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Genesys Administrator Extension Help

Genesys Administrator 8.5.0

12/29/2021

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Genesys Administrator Extension Help

Welcome to the Genesys Administrator Extension Help. This document introduces you to the GUI of Genesys Administrator Extension and describes concepts and procedures relevant to using this software in your contact center.

About Genesys Administrator Extension

Genesys Administrator Extension (GAX) introduces the next-generation user interface for Genesys that reduces both the overall operating costs and the time to deployment, by providing user-friendly interfaces that perform complex operations while at the same time preventing user error. This product is focused on the user experience for both Enterprise and Hosted customers, as well as by system administrators and line-of-business users.

The following are quick links to popular chapters and topics:

Core Features

- [Login and Password](#)
- [Setting Preferences](#)
- [Navigating the User Interface](#)

Configuration and Monitoring

- [Using the Agents Window](#)
- [Using Configuration Manager](#)
- [System Dashboard](#)

Solution Deployment

- [Installation Packages](#)
- [Solution Definitions](#)
- [Privileges](#)

Operational Parameter Management

- [Parameters](#)
- [Parameter Groups](#)
- [Parameter Group Templates](#)

Audio Resource Management

Audio Resource Management

Core Features

The pages in this chapter explain the core features of GAX. Select a topic below to learn more:

Login and Password

This page explains how to log in to GAX.

[Login and Password](#)

Preferences

This page explains how to set user-level and system-level preferences.

[Preferences](#)

User Interface

This page explains how to use the user interface.

[User Interface](#)

[Adding Links to the Navigation Bar](#)

Administration and Other Tasks

[Plug-in Management](#)

[Command Line Console](#)

[Bulk Change Sets](#)

Login and Password

Your user's first name is displayed in the top Header Bar of the Genesys Administrator Extension window.

You might be configured to set a new password the first time that you log in, or after a system administrator has reset your password.

Procedure: Setting a New Password

Steps

1. If you are configured to change your password the first time that you log in, or after your system administrator has reset your password, the **Change Password** dialog box is displayed.
2. Enter a new password in the **New Password** field.
3. Enter the same password in the **Confirm Password** field.
4. Click **OK**.

Inactivity Timeout

For security purposes, GAX might be configured to lock the application if you have not used the keyboard or mouse for a specified period of time. If inactivity-timeout occurs, all user input is blocked until you provide your login information to unlock the application. This feature ensures that no unauthorized user can access an unattended terminal that is running GAX.

Important

GAX employs a keep-alive strategy to prevent your session from timing out; this feature ensures that GAX maintains your session even if the inactivity-timeout feature locks the application and requires you to log in.

Related Links

- [Bulk Change Sets](#)
- [Adding Links to the Navigation Bar](#)
- [Login and Password](#)
- [Plug-In Management](#)
- [Using the Command Line Console \(CLC\)](#)

Preferences

Genesys Administrator Extension enables you to customize the interface to suit your personal preferences. These preferences take effect each time that you, or anyone using your login credentials, logs in to Genesys Administrator Extension from any browser.

To open the Preferences menu, click on your User name in the Header Bar. If configured, the menu displays the last time that this user account was logged into Genesys Administrator Extension.

Important

To use the last login time feature, you must ensure:

- The date and time of the local computer and the Management Framework computer are synchronized for the last login time to be accurate.
- The following lines are included in the Configuration Server `confserv.cfg` file (located in the installation directory of the machine that hosts Configuration Server):
 - `last-login = true`
 - `last-login-synchronization = true`

The **Preferences** menu contains the following options:

- **Log Out**—Log out of Genesys Administrator Extension.
- **User Preferences**
- **System Preferences**
- **Set Current Page As Home**—Set the currently displayed page as the home page for your User account. Once set, this page is displayed each time you log in.
- **Change Password**
- **About**—Click this option to view information about your installation. If your user account has the **Read Deployable and Undeployable IPs and SPDs** privilege, you can also view information about the Configuration Server to which you are connected.
- **Genesys Administrator**

Important

Settings in the **User Preferences** menu take precedence over settings in the **System Preferences** menu. For example, if the **System Preferences** language setting is English (US) and the **User Preferences** language setting is different, Genesys Administrator Extension will use the **User Preferences** language setting.

User Preferences

Advanced

In the **Advanced** window, you can specify the logging level for Genesys Administrator Extension JavaScript logging. You need to set this only if instructed to do so by support personnel. Use the drop-down list to set the level to one of the following:

- **Use system settings**—Use the same setting specified in the [System Preferences](#) menu.
- **Debug**—All (error, warning, info, and debug) logs are generated.
- **Info**—Error, warning, and info logs are generated.
- **Warning**—Only error and warning logs are generated.
- **Error**—Only error logs are generated.
- **Off**—Logging is disabled.

Important

These logs can be viewed in the browser console, and should not be confused with Tomcat logs.

Configuration Manager

In the **Configuration Manager** window, you can set the following display preferences for Configuration Manager:

- **Show DBID**—Shows the database ID when viewing details about a configuration object.
- **Show Recent**—On the Configuration Manager homepage, shows a list of recently accessed configuration objects. This list displays the configuration object type and name (for example, DNs , 80708), the Tenant to which the object belongs, and the last accessed date. Hover the mouse cursor over the item to see additional information, such as the specific date and time the object was accessed and its path. You can click on the item to access the object.
- **Maximum number of recent items to display**—Specifies how many items to display in the **Show Recent** list.

Locale

In the **Locale** window, you can set the following preferences by selecting the appropriate radio button:

Preference (field name)	Description
Language	The language to use in the GAX user interface. The default is Use system settings . You can add more language options by installing language pack plug-

Preference (field name)	Description
	<p>ins.</p> <p>Important A browser refresh is required for the changes to take effect.</p>
Date Format	The format in which dates are to be displayed in Genesys Administrator Extension. The default is Use system settings .
Start of Week	The day on which you consider the week to start. The default is Use system settings .
Number Format	The format in which numbers are to be displayed. The default is Use system settings .
Time Zone	The time zone in which times are displayed in GAX. The default is Use system settings .

System Preferences

Throttling

Genesys Administrator Extension enables you to throttle how many simultaneous changes are sent to Configuration Server. You can optimize these settings to help ensure consistent performance across your Genesys environment.

Change the **Bulk Update Batch Size** field to specify how many bulk updates for configuration objects can be executed simultaneously. The default value is 300. A value of 0 indicates that there will be no throttling of changes for configuration objects (all requested operations will be sent to Configuration Server without delay). You can enter 0 or any positive integer in this field.

Important

The maximum **Bulk Update Batch Size** for users who are entering from Genesys Administrator is 300.

Change the **Bulk Update Batch Timeout** field to specify how long (in seconds) Genesys Administrator Extension should wait between the execution of bulk-update operations. The default value is 1. A value of 0 indicates that there will be no delay between bulk-update operations. You can enter any value between 0 and 300 in this field.

Agent Management

In the **Agent Management** menu, you can choose whether the **Agents** window is displayed using the **Cloud** layout or **Premise** layout. For more information on the differences between these layouts, see **Agents**.

You can also set the following options for the **Add Agents** window:

- **Enforce User Name as E-mail Address**—If checked, GAX ensures information entered in the **User Name** field is in the form of an e-mail address.
- **Hide External ID**—If checked, GAX hides the **External ID** field when in the **Add Agent** window.
- **Default Access Group**—(Optional) The **Access Group** to which Agents are added when they are created in the **Agents** window. By default, this value is blank and Agents are not added to any Access Group.

Important

If you enter the name of an Access Group that does not exist, GAX cannot assign Agents to the group. You must create the Access Group first.

Locale

In the **Locale** menu, you can set the following preferences by selecting the appropriate radio button:

Preference (field name)	Description
Language	The language to use in the GAX user interface. The default is English (US) . You can add more language options by installing language pack plugins . Important A browser refresh is required for the changes to take effect.
Date Format	The format in which dates are to be displayed in Genesys Administrator Extension.
Start of Week	The day on which you consider the week to start, either Sunday or Monday.
Number Format	The format in which numbers are to be displayed.
Time Zone	The time zone in which times are displayed in GAX.

Change Password

You can change your password in the **Change Password** menu. You must have the **Modify User Password** privilege to change your password.

Genesys Administrator

Click this link to launch the Genesys Administrator application. This link is displayed if you are

configured to log in to Genesys Administrator, when you log in to Genesys Administrator Extension.

Related Links

- [Bulk Change Sets](#)
- [Adding Links to the Navigation Bar](#)
- [Login and Password](#)
- [Plug-In Management](#)
- [Using the Command Line Console \(CLC\)](#)

User Interface

The main screen of Genesys Administrator Extension consists of two parts, as follows:

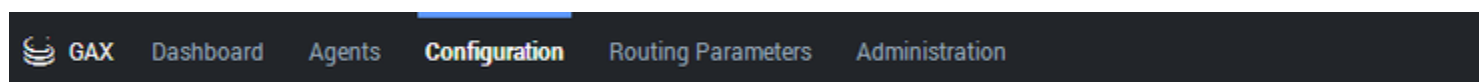
- The **header**, at the top of the screen, contains the main controls for the user interface.
- The **workspace**, under the header, is where you perform all the tasks in Genesys Administrator Extension.

Important

The workspace displays only those objects and options for which the logged-in user has **role privileges** and object permissions to access.

Header

The Header area is located at the top of the main screen of the interface and contains the main controls for the Genesys Administrator Extension (GAX) interface.



The Header Bar in Genesys Administrator Extension.

To the right, the Header Bar displays the name of the logged-in user and a link to this Help document. Click on the user name to access the **Preferences** menu.

To the left, the Header Bar contains the menu options for navigating GAX.

The following fixed headings are always displayed:

- **Dashboard**
- **Agents**
- **Configuration**
- **Routing Parameters**
- **Operations**

Click the **Home** button from any page in GAX to return to the home page.

Installing plug-ins will add submenu headings to the fixed headings. For example, installing the **ASD** plug-in adds **Solution Deployment** to the **Configuration** fixed heading. These submenu headings are listed in alphabetical order. If the plug-in does not specify a menu heading, it is added to the **Configuration** fixed heading.

Users can also add custom links to external websites. For more information, see [Adding Links to the Navigation Bar](#).

Important

The available submenu headings are determined by your access permissions and the plug-ins that are installed on your system. For example, the **Routing Parameters** submenu heading does not display if the **OPM** plug-in is not installed.

Workspace

The workspace, located below the header, is where you perform all tasks in Genesys Administrator Extension. It displays only those objects and options for which the logged-in user has **role privileges** and object permissions to access.

Lists of items in the workspace are organized by Tenant in multi-tenant environments. You can choose to view all Tenants, your default Tenant, or selected multiple Tenants by clicking **Tenant Directory**



You can sort lists by various criteria by clicking on column heads. You can also quickly find information by using the **Quick Filter** field.

Auditing History

For some objects, you can view an auditing history. Select the object, such as a solution definition, to view information about the object in a new panel. In the object information panel, click the **Related** button and select **History**. The **History** panel is displayed to the right. It contains information about the change history of the object.

Availability of Menu Items

Multiple instances of Genesys Administrator Extension might be connected to the same configuration environment, to support load balancing and high availability. Each instance of Genesys Administrator Extension might be configured to use different sets of functional modules. Not all modules might be available for every instance of Genesys Administrator Extension that is installed in your Genesys environment.

Related Links

- [Bulk Change Sets](#)
- [Adding Links to the Navigation Bar](#)
- [Login and Password](#)

- [Plug-In Management](#)
- [Using the Command Line Console \(CLC\)](#)

Adding Links to the Navigation Bar

Additional links can be added to the Navigation Bar by editing the configuration options of the default Application object.

Adding Custom Links

1. In Configuration Manager, click **Applications**. The **Applications** list displays.
2. Click the default client Application object in the list to edit the object.

Important

The default client Application name is defined in the options for the GAX Application object, in the **General** section. It is typically named **default**, but it might have another name in your environment.

3. Click the **Application Options** tab.
4. Click **Add**.
5. In the pop-up window, enter the following information:
 - **Section**—You must enter the following: `ga_preferences.navigation`
 - **Key**—You must enter the following: `categories`
 - **Value**—Enter the number of additional category items to add to the Navigation Bar. For example, to add one category item, set the value to 1.

Important

It is possible to enter 0 (zero), if you do not want to add additional category items to the Navigation Bar.

- Click **OK**.
6. Click **Add**.
 7. In the pop-up window, enter the following information:
 - **Section**—You must enter the following: `ga_preferences.navigation`
 - **Key**—You must enter the following: `items`
 - **Value**—Enter the number of additional links to add to the category item that you created in Step 6. For example, to add one link item, set the value to 1.

- Click **OK**.

Defining Category Items

For each category item, you must create an additional option that defines the parent category, an ID for the new category item, and a display name. Perform the following steps to define each category item.

1. Click **Add**.
2. In the pop-up window, enter the following information:
 - **Section**—You must enter the following: `ga_preferences.navigation_categories_0`
 - **Key**—You must enter the following: `category`
 - **Value**—Enter the name of the category to add to the Navigation Bar. For example: `custom`. You can also specify existing category items. For example, to add a menu item under the **Configuration** category item, enter `config`.
 - Click **OK**.
3. Click **Add**.
4. In the pop-up window, enter the following information:
 - **Section**—You must enter the following: `ga_preferences.navigation_categories_0`
 - **Key**—You must enter the following: `name`
 - **Value**—Enter an ID for the category to add to the Navigation Bar. For example: `custom`
 - Click **OK**.
5. Click **Add**.
6. In the pop-up window, enter the following information:
 - **Section**—You must enter the following: `ga_preferences.navigation_categories_0`
 - **Key**—You must enter the following: `title`
 - **Value**—Enter the name of the category to add to the Navigation Bar. For example: `Custom Links`
 - Click **OK**.

Important

Repeat the procedure above for additional category items. You must increment the **Section** name for each category item. For example, if you want to define three category items, the **Section** names are:

- `ga_preferences.navigation_categories_0`
- `ga_preferences.navigation_categories_1`

- `ga_preferences.navigation_categories_2`

Defining Link Items

For each link item, you must create an additional option that defines the parent category, privilege, title, and URL. Perform the following steps to define each link item.

1. Click **Add**.
2. In the pop-up window, enter the following information:
 - **Section**—You must enter the following: `ga_preferences.navigation_items_0`
 - **Key**—You must enter the following: `category`
 - **Value**—Enter the name of the category to which to add this link. For example: `custom`. You can also specify existing category items. For example, to add a link item under the **Configuration** category item, enter `config`.
 - Click **OK**.
3. Click **Add**.
4. In the pop-up window, enter the following information:
 - **Section**—You must enter the following: `ga_preferences.navigation_items_0`
 - **Key**—You must enter the following: `privilege`
 - **Value**—Enter the name of the privilege that dictates if the item is shown to a user. For example: `CUSTOM_LINK`

Important

Refer to [Assigned Privileges](#) to learn more about assigning privileges.

- Click **OK**.
5. Click **Add**.
 6. In the pop-up window, enter the following information:
 - **Section**—You must enter the following: `ga_preferences.navigation_items_0`
 - **Key**—You must enter the following: `title`
 - **Value**—Enter the name of the link item to add to the Navigation Bar. For example: `Genesys`
 - Click **OK**.

7. Click **Add**.
8. In the pop-up window, enter the following information:
 - **Section**—You must enter the following: `ga_preferences.navigation_items_0`
 - **Key**—You must enter the following: `url`
 - **Value**—Enter the URL to which the link item points. For example: `http://www.genesys.com`
 - Click **OK**.

Important

Repeat the procedure above for additional link items. You must increment the **Section** name for each link item. For example, if you want to define three link items, the **Section** names are:

- `ga_preferences.navigation_items_0`
 - `ga_preferences.navigation_items_1`
 - `ga_preferences.navigation_items_2`
-

Related Links

- [Bulk Change Sets](#)
- [Adding Links to the Navigation Bar](#)
- [Login and Password](#)
- [Plug-In Management](#)
- [Using the Command Line Console \(CLC\)](#)

Plug-In Management

This panel enables you to view information about the plug-ins that are installed in your environment. It also enables you to modify the settings of those plug-ins.

Important

Plug-ins can be managed on the local node only when the GAX Application object is of type:

- **Generic Genesys Server** (when using Management Framework releases 8.1.0 or lower).
- **Generic Administrator Server** (when using Management Framework releases 8.1.1 or higher).

The **Administrator Applications** panel lists the applications that are installed in your environment and the host upon which the applications are stored.

Install plug-ins by using the same process as for installing installation packages. For more information, see [Uploading Installation Packages](#).

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** panel. In this panel, select the check box beside each Tenant that you want to select. Use the **Quick Filter** field in this panel to filter the Tenant list.

Click an application to view details in a new panel that opens to the right. The new panel lists the name of the plug-in and its host. Click **Related** and select **Plug-ins** to view additional details:

- **Name**—The name of the plug-in
- **Version**—The version number of the plug-in
- **Language**—The language used by the user interface of the plug-in
- **Provider**—The name of the company or user that provided the plug-in
- **State**—Indicates whether the plug-in is **Enabled** or **Disabled**

Click the name of a plug-in to view additional details about the plug-in in a panel that opens to the right. From this panel, you can perform the following actions:

- [Enable or disable the plug-in](#)
- [Modify the settings of the plug-in](#)

Procedure: Enabling or Disabling a Plug-In

Steps

1. Select an application in the **Administrator Applications** list.
2. A new panel opens to the right. Click **Related** and select **Plug-ins** to view which plug-ins are associated with the application.
3. A new panel opens to the right. Select a plug-in in the **Plug-in Info** list.
4. A new panel opens to the right. Perform one of the following actions:
 - Click **Enable** to enable the plug-in.
 - Click **Disable** to disable the plug-in.

Procedure: Modifying the Settings of a Plug-In

Steps

1. Select an application in the **Administrator Applications** list.
2. A new panel opens to the right. Click **Related** and select **Plug-ins** to view which plug-ins are associated with the application.
3. A new panel opens to the right. Select a plug-in in the **Plug-in Info** list.
4. A new panel opens to the right. Click **Related** and select **Plug-in Options**.
5. A new panel opens to the right. The panel displays the options that are associated with the plug-in. Click an option to view more information about the option in a separate panel that opens to the right.
6. When you have finished modifying the option(s), perform one of the following actions:
 - Click **Save** to save your changes.
 - Click **Cancel** to discard your changes.

Important

You can only modify existing options for each plug-in from the **Plug-in Management** panels. You cannot create new options for the plug-ins.

Related Links

- [Bulk Change Sets](#)
- [Adding Links to the Navigation Bar](#)
- [Login and Password](#)
- [Plug-In Management](#)
- [Using the Command Line Console \(CLC\)](#)

Using the Command Line Console (CLC)

The Command Line Console (CLC) enables administrators to use the command line to execute certain GAX functions on **solution definitions (SPDs)** and **installation packages (IPs)**. For example, you might use the CLC to silently deploy SPDs onto remote hosts.

You must be able to access the operating system's command-line interface to use the CLC. If you are not on the GAX host machine, you must have the CLC tool (**gaxclc.jar**) available on the local machine.

To access CLC's embedded Help file, execute one of the following commands:

```
java -jar gaxclc.jar help
```

```
java -jar gaxclc.jar ?
```

Important

As you execute commands with CLC, a log file is generated in the same location as where the tool is executed.

Structure

CLC supports commands that use the following structure:

```
java -jar gaxclc.jar -u:user -p:password -s -h:<host>:<port> <function> <operation> <args>
```

In the above example:

- `-u:user` is the user name to log in to Configuration Server.
- `-p:password` is the password to log in to Configuration Server. CLC assumes there is no password if this flag does not specify a value.
- `-s` instructs CLC to use a secure *https* connection to the GAX server. If this flag is not specified, CLC uses *http*.
- `-h:<host>:<port>` specifies the host and port of the GAX server. If this flag is not specified, CLC uses the following value: `-h:localhost:8080`.
- `<function>` can be either `ip` or `spd`.
- `<operation>` specifies the operation to be executed. The valid values for this flag are specific to the function you specified in the previous step (`ip` or `spd`).
- `<args>` specifies the operation arguments. The valid values for this flag are specific to the `<function>` and `<operation>` parameters you specified in the previous steps.

The following is an example of a CLC command:


```
java -jar gaxclc.jar -u:default -p:password -h:localhost:8080 spd execute 10054 1 "C:/GAX/input.txt"
```

SPDs

CLC supports the following operations for SPDs:

- add
- query
- querybyid
- execute
- delete
- encrypt (see execute tab)

add

add

Overview

This operation adds an SPD to the GAX database. If the SPD already exists, as determined by the name and version in the SPD XML, this operation replaces the existing SPD.

If successful, the operation returns the ID of the added SPD.

Format

```
java -jar gaxclc.jar -u:user -p:password -s -h:<host>:<port> spd add "file path"
```

- "file path"—The path to the XML file.

Example

```
java -jar gaxclc.jar -u:default -p:password spd add "c:\GAX\newSpd.xml"
```

query

query

Overview

This operation queries all SPDs and displays a table that lists the following for each SPD:

- ID number
- Name
- Version
- Tenant DBID

The following is an example:

```
10054 gvp 8.1.5 1
10060 genesysOne 8.1.5 1
10060 eServices 8.1.5 1
```

Format

```
java -jar gaxclc.jar -u:user -p:password -s -h:<host>:<port> spd query
```

Example

```
java -jar gaxclc.jar -u:default -p:password -s -h:132.45.43.45:443 spd query
```

querybyid

querybyid

Overview

This operation queries an SPD by its ID. If the SPD does not exist, the operation fails.

If successful, the operation displays a table that lists the following details about the SPD:

- Profile ID
- Name

For example:

```
1 Install
```

Format

```
java -jar gaxclc.jar -u:user -p:password -s -h:<host>:<port> spd query SPDID
```

- SPDID—The ID of the SPD that is being queried.

Example

```
java -jar gaxclc.jar -u:default -p:password -h:132.45.43.45:8080 spd query 4374
```

execute

execute

Overview

This operation executes a SPD.

Format

```
java -jar gaxclc.jar -u:user -p:password -s -h:<host>:<port> spd execute SPDID profileName|  
-profileID:profileID|-profileName:profileName -encrypted "input file"
```

- SPDID—The ID of the SPD to be executed.
- profileName|-profileID:profileID|-profileName:profileName—The SPD profile to be executed.

Important

If no flag is specified, then profileName is assumed as the SPD profile to be executed.

- -encrypted—If specified, indicates if the input file is encrypted.

[+] Show Usage

CLC provides encryption support for input files that include sensitive data such as passwords.

Format:

```
java -jar gaxclc.jar -u:user -p:password -s -h:<host>:<port> spd encrypt "input file path"  
"encrypted output file path"
```

The encrypted input file is stored in the location specified by "encrypted output file path". If the file already exists at this location, it is overwritten.

Example:

```
java -jar gaxclc.jar -u:default -p:password spd -encrypted "c:\GAX\input.txt" "c:\GAX\
```

encrypted.txt"

```
java -jar gaxclc.jar -u:default -p:password spd -encrypted "input.txt" "encrypted.txt"
```

- "input file"—Specifies the input file that contains SPD parameters. If -encrypted is set, the input file is encrypted.

