

GENESYS[®]

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Genesys Knowledge Management User Guide

Defining an Access Role

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Defining an Access Role

Prerequisites

- The Knowledge Manager disable-rbac option has its default value false.
- Genesys Administrator is running.
- You have imported the Knowledge Manager metadata template into Knowledge Manager Application object.

Important

For information on using Genesys Administrator, see the Genesys Administrator Help.

1. In Genesys Administrator, navigate to PROVISIONING > Accounts > Roles, as shown in "Roles in Genesys Administrator." Be sure that the correct tenant shows in the drop-down list.

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Roles in Genesys Administrator

- 2. Click New. On the Configuration tab:
 - a. In the General section, enter a name, as shown in "Configuration: General."

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•	💢 Cancel 🔙 Save and Close 🔚 Save 🔚 Save & New 📴 Reload					
+	Configuration Role Privileges Permissions					
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+	* Name:	Overseer				
	Description:					
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Configuration: General

b. In the Members section, click Add for either Users or Access Groups, as shown in "Configuration: Members."

Members			
Users:	🔚 Add 🧱 Edit 🙀 Remove		
	User Name 🔺	Agent	Last Name

Configuration: Members

c. In the resulting Browse window, select Users or Access Groups to add to the list of members. The figure "Browse for Users" shows the Browse window for Users.

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Browse for Users

4. On the Role Privileges tab, select the Genesys Knowledge Manager tasks box, as shown in "Knowledge Management Tasks." If this box does not appear, you must import the metadata template into your Knowledge Manager Application.

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	🖻 Genesys Knowledge Management Access (19 Items)					
	Approve Stendard Rexponse					
	₽	Create Category				

Knowledge Management Tasks

5. A list of tasks appears. To enable this new role to perform one of them, select the task and change its value to Allowed, as shown in "Assigning a Task."

	Genesys Administrator	
2	Export 🚡 Import	Yion
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⊟ (}	Genesys Knowledge Management Access (19 Items) Approve Standard Response	Linas signed
₽	Create Category	[Unassigned]
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۶	Create Screening Rule	
4	Create Standard Response	

Assigning a Task

Important

The value [Unassigned] means that this Role cannot perform this task. But if multiple Roles are assigned to the same User or Access Group, this setting is overridden if another Role sets this privilege as Allowed.

• On the Permissions tab, add Users or Access Groups, as described in Genesys Administrator Help.