capacity Rules

Steps

1. Perform one of the following actions:
    - Click **New**, and create a new Capacity Rule.
    - Click an existing Capacity Rule in the **Capacity Rules** panel.
2. In the **Media Types** section, click **New** to add media types to the Capacity Rule. A new panel opens to the right.
3. In the new panel, click the **Media Type** drop-down menu to select a media type. A new section called **Conditions** displays.
4. Set the conditions for the media type.
5. Click **Save**.

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 **Voice exceeds 1** 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).

Procedure: Adding an **and** Condition to a Media Type

Steps

1. In the **Conditions** drop-down menu, click **and**. 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 **OK** to add the condition.

Procedure: Adding an **or** Condition to a Media Type

Steps

1. In the **Conditions** drop-down menu, click **or**. 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 **OK** to add the condition.

Validating Capacity Rules

[+] Show Procedure

When creating a new Capacity Rule or modifying an existing Capacity Rule, you can click **Validate** to verify whether the Capacity Rule is valid or not. This action ensures that the Capacity Rule is constructed properly and uses only media types that you can access.

For example, if you create a Capacity Rule that only specifies **voice** as a media type, but you use **callback** as part of a condition, GAX displays an error message after you click **Validate** that states you must add **callback** as a media type.

Otherwise, if the Capacity Rule is valid, GAX displays a confirmation message after you click **Validate**.

Procedure: Validating a Capacity Rule

Steps

1. Create a new Capacity Rule or modify an existing Capacity Rule.
2. Click **Validate**.
3. GAX displays one of the following messages:
    - A confirmation message that states the Capacity Rule is valid.
    - An error message that explains why the Capacity Rule is invalid.

Deleting Capacity Rules

[+] Show Procedure

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

Procedure: Deleting a Single Capacity Rule

Steps

1. Select a Capacity Rule in the **Capacity Rules** list. More information about the Capacity Rule is displayed in a new panel to the right.
2. In the new panel, click **Delete**.
3. A dialog box displays to confirm the action:
    - Click **OK** to continue.
    - Click **Cancel** to discard the action.

Procedure: Deleting Multiple Capacity Rules

Steps

1. In the **Capacity Rules** list, click the check box of each Capacity Rule that is to be deleted.
2. Click **Bulk Change**, and select **Delete** from the pop-up list of options.
3. A dialog box displays to confirm the action:
   - Click **OK** to continue.
   - Click **Cancel** to discard the action.

Copying Capacity Rules

[+] Show Procedure

Procedure: Copying Capacity Rules

Steps

1. Select a Capacity Rule to copy. More information about the Capacity Rule is displayed in a new panel to the right.
2. In the new panel, click **Copy**. A new panel opens to the right.
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 Capacity Rule.
   - **Tenant and Folder**—The Tenant and folder to which this Capacity Rule belongs. Click **Browse** 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 **New** to select which media types will be monitored by this Capacity Rule. For more information, see Media Types.

4. Click **Save**.

Enabling or Disabling Capacity Rules

[+] Show Procedure

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

Procedure: Enabling or Disabling a Single Capacity Rule

Steps

1. Select a Capacity Rule. A new panel opens to the right.
2. In the new panel, perform one of the following actions:
   - If the Capacity Rule is currently enabled, click **Disable**.
   - If the Capacity Rule is currently disabled, click **Enable**.

Procedure: Enabling or Disabling Multiple Capacity Rules

Steps

1. In the **Capacity Rules** panel, select the check box beside each Capacity Rule that you want to enable or disable.
2. Click **Bulk Change**. A pop-up menu displays. Select **Enable** to enable the selected Capacity Rules or **Disable** to disable the selected Capacity Rules.
3. A dialog box displays to confirm the action:
   - Click **OK** to continue.
   - Click **Cancel** to discard the action.

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

[+] Show Procedure

Procedure: Creating Access Permissions

Steps

1. Select an object.
2. Click **Related** and select **Access Control**. The **Access Control** panel opens.
3. Click **New**. 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.
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 **Save** to accept the changes.
   - Click **Cancel** to discard the changes.

Changing Access Permissions

[+] Show Procedure

Procedure: Changing Access Permissions

Steps

1. Select an object.
2. Click **Related** 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 **Save** to accept the changes.
    - Click **Cancel** to discard the changes.

Deleting Access Permissions

[+] Show Procedure

Procedure: Deleting Access Permissions

Steps

1. Select an object.
2. Click **Related** 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 **Delete**.
5. A dialog box appears to confirm deletion. Perform one of the following actions:
    - Click **OK** to confirm deletion.
    - Click **Cancel** to cancel deletion.