The input file must be in JSONObject format and include SPD parameters for a specific profile. The file must be encoded in UTF-8 format.

[+] Show usage

The input file must be in JSONObject format and include SPD parameters for a specific profile. The file must be encoded in UTF-8 format.

string

The input structure for a *string* type is described below:

```
{
  "Dialog name" : {
    "Input name" : "string"
  }
}
```

Example

SPD Profile

```
<profile name="Install">
  <dialog step="Step1">
    <input name="NAME_PARAM1" title="PERSON NAME" default="birit" type="string"
required="true">
      <description>Please enter the person name</description>
    </input>
  </dialog>
  <dialog step="Step2">
    <input name="NAME_PARAM2" title="PERSON NAME" default="birit" type="string"
required="true">
      <description>Please enter the person name</description>
    </input>
  </dialog>
  <execution>
    <script>
      log('string test' );
    </script>
  </execution>
</profile>
```

Input File for Install Profile

```
{
  "Step1" : {
    "NAME_PARAM1" : "Kate"
  },
  "Step2" : {
    "NAME_PARAM2" : "John"
  }
}
```

Boolean

The input structure for a *boolean* type is described below:

```
{
  "Dialog name" : {
    "Input name" : true/false
  }
}
```

Example**SPD Profile**

```
<profile name="Install">
  <dialog step="Step1">
    <input name="STATUS" title="status" type="boolean" required="true">
      <description>status field</description>
    </input>
  </dialog>
  <execution>
    <script>
      log('boolean test');
    </script>
  </execution>
</profile>
```

Input File for Install Profile

```
{
  "Step1" : {
    "STATUS" : true
  }
}
```

Integer

The input structure for an *integer* type is described below:

```
{
  "Dialog name" : {
    "Input name" : <integer>
  }
}
```

Example

SPD Profile

```
<profile name="Install">
  <dialog step="Step1">
    <input name="NUMBER" title="number" type="integer" required="true">
      <description>number field</description>
    </input>
  </dialog>
  <execution>
    <script>
      log('number test');
    </script>
  </execution>
</profile>
```

Input File for Install Profile

```
{
  "Step1" : {
    "NUMBER" : 132
  }
}
```

Password

The input structure for a *password* type is described below:

```
{
```

```

    "Dialog name" : {
      "Input name" : "password"
    }
  }
}

```

Important

Input files that include sensitive data such as passwords should be encrypted using the SPD encrypt operation.

Example

SPD Profile

```

<profile name="Install">
  <dialog step="Step1">
    <input name="PASSWORD" title="password" type="password" required="true">
      <description>password field</description>
    </input>
  </dialog>
  <execution>
    <script>
      log('password test');
    </script>
  </execution>
</profile>

```

Input File for Install Profile

```

{
  "Step1" : {
    "PASSWORD" : "xyz9846gdkjg"
  }
}

```

SelectOne

The input structure for a *selectOne* type with an **<objectselect>** tag is described bellow:

```

{
  "Dialog name" : {
    "Input name" : {

```

```

        "objectselect" : {
            "filter" : [{
                "value" : "filter value",
                "name" : "filter name"
            }
            ]
        }
    }
}

```

Important

CLC intersects (*AND*) filters defined in the SPD file and input file for a *selectOne* input. The filter criteria should be different in an SPD input file and filter names should differ in the same filter definition.

Example

SPD Profile

```

<profile name="Install">
  <dialog step="Step1">
    <input name="APP_OBJ_SELECT_ONE" title="Application Name" hidden="false"
type="selectOne" default="">
      <description>select application</description>
      <objectselect>
        <filter value="CfgApplication" name="type"/>
      </objectselect>
    </input>
  </dialog>
  <execution>
    <script>
      log('test select one' );
    </script>
  </execution>

```

Input File for Install Profile

```

{
  "Step1" : {
    "APP_OBJ_SELECT_ONE" : {
      "objectselect" : {
        "filter" : [{
          "value" : "SIP_lrm26",
          "name" : "name"
        }
        ]
      }
    }
  }
}

```



```

    }
  }
}

```

SelectMultiple

The input structure for a *selectMultiple* type with **<objectselect>** tag is described below:

```

{
  "Dialog name" : {
    "Input name" : {
      "objectselect" : {
        "filter" : [{
          "value" : "filter value",
          "name" : "filter name"
        }
      ]
    }
  }
}

```

Filters defined in an SPD input file are joined in union (*OR*) and then intersect (*AND*) with filters defined in an SPD file for a *selectMultiple* input.

Example

SPD Profile

```

<profile name="Install">
  <dialog step="Step1">
    <input name="APP_OBJ_SELECT_MULTIPLE" title="Application Name" hidden="false"
type="selectMultiple" default="">
      <description>select application</description>
      <objectselect>
        <filter value="CfgApplication" name="type"/>
      </objectselect>
    </input>
  </dialog>
  <execution>
    <script>
      log('test select multiple' );
    </script>
  </execution>

```

Input File for Install Profile

```
{
  "Step1" : {
    "APP_OBJ_SELECT_MULTIPLE" : {
      "objectselect" : {
        "filter" : [{
          "value" : "SIP_lrm26",
          "name" : "name"
        },{
          "value" : "SIP_lrm27",
          "name" : "name"
        }
      ]
    }
  }
}
```

The operation returns two applications named **SIP_lrm26** and **SIP_lrm27**.

Selection Tag

The input structure for a *selectOne/selectMultiple/boolean* type with **<selection>** tag is described below:

```
{
  "Dialog name" : {
    "Input name" : {
      "selection" : {
        "option" : [{
parameter",
          "value" : "option value assigned to the input
          "name" : "option name is displayed in UI"
        }
      ]
    }
  }
}
```

CLC selects options defined in the SPD input file. Multiple options can be specified only for the *selectMultiple* input type.

Example

SPD Profile

```
<profile name="Install">
```

```

<dialog step="Application Parameters">
  <input name="DATA_MODEL" title="Binary Version (32-bit or 64-bit)" default="64"
type="selectOne" required="true">
    <description>This parameter defines the 32-bit or the 64-bit version of the
binary to be deployed. </description>
    <selection>
      <option name="32" value="32"/>
      <option name="64" value="64"/>
    </selection>
  </input>
</dialog>
<execution>
  <script>
    log('test selection support' );
  </script>
</execution>

```

Input File for Install Profile

```

{
  "Application Parameters" : {
    "DATA_MODEL" : {
      "selection" : {
        "option" : [{
          "value" : "64",
          "name" : "64"
        }
      ]
    }
  }
}

```

Important

- If the input file does not specify a value for a SPD parameter, the value defined in the **default** attribute of the input element will be used.
- If an SPD input element has the **required** attribute set to `true`, but there is no corresponding input value that is supplied in either the SPD (as a default) or in the input file, then the SPD execution fails.
- If an SPD input element has the **readonly** attribute value set to `true`, then the value in the **default** attribute value is used for the execution, if defined. If the **readonly** attribute value is set to `true`, **required** is set to `false`, and the **default** attribute is not defined, then the following logic is used for input value determination:
 1. For the *boolean* input type, the input value is set to `false`.
 2. For the *string* and *password* input types, the input value is set to `""`.

3. For the *integer* input type, the input is not propagated.

- If a dialog **cond** attribute value evaluates to false, the dialog is skipped by the CLC tool.
Example:

```
<dialog step="Role input" cond="false">
  <input name="ROLE" title="Role" hidden="false" type="selectOne"
required="true">
    <description>Please indicate the role</description>
    <objectselect>
      <filter value="CfgRole" name="type"/>
    </objectselect>
  </input>
</dialog>
```

Example

```
java -jar gaxclc.jar -u:default -p:password -s -h:localhost:8080 spd execute 10054
-profileID:1 "C:/GAX/input.txt"
```

```
java -jar gaxclc.jar -u:default -p:password -h:localhost:8080 spd execute 10054
-profileName:"Install profile" "C:/GAX/input.txt"
```

```
java -jar gaxclc.jar -u:default -p:password -s -h:localhost:8080 spd execute 10054 1
-encrypted "C:/GAX/encryptedinput.txt"
```

delete

delete

Overview

This operation deletes an SPD. If SPD does not exist, the operation fails.

Format

```
java -jar gaxclc.jar -u:user -p:password -s -h:<host>:<port> spd delete SPDID
```

- SPDID—The ID of the SPD to be deleted.

Example

```
java -jar gaxclc.jar -u:default -p:password spd delete 5436
```

IPs

CLC supports the following operations for the `ip` function:

- add
- query
- querybyid
- delete

add

add

Overview

This operation adds an IP (packaged as a .zip file) to the GAX database. If the IP already exists, it is replaced.

If successful, the operation displays the ID of the IP.

Important

The .zip file must contain the IP and the templates folder for the IP.

Format

```
java -jar gaxclc.jar -u:user -p:password -s -h:<host>:<port> ip add "path to IP zip file"
```

Example

```
java -jar gaxclc.jar -u:default -p:password ip add "C:\GAX\TESTS\zippedIpUpload\PRODUCTION\IP_TSRvSIP64_18100079b1_ENU_windows.zip"
```

query

query

Overview

This operation queries all IPs and displays a table that lists the following details for each IP:

- ID number
- Name
- Version
- OS
- Locale
- Status

Format

```
java -jar gaxclc.jar -u:user -p:password -s -h:<host>:<port> ip query
```

Example

```
java -jar gaxclc.jar -u:default -p:password -s -h:132.45.43.45:443 ip query
```

querybyid

querybyid

Overview

This operation queries an IP by its ID and displays a table that lists the following details:

- ID number
 - Name
 - Version
 - OS
 - Locale
 - Status
-

Format

```
java -jar gaxclc.jar -u:user -p:password -s -h:<host>:<port> ip query IPID
```

- IPID—The ID of the IP to query.

Example

```
java -jar gaxclc.jar -u:default -p:password -h:132.45.43.45:8080 ip query 543
```

delete

delete

Overview

This operation deletes an IP.

Format

```
java -jar gaxclc.jar -u:user -p:password -s -h:<host>:<port> ip delete IPID
```

- IPID—The ID of the IP to delete.

Example

```
java -jar gaxclc.jar -u:default -p:password ip delete 547
```

Related Links

- [Bulk Change Sets](#)
- [Adding Links to the Navigation Bar](#)
- [Login and Password](#)
- [Plug-In Management](#)
- [Using the Command Line Console \(CLC\)](#)

Bulk Change Sets

Genesys Administrator Extension allows you to perform bulk changes to users. For example, you can create a Bulk Change Set to add or remove multiple users from your system in one action, or to add or remove multiple skills, or both.

Display Options

The **Bulk Change Sets** panel lists all the Bulk Change Sets in your environment that either have not been executed yet or have failed during execution. To see a list of successful Bulk Change Sets, see the **Completed Bulk Changes** panel. Configuration Object Management 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 the **Tenant Filter** button to open the **Tenant filter** panel. In this panel, click the check box beside each tenants 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.

Details

The **Bulk Change Sets** list displays the following information:

- **Change Set Name**—The name of the Bulk Change Set.
 - **Creator**—The name of the user that created the Bulk Change Set.
 - **Creation Date**—The date on which the Bulk Change Set was created.
 - **Last Modified Date**—The date on which the Bulk Change Set was last modified.
 - **Change Set Status**—This can be one of the following:
 - **Empty**—No data has yet been entered in the Bulk Change Set.
 - **Incomplete**—Only partial data has been entered in the Bulk Change Set.
 - **Ready to Execute**—The Bulk Change Set is ready to be executed.
 - **Execution**—This can be one of the following:
 - **Not Executed**—The Bulk Change Set has not been executed yet.
 - **Completed**—The Bulk Change Set has been executed.
 - **Failed**—The execution of the Bulk Change Set failed.
 - **Progress**—During execution, this field displays a progress bar for the Bulk Change Set.
-

- **Executed by Tenant**—Indicates which tenant last executed the Bulk Change Set.
- **Executed by User**—Indicates which user last executed the Bulk Change Set.
- **Previously Executed Date**—Indicates the date and time at which the Bulk Change Set was last executed.

Click a Bulk Change Set in the list to view more information about the item. The following fields are displayed:

- **Change Set Name**—The name of the Bulk Change Set
- **Deletions**—The objects that will be deleted by the Bulk Change Set
- **Additions**—The objects that will be added by the Bulk Change Set
- **Updates**—The objects that will be updated by the Bulk Change Set

Important

A **Solution Definition file** is created when a Bulk Change Set is executed. See the **Completed Bulk Changes** panel for instructions on how to download the Solution Definition file.

Procedures

You can perform the following actions from the **Bulk Change Set** panels:

Creating Bulk Change Sets

[+] Click here to reveal procedure

Procedure: Creating Bulk Change Sets

Steps

1. In the **Bulk Change Sets** panel, click +.
2. Enter information in the following fields:
 - **Change Set Name**—The name of the Bulk Change Set.

Important

The **Change Set Name** field must be unique in the environment.

- **Deletions**—Enter any Configuration Object that is to be deleted with the Bulk Change Set. If there are deletions, perform the following actions. Otherwise, move on to the next step.
 - a. Click **Add**. The **New Deletion Item** panel appears to the right.
 - b. Click **Browse**. A list of Configuration Objects appears to the right.
 - c. Objects that appear in the list are determined by the currently selected category. Click the drop-down menu at the top of the panel to change the category type.
 - d. You can use the **Quick Filter** or **Tenant Filter** field to find specific objects. Click the checkbox beside an object to add the object to the Deletions list.
 - e. The name of the object appears in the **New Deletion Item** panel. Click **OK** to add it to the Deletions list.
 - f. Repeat the steps in this list to add more objects to the Deletions list.
- **Additions**—Enter any Configuration Object that is to be added with the Bulk Change Set. If there are additions, perform the following actions. Otherwise, move on to the next step.
 - a. Click **Add**. A new panel appears to the right.
 - b. Click **Browse**. A list of Configuration Objects appears to the right.
 - c. Select an object type in the **Type** drop-down menu.
 - d. Click **Browse** to select an object to use as a template. A panel opens to the right. Click the checkbox beside an object to select it.

Important

When an object is used as a template, all aspects of the template object are used for the Addition objects, including connections and permissions.

- e. Click **Next**.
- f. In the **Number to Create** field, enter the number of objects to create with the template. The value must be an integer between 1 and 100.
- g. In the **CSV File** field, perform the following actions:
 - Click **Choose File** to select a CSV file from which to acquire the new data.
 - In the window that opens, navigate to the location in which the CSV file is stored. Select the CSV file to use.

Important

The following is an example of an acceptable CSV file format for creating User (Person) objects. Only the **employeeid** and **username** fields are mandatory. All other fields are optional and can be omitted, in which case GAX provides default values that are copied from the template object.

employeeid, folderid, tenantdbid, state, lastname, firstname, password, username, skilllevels

```
bulkuser1,105,1, CFGEnabled, Tamblyn, Ericm, password, bulkuser1, "{skilldbid:102, level:10},{skilldbid:106, level:6}"
```

```
bulkuser2,106,2, CFGEnabled, Tamblyn, Ericm, password, bulkuser1, "{skilldbid:102, level:10},{skilldbid:107, level:7}"
```

- Click **Open**.
- h. Click **Finish**.
- **Updates**—Enter any update that is to be performed on Configuration Objects with the Bulk Change Set. If there are updates, perform the following actions. Otherwise, move on to the next step.
 - a. Click **Add**. The **New Update Item** panel appears to the right.
 - b. Click **Browse**. A list of Configuration Objects appears to the right.
 - c. Objects that appear in the list are determined by the currently selected category. Click the drop-down menu at the top of the panel to change the category type.
 - d. You can use the **Quick Filter** or **Tenant Filter** field to find specific objects. Click the check box beside an object to add it to the Updates list.
 - e. The name of the object appears in the **New Update Item** panel. Click **OK** to add it to the Update list.
 - f. Repeat the steps in this list to add more objects to the Update list.
- 3. In the Bulk Change Set creation panel, you can reorder the objects within the **Deletions**, **Additions**, or **Updates** lists.

Important

Bulk Change Set actions are executed in the following order : Deletions, Additions, and then Updates.

4. Click **Save** to save the Bulk Change Set.

Important

This action does not execute the Bulk Change Set. To execute the Bulk Change set, follow the instructions for [executing a Bulk Change Set](#).

Deleting Bulk Change Sets

[+] Click here to reveal procedure

Procedure: Deleting Bulk Change Sets

Steps

1. Click the check box beside each Bulk Change Set that is to be deleted.
2. Click **Delete**.
3. A dialog box displays to confirm the action:
 - Click **OK** to continue.
 - Click **Cancel** to discard the action.

Executing Bulk Change Sets

[+] Click here to reveal procedure

Procedure: Executing Bulk Change Sets

Steps

1. Select a Bulk Change Set in the **Bulk Change Sets** list. A new panel with more information about the Bulk Change Set opens to the right.
2. You can choose to validate the Bulk Change Set before execution. Click **Validate** to ensure that the Bulk Change Set is ready to be executed.

Important

The **Validate** button is useful in determining whether the Bulk Change Set is ready to be executed or whether it is dependent on other Bulk Change Sets to be executed first. For example: Some Additions depend on other objects to be added. You might want to update several Agents with a new Skill. However, the Skill must be created first, before the Agents can be updated. In this scenario, clicking **Validate** will verify that the Skill has been created.

3. Click **Execute** to execute the Bulk Change Set. You can view the status of the Bulk Change Set in the **Completed Bulk Changes** panel.

Important

A **Solution Definition file** is created when a Bulk Change Set is executed. See the **Completed Bulk Changes** panel for instructions on how to download the Solution Definition file.

Completed Bulk Changes

The **Completed Bulk Changes** panel lists the successfully executed bulk changes in your environment. The **Completed Bulk Changes** list displays the following information:

- **Change Set Name**—The name of the Bulk Change Set
- **Creation Date**—The date on which the Bulk Change Set was created
- **Executed by Tenant**—Indicates which Tenant last executed the Bulk Change Set
- **Executed by User**—Indicates which user last executed the Bulk Change Set
- **Started**—Indicates the date and time at which the execution of the Bulk Change Set was started
- **Ended**—Indicates the date and time at which the execution of the Bulk Change Set was completed

To delete records of Bulk Change Sets, click the check box beside each Bulk Change Set that is to be deleted, and then click **Delete**.

Important

This action does not delete the Bulk Change Set; it deletes the record of the Bulk Change Set.

Click a Bulk Change Set in the list to view more information about the item. The following fields are displayed:

- **Change Set Name**—The name of the Bulk Change Set
- **Deletions**—The objects that were deleted by the Bulk Change Set
- **Additions**—The objects that were added by the Bulk Change Set
- **Updates**—The objects that were updated by the Bulk Change Set

Click **Export** to download the solution definition file that was used during execution of the Bulk Change Set.

Click **Delete** to delete the record of the Bulk Change Set.

Important

This action does not delete the Bulk Change Set; it deletes the record of the Bulk Change Set.

Related Links

- [Bulk Change Sets](#)
- [Adding Links to the Navigation Bar](#)
- [Login and Password](#)
- [Plug-In Management](#)
- [Using the Command Line Console \(CLC\)](#)

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](#)

Configuration Manager

Configuration Manager enables you to create and manage system-level configuration objects such as Alarm Conditions, Business Attributes, Hosts, and more.

Overview

Configuration Manager Overview

The **Configuration Manager** page is a central location for viewing and managing the configuration objects used by your system. Genesys Administrator Extension can manage objects in single-Tenant and multi-Tenant configurations.

Configuration objects, also known as Configuration Database objects, contain the data that Genesys applications and solutions require to operate in a particular environment. These objects are all contained in the Configuration Database.

Configuration Manager lists these objects by type. For example, configuration objects related to outbound campaigns are listed under the **Outbound** heading.

Click on a configuration object type to view a list of the related configuration objects on your system. From this list, you can edit or delete the existing configuration objects, or you can create a new configuration object.

To view and manage configuration objects for a specific Tenant, click the cube icon and enter the name of the Tenant in the **Tenant Directory** field. By default, Configuration Manager lists configuration objects for the Tenant to which your user account belongs. When viewing objects by Tenant, if you choose to create a new object, that object is created in the directory for that Tenant.

Important

The **Tenant Directory** field is not shown in a single-Tenant environment.

Click on a topic below to learn more about Configuration Manager.

Object Hierarchy

[+] Click here to reveal section

In Genesys Administrator Extension, objects are stored in folders, usually with one object type per folder.

To help you better manage your configuration environment, you can create a hierarchy by manually creating any combination of the following:

- Folders and subfolders—A folder contains objects of one type. For example, for Host objects, you might choose to create subfolders that group hosts by location.
- Business Units/Sites—Unlike folders, Business Units and Sites can contain objects of different types. For example, all configuration objects related to a specific site for your business can be grouped into a Site, which then contains configuration objects within folders and subfolders.

In addition, the following objects include their parent objects as part of their hierarchy:

- Campaign Groups—Hierarchy includes Campaigns.
- IVR Ports—Hierarchy includes IVRs.
- Business Attribute Values—Hierarchy includes Business Attributes.
- Agent Logins—Hierarchy includes Switches.
- DNS—Hierarchy includes Switches.

Genesys Administrator Extension displays a navigation path (a set of breadcrumbs) that shows you where the displayed objects reside in your hierarchy. This path appears with all lists of objects, and is located directly above the list. You can click any element of this path to go quickly to that element.

Some object types might only exist under the root tenant or a Business Unit/Site. If you are viewing objects by Tenant, you might not see the following objects:

- Alarm Conditions
- Application Templates
- Applications
- Hosts
- Solutions
- Switching Offices

Importing/Exporting Data

[+] [Click here to reveal section](#)

Most configuration objects allow you to import and export data, such as configuration options, by clicking **More** and selecting **Import** or **Export**. Genesys Administrator Extension uses the CFG/CONF file formats.

Refer to the File Formats tab, above, for more information on acceptable file formats for import.

Required Permissions

[+] [Click here to reveal section](#)

The minimum permissions required to perform a task in Genesys Administrator Extension depend on

the task. For more information about permissions, see the Permissions tab, above.

You must also be granted appropriate **Role privileges** to perform specific tasks on an object or group of objects.

Permission	Description	Prerequisites
Read	<ul style="list-style-type: none"> To view a particular object, you must have Read permission for that object. In Configuration Manager, you can view the object type. If you do not have Read permission for the object, you cannot see it in Configuration Manager. In list views, you can view the following button: Edit. You can click on an object to view its details. 	None
Create	<ul style="list-style-type: none"> To create an object under a particular folder, you must have Create permission for that folder. The person who creates an object receives Full Control permissions for that object. Other accounts have the same access permissions for a newly created object as they do for the folder in which the object is created. In list views, you can view the following buttons: New, Clone, and Move To. In object detail views, you can view the following buttons: Clone and Move to. You can also view the following tabs: Options, Permissions, and Dependencies. 	Read
Update	<ul style="list-style-type: none"> To modify a particular object, you must have Update permission for that object. In list views, you can view the following button: Enable or Disable. 	Read

Permission	Description	Prerequisites
	<ul style="list-style-type: none"> In object detail views, you can view the following buttons: Enable or Disable, Save, and Apply. 	
Delete	<ul style="list-style-type: none"> To delete a particular object, you must have Delete permission for that object. In list views, you can view the following button: Delete. In object detail views, you can view the following button: Delete. 	Read

Manipulating Multiple Objects

[+] Click here to reveal section

Genesys Administrator Extension uses **Bulk Change Sets** to manipulate several objects at once. For example, you can use Bulk Change Sets to add and/or remove multiple users at once. You can use Bulk Change Sets to replicate the wizard functionality in Genesys Administrator.

