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Genesys Administrator Extension Help

Agents

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Agents

Agents are **Users** who handle customer interactions directly. The **Agents** window lists all Agents in your environment (or Tenant, if you are in a multi-tenant environment). You can only see those objects for which you have access.

You can filter the contents of this list in several ways:

- Click **Show Quick Filter** and type a search term in the **Quick Filter** field. The list updates dynamically to show items that match the text in the **Quick Filter** field.
- Click **Show Column Filter** to show search fields for each column header. Enter a search term in one of these fields to quickly search the column for the search term.
- Click the cube icon to open the **Tenant Directory** window. In this window, click the Tenant that you want to select. Use the **Quick Filter** field 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.

The **Agents** window has two different modes to serve different users. You can change modes by opening **System Preferences**, selecting **Agent Management**, then choosing between **Cloud** or **Premise**. You can read more information about these modes by clicking a tab below.

Cloud

Cloud mode provides a simple, effective mechanism for creating and managing agents. It automatically provisions some configuration objects, such as **DNs** and **Places**, to simplify Agent creation. Alternatively, if you want greater control over this process, select **Premise** in the **Agent Management** menu.

Creating an Agent

To create a new Agent, click **Add**.

[+] Show Procedure

Procedure: Creating an Agent

Purpose: To create an Agent in the **Agents** window while using the **Cloud** mode.

Steps

1. Click **Add**. The **Add Agent** window appears.
2. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from a list:

- User Information

- **User Name**—The name that this User should use to log into the environment. You must specify a value for this property, and that value must be unique within the Configuration Database.
- **First Name**—The first name of this User.
- **Last Name**—The last name of this User.
- **External ID**—This setting applies only if your environment is using external authentication, either LDAP or RADIUS. This may be the user name in the external authentication system. For LDAP, it might be a whole, or partial, LDAP URL corresponding to RFC 2255. For more information, refer to the [Framework External Authentication Reference Manual](#).

Important

The **External ID** field might be hidden if the **Hide External ID** check box is checked in the [System Preferences/Agent Management](#) menu.

- **Email**—The e-mail address of this User.
- **Password**—A password no longer than 64-characters that this User must use to log in to the environment. You cannot view the existing password.

Important

Passwords can be subject to format rules. Refer to the [Genesys 8.1 Security Deployment Guide](#) for more information.

- **Organization**—The folder in which the [Person object](#) for this User is stored.
- **Default Number**—The phone number of this User. This field is used to create the associated [DN](#), [Place](#), and [Agent Login](#) objects for this User. GAX uses existing objects, if available.
- Skills
 - You can add [Skills](#) to the Agent by:
 - Creating a Skill—Type the name of the new Skill in the **Quick Filter** field and click **+**

to create the Skill.

- Selecting an existing Skill—In the **Skills** section, select existing Skills from a list to add to the Agent. To select a Skill, click the check box beside the Skill and enter a numerical value in the **Rating** field.

Important

Since Agent Groups might be defined automatically based on a Skill (Virtual Agent Groups), the list of Agent Groups refreshes if you create a Skill.

- Agent Groups
 - You can add the Agent to an **Agent Group** by clicking the check box beside an item in the list.

3. Click **Save**.

Important

When adding an Agent in **Cloud** mode, GAX also makes the following configuration changes:

- Create **Agent Logins** in each **Switch**, using information that was entered in the **Default Number** field.
- Create the **User** object and associate **Agent Logins** to the User object. **Wrap-up Time** for each Agent Login is set to 0.

Other Actions

Once you select an Agent, you can:

- Edit Agent Information—Select an Agent and click **Edit** to edit Agent information. If you edit the **Default Number** field:
 - If this field is emptied, the Agent is disassociated from the current **Place** and its **Agent Login** objects are emptied.
 - If a new value is given, the agent is associated with a new **Place**, **DN**, and **Agent Login** that match the value. New objects are created, if they do not already exist. Existing objects are emptied and not deleted.
- Copy an Agent—Select an Agent and click **Clone** to make a copy of the Agent object.
- Change State—Select an Agent and click either **Enable** or **Disable** to change the state of an Agent.

