GENESYS™

Genesys Knowledge Management User Guide

Knowledge Management Roles

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Knowledge Management Roles

Starting with eServices 8.0.1, you can define different levels of access to Knowledge Manager objects. For example, you might create a role called Supervisor which is allowed to create new standard responses but not to delete or approve them.

You define Roles in Genesys Administrator.

> ### Important
> Other aspects of eServices configuration can be done either in Configuration Manager or Genesys Administrator, but Genesys highly recommends using only Genesys Administrator for configuring Roles and Tasks.

Logically, a Role is a mapping between `Person` or `Access Group` objects on the one hand, and permitted tasks on the other. The `Person` and `Access Group` objects are created by you to suit your needs, while the tasks are predefined by eServices.

Most tasks are defined as the possible application of three actions (create, modify, and delete) to five KM objects (category, standard response, field code, screening rule, and training object); there are several more tasks such as Approve Standard Response. The complete list is given in the table Example Set of Roles.

> ### Important
> To enable a Person to *modify* standard responses, you must assign both the View Standard Response and the Modify Standard Response tasks to them.
>
> To enable a Person to *approve* standard responses, you must assign them (a) the Approve Standard Response task and (b) either the View Standard Response or the Create Standard Response task.