Naming Conventions

[+] Click here to reveal section

Because most objects in the Configuration Database mirror physical objects in your contact center (for example, switches, agents, and installed applications), this document uses an initial capital letter for Configuration Database objects. For example, the word switch appears in lowercase when it refers to a physical switch in your contact center, but it is capitalized when it refers to the configuration object that mirrors your physical switch. Similarly, the word application appears in lowercase when it refers to a physical installation in your contact center, but it is capitalized when it refers to the configuration object that mirrors the installed program.

Common Properties

Common Object Properties

All objects have the following configuration properties and elements:

- Name**—Names uniquely identify objects within a certain range. Therefore, the name, which can be up

to 255 characters, is a required parameter for most types of objects. The exceptions are:

- **DNs and Agent Logins**—Their unique numbers and codes identify them within a **Switch**.
- **IVR Ports**—Their unique port numbers identify them within an **IVR**.

The way you name objects in your environment is important. Consistent and sensible naming conventions make your configuration environment easier to understand and faster to browse, leading to a more maintainable and usable configuration.

Important

Although Genesys Administrator Extension supports the full character set in object names, the use of certain characters can cause problems in the behavior of other Genesys applications. Therefore, avoid spaces, dashes, periods, or special characters in object names. Consider using underscores where you might normally use spaces or dashes.

The names you set for some types of objects must match the names of the entities that those objects represent elsewhere in an environment. For example, the names of Hosts must match the names given to the computers they represent in the data network environment.

- **State Enabled**—If checked, indicates that the entity represented by an object is in regular operating condition and can be used without any restrictions. If not checked, indicates that the entity represented by an object is being used in a non-production environment. Customer interactions cannot be directed to this target, even if operating information indicates that this object is available.

Disabling a folder or an object that is a parent to other objects also disables all objects within the folder or all child objects of that parent object.

For example:

- Disabling a **Switch** disables all **DNs** and **Agent Logins** defined within this Switch.
- Disabling an Agent Group folder disables all **Agent Groups** configured within this folder.

However, if you disable a group of objects (for example, an Agent Group), the individual members of this group (in this example, Agents) remain enabled.

Permissions

Permissions

The **Permissions** tab 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 8.1 Security Deployment Guide](#).

Important

Some configuration objects, such as Tenants and Folders, are parent objects to one or more child objects. When you access the **Permissions** tab for these parent objects, you can use the following additional options to set permissions:

- **Propagate** check box—If **Propagate** is checked, the permission is propagated to every child object under this parent object. If **Propagate** is not checked, the permission is removed from every child object under this parent object, unless the permission has been modified in the child object.
- **Replace Recursively** button—If **Replace Recursively** is clicked, the permissions of every child object are removed and replaced with permissions from the parent object.

You can perform the following actions:

Changing Members

[+] Click here to reveal procedure

Procedure: Changing Members

Steps

1. Select an object, and click the **Permissions** tab.
2. Click **Add User** or **Add Access Group**.
3. A new window appears to enable you to select a User or Access Group. You can find Users or Access Groups by using one of the following methods:
 - By Hierarchy—Click **Show Hierarchy** to see a list of all Users or Access Groups in your environment, sorted by hierarchy.
 - By List—Click **Show List** to see a list of all Users or Access Groups in your environment.
 - By Quick Filter—Enter the name or partial name of the User or Access Group in the **Quick Filter** field.
4. Perform one of the following actions:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the **Permissions** tab.
 - Click **Cancel** to discard the changes.

Changing Access Permissions

[+] [Click here to reveal procedure](#)

Procedure:

Steps

1. Select an object, and click the **Permissions** tab.
2. You can change any or all of the following options:

Property	Description
Create (C)	You can create objects of this type.
Read (R)	You can view details for this object.
Update (U)	You can change, or modify, this object.
Delete (D)	You can delete this object.
Execute (X)	You can deploy, start, stop, or otherwise activate 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.

3. Perform one of the following actions:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the **Permissions** tab.
 - Click **Cancel** to discard the changes.

Removing Access Permissions

[+] [Click here to reveal procedure](#)

Procedure:

Steps

1. Select an object, and click the **Permissions** tab.
2. Select an Access Group or User for which to remove permissions.
3. Click **Remove**.
4. A dialog box appears to confirm deletion. Perform one of the following actions:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the **Permissions** tab.
 - Click **Cancel** to discard the changes.

Configuration Options

Configuration Options

Important

Application and Application Template objects have an additional tab, **Application Options**, to set configuration options specific to these objects. These options are created, updated, or deleted in the same manner as regular options.

The **Options** tab enables you to set configuration options for the object. You can perform the following actions:

Creating an Option

[+] Click here to reveal procedure

Procedure: Creating an Option

Steps

1. Select an object, and click the **Options** tab.
2. Click **Add**.
3. Enter information in the **Section, Key,** and **Value** fields.
4. Click **OK**.
5. Perform one of the following actions:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the **Options** tab.
 - Click **Cancel** to discard the changes.

Updating an Option

[+] Click here to reveal procedure

Procedure: Updating an Option

Steps

1. Select an object, and click the **Options** tab.
2. Select an option.
3. Edit information in the **Section, Key,** and **Value** fields.
4. Click **OK**.
5. Perform one of the following actions:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the **Options** tab.
 - Click **Cancel** to discard the changes.

Deleting an Option

[+] [Click here to reveal procedure](#)

Procedure: Deleting an Option

Steps

1. Select an object, and click the **Options** tab.
2. Select an option.
3. Click **Delete**.
4. Perform one of the following actions:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the **Options** tab.
 - Click **Cancel** to discard the changes.

Important

- The **Section** and **Key** fields are required, and the values for these fields must be unique in the environment.
- You can click **More** to import or export options. See the **Importing/Exporting Data** section in the Overview tab, above, for more information.

Dependencies

Dependencies

The **Dependencies** tab displays a list of all objects that are dependent on this object, and by what property they are dependent.

For example, consider a scenario in which an Application object, **AppA**, is running on a Host object, **HostA**. **AppA** is dependent on **HostA** to function, so the **Dependencies** tab for **HostA** shows **AppA**

as a dependent object, with the property being **Host**.

For all Users and Agents, the **Dependencies** tab also lists the Roles to which they have been assigned.

Click any object in the list to view the properties of that dependent object. You can then modify its properties or create another object of the same type.

Security

Assigning Security Certificates

Genesys supports the optional use of the Transport Layer Security (TLS) protocol to secure data exchange between Genesys components. The TLS protocol is implemented using security certificates, which must be configured in the Host objects and the Application objects representing these components.

Important

Before configuring secure data exchange, make sure that certificates are installed on the host computers on which the Genesys components run, and that the certificate information is available to you.

Security certificates are assigned at the **Host** level, and optionally at the **Application and Port** levels. The Host certificate is used by Applications and Ports by default, unless the Applications and Ports specify their own certificates. In this case, those specific certificates override the default Host certificate.

For more information about deploying TLS, refer to the [Genesys 8.1 Security Deployment Guide](#).

File Formats

Supported File Formats

The CFG/CONF file format is a plain-text format. The CFG format is for use on Microsoft Windows systems, and the CONF format on UNIX systems.

Both formats support only the import and export of string options. Other types of configuration options are ignored and not imported or exported.

Syntax

The syntax of the .cfg and .conf files is identical. Each section and option appears on a separate line, with section names in square brackets. Each section is followed by a list of options in that section, with the appropriate values:

```
[section_name1]
option_name1=option_value2
...
option_nameN=option_valueN

[section_name2]
option_nameN+1=option_valueN+1
...
```

Example

The following excerpt from a configuration file illustrates the correct syntax in a .cfg or .conf file:

```
[confserv]
port=2520
management-port=2521
server=dbserver
encryption=false
encoding=utf-8

[log]
verbose=standard
all=stderr

[hca]
schema=none
```

Accounts

The Accounts section of Configuration Manager enables you to configure the following objects:

- [Access Groups](#)
- [Agent Groups](#)
- [Users \(Persons\)](#)
- [Roles](#)
- [Skills](#)
- [Capacity Rules](#)

Access Groups

Access Groups are groups of **Users** who need to have the same set of **permissions** for Configuration Database objects.

In many cases, users fall into a small number of categories with similar access needs. A team of agents all performing the same tasks often has identical access needs. Two or three people responsible for maintaining a specific site of the contact center may also have identical access needs. You can greatly simplify access control by adding individuals to Access Groups and then setting permissions for those groups.

Important

- The default user account is not related to Access Groups and, therefore, does not appear as a member of any Access Group.
- For detailed instructions about managing Roles assigned to Access Groups, refer to the [Genesys 8.1 Security Deployment Guide](#).

Display Options

The **Access Groups** list shows the Access Groups that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Access Groups that are disabled appears grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the Tenant that you want to select. Use the **Quick Filter** field in this panel to filter the Tenant list.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Access Group object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Important

When you delete an Access Group, only the Access Group object itself is removed from the Configuration Database. Its member objects—Access Group and User objects—are not deleted.

Otherwise, select the check box beside one or more objects and click **More** to perform the following tasks:

- **Clone**—Copy an Access Group.
- **Move To**—Move an Access Group to another [hierarchical structure](#).
- Enable or disable Access Groups
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of an Access Group to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Access Group Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Access Group. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the Tenant Directory field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and

can be used without any restrictions.

3. Click **Apply** to save the access group. The **Members** tab appears.
4. In the **Members** tab, click **Add** to add a User. In the pop-up window, you can create a new User object by clicking **+**.
5. Perform one of the following actions after you have added a User to the Access Group:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the tab.
 - Click **Cancel** to discard the changes.

Related Links

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

Agent Groups

An Agent Group is a logical grouping of **Agents**. Agent Groups are typically set up to provide particular sets of contact-center services.

Display Options

The **Agent Groups** list shows the Agent Groups that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Agent Groups that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the Tenant that you want to select. Use the **Quick Filter** field in this panel to filter the Tenant list.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Agent Group object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Important

When you delete an Agent Group, only the Agent Group object itself is removed from the Configuration Database. Its member Agent objects are not deleted.

Otherwise, select the check box beside one or more objects and click **More** to perform the following

tasks:

- **Clone**—Copy an Agent Group.
- **Move To**—Move an Agent Group to another [hierarchical structure](#).
- Enable or disable Agent Groups
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of an Agent Group to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Agent Group Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Agent Group. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment). You cannot change this value as long as this Agent Group contains at least one User.
 - **Capacity Table**—This field applies only for the Enterprise Routing Solution. It is the Capacity Table associated with this Agent Group. Refer to Enterprise Routing Solution documentation for more information.
 - **Quota Table**—This field applies only for the Enterprise Routing Solution. It is the Quota Table associated with this Agent Group. Refer to Enterprise Routing Solution documentation for more information.
 - **Cost Contract**—The [Cost Contract](#) associated with this Agent Group.
 - **Site**—The Site containing this Cost Contract.
 - **Script**—Enter a valid expression on the **Script** tab to define the group as a Virtual Agent Group. The expression must be in Virtual Group Script Language (VGSL) and must define at least one skill (with optionally, a skill level) in the following format:
Skill("SkillName")>SkillLevel
Example
Skill("Spanish")>5
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the Tenant Directory field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. In the **Supervisors** tab, click **Add** to add a User. In the pop-up window, you can create a new User by clicking +.
4. In the **Agents** tab, click **Add** to add a User. In the pop-up window, you can create a new User by clicking +.
5. The **Origination DNs** tab lists **DNs** from which calls can be routed or diverted to this Agent Group. You can include DNs of the following types into this list: Routing Point, External Routing Point, Service Number, Routing Queue, ACD Queue, Virtual Queue, or Virtual Routing Point. Click **Add** to add a DN. In the pop-up window, you can create a new DN object by clicking +.
6. Perform one of the following actions:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the tab.
 - Click **Cancel** to discard the changes.

Virtual Agent Groups

A Virtual Agent Group is similar to an Agent Group except that a Virtual Agent Group has no permanent members. Instead, an Agent becomes a member of a Virtual Agent Group if that Agent meets the criteria specified by the script. Agent membership in a Virtual Agent Group can change dynamically based on changes in the Virtual Agent Group criteria or changes in the object properties of the Agent. When you click a Virtual Agent Group in Genesys Administrator Extension, you see its current member Agents.

Important

Although you can create and configure them using Genesys Administrator Extension, Virtual Agent Groups are used primarily by Reporting applications. For more information about Virtual Agent Groups, refer to the latest version of the *Framework Stat Server User's Guide*.

Warning

If Genesys Administrator Extension finds Virtual Agent Groups (converted from an earlier installation) that contain illegal script expressions or include permanent members, Genesys Administrator Extension will display an error message. To preserve correct functionality of the Virtual Agent Groups, you must address the problem manually by either correcting the error or converting the Virtual Agent Group to a non-virtual Agent Group by removing the expression from the configuration option script.

Related Links

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

Users (Persons)

Users are the contact-center personnel, including Agents, who need access to Genesys applications. Agents are Users who handle customer interactions directly.

Genesys Framework requires that every User who needs such access be registered in the Configuration Database with an appropriate set of **permissions**.

Important

To run a particular application, a User must have Read and Execute permissions for the object that represents this application in the Configuration Database. New Users created in Genesys Administrator Extension receive the same set of default permissions and access privileges that Configuration Server grants.

Display Options

The **Persons** list shows the Users that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list. You can quickly distinguish between Users and Agents by looking at the icon to the left of the object name.

Important

Users that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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.

Click **Group By** to group objects by various criteria.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new User object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a User.
- **Move To**—Move a User to another **hierarchical structure**.
- Enable or disable Users.

Important

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

- Create a folder, configuration unit, or site. See **Object Hierarchy** for more information.

Click on the name of a User to view additional information about the object. You can also set **options** and **permissions**, and view **dependencies**.

Procedure: Creating User Objects

Steps

1. Click **New**.
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:
 - **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.
 - **Agent**—Indicates whether this User is an Agent. If checked, additional fields appear. Once you set this flag, you cannot change it.
 - **First Name**—The first name of this User.
 - **Last Name**—The last name of this User.

- **E-mail Address**—The e-mail address of this User.
- **Employee ID**—A code of up to 64-characters that identifies this User within the contact-center staff. You must specify a value for this property and that value must be unique within the Configuration Database (in an enterprise environment), or within the Tenant (in a multi-tenant environment).
- **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. When creating a new user, this field is always enabled. When editing an existing user, this field is enabled only if **Reset Password** is not selected.

Important

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

- **Confirm Password**—Confirmation of the password entered. When creating a new user, this field is always enabled. When editing an existing user, this field is enabled only if **Force Password Reset on Next Login** is not selected.

Important

Do not copy-and-paste the value from the **Password** field. You must retype the password.

- **Force Password Reset on Next Login**—A check-box that, if selected, prompts the user to enter a new password upon the next login.

Important

The **Force Password Reset on Next Login** option displays only if Genesys Administrator Extension connects to Management Framework 8.1.1, or higher. See the [Genesys 8.1 Security Deployment Guide](#) for more information about resetting passwords.

- **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](#).
- **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
- **State Enabled**—If selected, indicates that the object is in regular operating condition and

can be used without any restrictions.

3. If **Agent** is selected, enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from the following list:
 - **Default Place**—The Place assigned to this Agent, by default. This optional parameter applies to a limited number of configurations, in particular those where a real-time association between a Place and an Agent cannot be established through a telephony login procedure.
 - **Capacity Rule**—The name of the Script of type Capacity Rule that defines the ability of this Agent to handle multiple interactions. Refer to Reporting documentation for more information.
 - **Cost Contract**—The **Cost Contract** associated with this Agent.
 - **Site**—The Site containing this Cost Contract.
4. In the **Member Of** tab, click **Add** to add an **Access Group**.
5. In the **Ranks** tab, click **Add** to add a Rank.
6. Enter the following information in the pop-up window that displays on your screen:
 - **Application Type**—The type of Application to which a User needs access. Consult the manuals for a GUI application to see if this application is using Ranks to enable or block certain functions. If a manual does not contain any references to Ranks, this application does not use Ranks, and you do not need to specify the Person's Ranks with respect to this application.
 - **Application rank**—The Rank with respect to Applications of the specified type.
7. If **Agent** is selected, click **Apply** to display the following tabs.
 - In the **Skills** tab, click **Add** to add a Skill.
 - Enter the following information in the pop-up window that displays on your screen:
 - **Skill**—The Skill assigned to this Agent.
 - **Level**—The relative measure of the Agent's proficiency in this Skill.
 - In the **Agent Logins** tab, click **Add** to add an Agent Login.
 - Enter the following information in the pop-up window that displays on your screen:
 - **Agent Login**—The Agent Login code assigned to this Agent. You cannot assign an Agent Login to more than one Agent.
 - **Wrap-up Time**—Some switches do not support transfer of information about an agent's postcall work status through the CTI-link. However, when this operation is supported, consider specifying the wrapup time, in seconds, for the Agent Logins that belong to such switches. This specification must match the corresponding switch setting.
8. Click **Save**.

Important

New Users do not automatically receive Read and Update permissions for their User object. You must manually provision these permissions to allow Users to save their user preferences in GUI-based programs, such as GAX or Workspace Desktop Edition (formerly known as Interaction Workspace).

Related Links

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

Roles

Roles define what you can do in a given application. In Genesys Administrator Extension, roles and their privileges are controlled by the use of Role objects, which are assigned to **Users** (including Agents) and **Access Groups**. Roles are application-specific, and must be defined for each application that supports them.

In a hierarchical multi-Tenant configuration, only those Roles defined in the Environment Tenant can be used to allow Users to access all screens in Genesys Administrator Extension. Users cannot include Genesys Administrator Extension-specific privileges in Roles from other Tenants.

For more information about Roles, refer to the [Genesys 8.1 Security Deployment Guide](#). For a listing of Role Privileges for the Genesys Administrator Extension application, refer to [Role Privileges in the Genesys Administrator Extension Deployment Guide](#).

Display Options

The **Roles** list shows the Roles that are in your environment. It is sorted in a hierarchy by tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Roles that are disabled will appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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.

To select or de-select multiple objects at once, click **Select**.

Procedures

To [create a new Role object](#), click **New**. To view or edit details of an existing object, click on the name

of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Role.
- **Move To**—Move a Role to another [hierarchical structure](#).
- Enable or disable Roles.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Role to view additional information about the object. You can also set [options](#) and [permissions](#).

Procedure: Creating Role Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of this Role. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Description**—A brief description of this Role.
 - **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. In the **Role Members** tab, click **Add Access Group** to add an [Access Group](#), or **Add Person** to add a [User](#).
4. In the **Assigned Privileges** tab, select [role privileges](#) to add to this Role object.
5. Click **Save**.

Related Links

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

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

Skills

Skills are qualities or abilities that Agents possess and that affect the placement of each Agent in a contact center hierarchy. Common Skills include abilities in different languages, particular categories of product knowledge, or ability in particular types of sales.

Display Options

The **Skills** list shows the Skills that are in your environment. It is sorted in a hierarchy by tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Skills that are disabled will appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Skill object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Important

When you delete a Skill, it is removed from the Configuration Database and from any Agent to which it is assigned. If you want to remove only the Skill from an Agent to which it is assigned, but leave it in the Configuration Database and available for assignment to another Agent, remove the Skill from the Agent.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Skill.
- **Move To**—Move a Skill to another [hierarchical structure](#).
- Enable or disable Skills.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Skill to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Skill Objects

Steps

1. Click **New**.
2. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** button to select a value from a list:
 - **Name**—The name of this Skill. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. Click **Save**.

Related Links

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

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

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.

Click **Display Options** below to learn more about the list and how it can be sorted or searched; or, click **Actions** to learn more about possible actions you can perform in this window.

Display Options

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.

Actions

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 8.1 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.

Related Links

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

Environment

The Environment section of Configuration Manager enables you to configure the following objects:

- [Application Templates](#)
- [Applications](#)
- [Alarm Conditions](#)
- [Hosts](#)
- [Scripts](#)
- [Solutions](#)
- [Tenants](#)
- [Time Zones](#)
- [Detection/Reaction Scripts](#)

Application Templates

An Application Template is the model you use for registering a new application in the Configuration Database. An Application Template describes the set of options that applies to an application of a particular type and version.

Before installing a new Genesys application, an Application Template must be available for that application. You can import the generic Application Template that is supplied with every Genesys application, or you can create a new Application Template.

Important

When upgrading previously installed releases of Genesys applications, you must register new Application Templates for the new releases, if the Release Notes indicate that these releases contain new configuration options that are essential for your environment.

Display Options

The **Application Templates** list shows the Application Templates that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Application Templates that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Application Template object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Important

You cannot delete an Application Template, if it has already been used to create an Application.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy an Application Template
- **Move To**—Move an Application Template to another **hierarchical structure**.
- Enable or disable Application Templates
- Create a folder, configuration unit, or site. See **Object Hierarchy** for more information.
- **Import Application Template**—**Import an Application Template**.

Click on the name of an Application Template to view additional information about the object. You can also set **permissions**, **options and application options**, and view **dependencies**.

Procedure: Creating Application Template Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Application Template. You must specify a value for this property, and that value must be unique within the Configuration Database. Once you set the value, you cannot change it.
 - **Type**—The type of application to which the Application Template relates. Once you set the value, you cannot change it.
 - **Version**—The version of the application to which the Application Template relates. You must specify a value for this property. Once you set the value, you cannot change it. Genesys

recommends that you specify the first three digits of the application version.

- **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. Click **Save**.

Importing Application Templates

Genesys provides generic templates for all Genesys applications. You can find the .apd files for Application Templates, which come with every version of Genesys software, in the **Templates** folder on a product CD.

To import an Application Template from the .apd file, perform the following procedure.

Procedure: Importing Application Templates

Steps

1. Click **More**, then select **Import Application Template**.
2. A new window displays. Click **Browse** to select an Application Template .apd file to import.
3. Click **OK** to upload the Application Template.
4. Refer to [Creating Application Template Objects](#) to finish creating the Application Template object.

Related Links

- [Time Zones](#)
- [Application Templates](#)
- [Time Zones](#)
- [Application Templates](#)
- [Solutions](#)

Applications

Applications are the various Genesys software programs that serve the contact center. There are two types of applications: graphical user interface (GUI) applications and daemon applications. Most daemon applications are servers to other applications.

You must register each instance of a daemon application separately. Configuration Server does not allow two daemon applications with the same name to be connected at the same time. By contrast, one object in the Configuration Database can represent any number of GUI applications of the same type and configuration parameters.