Important

- Agents that are disabled appear grayed out in the list.
- When a User is either disabled or removed, Genesys Administrator Extension invalidates all sessions associated with this User. Upon the User's next action, he or she will be redirected to the login page.

To delete one or more Agents, click the check box beside the Agent(s) in the list and click **Delete**.

Important

When deleting an Agent, GAX does not delete the **DN**, **Place**, or **Agent Login** objects assigned to the Agent.

Premise

Premise mode provides you with more control over creating and managing agents. You can choose whether GAX automatically provisions some configuration objects, such as **DNs** and **Places**. Alternatively, if you do not want greater control over this process, select **Cloud** in the **Agent Management** menu.

Creating an Agent

To create a new Agent, click **Add**.

[+] Show Procedure

Procedure: Creating an Agent

Purpose: To create an Agent in the **Agents** window while using the **Premise** mode.

Steps

1. Click **Add**. The **Add Agent** window appears.
2. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from a list:

- User Information

- **User Name**—The name that this User should use to log into the environment. You must specify a value for this property, and that value must be unique within the Configuration Database.
- **First Name**—The first name of this User.
- **Last Name**—The last name of this User.
- **External ID**—This setting applies only if your environment is using external authentication, either LDAP or RADIUS. This may be the user name in the external authentication system. For LDAP, it might be a whole, or partial, LDAP URL corresponding to RFC 2255. For more information, refer to the [Framework External Authentication Reference Manual](#).

Important

The **External ID** field might be hidden if the **Hide External ID** check box is checked in the [System Preferences/Agent Management](#) menu.

- **Email**—The e-mail address of this User.
- **Password**—A password no longer than 64-characters that this User must use to log in to the environment. You cannot view the existing password.

Important

Passwords can be subject to format rules. Refer to the [Genesys 8.1 Security Deployment Guide](#) for more information.

- **Organization**—The folder in which the [Person object](#) for this User is stored.
 - **Place**—The [Place](#) assigned to this Agent. Click **Browse** to browse a list of Places in your environment. Once you select a Place, the **Number/DN** field is visible.
 - **Agent Logins**—The [Agent Login\(s\)](#) of this User. Click + to add an Agent Login.
 - **Number/DN**—The Number/DN of this User. This field appears once a Place is selected. Click + to add a DN.
- Add User Skills
 - You can add [Skills](#) to the Agent by:
 - Creating a Skill—Type the name of the new Skill in the **Quick Filter** field and click + to create the Skill.
 - Selecting an existing Skill—In the **Skills** section, select existing Skills from a list to add to the Agent. To select a Skill, click the check box beside the Skill and enter a

numerical value in the **Rating** field.

Important

Since Agent Groups might be defined automatically based on a Skill (Virtual Agent Groups), the list of Agent Groups refreshes if you create a Skill.

- Agent Groups
 - You can add the Agent to an **Agent Group** by clicking the check box beside an item in the list.
3. Click **Save**.

Other Actions

Once you select an Agent, you can:

- Edit Agent Information—Select an Agent and click **Edit** to edit Agent information.
- Copy an Agent—Select an Agent and click **Clone** to make a copy of the Agent object.
- Change State—Select an Agent and click either **Enable** or **Disable** to change the state of an Agent.

Important

- Agents that are disabled appear grayed out in the list.
- When a User is either disabled or removed, Genesys Administrator Extension invalidates all sessions associated with this User. Upon the User's next action, he or she will be redirected to the login page.

To delete one or more Agents, click the check box beside the Agent(s) in the list and click **Delete**.

Important

When deleting an Agent, GAX does not delete the **DN**, **Place**, or **Agent Login** objects assigned to the Agent.

Related Links

- [Skills](#)
- [Agent Groups](#)
- [Agent Groups](#)
- [Skills](#)
- [Access Groups](#)