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Genesys Pulse Deployment Guide

Configure User Access

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Roles

In GAX, navigate to **Configuration > Accounts > Roles** and create a new Role object to provide access to Genesys Pulse functionality.

Important

When creating a new Role, a dialog box with Role Template Selection appears. Do not select a template (leave the selection empty). Press **OK**.

Define the privileges granted by the Role on the Assigned Privileges tab in the Genesys Pulse section.

Privilege Details		
Name	Description	Prerequisite
Pulse View Dashboard	User has read-only access to launched dashboards without the ability to expand widgets to tab (includes stay on dashboard ability, which means that user's sessions will not expire and users will not be automatically logged out due to inactivity timeout).	
Pulse View Dashboard Restricted	User has read-only access to launched dashboards without the ability to expand widgets to tab (excludes stay on dashboard ability).	
Pulse Manage Tabs	User can launch, close or customize dashboards and wallboards and expand widgets to tab.	Pulse View Dashboard or Pulse View Dashboard Restricted
Pulse Edit Widget Display	User can modify display options of widgets.	Pulse Manage Tabs
Pulse Manage Widgets	User can create, remove, or modify all widget options.	Pulse Edit Widget Display
Pulse Manage Shared Dashboards	User can create, remove, import, export, or modify shared dashboards.	Pulse Manage Widgets
Pulse Manage Templates	User can create, remove, import, export, or modify templates.	Pulse Manage Widgets

Privilege Details		
Pulse Add Dashboards Without Limit	User can add any number of dashboards. Applicable if the [pulse]\max_tabs_per_user option is set in your Genesys Pulse application object or the max_tabs_per_user is set for the Access Groups Object.	Pulse Manage Tabs
Pulse Add Widgets Without Limit	User can add any number of widgets. Applicable if the [pulse]\max_widgets_per_user option is set in your Genesys Pulse application object or the max_widgets_per_user is set for the Access Groups Object.	Pulse Manage Widgets
Pulse Manage Users	User can manage other users' widgets and dashboards.	Pulse Manage Tabs, Pulse Edit Widget Display, Pulse Manage Widgets
Pulse Manually Bind Collectors	User can manually select Pulse Collectors to process particular widgets or templates.	Pulse Manage Tabs, Pulse Edit Widget Display, Pulse Manage Widgets

The following privileges are for users or third-party applications that connect to Genesys Pulse using a Web API.

- **Pulse Read All Layouts**—View all Genesys Pulse layouts using a Web API and switch off filtration of rows by access in snapshot.
- **Pulse Write Snapshot**—Upload layout snapshots using a Web API.

Genesys Pulse privileges use GAX logic—the high-level privileges do not include lower-level privileges. For example, to configure role with full control access, you have to assign all privileges to it.

For role members to create Widgets, you must assign **Pulse View Dashboard** (or **Pulse View Dashboard Restricted**), **Pulse Manage Tabs**, and **Pulse Edit Widget Display** in addition to **Pulse Manage Widgets**.

Important

You must assign at least the **Pulse View Dashboard** or **Pulse View Dashboard Restricted** privilege to each Role object.

Assign the Role to Persons and Access Groups in the Role Members section as required.

Permissions

Provide appropriate permissions (**Read** and **Execute**) on the following objects:

1. Genesys Pulse client application object (usually called default. The name is controlled by the Genesys Pulse option **client_app_name** in the **[general]** section):
 1. Select **Configuration**.
 2. On the **Environment** pane, click **Applications**.
 3. From the **Applications** list, open the required application (usually called **default**) to view its properties.
 4. Select the **Permissions** tab.
 5. Add the **Person** or **Access Group** containing this user.
 6. Add required permissions: **Read** and **Execute** are required to log in to Genesys Pulse.
2. Tenant Environment:
 1. Select **Configuration**.
 2. On the **Environment** pane, click **Tenants**.
 3. From the **Tenants** list, open the Environment tenant to view its properties.
 4. Select the **Permissions** tab.
 5. Add the **Person** or **Access Group** containing this user.
 6. Add required permissions: **Read** and **Execute** are required to log in to Genesys Pulse.
3. User's own tenant:
 1. Select **Configuration**.
 2. On the **Environment** pane, click **Tenants**.
 3. From the **Tenants** list, open the User's own tenant to view its properties.
 4. Select the **Permissions** tab.
 5. Add the **Person** or **Access Group** containing this user.
 6. Add required permissions: **Read** and **Execute** on tenant are required to log in to Genesys Pulse.