Display Options

The **Applications** list shows the applications that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Applications that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Application object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy an Application.
- **Move To**—Move an Application to another [hierarchical structure](#).
- Enable or disable Applications.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.
- [Configure Logging](#)

Click on the name of an Application to view additional information about the object. You can also set [permissions](#), [options and application options](#), and view [dependencies](#).

Creating Application Objects

[+] Click to show procedure

Procedure: Creating Application Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Application. You must specify a value for this property, and that value must be unique within the Configuration Database. Genesys does not recommend that you use symbols (including single and double quotation marks) in Application names; doing so may cause Applications to malfunction.
 - **Template**—The Application Template on which this Application is based. This value is set automatically when you select the Application Template.
 - **Type**—The type of the Application. This value is set automatically, based on the selected Application Template.
 - **Component Type**—Specifies the detailed purpose of this Application object within the configuration. Leave this field at its default value (Unknown) unless Application-specific documentation directs you to enter a specific value. This field is only displayed for daemon Applications.
 - **Version**—The version of the Application. This value is set automatically, based on the selected Application Template version.
 - **Is Application Server**—This field is checked for all daemon Applications and not checked for all GUI Applications. It is set automatically, based on the **Type** field.

- **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

The following fields apply only to daemon Applications, not to GUI Applications:

- **Working Directory**—The full path to the directory where this Application is installed. This field is mandatory. When creating a new Application, Genesys recommends inserting a period (.). The path will be filled in automatically when the new Application is installed and connects to Configuration Server.
- **Command Line**—The command line that is used to start this Application, specifying the name of the Application's executable file. This field is mandatory. When creating a new Application, Genesys recommends inserting a period (.). The command line will be filled in automatically when the new Application is installed and connects to Configuration Server.
- **Command Line Arguments**—Additional command-line parameters that are used to start this Application. When creating a new Application, Genesys recommends leaving this field blank. Any arguments will be filled in automatically when the new Application is installed and connects to Configuration Server.
- **Startup Timeout**—The time interval, in seconds, during which the Management Layer expects this Application to start. If the Application has been configured with the autostart configuration option set to `true`, this is also the amount of time that Solution Control Server should wait to start this Application after initialization or after a system reboot. This field is mandatory.
- **Shutdown Timeout**—The time interval, in seconds, during which the Management Layer expects this Application to shut down. This field is mandatory.
- **Auto-Restart**—Indicates whether the Management Layer automatically restarts the Application after it shuts down unexpectedly.
- **Host**—The host computer on which the Application is running.

Important

To support specific HA configurations, more than one server can be registered on the same port within the same host.

Otherwise, do not assign the port number to any other server on the same host.

- **Backup Server**—The server that Client Applications contact if the connection to the primary server fails. You cannot associate one backup server with more than one primary server. You must use the same Application Template for the backup server that you use for the primary server, and you must associate the servers with the same user account.

Important

When you designate an Application as a backup server for another server, the Application's Connections, Tenants, and Switch (for T-Server Applications) are automatically changed to match the corresponding values for the primary server. As long as this Application is associated with the primary server, its Connections are treated as read-only, and they are changed only when you apply changes to the Connections of the primary server.

- **Redundancy Type**—The type of redundancy with which this Application is running.
- **Timeout**—The amount of time, in seconds, that the client Application waits between reconnection attempts after a connection failure with the server.
- **Attempts**—The number of attempts to reconnect to this server before trying to connect to the backup server. This value must be 1 or higher. This property is used only if you specify a Backup Server for this server.

Important

Setting this parameter to any value other than **1** may not take effect for some types of Applications.

- **Login as SYSTEM**—If checked, indicates that this Application logs into Configuration Server on behalf of the SYSTEM account.
- **Login As Account**—Identifies the account that applications must use to log in to Configuration Server. If **Login as SYSTEM** is checked, this field is disabled. For Configuration Server type applications, this field defaults to `Environment\default`.

Important

If you are configuring Configuration Server Proxy, Genesys strongly recommends that you use the default value (`Environment\default`).

- **Certificate**—The security certificate value. In Windows, select the certificate value from the list of installed certificates. In UNIX, enter the full path to the `<serial_#>_<host_name>_cert.pem` file.
- **Certificate Description**—An optional description of the Certificate.
- **Certificate Key**—The full path to the `<serial_#>_<host_name>_priv_key.pem` file of the security certificate key. This field is used only if Genesys Security is deployed on UNIX; otherwise this field is empty.
- **Trusted CA**—The full path to the `ca_cert.pem` file of the CA that issued the default security certificate. This field is used only if Genesys Security is deployed on UNIX; otherwise this

field is empty.

Important

Refer to the [Genesys 8.1 Security Deployment Guide](#) for more information about deploying Genesys TLS Security.

3. The **Connections** tab lists the connections that this Application has to other Applications. Click **Add** to add a connection.
4. Enter the following information in the pop-up window that displays on your screen:
 - **Server**—The server application that this application connects to as a client when it starts.
 - **Port ID**—The port of the server to which the application connects. If you want to use a secure connection, be sure to select a secure port.
 - **Connection Protocol**—The name of the connection control protocol.

Important

Set the ADDP protocol between Local Control Agent and Solution Control Server in the **Options** tab of the Host object.

- **Local Timeout**—This value is required only if you specified **addp** in **Connection Protocol**. This value specifies the heartbeat polling interval, measured in seconds, on a client side. This indicates how often the client application sends polling signals to the server application. To enable this functionality, specify any integer as the value.

Warning

To avoid false disconnect states that might occur because of delays in the data network, Genesys recommends that you set the ADDP timeouts to values greater than 10 seconds.

- **Remote Timeout**—This value is required only if you specified **addp** in **Connection Protocol**. This value specifies the heartbeat polling interval measured, in seconds, on a server side. This indicates how often the server application sends polling signals to the client application. To enable this functionality, specify any integer as the value.

Warning

To avoid false disconnect states that might occur because of delays in the data network, Genesys recommends that you set the ADDP timeouts to values greater than 10 seconds.

- **Trace Mode**—The connection trace mode used between a server and its client.
 - **Trace Is Turned Off**—Select if you do not want either the client or the server application to print ADDP-related messages in its log.
 - **Trace On Client Side**—Select if you want the client application to print ADDP-related messages in its log.
 - **Trace On Server Side**—Select if you want the server application to print ADDP-related messages in its log.
 - **Trace On Both Sides**—Select if you want both the client and server applications to print ADDP-related messages in their log.
 - **Connection Mode**—Specifies whether this port is secured or not by Genesys Security using the TLS protocol. This field is disabled if the client does not use Genesys Security.
 - **Transport Protocol Parameters**—Any text, usually **key=value** pairs, separated by a semicolon (;). This property is application-specific. Refer to the documentation for the particular application to determine the appropriate values for this field, if any.
 - **Application Parameters**—Any text, usually **key=value** pairs, separated by a semicolon (;). This property is application-specific. Refer to the documentation for the particular application to determine the appropriate values for this field, if any.
5. Click **Apply** to save the information in the **Connections** tab.
 6. The **Ports** tab lists communication ports used by the clients of an application to connect to a server. To support specific high-availability configurations, more than one server can be registered on the same port within the same host. Otherwise, do not assign the port number to any other server on the same host. Click **Add** to add a connection.
 7. Enter the following information in the pop-up window that displays on your screen:
 - **Port ID**—The identifier of the port.
 - **Communication Port**—The port associated with the specified port ID.
 - **Connection Protocol**—The protocol used for the connection.
 - **HA Sync**—If selected, an HA backup server will use this port to establish a connection to the primary server.
 - **Listening Mode**—The listening mode configured for this port
 - **Certificate**—The security certificate value. In Windows, select the certificate value from the list of installed certificates. In UNIX, enter the full path to the `<serial_#>_<host_name>_cert.pem` file.
 - **Description**—An optional description of the Certificate.
 - **Certificate Key**—The full path to the `<serial_#>_<host_name>_priv_key.pem` file of the

security certificate key. This field is used only if Genesys Security is deployed on UNIX; otherwise this field is empty.

- **Trusted CA**—The full path to the **ca_cert.pem** file of the CA that issued the default security certificate. This field is used only if Genesys Security is deployed on UNIX; otherwise this field is empty.

Important

Refer to the [Genesys 8.1 Security Deployment Guide](#) for more information about deploying Genesys TLS Security.

- **Transport Parameters**—Any text, usually **key=value** pairs, separated by a semicolon (;). This property is application-specific. Refer to the documentation for the particular application to determine the appropriate values for this field, if any.
 - **Application Parameters**—Any text, usually **key=value** pairs, separated by a semicolon (;). This property is application-specific. Refer to the documentation for the particular application to determine the appropriate values for this field, if any.
8. Click **Apply** to save the information in the **Ports** tab.
 9. The **Tenants** tab functional meaning only in a multi-Tenant environment. It specifies a list of Tenants that this application serves. The information specified in this list does not restrict the access privileges of the daemon applications with respect to the configuration data. Click **Add** to add a Tenant to this Application object.

Important

T-Server and High Availability (HA) Proxy applications do not display the Tenant property. A T-Server can serve only one Tenant, which is specified in the T-Server's **General** properties. An HA Proxy can serve only the same Tenant as the corresponding T-Server, and this Tenant is also specified in the HA Proxy's **General** properties.

10. Click **Save**.

Configuring Logging

[+] Click to show procedure

Procedure: Configuring Logging

Steps

1. In the **Applications** list, select one or more Applications.
2. Click **More** and select **Configure Logging**.
3. In the **Configuration of Logging** window, set the following options:
 - The Applications that you selected from the **Applications** list appears in the **Applications** section. You can select or de-select Applications to include in this procedure.
 - In the **Log Level** section, select one of the following options:
 - **All**—All events from the **Trace**, **Interaction**, and **Standard** log levels are logged.
 - **Trace**—Generates all log events from the **Trace**, **Interaction**, and **Standard** levels. This setting might adversely affect application performance. Set this level only when you are testing new interaction-processing functions or scenarios.
 - **Interaction**—Generates all log events of **Interaction** and **Standard** levels. Set this level only when you are testing events on a particular interaction.

Important

Interaction-level records contain the Interaction ID attribute that helps to search for log events that are generated by various applications but related to the same interaction.

Warning

Using the Interaction level generates a higher number of logging events on the network, which might adversely affect the performance of the DBMS, Message Servers, and interaction-processing components.

- **Standard**—Genesys recommends you permanently enable only a Standard level of logging during the operation of Solutions in regular production mode. This level reports events for significant problems and normal operations of in-service Solutions. An event is reported at the Standard level if it satisfies one of these criteria:
 - Indicates that an attempt to perform any external operation has failed
 - Indicates that the latest attempt to perform an external operation that previously failed has succeeded
 - Indicates detection of a condition that has a negative impact on operations, actual or projected

- Indicates that a previously detected condition, which had a negative impact on operations, no longer exists
 - Indicates a security violation of any kind
 - Indicates a high-level data exchange that cannot be recognized or does not follow the expected logical sequence
 - Indicates inability to process an external request
 - Indicates successful completion of a logical step in an initialization process
 - Indicates a transition of an Application from one operational mode to another
 - Indicates that the value of a parameter associated with a configurable threshold has exceeded that threshold
 - Indicates that the value of a parameter associated with a configurable threshold that earlier exceeded the threshold has returned to its normal range.
- **None**—No logging is performed.
4. In the **Log Outputs Adjustment** section, you can fine-tune the logging level for the following output types: **Network Log Server**, **Plain Text File**, and **Console**.
 5. Perform one of the the following:
 - If you selected **Network Log Server** in the previous step, go to the **Message Server** section and select the Message Server to receive logs.
 - If you selected **Plain Text File** in the previous step, go to the **Log File Name** section and specify the log file name to receive logs. You can also specify the following:
 - **Create Segment**—If checked, segment the log file into chunks specified by the **Segment Size (MB)** field.
 - **Segment Size (MB)**—If **Create Segment** is checked, specify a segment size for the log file, in megabytes.
 - **Segment Expiration**—If checked, segments are deleted after a maximum number of segments is reached, as defined by **Maximum Segments**.
 - **Maximum Segments**—If **Segment Expiration** is checked, specify how many segments to retain before segments beyond this limit are removed.
 6. Click **OK**.

Related Links

- [Time Zones](#)
- [Application Templates](#)
- [Time Zones](#)
- [Application Templates](#)

- [Solutions](#)

Alarm Conditions

Alarm Conditions specify the events that you might want to know about and manage as soon as they occur, such as if a Host or Solution is unresponsive. Genesys software contains predefined Alarm Conditions, or you can create your own.

Alarm Conditions work with the following Scripts:

- Alarm Detection Scripts, which identify what system variables the Management Layer must monitor to trigger an alarm.
- Alarm Reaction Scripts, which identify what the Management Layer must do when alarms occur in, or are cleared from, the system. Alarm Reaction Scripts that identify what happens when alarms are cleared are referred to as alarm Clearance Scripts.

To create an Alarm Condition script, see [Scripts](#). To associate Alarm Detection and Alarm Reaction Scripts with Alarm Conditions, specify them in the tabs of the Alarm Condition.

Display Options

The **Alarm Conditions** list shows the Alarm Conditions that are in your environment. It is sorted in a hierarchy by tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Alarm Conditions that are disabled will appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the Tenant that you want to select. Use the **Quick Filter** field in this panel to filter the Tenant list.

To select or de-select multiple objects at once, click **Select**.

Procedures

To [create a new Alarm Condition object](#), click **New**. To view or edit details of an existing object, click

on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy an Alarm Condition.
- **Move To**—Move an Alarm Condition to another [hierarchical structure](#).
- Enable or disable Alarm Conditions
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of an Alarm Condition to view additional information about the object. You can also set [options](#) and [permissions](#).

Procedure: Creating Alarm Condition Objects

Steps

1. Click **New**.
2. Enter the following information. For some fields, you can either enter the name of a value or click the **Browse** button to select a value from a list:
 - **Name**—The name of the Alarm Condition. You must specify a value for this property and that value must be unique within the Configuration Database.
 - **Description**—A brief description of the Alarm Condition.
 - **Category**—The category of the Alarm Condition: **Critical**, **Major**, or **Minor**. You must specify a value for this property.
 - **Detect Script**—The Script that describes the logic applied to detect the alarm.
 - **Cancel Timeout**—The amount of time, in seconds, that the Alarm Condition is registered in the Log Database, unless another event cancels it or a user clears it. When this timeout expires, the Alarm Condition is unconditionally cleared.
 - **Detect Log Event ID**—The identifier of the event that triggers the alarm. You must specify a value for this property.
 - **Detect Selection**—The mode for event selection that the Management Layer uses for Alarm Condition analysis. The modes are as follows:
 - **Select By Any**—The specified event from any application results in an alarm.
 - **Select By Application**—The specified event from a selected application results in an alarm. Select this option to display the **Application** field. Click the **Browse** icon to select an item from a list, or type the name or partial name of the item in the **Quick Filter** field. The list is populated with Application objects that are stored in Configuration Server.

- **Select By Application Type**—The specified event from a selected application type results in an alarm. Select this option to display the **Type** field. Click the drop-down button to select an item from the list. The list is populated with Application objects that have defined subtypes.
- **Cancel Log Event ID**—The identifier of the event that triggers clearance of the alarm. For alarm clearance, the Management Layer uses the event from the same application(s) as specified for the detect event for this Alarm Condition.
- **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. Click **Save**.

Once the object has been created, you can edit the object and click the **Reaction Scripts** or **Clearance Scripts** tabs to assign scripts to the Alarm Condition. See [Scripts](#) for more information.

Procedure: Testing Alarm Conditions

Steps

1. In the **Alarm Conditions** list, click the check box beside one or more Alarm Conditions that you want to test.
2. Click **More** and select **Activate Alarm**.
3. The Alarm Condition activates. Go to the [System Dashboard](#) to view the Alarm and clear it.

Predefined Alarm Conditions

Genesys provides the predefined Alarm Conditions listed in the following table. If required, you can further configure these conditions to meet your requirements.

Alarm Type	Description
Application Failure	Reports that the specified application has either

Alarm Type	Description
	terminated or stopped responding.
Connection Failure	Reports that the specified connection between any two applications has been lost.
CTI Link Failure	Reports that the connection between the specified T-Server and its switch has been lost.
Host Inaccessible	Reports that the Management Layer cannot contact the Local Control Agent (LCA) on the host where Genesys daemon applications are running. LCA is not started, or it is listening on a port other than the one specified in the configuration. A condition of Host Inaccessible is also referred to as being Down.
Licensing Error	Reports that a licensing error has occurred.
Service Unavailable	Reports that a Genesys component cannot provide service for some internal reasons.
Host Unavailable	Reports that a host where Genesys daemon applications are running is unavailable (turned off).
Host Unreachable	Reports that the Management Layer cannot reach the host where Genesys daemon applications are running (no route to the host).
Unplanned Solution Status Change	Reports that the status of a Solution has changed from Started to Pending, but without any requests to stop the Solution. This may indicate a failure of one of the Solution components.
Message Server Loss of Database Connection	Reports that Message Server has lost connection to the Centralized Log Database.

For more information about predefined Alarm Conditions, see the [Management Layer User's Guide](#).

Alarm E-mails

You can customize the Subject line and body of an Alarm Reaction e-mail by creating a template, using plain text, and any of the following reserved variables that represent the specific information about the alarm:

Variable	Description
\$REACT_NAME	The name of the Alarm Reaction.
\$COND_ID	The Alarm Condition ID.
\$COND_NAME	The name of the Alarm Condition.
\$COND_CTGR	The category of the Alarm Condition.
\$APP_ID	The Application ID.
\$APP_NAME	The name of the Application.
\$APP_TYPE	The Application type.

Variable	Description
\$MSG_ID	The Message ID.
\$MSG_DESCR	The text of the Message.
\$\$	The dollar sign character (\$).

You can then use this Alarm Reaction script as often as appropriate. For each use, the e-mail text is automatically customized for the specific situation.

Example

An example Alarm Reaction e-mail uses the following template:

Subject:

\$COND_ID detected in \$APP_NAME

Message:

CPU Overload has been detected by Genesys Solution Management Layer for Host1.

Alarm Reaction: \$REACT_NAME

Alarm Condition:

ID: \$COND_ID

NAME: \$COND_NAME

Category: \$COND_CTGR

Application:

ID: \$APP_ID

Name: \$APP_NAME

Type: \$APP_TYPE

In the following scenario, the system detects that a CPU overload has occurred in the Solution Control Server, an alarm is triggered, and the following e-mail is sent in response. Note how the variable names have been replaced with actual values that are appropriate to the alarm scenario.:

Subject:

CPU_overload detected in Solution_Control_Server_760

Message:

CPU Overload has been detected by Genesys Solution Management Layer for Host1.

Alarm Reaction: cpu_overload_mail

Alarm Condition:

ID: 118

NAME: CPU_overload

Category: Major

Application:

ID: 105

Name: Solution_Control_Server_760

Type: SCS

Related Links

- [Time Zones](#)
- [Application Templates](#)
- [Time Zones](#)
- [Application Templates](#)
- [Solutions](#)

Hosts

Hosts are the computers that run the various server applications in the environment.

Register only those hosts on which you will install and run Genesys servers or third-party servers that you configure in the Configuration Database.

Display Options

The **Hosts** list shows the hosts that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Hosts that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Host object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Important

You can delete a Host only if there are no server applications currently assigned to it.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Host.
- **Move To**—Move a Host to another [hierarchical structure](#).
- Enable or disable Hosts.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.
- [Configure Logging](#)

Click on the name of a Host to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Creating Host Objects

[+] Click to show procedure

Procedure: Creating Host Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the host. You must specify a value for this property, and that value must be unique within the Configuration Database. Because applications use this host name to establish connections with the servers running on this host, make sure that the name exactly matches the name of this host in the data network configuration.

Important

You cannot change this host name if any server applications are assigned to this host.

- **IP Address**—The IP address of the host. This value must be unique within the Configuration Database. Because applications may be using the specified IP address to establish connections with the servers running on this host, make sure that the value that you enter exactly matches the IP address of this host in the data network configuration.
- **OS Type**—The type of the operating system of this host. You must specify a value for this property.
- **Version**—The version of the operating system.
- **LCA Port**—The port number on which Local Control Agent (LCA) for this host is running. The LCA port must be set to a value between 2000 and 9999, inclusive. When the LCA port is specified as less than 2000, LCA starts on port number 4999 (the default value).

Important

Do not change the value of the LCA port if any application has already connected to LCA or if Solution Control Server (SCS) has already started to control LCA.

- **Solution Control Server**—The SCS that monitors and controls this host. This property is valid only if you enable distributed SCS functionality. See the [Management Layer User's Guide](#) for details.
- **Certificate**—The security certificate value. In Windows, select the certificate value from the list of installed certificates. In UNIX, enter the full path to the `<serial_#>_<host_name>_cert.pem` file.
- **Certificate Description**—An optional description of the Certificate.
- **Certificate Key**—The full path to the `<serial_#>_<host_name>_priv_key.pem` file of the security certificate key. This field is used only if Genesys Security is deployed on UNIX; otherwise this field is empty.
- **Trusted CA**—The full path to the `ca_cert.pem` file of the CA that issued the default security certificate. This field is used only if Genesys Security is deployed on UNIX; otherwise this field is empty.

Important

Refer to the [Genesys 8.1 Security Deployment Guide](#) for more information about deploying Genesys TLS Security.

- **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. Click **Save**.

Configuring Logging

[+] Click to show procedure

Procedure: Configuring Logging

Steps

1. In the **Hosts** list, select one or more Hosts.
2. Click **More** and select **Configure Logging**.
3. In the **Configuration of Logging** window, set the following options:
 - The Hosts that you selected from the **Hosts** list appears in the **Hosts** section. You can select or de-select Hosts to include in this procedure.
 - In the **Log Level** section, select one of the following options:
 - **All**—Generates all log events from the **Trace**, **Interaction**, and **Standard** levels.
 - **Trace**—Generates all log events from the **Trace**, **Interaction**, and **Standard** levels. This setting might adversely affect application performance. Set this level only when you are testing new interaction-processing functions or scenarios.
 - **Interaction**—Generates all log events of **Interaction** and **Standard** levels. Set this level only when you are testing events on a particular interaction.

Important

Interaction-level records contain the Interaction ID attribute that helps to search for log events that are generated by various applications but related to the same interaction.

Warning

Using the Interaction level generates a higher number of logging events on the network, which might adversely affect the performance of the DBMS, Message Servers, and interaction-processing components.

- **Standard**—Genesys recommends you permanently enable only a Standard level of logging during the operation of Solutions in regular production mode. This level reports events for significant problems and normal operations of in-service Solutions. An event is reported at the Standard level if it satisfies one of these criteria:
 - Indicates that an attempt to perform any external operation has failed
 - Indicates that the latest attempt to perform an external operation that previously failed has succeeded
 - Indicates detection of a condition that has a negative impact on operations, actual or projected
 - Indicates that a previously detected condition, which had a negative impact on operations, no longer exists
 - Indicates a security violation of any kind
 - Indicates a high-level data exchange that cannot be recognized or does not follow the expected logical sequence
 - Indicates inability to process an external request
 - Indicates successful completion of a logical step in an initialization process
 - Indicates a transition of an Application from one operational mode to another
 - Indicates that the value of a parameter associated with a configurable threshold has exceeded that threshold
 - Indicates that the value of a parameter associated with a configurable threshold that earlier exceeded the threshold has returned to its normal range.
 - **None**—No logging is performed.
4. In the **Log Outputs Adjustment** section, you can fine-tune the logging level for the following output types: **Network Log Server**, **Plain Text File**, and **Console**.
 5. Perform one of the the following:
 - If you selected **Network Log Server** in the previous step, go to the **Message Server** section and select the Message Server to receive logs.
 - If you selected **Plain Text File** in the previous step, go to the **Log File Name** section and specify the log file name to receive logs. You can also specify the following:
 - **Create Segment**—If checked, segment the log file into chunks specified by the **Segment Size (MB)** field.

- **Segment Size (MB)**—If **Create Segment** is checked, specify a segment size for the log file, in megabytes.
- **Segment Expiration**—If checked, segments are deleted after a maximum number of segments is reached, as defined by **Maximum Segments**.
- **Maximum Segments**—If **Segment Expiration** is checked, specify how many segments to retain before segments beyond this limit are removed.

6. Click **OK**.

ADDP

To configure the Advanced Disconnect Detection Protocol (ADDP) protocol between the LCA of a given host and SCS, use the **Options** tab of the Host object. If you are using the Management Layer for application failure management, set up ADDP parameters for the host as described.

Procedure: Setting up ADDP Connections

Steps

1. Open the **Options** tab of the Host.
2. Create a section called addp.
3. In the addp section, specify the following configuration options:

Option Name	Option Value	Option Description
addp-timeout	Any integer	Sets the ADDP timeout in seconds. If one application in the connection does not receive messages from the other application in the connection within this interval, the first application sends a polling message. If the first application does not receive a response to the polling message within this time interval, it interprets the lack of response as a loss of connection. The recommended setting for this option

Option Name	Option Value	Option Description
		is 3 seconds for a LAN connection or 10 seconds for a WAN connection.
addp-trace	local	LCA prints ADDP-related messages into its log.

Important

You configure ADDP between servers by using the Application's **Connections** tab.

Check Ports

You can click on the name of a Host to view more information about the host's configuration, as well as check port information and identify port conflicts. Click **Check Ports** to display all applications and configured ports for the Host object, as well as any port conflicts. Ports that are duplicated in multiple applications are highlighted in the list, as these ports might be in conflict. You can click on an Application in the **Check Ports** list to view details about the Application object. Click **Export** to export the items in the list to a Microsoft Excel-compatible file.

Related Links

- [Time Zones](#)
- [Application Templates](#)
- [Time Zones](#)
- [Application Templates](#)
- [Solutions](#)

Scripts

Scripts identify processing scenarios or treatments that can be applied to customer interactions. For example, an Alarm Reaction Script specifies how to react when an Alarm Condition is triggered.

Important

Depending on the application type, a scenario or treatment itself might be part of the Script object, in which case it is listed in the **Options** tab of the Script object.

For more information about Scripts, refer to the [Management Layer User's Guide](#) or to the documentation specific to your product.

Display Options

The **Scripts** list shows the Scripts that are in your environment. It is sorted in a hierarchy by tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Scripts that are disabled will appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Script object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. When you delete a Script, it is removed from the Configuration Database and from the **Alarm Condition** with which it is associated. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Script.
- **Move To**—Move a Script to another **hierarchical structure**.
- Enable or disable Scripts.
- Create a folder, configuration unit, or site. See **Object Hierarchy** for more information.

Click on the name of a Script to view additional information about the object. You can also set **options** and **permissions**, and view **dependencies**.

Creating Script Objects

Procedure: Creating Script Objects

Purpose: To create Script objects.

Prerequisites

You are in the **Scripts** window of Configuration Manager.

Steps

1. Click **New**.
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:
 - **Name**—The name of the Script. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Script Type**—The type of the Script. You must specify a type. Once you set the type, you cannot change it.
 - **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.

- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. Click **Save**.

Procedure: Creating Alarm Condition Script Objects

Purpose: To create Script objects for Alarm Conditions.

Prerequisites

You are in the **Detection/Reaction Scripts** window of Configuration Manager.

Steps

1. Click **New**.
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:
 - **Name**—The name of the Script. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Script Type**—The type of the Script. You must specify a type. Once you set the type, you cannot change it.
 - **Alarm Reaction**—See the Alarm Scripts tab, above, for more information about Alarm Reaction scripts.
 - **Alarm Reaction Types**—Select what action to take when this Script is triggered. The available text fields change to show information applicable to your selection.
 - **Alarm Detection**—See the Alarm Scripts tab, above, for more information about options you can set for Alarm Detection scripts.
 - **Detection Types**—Select what action to take when this Script is triggered. The available text fields change to show information applicable to your selection.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. Click **Save**.

Alarm Scripts

Choose one of the following script types to learn more:

- [Alarm Detection Scripts](#)
- [Alarm Reaction Scripts](#)

Alarm Detection Scripts

Alarm Detection Scripts identify what system variables the Management Layer must monitor to trigger an alarm.

The system variables that the Management Layer can monitor (also called advanced alarm detection parameters) include:

- **Host System Variable Threshold**—Enables you to specify the value for an irregular change that might occur over a certain interval, in either CPU or memory use, on a given host.
- **Application System Variable Threshold**—Enables you to specify the value for an irregular change that might occur over a certain interval in either an application's CPU or memory use.
- **Local SNMP Variable Threshold**—Enables you to specify the value for an irregular change that might occur over a certain interval in any SNMP variable retrieved from the Genesys MIB file.
- **Remote SNMP Variable Threshold**—Enables you to specify the value for an irregular change that might occur over a certain interval in any SNMP variable retrieved from a non-Genesys MIB file.

Warning

The SNMP-related alarm detection capabilities require that you have a Genesys SNMP license for Solution Control Server.

Important

The Rising Threshold, which triggers an alarm when crossed only if the value is rising, must be a higher number than the Falling Threshold, which clears the alarm when crossed only if the value is falling. For example, if the Rising Threshold is 300, the Falling Threshold must be less than 300.

Alarm Reaction Scripts

Alarm Reaction Scripts identify what the Management Layer must do when alarms occur in, or are cleared from, the system.

The Management Layer supports the following types of Alarm Reaction Scripts:

- Shutdown of a specified application.

- Startup of a specified application.
- Restart of the application that reported the alarm.
- Startup of a specified solution.
- Sending an e-mail message with information about the alarm to specified Internet addresses. You can customize the e-mail with specific details about the alarm.
- Switchover of operations from the application that reported the alarm to its backup application, for applications running in primary mode, backup mode, or regardless of the mode.
- Sending an SNMP trap with detailed information about the alarm to a general-purpose network management system.
- Execution of an operating system command.

Important

For a description of the OS commands you can specify in an Alarm Reaction Script, refer to the [Management Layer User's Guide](#).

- Changing a configuration option value for the specified application or for the application that reported the alarm.
-

Related Links

- [Time Zones](#)
- [Application Templates](#)
- [Time Zones](#)
- [Application Templates](#)
- [Solutions](#)

Solutions

Solutions are sets of applications that accomplish particular business tasks in contact centers.

Display Options

The **Solutions** list shows the Solutions that are in your environment. It is sorted in a hierarchy by tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Solutions that are disabled will appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Solution object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Solution.
- **Move To**—Move a Solution to another **hierarchical structure**.
- Enable or disable Solutions.
- Create a folder, configuration unit, or site. See **Object Hierarchy** for more information.

- [Configure Logging](#)

Click on the name of a Solution to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Creating Solution Objects

[+] Click to show procedure

Procedure: Creating Solution Objects

Prerequisites

The [Applications](#) exist that will be part of the Solution.

Steps

1. Click **New**.
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:
 - **Name**—The name of the Solution. You must specify a value for this property, and that value must be unique within the Configuration Database.
 - **Assigned to Tenant**—In a multi-tenant environment, the Tenant to which this Solution is assigned.
 - **Solution Type**—The type of the Solution. You must specify a value for this property. Once you set the value, you cannot change it. This value is automatically set, based on the type of the imported Solution.

Important

A Solution of type **Default Solution Type** or **Framework** cannot be started and stopped with Solution Control Interface unless they have been created using a solution wizard. See the [Management Layer User's Guide](#) for more information.

- **Solution Control Server**—The name of the Solution Control Server that controls this Solution.
- **Version**—The version of the Solution. You must specify a value for this property.
- **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.

- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. In the **Application Definitions** tab, click **Add** to add an Application object to this Solution.

Important

The same Solution Control Server must control all Solutions that use the same Solution component.

4. Enter the following information in the pop-up window that displays on your screen:

- **Application Type**—The type of Application used as a Solution component.
- **Version**—The version of the Application used as a Solution component.
- **Startup Priority**—The default position of the Solution component in the component startup sequence within the Solution.
- **Optional**—Specifies whether this Solution component is optional.
- Click **OK**.

5. Click **Apply** to save the information in the **Application Definitions** tab.

6. In the **Applications** tab, click **Add** to add an Application to this Solution.

Important

The same Solution Control Server must control all Solutions that use the same Solution component.

7. Enter the following information in the pop-up window that displays on your screen:

- **Application**—The type of Application used as a Solution component.
- **Startup Priority**—The default position of the Solution component in the component startup sequence within the Solution.
- **Optional**—Specifies whether this Solution component is optional.
- Click **OK**.

8. Click **Save**.

Configuring Logging

[+] Click to show procedure

Procedure: Configuring Logging

Steps

1. In the **Solutions** list, select one or more Solutions.
2. Click **More** and select **Configure Logging**.
3. In the **Configuration of Logging** window, set the following options:
 - The Solutions that you selected from the **Solutions** list appears in the **Solutions** section. You can select or de-select Solutions to include in this procedure.
 - In the **Log Level** section, select one of the following options:
 - **All**—All events from the **Trace**, **Interaction**, and **Standard** log levels are logged.
 - **Trace**—Generates all log events from the **Trace**, **Interaction**, and **Standard** levels. This setting might adversely affect application performance. Set this level only when you are testing new interaction-processing functions or scenarios.
 - **Interaction**—Generates all log events of **Interaction** and **Standard** levels. Set this level only when you are testing events on a particular interaction.

Important

Interaction-level records contain the Interaction ID attribute that helps to search for log events that are generated by various applications but related to the same interaction.

Warning

Using the Interaction level generates a higher number of logging events on the network, which might adversely affect the performance of the DBMS, Message Servers, and interaction-processing components.

- **Standard**—Genesys recommends you permanently enable only a Standard level of logging during the operation of Solutions in regular production mode. This level reports events for significant problems and normal operations of in-service Solutions. An event is reported at the Standard level if it satisfies one of these criteria:

- Indicates that an attempt to perform any external operation has failed
 - Indicates that the latest attempt to perform an external operation that previously failed has succeeded
 - Indicates detection of a condition that has a negative impact on operations, actual or projected
 - Indicates that a previously detected condition, which had a negative impact on operations, no longer exists
 - Indicates a security violation of any kind
 - Indicates a high-level data exchange that cannot be recognized or does not follow the expected logical sequence
 - Indicates inability to process an external request
 - Indicates successful completion of a logical step in an initialization process
 - Indicates a transition of an Application from one operational mode to another
 - Indicates that the value of a parameter associated with a configurable threshold has exceeded that threshold
 - Indicates that the value of a parameter associated with a configurable threshold that earlier exceeded the threshold has returned to its normal range.
- **None**—No logging is performed.
4. In the **Log Outputs Adjustment** section, you can fine-tune the logging level for the following output types: **Network Log Server**, **Plain Text File**, and **Console**.
 5. Perform one of the the following:
 - If you selected **Network Log Server** in the previous step, go to the **Message Server** section and select the Message Server to receive logs.
 - If you selected **Plain Text File** in the previous step, go to the **Log File Name** section and specify the log file name to receive logs. You can also specify the following:
 - **Create Segment**—If checked, segment the log file into chunks specified by the **Segment Size (MB)** field.
 - **Segment Size (MB)**—If **Create Segment** is checked, specify a segment size for the log file, in megabytes.
 - **Segment Expiration**—If checked, segments are deleted after a maximum number of segments is reached, as defined by **Maximum Segments**.
 - **Maximum Segments**—If **Segment Expiration** is checked, specify how many segments to retain before segments beyond this limit are removed.
 6. Click **OK**.

Related Links

- [Time Zones](#)
- [Application Templates](#)
- [Time Zones](#)
- [Application Templates](#)
- [Solutions](#)

Tenants

Tenants are businesses whose customer interactions are enabled or enhanced through services offered by a third party, typically a telecommunications service provider. From an architectural standpoint, however, most of the hardware and software that Tenants use to enable or enhance those interactions belong to the service provider.

From a functional standpoint, each Tenant in a hierarchical multi-tenant environment is a contact center (single or multi-site) completely equipped to process customer interactions. In a hierarchical multi-tenant environment, at any given time, Genesys Administrator Extension displays only those hardware and software resources belonging to a particular Tenant within that environment.

Important

To create Tenants, a user must have the appropriate permissions and role privileges to log in to Genesys Administrator Extension and create Tenants. However, the Tenant Creators Access Group must exist for the user to create a Tenant.

Allocation of Resources

Some of these hardware and software resources are allocated to each Tenant separately (for example, the telephony extensions and queues of a switching system).

Other resources are shared by the Tenants; these resources process customer interactions for some or all of the Tenants simultaneously (for example, the control and signaling devices of a switching system, and service control points of the public telephone network).

The configuration objects that describe both types of resources are allocated to Tenants accordingly.

Viewing Tenants

Normally, the Tenants that are visible depends on which Tenant is selected in the **Tenant Directory** of Configuration Manager. When set to Environment, the User is able to see all Tenants. If another Tenant is selected, the User can view only that Tenant and any existing child Tenants.

If the User is using the **Quick Filter** field, all Tenants to which the User has access are searched. If the User does not have access to the Environment (root) Tenant, it is not displayed.

Display Options

The **Tenants** list shows the Tenants that are in your environment.

Important

Tenants that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges to access.

You can filter the contents of this list by typing the name or partial name of an object in the **Quick Filter** field.

Procedures

To **create a new Tenant object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. You must click a Tenant to access functions to copy the Tenant, delete the Tenant, or to enable or disable the Tenant.

Important

When you delete a Tenant from the Configuration Database, all of its child Tenants are also deleted, and recursively, all of their child Tenants.

Click on the name of a Tenant to view additional information about the object. You can also set **options** and **permissions**, and view **dependencies**.

Procedure: Creating Tenant Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Tenant. You must specify a value for this property, and that value must be unique within the Configuration Database.
 - **Password**—A password that must be used to access this Tenant.
 - **Confirm Password**—A confirmation of the password.

- **Parent Tenant**—The parent Tenant of this Tenant. By default, the parent Tenant is the Tenant in which you are creating the new Tenant. If you change this field, the new Tenant will be created as a new child Tenant under the specified parent Tenant. To subsequently change the parent Tenant, refer to the Structure tab, above.
- **Chargeable Number**—The account number to which activities for this Tenant are charged, for cost-tracking purposes.
- **Default Capacity Rule**—The name of the Script of Capacity Rule type that defines the ability of this Tenant to handle multiple interactions. For more information, refer to Reporting documentation.
- **Default Contract**—The default cost contract applied to resources of this Tenant. For more information, refer to the Routing Solutions chapter of the [Universal Routing 8.0 Routing Application Configuration Guide](#).
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. Click **Save**.

Important

If you are not logged in as the default User, or are not a member of the **SuperAdministrators** Access Group, you must have special [permissions](#) and [role privileges](#) to create a Tenant. Refer to the [Genesys 8.1 Security Deployment Guide](#) for details about the security requirements for creating a Tenant.

Structure

Hierarchical Multi-Tenant Structure

The structure of a hierarchical multi-tenant structure can contain an unlimited number of levels. This configuration environment serves the needs of every company in the hierarchy.

In any multi-tenant environment, when you run Genesys Administrator Extension for the first time after the Configuration Database initialization, you can only view the Environment Tenant. When you register a new Tenant in the Configuration Database, the Configuration Layer automatically creates all the folders necessary to support resource allocation and configuration data entry for this Tenant.

Refer to the [Genesys 8.1 Security Deployment Guide](#) for information about how permissions are inherited in a hierarchical multi-tenant structure.

Modifying the Hierarchical Multi-Tenant Structure

To rearrange Tenants between parent Tenants in the structure, modify the Parent Tenant field for the Tenant object that you want to move.

Related Links

- [Time Zones](#)
- [Application Templates](#)
- [Time Zones](#)
- [Application Templates](#)
- [Solutions](#)

Time Zones

Time Zones are predefined objects that provide Genesys applications with information about international time zones.

When you first open the list of Time Zone objects, you will see a list of international time zones.

Display Options

The **Time Zones** list shows the Time Zones that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Time Zones that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Time Zone object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Time Zone.
- **Move To**—Move a Time Zone to another **hierarchical structure**.

- Enable or disable Time Zones.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Time Zone to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Time Zone Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Time Zone. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Description**—A brief description of the Time Zone.
 - **Name in Mozilla**—The name of the Time Zone used in the Mozilla Firefox browser. You must specify a value for this property.
 - **Name in Explorer**—The name of the Time Zone used in the Microsoft Internet Explorer browser. You must specify a value for this property.
 - **DST Observed**—Indicates whether Daylight Saving Time (DST) is used.

Note: The following fields display only if the **DST Observed** check box is selected.

- **Daylight Saving Time Type**—Select one of the following to define when DST starts and ends:
 - **Current Year or Fixed Date (local)**—DST begins and ends on a specific date and time. This setting covers only one year, and must be reset every year.
 - **Start Date**—The date at which DST begins.
 - **End Date**—The date at which DST ends.
 - **Start Time**—The time at which DST begins.
 - **End Time**—The time at which DST ends.
 - **Daylight Saving Time definition (GMT)**—DST begins and ends on a specific month/day/time. These settings are carried forward over many years, until changed or DST is no longer used.
 - **Start Year**—The year that DST started to be observed or will start to be observed. If DST is currently in use, you can also select **Not Observed**.

- **End Year**—The year that DST is to be discontinued. If there are no plans to discontinue DST, select **Not Observed**.
- **Start Month**—The month in which DST starts.
- **End Month**—The month in which DST ends.
- **Start Day Type**—Specifies whether the **Start Day** value is **Fixed**, in which DST starts on the same date every year, or **Variable**, in which you must define the variables to be used to determine the Start Day.
- **End Day Type**—Specifies whether the **End Day** value is **Fixed**, in which DST ends on the same date every year, or **Variable**, in which you must define the variables to be used to determine the End Day.
- (If **Start Day Type** is set to **Fixed**) **Start Day**—The date at which DST begins.
- (If **End Day Type** is set to **Fixed**) **End Day**—The date at which DST ends.
- (If **Start Day Type** is set to **Variable**) **Start Week**—The week number in which DST begins.
- (If **End Day Type** is set to **Variable**) **End Week**—The week number in which DST ends.
- (If **Start Day Type** is set to **Variable**) **Start Day of Week**—The day of the week in which DST begins.
- (If **End Day Type** is set to **Variable**) **End Day of Week**—The day of the week in which DST ends.
- **Start Time**—The time at which DST begins.
- **End Time**—The time at which DST ends.
- **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. Click **Save**.

International Time Zones

Genesys Administrator Extension includes the following international time zones:

Abbreviation	Time Zone
ACT	Australia Central Time
AET	Australia Eastern Time

Abbreviation	Time Zone
AGT	Argentina Standard Time
AtIST	Atlantic Standard Time
ART	(Arabic) Egypt Standard Time
AST	Alaska Standard Time
BET	Brazil Eastern Time
BST	Bangladesh Standard Time
CAT	Central Africa Time
CNT	Canada Newfoundland Time
CST	Central Standard Time
CTT	China Taiwan Time
EAT	Eastern Africa Time
ECT	European Central Time
EET	Eastern European Time
EST	Eastern Standard Time
GMT	Greenwich Mean Time
HST	Hawaii Standard Time
IET	Indiana Eastern Standard
IST	India Standard Time
JST	Japan Standard Time
KST	Korea Standard Time
MET	Middle East Time
MIT	Midway Islands Time
MST	Mountain Standard Time
NET	Near East Time
NST	New Zealand Standard Time
PLT	Pakistan Lahore Time
PNT	Phoenix Standard Time
PRT	Puerto Rico and US Virgin Islands Time
PST	Pacific Standard Time
SST	Solomon Standard Time
VST	Vietnam Standard Time

Related Links

- [Time Zones](#)
- [Application Templates](#)
- [Time Zones](#)

- [Application Templates](#)
- [Solutions](#)

Switching

The Switching section of Configuration Manager enables you to configure the following objects:

- [Agent Logins](#)
- [DNs](#)
- [DN Groups](#)
- [IVRs](#)
- [IVR Ports](#)
- [Places](#)
- [Place Groups](#)
- [Switches](#)
- [Switching Offices](#)

Agent Logins

Agent Logins are unique codes defined within a **Switch** and assigned to agents. They identify which agent is working at which **Place** during a particular working session.

The configuration of Agent Logins in the Configuration Database must match exactly the configuration of those Agent Logins in the switching system. Before adding or deleting a particular Agent Login, make sure that the same change was made in the database of the switching system.

When you specify Agent Logins as objects in a Switch, they are not associated with any particular agents. For information about how to assign Agent Logins to agents, refer to **Creating Agents**.

Display Options

The **Agent Logins** list shows the Agent Logins that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

- The **Switches** list displays when you select **Agent Logins** in Configuration Manager. To access the **Agent Logins** list, you must first select a Switch object and then an Agent Logins folder.
- Agent Logins that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the Tenant that you want to select. Use the **Quick Filter** field in this panel to filter the Tenant list.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Agent Login object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more

objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Important

When you delete an Agent Login, the Agent Login is removed from the Configuration Database and from any Agent to which it is assigned. This might affect the configuration of a particular Agent in the contact center. Before deleting an Agent Login, consider viewing the **dependencies** tab to identify the Agent to which this Login is assigned. If you want to remove only the Agent Login from the Agent to which it is assigned, but leave it still existing in the Configuration Database and available for assignment to another Agent, open the **User Account** for the Agent, remove the Agent Login from the Agent, and click **Save**.

Otherwise, select the check box beside one or more objects and click **More** to perform the following tasks:

- **Clone**—Copy an Agent Login.
- **Move To**—Move an Agent Login to another **hierarchical structure**.
- Enable or disable Agent Logins
- Create a folder, configuration unit, or site. See **Object Hierarchy** for more information.

Click on the name of an Agent Login to view additional information about the object. You can also set **options** and **permissions**, and view **dependencies**.

Procedure: Creating Agent Login Objects

Steps

1. Click the Switch object in which you wish to create an Agent Login.
2. Click the Agent Logins folder in which you wish to create an Agent Login.
3. Click **New**.
4. 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:
 - **Code**—The Agent Login code. You must specify a value for this property, and that value must be unique within the Switch. Once you set the value, you cannot change it.
 - **Switch**—The Switch to which this Agent Login belongs. This value is automatically set, based on the Switch being viewed in the **Agent Logins** list.

- **Override**—Value to use as the override instead of the Code value for accessing this Agent Login in certain types of routing. You must specify an override value, and it must be unique within the Switch.

Important

To specify a value in the **Override** field, you must ensure the **Use Override** check box is checked.

- **Switch-specific Type**—An integer that corresponds to a combination of switch-specific settings for this Agent Login. It identifies the device type (for example, Extension, ACD Position, or Trunk) for each switch (PBX) that T-Server supports. It is unique for each switch/DN/T-Server configuration. In essence, it provides a cross-reference for DN Types between T-Server and PBX. You must specify a value for this property, and it must be 1 or greater. For more information, refer to the *Framework T-Server Deployment Guide* for your particular T-Server.
- **Password**—A security protection key used along with this Agent Login to authenticate a User for contact-center activity. You can associate one User with multiple password-protected Agent Logins.
- **Confirm Password**—Confirmation of the password entered in the **New Password** field.
- **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the Tenant Directory field in the object list.
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

5. Click **Save**.

Related Links

- [Places](#)
- [IVRs](#)
- [IVR Ports](#)
- [Place Groups](#)
- [Switching Offices](#)

DNs

DNs are communication devices, uniquely identified by their directory numbers (DNs), where customer interactions (for example, telephone calls or e-mails) reside and are handled.

Because most types of DNs represent the actual devices of the telephone system, their specification in the Configuration Database must always correspond to their Switch settings. Remember that Genesys Administrator Extension has no way of verifying this correspondence.

As a general rule, changes made to DN configurations in the Configuration Database must always follow the changes made to DNs within the telephone system, and never the other way around.

Display Options

The **DNs** list shows the DNs that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

- The **Switches** list displays when you select **DNs** in Configuration Manager. To access the **DNs** list, you must first select a Switch object and then a DN folder.
- DNs that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

Click **Group By** to group objects by various criteria.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new DN object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Important

When you delete a DN, it is removed from the Configuration Database and from any DN Group of which it is a member. If you want to remove only the DN from a DN Group of which it is a member, but leave it still existing in the Configuration Database and available for assignment to another DN Group, you must remove it from the DNs tab of the DN Group.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a DN.
- **Move To**—Move a DN to another **hierarchical structure**.
- Enable or disable DNs.
- Create a folder, configuration unit, or site. See **Object Hierarchy** for more information.

Click on the name of a DN to view additional information about the object. You can also set **options** and **permissions**, and view **dependencies**.

Procedure: Creating DN Objects

Steps

1. Click the Switch object in which you wish to create a DN.
2. Click the DN folder in which you wish to create a DN.
3. Click **New**.
4. 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:
 - **Number**—A directory number assigned to this DN within the Switch. You must specify a value for this property, and that value must be unique within the Switch for all DN types

except the **Destination Label** type. Once you set the value, you cannot change it. Genesys Administrator Extension does not verify the correspondence between the numbers assigned to DNs and the switch's numbering plan defined by the **DN Range** property of the Switch. If, according to T-Server specifications, such correspondence is important in an environment, make sure that the specified **DN Range** covers all DN numbers that are defined within the Switch in question.

- **Type**—The type of the DN. Once you set the value, you cannot change it.
- **Switch**—The Switch to which this DN belongs. You must specify a value for this property. Once you set the value, you cannot change it.
- **Association**—An entity permanently associated with this DN (for example, an IVR port number, channel name, or access number). For DNs of **External Routing Point** type, this number may be required to substitute for the actual DN directory number and may be used when placing calls to this routing point from another Switch.
- **Register**—Indicates whether T-Server must register this DN within the Switch. You must specify a value for this property. From the drop-down menu, select one of the following values:
 - **False**—T-Server should never register the DN in question on the Switch, but process it locally.
 - **True**—T-Server should always register the DN on the Switch during T-Server startup or reconnection.
 - **On-Demand**—T-Server should register the DN only when a T-Server client requests the registration. Consult T-Server documentation for more information.

Warning

The last two values force T-Server to register this DN regardless of whether it is enabled or disabled.

- **Alias**—An alternative name for this DN. You must specify a value for this property if the DN is used as a target in routing instructions. If you specify this value, it must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
- **Route Type**—The type of routing that applies to this DN. You must specify a value for this property.
- **DN Group**—The DN Group to which this DN belongs.
- **Override**—Value to use as the override instead of the number or name value for accessing this DN in certain types of routing. You must specify an override value, and it must be unique within the Switch.

Important

To specify a value in the **Override** field, you must ensure the **Use Override** check box is checked.

- **Login ID**—The login identifier used to activate this DN. Some types of switching systems require that the login code used to activate a particular DN be permanently associated with this DN. In that case, the Login ID may be applicable to the following types of DNs: **ACD Position, Extension, Voice Treatment Port, Voice Mail, or Mixed.**
- **Switch-specific Type**—An integer that corresponds to a combination of switch-specific settings for this DN. It identifies the device type (for example, **Extension, ACD Position, or Trunk**) for each switch (PBX) that T-Server supports. It is unique for each switch/DN/T-Server configuration. In essence, it provides a cross-reference for DN Types between T-Server and PBX. You must specify a value for this property, and it must be 1 or greater. For more information, refer to the *Framework T-Server Deployment Guide* for your particular T-Server.
- **Number of Trunks**—The number of trunks associated with this DN. It applies only if the Type property has a **Network Destination** value. The default value is 0.
- **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

5. Click **Save**.

DN Types

DN Type	Description
Access Resource	A Switch access resource to be used in a multi-site environment for external routing.
ACD Position	An extension designated for customer interactions only.
ACD Queue	A device in a Switch, typically associated with a number of targets, where customer interactions wait while the control system is looking for an available target.
Call Processing Port	An extension connected to a call-processing equipment port.
Chat	A Chat address.
CoBrowse	A Co-Browse address.

DN Type	Description
Communication DN	A virtual device that applications use to communicate with each other through the User Event mechanism.
E-mail Address	An e-mail address.
Extension	A regular extension line.
External Routing Point	An ISCC (Inter Server Call Control) resource dedicated to supporting the external routing and call overflow functions.
Fax	An extension connected to a fax machine.
Mixed	An extension line that can be used as both an Extension and an ACD Position.
Mobile Station	A mobile station.
Modem	An extension connected to data communication equipment.
Music Port	A music source.
Network Destination	A destination number in network routing.
Routing Point	A device in a Switch, not associated with any particular target, where customer interactions wait while a routing application is making routing decisions.
Routing Queue	A telephony device that can be used as both a Routing Point and an ACD Queue.
Service Number	A service number used as a Routing Point in network routing.
Tie Line	A direct communication channel between two Switches of a private telephone network.
Tie Line Group	A group of tie lines forming one route.
Trunk	A communication channel between the public telephone network and a private telephone network.
Trunk Group	A group of trunks forming one route.
Video over IP Port	A video channel.
Virtual Queue	A virtual device, created and maintained by the switch, with activity identical to an ACD Queue.
Virtual Routing Point	A virtual device, created and maintained by the switch, with activity identical to a Routing Point.
Voice Mail	A voice mail channel.
Voice over IP Port	A Voice over IP (VoIP) Port.
Voice over IP Service	A VoIP Service.
Voice Treatment Port	An extension connected to an electronic audio equipment port (for example, IVR).
Workflow	A Workflow resource.

Related Links

- [Places](#)
- [IVRs](#)
- [IVR Ports](#)
- [Place Groups](#)
- [Switching Offices](#)

DN Groups

DN Groups are logical groupings of **DNs**. You can use DN Groups in network-level routing algorithms and in some types of statistics. To determine if you need to set up DN Groups, refer to your solution-specific documentation.

When you are specifying a DN Group, remember that the DNs in each DN Group must have the same telephony event model.

Although a DN Group can contain DNs that belong to a number of different **Switches**, you can receive correct statistical information about this DN Group only if the reporting applications connect to the servers associated with those Switches.

Display Options

The **DN Groups** list shows the DN Groups that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

DN Groups that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new DN Group object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete

individual objects by clicking on the object and then clicking **Delete**.

Important

When you delete a DN Group, only the DN Group object itself is removed from the Configuration Database. Its member DN objects are not deleted.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a DN Group.
- **Move To**—Move a DN Group to another [hierarchical structure](#).
- Enable or disable DN Groups.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a DN Group to view additional information about the object. You can also set [options](#) and [permissions](#).

Procedure: Creating DN Group Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the DN Group. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment). You cannot change this value as long as this DN Group contains at least one DN.
 - **Type**—The type of the DN Group. Once you set the value, you cannot change it.
 - **Capacity Table**—This field applies only for the Enterprise Routing Solution. It is the Capacity Table associated with this DN Group. Refer to Enterprise Routing Solution documentation for more information.
 - **Quota Table**—This field applies only for the Enterprise Routing Solution. It is the Quota Table associated with this DN Group. Refer to Enterprise Routing Solution documentation for more information.
 - **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.

- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. The **Origination DNs** tab lists **DNs** from which calls can be routed or diverted to this Agent Group. You can include DNs of the following types into this list: **Routing Point, External Routing Point, Service Number, Routing Queue, ACD Queue, Virtual Queue, or Virtual Routing Point.**
 4. In the **DNs** tab, click **Add** to add a DN to this DN Group. In the pop-up window, you can create a new DN object by clicking **+**.
 5. Perform one of the following actions after you have added a DN to the DN Group:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the tab.
 - Click **Cancel** to discard the changes.
 6. Click **Save**.

DN Group Types

The following are DN Group types and types of DNs that you can include in a group:

DN Group Type	Compatible DN Types
ACD Queues	ACD Queue, Routing Queue, and Virtual Queue
Network Ports	Network Destination
Routing Points	Routing Point, External Routing Point, Routing Queue, and Virtual Routing Point
Service Numbers	Service Number
Single Ports	Extension, ACD Position, Call Processing Port, Music Port, Communication DN, E-mail Address, Modem, Fax, Chat, CoBrowse, Voice over IP Port, Video over IP Port, Voice Treatment Port, and Voice Mail

Related Links

- [Places](#)
- [IVRs](#)
- [IVR Ports](#)
- [Place Groups](#)
- [Switching Offices](#)

IVRs

IVRs (Interactive Voice Responses) are telephony objects consisting of IVR Ports; they are controlled through IVR interface drivers.

When you register a new IVR in the Configuration Database, an IVR Ports folder is automatically created under this IVR.

IVR Ports are telephony objects uniquely identified by the numbers within IVRs at which telephone calls may reside and be handled.

Display Options

The **IVRs** list shows the IVRs that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

IVRs that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new IVR object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Warning

When you delete an IVR, this also deletes all IVR Ports specified within the IVR. Their deletion might in turn cause modifications in other objects.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy an IVR.
- **Move To**—Move an IVR to another [hierarchical structure](#).
- Enable or disable IVRs.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of an IVR to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating IVR Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the IVR. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Description**—A brief description of the IVR.
 - **Type**—The type of this IVR. You must specify a value for this property.
 - **Version**—The version of the IVR. You must specify a value for this property.
 - **IVR Server**—The name of the Application of the IVR Interface Server type that serves this IVR.
 - **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. In the **IVR Ports** tab, click **Add** to add an [IVR Port](#).

4. Click **Save**.

Important

IVR Ports are configured as separate objects. They can be created and configured only after the associated IVR has been created.

Related Links

- [Places](#)
- [IVRs](#)
- [IVR Ports](#)
- [Place Groups](#)
- [Switching Offices](#)

IVR Ports

IVR (Interactive Voice Response) Ports are telephony objects uniquely identified by the numbers within **IVRs** at which telephone calls may reside and be handled.

When you register a new IVR in the Configuration Database, an IVR Ports folder under this IVR is automatically created. An IVR Port can, therefore, be created only when the associated IVR is created.

Display Options

The **IVR Ports** list shows the IVR Ports that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

- The **IVRs** list displays when you select **IVR Ports** in Configuration Manager. To access the **IVR Ports** list, you must first select an IVR object and then an IVR Ports folder.
- IVR Ports that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new IVR Port object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Warning

When you delete an IVR Port, this might affect some objects in the configuration. To see associations between an IVR Port and other objects, use the **Dependencies** tab.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy an IVR Port.
- **Move To**—Move an IVR Port to another [hierarchical structure](#).
- Enable or disable IVR Ports.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of an IVR Port to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating IVR Port Objects

Prerequisites

You have [created the IVR](#) with which these Ports are associated.

Steps

1. In the **IVRs** list, click the IVR object in which you wish to create an IVR Port.
2. Click the IVR Ports folder in which you wish to create an IVR Port.
3. Click **New**.
4. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** button to select a value from a list:
 - **Port Number**—The number associated with a channel on an IVR. You must specify a value for this property, and that value can be equal to 0 (zero) or any positive integer. It must be unique within the IVR with which it is associated.
 - **Description**—A brief description of the IVR Port.
 - **IVR**—The IVR to which this IVR Port belongs. This value is automatically set, and you cannot change it.
 - **Associated DN**—The DN associated with this IVR Port.
 - **Associated Switch**—The Switch associated with this IVR Port.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the

object list.

- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

5. Click **Save**.

Related Links

- [Places](#)
- [IVRs](#)
- [IVR Ports](#)
- [Place Groups](#)
- [Switching Offices](#)

Places

A Place is a location that has one or more **DNs** operated by a single agent.

You configure Places and assign individual DNs to them in order to monitor performance and availability of **Agents**, **Agent Groups**, and **Place Groups**, and to provide this information to call-processing applications.

A typical Agent Place consists of two DNs: one DN that an Agent uses to take customer calls, and one DN that the Agent uses to make consultation calls and transfers.

If you are using the multimedia options of the Genesys products, Places may need to be equipped with DNs of other types, such as an e-mail address.

Display Options

The **Places** list shows the Places that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Places that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Place object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more

objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Important

When you delete a Place, it is removed from the Configuration Database and from any Place Group of which it is a member. If you want to remove the Place from a Place Group of which it is a member, but leave it in the Configuration Database and available for membership in another Place Group, remove the Place from the Place Group.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Place.
- **Move To**—Move a Place to another [hierarchical structure](#).
- Enable or disable Places.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Place to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Place Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of this Place. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Capacity Rule**—The Capacity Rule Script associated with this Place.
 - **Cost Contract**—The Cost Contract associated with this Place.
 - **Site**—The Site with which the Capacity Rule and/or Cost Contract is associated. If the Capacity Rule or Cost Contract are associated with a Site, this field is set to that Site.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is

automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.

- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. In the **DNs** tab, click **Add** to add a DN. In the pop-up window, you can create a new object by clicking **New**.
 4. Perform one of the following actions after you have added a DN to the Place:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the tab.
 - Click **Cancel** to discard the changes.
 5. Click **Save**.

Related Links

- [Places](#)
- [IVRs](#)
- [IVR Ports](#)
- [Place Groups](#)
- [Switching Offices](#)

Place Groups

Place Groups are logical groupings of **Places**. You can group Places if, according to the call-processing algorithms, the calls must be distributed among a set of Places under the control of applications instead of through the ACD mechanisms of the **Switch**.

As an example, consider a call-parking service: A Routing application transfers a call to a port that is assigned to a call-parking Place Group; then, while the call is parked, the application attaches information about the treatment to be applied to it.

Display Options

The **Place Groups** list shows the Place Groups that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Place Groups that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Place Group object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Important

When you delete a Place Group, only the Place Group object itself is removed from the Configuration Database. Its member Place objects are not deleted.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Place Group.
- **Move To**—Move a Place Group to another [hierarchical structure](#).
- Enable or disable Place Groups.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Place Group to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Place Group Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Place Group. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment). You cannot change this value as long as this Place Group contains at least one Place.
 - **Capacity Table**—This field applies only to the Enterprise Routing Solution. It is the Capacity Table associated with this Place Group. Refer to Enterprise Routing Solution documentation for more information.
 - **Quota Table**—This field applies only to the Enterprise Routing Solution. It is the Quota Table associated with this Place Group. Refer to Enterprise Routing Solution documentation for more information.
 - **Cost Contract**—The Cost Contract associated with this Place Group.
 - **Site**—The Site containing this Cost Contract.
 - **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.

- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. The **Origination DNs** tab lists DNs from which calls can be routed or diverted to this Place Group. You can include DNs of the following types into this list: **Routing Point, External Routing Point, Service Number, Routing Queue, ACD Queue, Virtual Queue, or Virtual Routing Point**. Click **Add** to add a DN. In the pop-up window, you can create a new DN object by clicking **+**.
 4. Perform one of the following actions after you have added a DN:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the tab.
 - Click **Cancel** to discard the changes.
 5. In the **Places** tab, click **Add** to add a Place. In the pop-up window, you can create a new Place object by clicking **+**.
 6. Perform one of the following actions after you have added a Place to the Place Group:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the tab.
 - Click **Cancel** to discard the changes.
 7. Click **Save**.

Related Links

- [Places](#)
- [IVRs](#)
- [IVR Ports](#)
- [Place Groups](#)
- [Switching Offices](#)

Switches

A Switch is an aggregate of telephony resources within a [Switching Office](#).

Most enterprise-level configurations have a one-to-one match between the Switches and the Switching Offices. However, there may be instances when it is desirable to partition the office into more than one Switch or to create a more efficient and secure numbering plan. In that case, you must define a Switch within a Switching Office.

In the event of the loss of all components at a single site, a Disaster Recovery (DR) strategy is required to ensure that there is a minimal disruption in service. The central part of this strategy is the existence of synchronized switches located at separate sites, and configured with identical sets of Agent extensions and [Agent Logins](#). An agent can log in to either switch at any time.

The Disaster Recovery strategy implemented by Genesys for Genesys components applies to Switches of type **SIP Switch**. To configure Disaster Recovery for Genesys components, at least one Switch must exist in the Configuration Database.

For additional information about Disaster Recovery, refer to the [SIP Server High-Availability Deployment Guide](#) or the [Genesys Administrator 8.1 Help](#).

Display Options

The **Switches** list shows the Switches that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Switches that are disabled will appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Switch object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Switch.
- **Move To**—Move a Switch to another **hierarchical structure**.
- Enable or disable Switches.
- Create a folder, configuration unit, or site. See **Object Hierarchy** for more information.

Click on the name of a Switch to view additional information about the object. You can also set **options** and **permissions**, and view **dependencies**.

Procedure: Creating Switch Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Switch. You must specify a value for this property, and that value must be unique within this Tenant (in a multi-tenant environment).
 - **Switching Office**—The Switching Office to which this Switch belongs. You must specify a value for this property. Once you set the value, you cannot change it.
 - **Switch Type**—The type of Switching Office to which this Switch belongs. This value is set automatically.
 - **T-Server**—The T-Server Application object through which the telephony objects of this Switch are controlled. Once you establish the association, it cannot be broken as long as the specified T-Server has at least one client application.
 - **DN Range**—The internal numbering plan of the Switch. Use a hyphen to specify a range of numbers, and use commas to specify a series of stand-alone numbers or ranges—for example, 1100-1179, 1190-1195, 1199. Although this parameter is optional, it may be important for T-Server operation with certain types of Switches.
 - **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.

- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. The **Access Codes** tab displays a list of Access Codes that are used to place, route, or transfer calls from this Switch to other Switches in a multi-site installation. Depending on the structure of a numbering plan, you may or may not need access codes to reach DN's that belong to different Switches of a multi-site telephone network. Click **Add** to add an Access Code to this Switch.
 4. Enter the following information in the pop-up window that displays on your screen:
 - **Switch**—The Switch to which you assign this Access Code.
 - **Code**—The prefix used to reach DN's of the Switch specified in the Switch property when placing or transferring calls from DN's of the Switch to the object for which you are configuring. You must specify a value for this property. You must specify an Access Code in full accordance with the numbering plan of the contact center telephone network, and you must make any changes to the Access Codes only after the corresponding changes have been made to the telephone network.
 - **Target Type**—The type of target within the Switch for which you are specifying all routing parameters.

Important

The combination of values for the first three properties—**Switch**, **Code**, and **Target Type**—defines the uniqueness of the Switch Access Codes. You may specify multiple Access Codes with the same code to the same Switch, provided that they have different target types.

- **Route Type**—The type of routing for the target specified in the Target Type for this Switch.
 - **DN Source**—An informational source that specifies the origination point in routing instructions.
 - **Destination Source**—An informational source that specifies the destination in routing instructions.
 - **Location Source**—An informational source that specifies the location in routing instructions.
 - **DNIS Source**—An informational source that specifies the DNIS in routing instructions.
 - **Reason Source**—An informational source that specifies the reasons in routing instructions.
 - **Extension Source**—An informational source that specifies the extensions in routing instructions.
 - Click **OK**.
5. Click **Apply** to save the information in the tab.
 6. The **Default Access Codes** tab displays a list of Access Codes that can be used by default to place, route, or transfer calls to this Switch from any other Switches in a multi-site installation. Depending on the structure of a numbering plan, you may or may not need access codes to reach DN's that belong to different Switches of a multi-site telephone network. Click **Add** to add a Default Access Code to this switch.

7. Enter the following information in the pop-up window that displays on your screen:

- **Code**—The prefix used to reach DNs of the Switch specified in the Switch property when placing or transferring calls from DNs of the Switch to the object for which you are configuring. You must specify a value for this property. You must specify an Access Code in full accordance with the numbering plan of the contact center telephone network, and you must make any changes to the Access Codes only after the corresponding changes have been made to the telephone network.
- **Target Type**—The type of target within the Switch for which you are specifying all routing parameters.

Important

The combination of values for the first three properties—**Switch**, **Code**, and **Target Type**—defines the uniqueness of the Switch Access Codes. You may specify multiple Access Codes with the same code to the same Switch, provided that they have different target types.

- **Route Type**—The type of routing for the target specified in the Target Type for this Switch.
- **DN Source**—An informational source that specifies the origination point in routing instructions.
- **Destination Source**—An informational source that specifies the destination in routing instructions.
- **Location Source**—An informational source that specifies the location in routing instructions.
- **DNIS Source**—An informational source that specifies the DNIS in routing instructions.
- **Reason Source**—An informational source that specifies the reasons in routing instructions.
- **Extension Source**—An informational source that specifies the extensions in routing instructions.
- Click **OK**.

8. Click **Save**.

Related Links

- [Places](#)
- [IVRs](#)
- [IVR Ports](#)
- [Place Groups](#)
- [Switching Offices](#)

Switching Offices

Switching Offices are the actual telephone switches that provide telephone service to contact centers.

You must register a Switching Office before you configure a **Switch** with **DNs** and **Agent Logins**.

Display Options

The **Switching Offices** list shows the Switching Offices that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Switching Offices that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Switching Office object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. You cannot delete a Switching Office if it has at least one Switch associated with it. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Switching Office.

- **Move To**—Move a Switching Office to another [hierarchical structure](#).
- Enable or disable Switching Offices.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Switching Office to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Switching Office Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Switching Office. You must specify a value for this property, and that value must be unique within this Switching Office (in either an enterprise or a multi-tenant environment) or within this Tenant (in a multi-tenant environment).
 - **Switch Type**—The type of the Switching Office. You must specify a type. Once you set the type, you cannot change it.
 - **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. Click **Save**.

Related Links

- [Places](#)
- [IVRs](#)
- [IVR Ports](#)
- [Place Groups](#)
- [Switching Offices](#)

Routing/eServices

The Routing/eServices section of Configuration Manager enables you to configure the following objects:

- [Audio Resources](#)
- [Business Attributes](#)
- [Business Attribute Values](#)
- [Objective Tables](#)
- [Statistical Days](#)
- [Statistical Tables](#)
- [Transactions](#)
- [Voice Prompts](#)

Audio Resources (Configuration Manager)

This window enables you to manage personalities and their associated audio resources (announcements and music files).

You can create Personalities to help you organize which files belong to a particular speaker. For example, you might have a personality called John that uses dialog spoken in English by a male speaker. Or, you might have a personality called Marie that uses dialog spoken in French by a female speaker.

You can upload two types of audio resources:

- **Announcements**—These are files that contain spoken dialog that will be played for customers. For example, you might have an announcement file that tells customers about your business hours.
- **Music**—These are files that play music for customers. For example, you might have a music file that plays music for customers who are about to be transferred to an Agent.

The **Audio Resources** window in Genesys Administrator Extension (GAX) is a unified list of your personalities and audio resources. For each audio resource, GAX displays the following:

- A logo to indicate whether the file has been designated as Announcement or Music.
- The name of the audio resource.
- The Audio Resource ID (ARID).
- Additional columns, one for each personality, to indicate which personality is using this audio resource.

Click **Show Quick Filter** and type the name or partial name of an object in the **Quick Filter** field. The list updates dynamically to show items that match the text in the **Quick Filter** field.

Audio Resource Management (ARM) is integrated with **Operational Parameters Management (OPM)** to allow users to dynamically select personalities and audio resources to be used with a parameterized strategy or orchestration application, or a parameterized routing or voice applications.

Access to ARM is based on both role privileges and Tenant access control permissions, as follows:

- User access to screens or certain ARM functionality is managed by role privileges.
- Access control permissions define which audio resources can be viewed or modified by an authenticated user. Access to audio resources is granted by Tenant. Users have access to all audio resources for each Tenant to which they have access.

Click on a tab below to learn more.

Personalities

Creating a Personality

To create a new Personality, click **New**.

[+] Show Procedure

Procedure: Creating a Personality

Steps

1. Click **New** and select **Add Personality**.
2. Enter the following information:
 - **Personality Name**—The name of this personality.
 - **Language**—The language spoken by this personality.
 - **Description**—A description of this personality.
 - **Gender**—Select whether this personality is Male, Female, or Not Specified.
3. Click **Save**.

Other Actions

Once you create a personality, you can:

- Edit the personality—Click **Edit** beside a personality to edit personality properties.
- Delete the personality—Click **Edit** to view personality properties. In the **Edit Personality** window, click **Delete** to delete the personality.

Important

You cannot delete a Personality that is a part of one or more Audio Resource Files.

- Manipulate the audio resource—Once an audio resource is assigned to the personality, several options become available to manipulate the file.
 - Play the file—Click the play button to listen to the file.
 - **Delete**—Delete the file. This does not delete the associated personalities, but it does delete the original audio files. A file can only be removed if the audio resource to which it has been assigned has not been deployed. If the user performing this operation is a Service Provider, the file can only be removed if the file was not created by a Tenant.

- **Reprocess**—Reprocessing recreates an audio resource file from the original audio file that was uploaded (if it has not been deleted from the database and/or target storage). It also performs any necessary conversion between audio formats.
- **Download**—Download the file to your computer.
- **Encodings**—View information about how the file was encoded by GAX. When audio files are uploaded, GAX automatically encodes them to the following formats: μ -law, A-law, and GSM.

Audio Resources

Creating an Audio Resource

To create an Audio Resource, click **New**.

[+] Show Procedure

Procedure: Creating an Audio Resource

Steps

1. Click **New** and select **Add Message**.
2. Enter the following information:
 - **Name**—The name of this audio resource.
 - **Description**—A description of this audio resource.
 - **Type**—Select whether this audio resource is Music (a music file) or Announcement (an announcement file).
3. Click **Save**.

Uploading Audio Resources

[+] Show Procedure

Procedure: Uploading Audio Resources

Steps

1. Identify which audio resource and personality to assign to the file. Once identified, select or hover over the table cell that is shared by the target audio resource and personality.
2. Click **Upload Audio File**.
3. Your browser opens a dialog box to select an audio resource to upload. Select a file to upload.
4. The audio resource is uploaded to GAX and assigned to the personality.

Deleting Audio Resources

[+] Show Procedure

Procedure: Deleting Audio Resources

Steps

1. Click the check box beside the audio resource that you want to delete.
2. Click **Delete**.

Important

- If you delete an audio resource, all files that are associated with it are also deleted.
- If you are deleting an audio resource that is being used by Operational Parameter Management, and this Audio Resource being used by one or more parameters or Parameter Groups, a message is displayed that indicates this fact. When this happens, you can either cancel the deletion or force the deletion.

Other Actions

Once you upload a file, you can select or highlight over the file and choose one of the following

actions:

- Play the file—Click the play button to listen to the file.
- **Delete**—Delete the file. This does not delete the associated personalities, but it does delete the original audio files. A file can only be removed if the audio resource to which it has been assigned has not been deployed. If the user performing this operation is a Service Provider, the file can only be removed if the file was not created by a Tenant.
- **Reprocess**—Reprocessing recreates an audio resource file from the original audio file that was uploaded (if it has not been deleted from the database and/or target storage). It also performs any necessary conversion between audio formats.
- **Download**—Download the file to your computer.
- **Encodings**—View information about how the file was encoded by GAX. When audio files are uploaded, GAX automatically encodes them to the following formats: μ -law, A-law, and GSM.

Sharing Audio Resources

The Environment Tenant (Service Provider) can share audio resources with other Tenants. Deployed audio resources have the following properties:

- A new audio resource is created for each Tenant.
- If the Tenant does not have matching personalities, new personalities are automatically created.
- The Personality IDs and Audio Resource IDs match the IDs of the files that are being deployed.
- File names are shared through the new audio resource. New files are not created on the file server. Audio resources provide a mechanism to make the encoded file names visible to other Tenants so that they can be used with Operational Parameter Management.
- Only the Environment Tenant can deploy an audio resource to another Tenant. It is not possible for a Tenant to re-deploy an audio resource to another Tenant.
- Changes that are made by the Environment Tenant in files of the deployed audio resources are propagated automatically. This includes adding, updating, and removal of Audio Resource Files of deployed audio resources.

Deploying Audio Resources

[+] Show Procedure

Procedure: Deploying Audio Resources

Steps

You can deploy audio resources by Tenant or by audio resource. Choose one of the methods below:

By Tenant

1. Click **Tenant Directory** and choose a Tenant to receive the audio resource.
2. Click **Edit Deployment**.
3. The **Environment Owner Messages** displays a list of audio resources in your environment. You can add or remove audio resources from the Tenant by clicking **Add** or **Remove** beside each audio resource.
4. Click **OK**.

By Audio Resource

1. Click the check box beside the audio resource that you want to deploy.
2. Click **Edit**.
3. In the Tenants list, select which Tenants to which this audio resource will be deployed. You can also click **Make this message available for all tenants** to deploy the resource to all Tenants.
4. Click **Save**.

Related Links

- [Voice Prompts](#)
- [Statistical Tables](#)
- [Transactions](#)
- [Audio Resources \(Configuration Manager\)](#)
- [Business Attribute Values](#)

Business Attributes

Business Attributes are objects that serve as containers of a particular type for **Attribute Value** objects. Instances of this object are available enumerations (classifications), such as Media Type, Service Type, and others.

Important

Business Attribute names and values may be stored using UTF-8. This enables the attributes and their values to be entered and displayed in any language, including non-ASCII languages such as Japanese. If required, two or more languages can be combined for a single Business Attribute.

For more information about Business Attributes, refer to the following documents:

- [Universal Routing 8.1 Business Process User's Guide](#)
- [Universal Routing 8.1 Reference Manual](#)
- [<https://docs.genesys.com/Documentation/ES/8.1/IxnProps/BizAttrib> Business Attributes topic in eServices Interaction Properties Reference Manual]

Display Options

The **Business Attributes** list shows the Business Attributes that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Business Attributes that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Business Attribute object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Business Attribute.
- **Move To**—Move a Business Attribute to another **hierarchical structure**.
- Enable or disable Business Attributes
- Create a folder, configuration unit, or site. See **Object Hierarchy** for more information.

Click on the name of a Business Attribute to view additional information about the object. You can also set **options** and **permissions**.

Procedure: Creating Business Attribute Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Business Attribute. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment). Once you set the value, you cannot change it.
 - **Display Name**—The localized name of the Business Attribute under which this object is to be displayed on graphical user interface elements such as dialog boxes. By default, this value is the same as for the **Name** property.
 - **Description**—A brief description of the Business Attribute.
 - **Type**—The type of the Business Attribute. You must specify a value for this property. Once you set the value, you cannot change it.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is

automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.

- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. Click **Save**.

Related Links

- [Voice Prompts](#)
- [Statistical Tables](#)
- [Transactions](#)
- [Audio Resources \(Configuration Manager\)](#)
- [Business Attribute Values](#)

Business Attribute Values

A Business Attribute Value is an object which represents a single value within the range of values for a given **Business Attribute** object.

Display Options

The **Business Attribute Values** list shows the Business Attribute Values that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

- The **Business Attributes** list displays when you select **Business Attribute Values** in Configuration Manager. To access the **Business Attribute Values** list, you must first select a Business Attribute object and then a Business Attribute Value folder.
- Business Attribute Values that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Business Attribute Value object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Business Attribute Value.
- **Move To**—Move a Business Attribute Value to another [hierarchical structure](#).
- Enable or disable Business Attribute Values.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Business Attribute Value to view additional information about the object. You can also set [options](#) and [permissions](#).

Procedure: Creating Business Attribute Value Objects

Steps

1. In the **Business Attributes** list, click the Business Attribute object in which you wish to create a Business Attribute Value.
2. Click the Business Attribute Value folder in which you wish to create a Business Attribute Value.
3. Click **New**.
4. 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:
 - **Name**—The name of the Business Attribute Value. You must specify a value for this property, and that value must be unique within the Business Attribute to which this Business Attribute Value belongs. Once you set the value, you cannot change it.
 - **Display Name**—The localized name of the Business Attribute Value under which this object is to be displayed on graphical user interface elements such as dialog boxes. By default, this value is the same as for the **Name** property.
 - **Business Attribute**—The Business Attribute to which this Business Attribute Value belongs. You must specify a value for this property. Once you set the value, you cannot change it.
 - **Description**—A brief description of the Business Attribute Value.
 - **Default**—If selected, indicates that this value is the default value for the Business Attribute to which it belongs. After you select this check box for one Business Attribute Value, you cannot select it for any other value that belongs to the same Business Attribute.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
5. Click **Save**.

Related Links

- [Voice Prompts](#)
- [Statistical Tables](#)
- [Transactions](#)
- [Audio Resources \(Configuration Manager\)](#)
- [Business Attribute Values](#)

Objective Tables

Objective Tables are collections of Objective Records that define the correspondence between interaction attributes (such as media type, service type, and customer segment) and service objectives.

If you are using Cost-Based Routing, use a Cost Contract. A Cost Contract is a special type of Objective Table, and contains the information required for calculating the cost of an interaction to be routed. Cost Contracts contain Objective Records, each of which is associated with an IT Contract. For information about working with Cost Contracts, see the Cost Contracts section in the Procedures tab, below.

Refer to the [Universal Routing 8.0 Routing Application Configuration Guide](#) for more information about Objective Tables.

Display Options

The **Objective Tables** list shows the Objective Tables that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Objective Tables that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To [create a new Objective Table object](#), click **New**. To view or edit details of an existing object, click

on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy an Objective Table.
- **Move To**—Move an Objective Table to another [hierarchical structure](#).
- Enable or disable Objective Tables.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of an Objective Table to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Objective Table Objects

Steps

- [Objective Table](#)
- [Cost Contract](#)

Objective Table

1. Click **New**.
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:
 - **Name**—The name of the Objective Table. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or the Tenant (in a multi-tenant environment).
 - **Description**—A brief description of the Objective Table.
 - **Type**—Select **default** to create an Objective Table that is not a Cost Contract
 - **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. Click **Save**.

Cost Contract

1. Click **New**.
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:
 - **Name**—The name of the Objective Table. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or the Tenant (in a multi-tenant environment).
 - **Description**—A brief description of the Objective Table.
 - **Type**—Select **Contract** to create an Objective Table that is a Cost Contract.
 - **Total Prepaid Cost**—The prepaid contract cost, for Volume Rate Contracts only.
 - **Time Zone**—The Time Zone for this Cost Contract and the Interaction Types specified in the General tab.
 - **Start**—The date on which to start the Cost Contract.
 - **End**—The date on which to end the Cost Contract.

Important

Refer to the [Universal Routing 8.0 Routing Application Configuration Guide](#) for more information.

3. Click **Apply** to save the Cost Contract. The **Objective Records** tab displays.
4. In the **Objective Records** tab, click **Add**.
5. Enter the following information in the pop-up window that displays on your screen:
 - **Media Type**—The type of media technology used for information exchange, for example voice, e-mail, and fax. The range of Attribute Values for this field is defined within Media Type Business Attribute.
 - **Service Type**—The service that a customer is requesting. The range of Attribute Values for this field is defined within Service Type Business Attribute.
 - **Customer Segment**—Categorizes a customer based on their revenue potential to the enterprise relative to a business line. The range of Attribute Values for this field is defined within Customer Segment Business Attribute.
 - **Service Objective Goal**—Service Objective Goal defined for this Record. For voice interactions, this is the target time for the voice call to be answered by a live agent.
 - **Service Objective Delta**—Service Objective Delta defined for this Record. Defines the step for Service Objective Goal deviation.
 - Click **OK**.

Important

Refer to the [Universal Routing 8.0 Routing Application Configuration Guide](#) for more information.

6. Click **Save**.

Related Links

- [Voice Prompts](#)
- [Statistical Tables](#)
- [Transactions](#)
- [Audio Resources \(Configuration Manager\)](#)
- [Business Attribute Values](#)

Statistical Days

A Statistical Day is a numerically expressed workload that a particular **Agent Group** is expected to handle during a particular business day.

If you are using Cost-Based Routing, use a Day Contract. A Day Contract is a special type of Statistical Day. If you are using Cost-Based Routing, a Day Contract is a Statistical Day that also includes base rates, and penalties for processing a volume over or below the expected workload. Day Contracts apply only to Volume Rate IT Contracts. Day Contracts allow the base rate to vary to accommodate volume fluctuations that may occur on different days of the week, weekends, and exception days such as holidays. Refer to the [Universal Routing 8.0 Routing Application Configuration Guide](#) for more information about Day Contracts.

Statistical Days represent the definition of a point in time, and is interpreted by the Genesys server applications that are designed with these objects and coordinate them with the actual timeline that the server is running. Depending on the behavior of the server, the definition is applied to either the local time in the server's time zone, or UTC time. The Statistical Day itself does not indicate any particular time zone.

Refer to the [Universal Routing 8.0 Routing Application Configuration Guide](#) for more information about Statistical Days.

Display Options

The **Statistical Days** list shows the Statistical Days that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Statistical Days that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Statistical Day object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Statistical Day.
- **Move To**—Move a Statistical Day to another **hierarchical structure**.
- Enable or disable Statistical Days.
- Create a folder, configuration unit, or site. See **Object Hierarchy** for more information.

Click on the name of a Statistical Day to view additional information about the object. You can also set **options** and **permissions**, and view **dependencies**.

Procedure: Creating Statistical Day Objects

Steps

To create a Statistical Day object, choose one of the following types:

- **Statistical Day**
- **Day Contract**

Statistical Day

To create a Statistical Day, perform the following actions:

1. Click **New**.
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:
 - **Name**—The name of the Statistical Day. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Type**—Select **Default** to create a Statistical Day that is not a Day Contract.
 - **Day Type**—These fields identify the calendar days to which the statistical values of the Statistical Day apply. If **Date** is selected, you can modify the following fields: **Year**, **Month**,

Day. If **Day of Week** is selected, you can modify the **Day of Week** field.

Important

Do not set any properties in the following section when a Statistical Day object is configured for use in a Statistical Table of the Special Day Table type.

- **Start Time**—Start time of the Business Day. The value must be a positive number expressed in hours, minutes, and seconds from 00:00:00 AM/PM.
- **End Time**—End time of the Business Day. The value must be a positive number expressed in hours, minutes, and seconds from 00:00:00 AM/PM.

Warning

Do not configure a Business Day that spans midnight as a single day, because it may be misinterpreted by the Routing Solution. If your Business Day starts on one day and ends on the next, you must configure it as two days, as follows:

The first Business Day starting at the overall start time and ending at 11:59 PM of that day; and
The second Business Day starting at starting at 00:00 AM of the next calendar day and ending at the overall end time.

Example

Assume you wish to track activity from Monday at **8:00 PM** to Tuesday at **2:00 AM**. You must explicitly create two Business Days, as follows:

The first Business Day on Monday, starting at 8:00 PM and ending at 11:59 PM; and

The second Business Day on Tuesday, starting at 00:00 AM and ending at 2:00 AM.

- **Min Value**—A statistical value that represents the minimum expected workload for the whole day.
- **Max Value**—A statistical value that represents the maximum expected workload for the whole day. This value cannot be less than the setting for **Statistical Values Minimum**.
- **Target Value**—A statistical value that represents the target workload for the whole day. The Target Value cannot be less than the setting for the Statistical Values Minimum or greater than the setting for the Statistical Values Maximum. This property is reserved for future use.
- **Interval Length (Min)**—The Statistical Interval in minutes. This parameter is used to break up the Statistical Day into smaller time slots that allow a model for load distribution throughout the day. This value must be a multiple of 5. Once you set the value, you cannot change it.
- **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is

automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.

- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. In the **Intervals** tab, specify the statistical intervals. Refer to the Statistical Intervals tab, above, for more information.
 4. Click **Save**.

Day Contract

To create a Day Contract, perform the following actions:

1. Click **New**.
2. Enter the following information. For some fields, you can either enter the name of a value or click the **Browse** button to select a value from a list:
 - **Name**—The name of the Statistical Day. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Type**—Select **Day Contract** to create a Statistical Day that is a Day Contract.
 - **Day Type**—These fields identify the calendar days to which the statistical values of the Statistical Day apply. If **Date** is selected, you can modify the following fields: **Year**, **Month**, **Day**. If **Day of Week** is selected, you can modify the **Day of Week** field.
 - **Start Time**—Start time of the Business Day. The value must be a positive number expressed in hours, minutes, and seconds from 00:00:00 AM/PM.
 - **End Time**—End time of the Business Day. The value must be a positive number expressed in hours, minutes, and seconds from 00:00:00 AM/PM.
 - **Interval Length (Min)**—A list of statistical intervals.
 - **Forecast Allowance (%)**—The percentage of the forecasted volume of routed interactions for this Volume Period that can be over- or underestimated without incurring a penalty. This allowance applies throughout the whole day, including intervals. The value must be a positive value.
 - **Under Forecast Allowance (%)**—The percentage of the forecasted volume of routed interactions for this Volume Period that must be exceeded to avoid a penalty for forecasting too high.
 - **Over Forecast Allowance (%)**—The percentage of the forecasted volume of routed interactions for this Volume Period that cannot be exceeded to avoid a penalty for forecasting too low.
 - **Flat Rate**—If selected, the Flat Rate to be applied during this Volume Period.
3. In the **Volume Period** tab, click **Add**. In the pop-up window, enter the following information:
 - **Volume Period**—The interval number. The first interval is numbered 1 and is always counted

from the start time of the Business Day.

- **Forecasted Volume**—The volume of interactions expected within the time period.
- **Base Rate**—The total cost of all interactions expected within the time period.
- **Penalty For Interaction For Over Forecast**—The additional cost, per interaction, for exceeding the forecasted interaction volume beyond that allowed by the Forecast Allowance Penalty. In effect, this is a penalty for forecasting too low.
- **Penalty For Interaction For Under Forecast**—The additional cost, per interaction, for not achieving the forecasted interaction volume beyond that allowed by the Forecast Allowance Penalty. In effect, this is a penalty for forecasting too high.

Important

Refer to the [Universal Routing 8.0 Routing Application Configuration Guide](#) for more information.

4. Click **Save**.

Statistical Intervals

Use a Statistical Interval to associate each Statistical Interval with certain Statistical Values. For each interval, specify values representing the expected load during that interval. The value must be numeric and unique within the statistical field. When you are configuring a Statistical Day object for use in a Statistical Table of the Capacity Table type, specify:

- Statistical Value 1—A number of agents.
- Statistical Value 2—An average handling time.

When you are configuring a Statistical Day object for use in a Statistical Table of the Quota Table type, specify:

- Statistical Value 1—A statistical value that represents the minimum expected workload for the interval.
- Statistical Value 2—A statistical value that represents the target workload for the interval. This value cannot be less than the setting for the Statistical Value 1 or greater than the setting for the Statistical Value 3.
- Statistical Value 3—A statistical value that represents the maximum expected workload for the interval. This value cannot be less than the setting for the Statistical Value 1.

Related Links

- [Voice Prompts](#)
- [Statistical Tables](#)
- [Transactions](#)
- [Audio Resources \(Configuration Manager\)](#)
- [Business Attribute Values](#)

Statistical Tables

Statistical Tables are groups of **Statistical Days** that represent statistically modeled performances of **Agent Groups** over a calendar period of up to one year. Call-processing applications can use Statistical Tables to provide load balancing between Agent Groups when the real-time statistics for those groups are unavailable.

Display Options

The **Statistical Tables** list shows the Statistical Tables that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Statistical Tables that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Statistical Table object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Statistical Table.
- **Move To**—Move a Statistical Table to another **hierarchical structure**.

- Enable or disable Statistical Tables.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Statistical Table to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Statistical Table Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Statistical Table. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Type**—The type of Statistical Table. Once you set the value, you cannot change it. The five types of Statistical Tables are:
 - Capacity Table—The call-processing applications compare the values specified in the **Intervals** list of the Statistical Days object.
 - Quota Table—The call-processing applications compare the **Minimum**, **Maximum**, and **Target** values specified in the Statistical Days object.
 - Special Day Table—The call-processing applications can identify certain days (for example, holidays).
 - Variable Rate Contract Table—The call-processing applications calculate the interaction cost based on forecasted volume, and a rate for that volume.
 - Volume Contract Table—The call-processing applications calculate the interaction cost based on a predefined call cost or agent cost.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. In the **Statistical Days** tab, click **Add** to add a [Statistical Day](#). In the pop-up window, you can create a new object by clicking **New**.
4. Click **Save**.

Related Links

- [Voice Prompts](#)
- [Statistical Tables](#)
- [Transactions](#)
- [Audio Resources \(Configuration Manager\)](#)
- [Business Attribute Values](#)

Transactions

Transactions define how applications calculate customer-defined statistics.

For more information about specifications and use of Transactions, consult the Universal Routing documentation.

Display Options

The **Transactions** list shows the Transactions that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Transactions that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Transaction object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Transaction.
- **Move To**—Move a Transaction to another **hierarchical structure**.

- Enable or disable Transactions.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Transaction to view additional information about the object. You can also set [options](#) and [permissions](#).

Procedure: Creating Transaction Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Transaction. You must specify a value for this property, and that value must be unique. A combination of the name and type specified in the Type property determines the uniqueness within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Alias**—An alternative name for this Transaction. If you specify this value, it must be unique within the object type specified in the **Type** property for the given contact center.
 - **Transaction Type**—The type of this Transaction. You must specify a value for this property. Once you set the value, you cannot change it.
 - **Recording Period (min.)**—A time period, in minutes, indicating how often to report the current status of the Transaction or to record it in the database.
 - **Format**—An application-specific format or script that defines how the Transaction is processed.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the Tenant Directory field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. Click **Save**.

Related Links

- [Voice Prompts](#)
- [Statistical Tables](#)
- [Transactions](#)
- [Audio Resources \(Configuration Manager\)](#)

- [Business Attribute Values](#)

Voice Prompts

Voice Prompts are call treatment objects that may include a set of actions to be applied to a called party.

Display Options

The **Voice Prompts** list shows the Voice Prompts that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Voice Prompts that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Voice Prompt object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Voice Prompt.
- **Move To**—Move a Voice Prompt to another **hierarchical structure**.
- Enable or disable Voice Prompts.

- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Voice Prompt to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Voice Prompt Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Voice Prompt. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment). Once you set the value, you cannot change it. If the Voice Prompt is used for a parked-call treatment, this value must correspond to the voice prompt identifier that the switch provides.
 - **Description**—A brief description of the Voice Prompt. For Text-to-Speech synthesis, a parking platform or a switch can use this property to generate the Voice Prompt.
 - **Switch**—The Switch to which this Voice Prompt belongs. Once you set the value, you cannot change it.
 - **Script**—A unique identifier of the Script for this Voice Prompt.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. Click **Save**.

Related Links

- [Voice Prompts](#)
- [Statistical Tables](#)
- [Transactions](#)
- [Audio Resources \(Configuration Manager\)](#)
- [Business Attribute Values](#)

Desktop

The Desktop section of Configuration Manager enables you to configure the following object:

- [Action Codes](#)

Action Codes

Action Codes enable agents to report the business results of customer interactions, as well as to explain the reasons for certain operations.

After you select an appropriate code from a menu of predefined Action Codes, the code is passed along with its related request. The code then returns with the event which indicates that the request has been successfully processed. Eventually, the code is stored in the reporting database.

You can supplement each Action Code with a number of Subcodes that more precisely characterize the reasons for a certain action.

Display Options

The **Action Codes** list shows the Action Codes that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Action Codes that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Action Code object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to

perform the following tasks:

- **Clone**—Copy an Action Code.
- **Move To**—Move an Action Code to another [hierarchical structure](#).
- Enable or disable Action Codes
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of an Action Code to view additional information about the object. You can also set [options](#) and [permissions](#).

Procedure: Creating Action Code Objects

Steps

1. Click **New**.
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:
 - **Name**—The Name of this Action Code. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Type**—The Action Code Type. You must specify a value for this property. Once you set the value, you cannot change it. See the **Action Code Types** tab for more information.
 - **Code**—The Action Code. You must specify a value for this property, and that value must be unique within the Action Code type specified in the **Type** property.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. (Optional) You can also set Subcodes to more precisely characterize the reasons for a certain action. To set Subcodes, perform the following steps:
 - Click the **Subcodes** tab.
 - Click **Add**.
 - Enter the following information:
 - **Name**—The name of the Subcode. You must specify a value for this property, and that value must be unique within the Action Code. Once you set the value, you cannot change it.
 - **Code**—The Subcode value. You must specify a value for this property, and that value

must be unique within the Action Code. Once you set the value, you cannot change it.

- Perform one of the following actions:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the tab.
 - Click **Cancel** to discard the changes.

4. Click **Save**.

Action Code Types

The following are types of Action Codes:

Type	Description
Busy Off	Selected and sent when an agent cancels the Make Busy function.
Busy On	Selected and sent when an agent activates the Make Busy function.
Conference	Selected and sent when an agent initiates a conference.
Forward Off	Selected and sent when an agent cancels the Call Forwarding function.
Forward On	Selected and sent when an agent activates the Call Forwarding function.
Inbound Call	Selected and sent when an agent releases an inbound call.
Internal Call	Selected and sent when an agent releases an internal call.
Login	Selected and sent when the agent logs in.
Logout	Selected and sent when the agent logs out.
Not Ready	Selected and sent when the agent's status changes to Not Ready.
Outbound Call	Selected and sent when an agent releases an outbound call.
Ready	Selected and sent when the agent's status changes to Ready.
Transfer	Selected and sent when an agent initiates a transfer.

Voice Platform

The Voice Platform section of Configuration Manager enables you to configure the following object:

- [Voice Platform Profiles](#)

Voice Platform Profiles

Voice Platform Profiles are voice (VoiceXML), call control (CCXML), announcement, or conference applications that specify the unique service information required as this application executes within the Genesys Voice Platform. Each profile contains prerequisites, parameters, and policies for each type of service.

Display Options

The **Voice Platform Profiles** list shows the Voice Platform Profiles that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Voice Platform Profiles that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Voice Platform Profile object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Voice Platform Profile.
- **Move To**—Move a Voice Platform Profile to another **hierarchical structure**.

- Enable or disable Voice Platform Profiles.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Voice Platform Profile to view additional information about the object. You can also set [options](#) and [permissions](#).

Procedure: Creating Voice Platform Profile Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Voice Platform Profile. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment). Once you set the value, you cannot change it.
 - **Display Name**—The name of the Voice Platform Profile as displayed in GVP reports and on the console.
 - **Description**—A brief description of this Voice Platform Profile.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. Click **Save**.

Outbound

The Outbound section of Configuration Manager enables you to configure the following objects:

- [Calling Lists](#)
- [Campaigns](#)
- [Campaign Groups](#)
- [Fields](#)
- [Filters](#)
- [Formats](#)
- [Table Accesses](#)
- [Treatments](#)

Calling Lists

Calling Lists are database tables with records that store a collection of phone numbers and other customer and business-related data. Calling Lists are created in Genesys Administrator Extension, and inherit their structure from the assigned format. See [Formats in the Outbound Contact Deployment Guide](#). See additional information about Calling Lists in the [Outbound Contact 8.1 Reference Manual](#).

A Calling List must contain Genesys mandatory fields, such as **contact_info** and **contact_info_type**, and can also contain user-defined, custom fields. The campaign name, for example, is stored in a user-defined field, which is specified by the **campaign_name_field** option. A user-defined field may also serve as a customer identifier for Do Not Call requests, as an alternative to the DNC restriction on a customer's phone number.

An unlimited number of Calling Lists can be added to one [Campaign](#), and a Calling List can be added to or deleted from a running Dialing Session for a Campaign. A Campaign can be assigned to multiple [Campaign Groups](#).

Display Options

The **Calling Lists** list shows the Calling Lists that are in your environment. It is sorted in a hierarchy by tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Calling Lists that are disabled will appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

Click **Group By** to group objects by various criteria.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Calling List object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Calling List.
- **Move To**—Move a Calling List to another **hierarchical structure**.
- Enable or disable Calling Lists.
- Create a folder, configuration unit, or site. See **Object Hierarchy** for more information.

Click on the name of a Calling List to view additional information about the object. You can also set **options** and **permissions**, and view **dependencies**.

Procedure: Creating Calling List Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Calling List. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Description**—A brief description of the Calling List.
 - **Table Access**—The Table Access to which the Calling List refers. You must specify a value for this property.
 - **Log Table Access**—The Table Access of the Log Table type. Genesys recommends dedicating a single Log Table Access to all Calling Lists associated with one campaign.
 - **Filter**—The Filter to be applied to this Calling List. If you specify the Filter, associate it with the same format as the Table Access.
 - **Calling Time From**—Not used at the list level at this time. The default is **8:00:00 AM**.
 - **Calling Time To**—Not used at the list level at this time. The default is **6:00:00 PM**.
 - **Script**—The Script Property defines the Script Object, which contains all of the attributes that

are required by Agent Scripting. For more information, see the section, "Attaching Script Information to OCS User Events and Telephony Events" in the *Outbound Contact Reference Manual*.

- **Maximum Attempts**—The maximum number of attempts to call a single record in this Calling List during one campaign if a Treatment associated with this campaign results in re-dialing a particular record. You must specify a value for this property, and that value must be other than zero. The default value is 10.
 - **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. In the **Treatments** tab, click **Add** to add a **Treatment**. In the pop-up window, you can create a new Treatment object by clicking **+**.
 4. In the **Campaigns** tab, click **Add** to add a **Campaign**. In the pop-up window, you can create a new Campaign object by clicking **+**.
 5. In the **Formats** tab, click **Add** to add a **Format**. In the pop-up window, you can create a new Format object by clicking **+**.
 6. Click **Save**.

Related Links

- [Table Access](#)
- [Fields](#)
- [Treatments](#)
- [Campaign Groups](#)
- [Campaigns](#)

Campaigns

A Campaign is a flexible master plan that organizes [Calling Lists](#) and [Agent Groups](#) (or [Place Groups](#)) for dialing calls and handling call results. A Campaign can be assigned to multiple [Campaign Groups](#). See additional information in the [Outbound Contact Deployment Guide](#).

Display Options

The **Campaigns** list shows the Campaigns that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Campaigns that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To [create a new Campaign object](#), click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Campaign.
- **Move To**—Move a Campaign to another [hierarchical structure](#).

- Enable or disable Campaigns.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of an Campaign to view additional information about the object. You can also set [options](#) and [permissions](#).

Procedure: Creating Campaign Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Campaign. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Description**—A brief description of the Campaign.
 - **Script**—Defines the Script object that contains all of the attributes that are required by Agent Scripting.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. In the **Calling Lists** tab, click **Add** to add a Calling List. In the pop-up window, you can create a new Calling List object by clicking **+**.
4. Perform one of the following actions after you have added a Calling List to the Campaign:
 - Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the tab.
 - Click **Cancel** to discard the changes.
5. Click **Save**.

Related Links

- [Table Access](#)
- [Fields](#)
- [Treatments](#)
- [Campaign Groups](#)
- [Campaigns](#)

Campaign Groups

Campaign Groups are structures for organizing and managing an automated process of making outbound calls to the destinations specified in [Calling Lists](#).

Display Options

The **Campaign Groups** list shows the Campaign Groups that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

- The **Campaigns** list displays when you select **Campaign Groups** in Configuration Manager. To access the **Campaign Groups** list, you must first select a Campaign object and then a Campaign Groups folder.
- Campaign Groups that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the magnifying glass button to open the **Tenant Directory** filter panel. In this panel, click the 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.

To select or de-select multiple objects at once, click **Select**.

Procedures

To [create a new Campaign Group object](#), click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Campaign Group.
- **Move To**—Move a Campaign Group to another [hierarchical structure](#).
- Enable or disable Campaign Groups.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Campaign Group to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Campaign Group Objects

Steps

1. In the **Campaigns** list, click the Campaign object in which you wish to create a Campaign Group.
2. Click the Campaign Group folder in which you wish to create a Campaign Group.
3. Click **New**.
4. 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:
 - **Name**—The name of the Campaign Group, in the format [Campaign@CampaignGroup]. This value is set automatically, based on the content of the fields Campaign and Group.
 - **Description**—A brief description of the Campaign Group.
 - **Group Type**—The type of Campaign Group, Agent, or Place.
 - **Group**—The name of the Agent Group or Place Group that is associated with this Campaign Group. This value is set automatically and you cannot change it.
 - **Dialing Mode**—The name of the Dialing Mode for this Campaign Group.
 - **Voice Transfer Destination**—Identifies where calls are to be delivered for handling.

Important

In addition to the Voice Transfer Destination DN, any ACD Queue, Virtual Queue, Routing Point, or Service Number DN that may be part of a call flow involving this group of agents or places must be specified as an Origination DN of the Agent Group or Place Group objects. Outbound Contact Server (OCS) needs to monitor these DNs to identify "r;foreign" inbound or outbound calls that are delivered to agents but were not issued by OCS on behalf of the Campaign Group, or if the ACD Queue DN is configured as an "r;overflow" DN.

- **Operation Mode**—An operation mode: **Manual** or **Scheduled**. This property applies only to the Preview dialing mode.

- **Optimization Method**—A method to optimize direct dialing algorithms in the predictive dialing modes. These methods include: **Agent Busy Factor**, **Average Distribution Time**, **Average Waiting Time**, **Overdial Rate** and **Maximum Gain**.

Important

Average Distribution Time can be set only for the Predictive GVP Dialing Mode.

- **Optimization Target %**—The target value for the optimization method. The unit of measure depending on the optimization method selected in the preceding field. The default value is 80.
 - **Maximum Queue Size**—The number of records to keep in the dialer's queue. It is an internal counter that is used when OCS performs with Power GVP or Push Preview modes. OCS tries to always keep the dialer's buffer full with the specified Maximum Queue Size. The default value is 0 (zero).
 - **IVR Profile**—The IVR Profile DBID that is specified in the GVP EMPS IVR Profile. The OCS **ivr-profile-name** option uses the value specified in this field.
 - **Interaction Queue**—A configuration object that is created in the **Scripts** section by Interaction Routing Designer when developing a Business Process to process outbound Preview mode interactions.
 - **Trunk Group DN**—Required only if you are using Outbound Contact in an Outbound VoIP environment. If specified, OCS uses this DN as the DN on behalf of which outbound and engaging calls originate.
 - **Script**—The Script object that contains all of the attributes that are required by Agent Scripting.
 - **Minimum Record Buffer Size**—The minimum record buffer size that acts as a multiplier, along with the optimal record buffer size, for the number of agents that are available for a campaign. The default value is 4.
 - **Optimal Record Buffer Size**—The optimal record buffer size that acts as a multiplier, along with the minimum record buffer size, for the number of agents that are available for a campaign. The default value is 6.
 - **Number of Channels**—Identifies the maximum number of ports that a Campaign Group can use to place calls. This max number is used in: **Progressive**, **Predictive**, **Progressive with seizing**, **Predictive with seizing**, and **Progressive GVP** dialing modes. The default value is 10.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
5. In the **Connections** tab, add all connections to all server needed (except T-Server or SIP Server)

to run this Campaign Group. Click **Add** to add a connection. In the pop-up window, you can create a new Application object by clicking **+**.

6. Click **Save**.

Dialing Modes

Outbound Contact has many dialing modes which are listed in the table below. You can switch between Progressive and Predictive dialing modes at any time, and change the optimized parameter. Changing the dialing mode and optimized parameter in Genesys Administrator Extension is temporary. It lasts only until the Campaign is stopped or you change the setting. To change from Predictive or Progressive Dialing mode to Preview Dialing mode, the Campaign must be stopped and restarted. A Preview Only license limits the use of OCS to this one dialing mode. A full license is required in order to run Campaigns in all dialing modes.

Important

The Campaign needs to be loaded in order to change the dialing mode and optimized parameter.

The dialing mode is used in conjunction with the values in the **Optimization** parameters and **Optimization Target** value fields.

Dialing Mode	Description
Power GVP	Dial calls by issuing call requests. For more information, see the Outbound Contact Deployment Guide .
Predictive	Dials calls from a calling list and predicts agent availability. Recommended for high-volume, low-value Campaigns.
Predictive GVP	<p>Pacing is based on optimizing agent workloads in deployments where outbound calls first arrive to GVP for self-service. A portion of these outbound calls (for customers who selected the agent-assisted service option in GVP) is then passed to an agent group. In this dialing mode, it is assumed that outbound calls passed for agent-assisted service wait in the queue for some time for the next available agent.</p> <p>This dialing mode requires SIP Server for placing outbound calls, rather than T-Server, and uses GVP Voice XML applications for self-serviced call processing.</p>

Dialing Mode	Description
	<p>Important This dialing mode is supported by OCS starting in release 8.1.2.</p>
Predictive with seizing	Used only with the Active Switching Matrix mode. Calls are dialed automatically, similar to Predictive mode.
Preview	Dials calls from a calling list only when an agent previews a calling list record and manually requests a call to be dialed. Recommended for low-volume, high-value applications, where individual ownership of accounts is the highest priority.
Progressive	Dials calls from a calling list only when an agent is available. Recommended for low-volume, high-value Campaigns.
Progressive GVP	Dials calls from a Calling List when a GVP port is available. This dialing mode requires SIP Server for placing outbound calls, rather than T-Server, and uses Voice XML applications for call processing.
Progressive with seizing	Used only with the Active Switching Matrix mode. Calls are dialed automatically, similar to Progressive mode.
Push Preview	Dials calls that are "pushed" to the agent's desktop using Interaction Server.

Related Links

- [Table Access](#)
- [Fields](#)
- [Treatments](#)
- [Campaign Groups](#)
- [Campaigns](#)

Fields

A Field object defines a field in a **Calling List** database table. Fields are single pieces of data (for example, a phone number) within a record.

There are two types of fields in a Calling List:

- **Genesys mandatory fields**—These fields must exist in all Calling List tables.
- User-defined fields—These custom fields contain business-related data.

Display Options

The **Fields** list shows the fields that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Fields that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the magnifying glass button to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Field object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete** button. You can also delete individual objects by clicking on the object and then clicking **Delete**.

Important

You can delete a Field only if there is no **Filter** associated with it.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Field.
- **Move To**—Move a Field to another **hierarchical structure**.
- Enable or disable Fields.
- Create a folder, configuration unit, or site. See **Object Hierarchy** for more information.

Click on the name of a Field to view additional information about the object. You can also set **options** and **permissions**, and view **dependencies**.

Procedure: Creating Field Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Field.
 - **Description**—A brief description of the Field.
 - **Data Type**—The data type for the data stored in this Field.
 - **Length**—(Required for **char** and **varchar** data types only) The length of the Field in the database.
 - **Field Type**—Outbound business-specific information for this Field.
 - **Default**—The default value for the Field. All formats that include the Field use this default value. The value should be consistent with the data type of the Field. For example, if the data type is integer, the default value should be an integer value only. When Genesys Administrator Extension imports records from an ASCII file in which a Field is missing or has no value, Genesys Administrator Extension populates the Field with this default value—if the check box **Nullable** is not checked. If the Field is nullable, Genesys Administrator Extension accepts a blank value.
 - **Primary Key**—This check box indicates whether the Field is a primary key in a database

table. In Outbound Contact, the only primary key Fields are **chain_id** and **chain_n**.

- **Unique**—This check box indicates whether the Field value is unique within the table.
- **Nullable**—The checkbox indicates whether the Field value can be set to **NULL**.
- **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. Click **Save**.

Field Types

Field Type	Description
Agent	A field containing a login ID of the last agent who handled an outbound call associated with this record.
ANI	A field containing an Automatic Number Identification.
Application	A field containing a Genesys application. An Application is: any of the executable programs that are installed and configured during a Framework installation, and which has a particular function within Framework. Examples: Configuration Server, Solution Control Server (SCS), Message Server, Local Control Agent (LCA).
Call Time	A field containing the time of the actual dialing attempt.
Campaign	A field containing the campaign with which this record is associated.
Chain	A field containing the special ID of records that should be linked in a chain. Each record that is associated with one customer account, for example, has the same chain ID.
Contact Info	A field containing a destination telephone number.
Contact Info Type	A field containing the type of telephone number, such as home or work.
Country Code	A field containing the country code.
Dialing Result	A field containing the result of a dialed call.

Field Type	Description
E-mail Subject	A field containing the text in the subject line of an e-mail interaction.
E-mail Template ID	A field containing the template ID of an email interaction.
From	A field containing the time a record is scheduled for dialing.
Group	A field containing the name of a configuration object that groups person objects.
Info Digits	A field containing the Information Indicator-Digits, which indicate the originating line type of the caller.
LATA	A field containing the number of the Local Access and Transport Area.
Media Reference	A field containing the Configuration Server API reference to media body to be sent in case of treatment.
NPA	A field containing the number of the Numbering Plan Area.
NPA-NXX	A field containing the number of the Numbering Plan Area with an identifier of the specific telephone company central office serving that number.
Number in Chain	A field containing the priority assigned to a given record in the chain. The smallest number is processed first.
Number of Attempts	A field containing the number of attempts. (It does not include redialing attempts in the event of errors.)
Record ID	A field containing the unique ID number for the current record.
Record Status	A field containing the status of the record.
Record Type	A field containing the type of record.
Scheduled Time	A field containing the time of a scheduled personal callback or a rescheduled call (from a treatment).
State Code	A field containing State or International code, for example, a U.S. or Canadian postal code such as CA for California.
Switch ID	A field containing a configuration database object that represents a physical or virtual switch.
Time Zone	A field containing the time zone offset of the record.
To	A field containing the time the dialing attempts should conclude.
Treatments History	A field containing the record of treatments that have been applied to a customer.
User-Defined Field	A user-defined field.

Related Links

- [Table Access](#)
- [Fields](#)
- [Treatments](#)
- [Campaign Groups](#)
- [Campaigns](#)

Filters

A Dialing Filter restricts **Calling Lists** so that only certain numbers are dialed during a **Campaign**.

Important

Creating Dialing Filters requires using Enumeration values in place of text values for some mandatory fields. An Enumeration value is a numeric representation of a Genesys mandatory field value. For more information about Enumeration values, see "Genesys Enumeration Tables" in the **Outbound Contact 8.1 Reference Manual**.

Display Options

The **Filters** list shows the filters that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Filters that are disabled will appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Filter object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more

objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Filter.
- **Move To**—Move a Filter to another [hierarchical structure](#).
- Enable or disable Filters.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Filter to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Filter Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Filter.
 - **Description**—A brief description of the Filter.
 - **Format**—The format to which this filter is applied. Once it is specified, it cannot be changed. You assign a Filter object to a Calling List object with the same format.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. Click **Save**.

Related Links

- [Table Access](#)
- [Fields](#)
- [Treatments](#)
- [Campaign Groups](#)

- [Campaigns](#)

Formats

A Format is a user-customized template for **Calling Lists**. It is created in Genesys Administrator Extension and consists of **Fields** that form a data structure (for example, a database table); each Field has properties that describe its characteristics. A Calling List must contain Genesys mandatory fields and can also contain user-defined custom Fields. See additional information in the **Outbound Contact Deployment Guide**.

Mandatory Fields are necessary in order to process records properly. They identify each customer and the status of each customer record. Genesys mandatory fields are described in the Mandatory Fields tab, below. See additional information in the **Outbound Contact Deployment Guide**.

Custom/user-defined Fields, typically containing business-related data, can be created and added to a Format in Genesys Administrator Extension. Custom fields define customer information that is available to the agent during a call. See **Fields in the Outbound Contact Deployment Guide** about how to send customer data to an agent.

After custom/user-defined fields are added, the Format is finished and is ready to be used to create Calling Lists. A Calling List must be created from a Format, and inherits mandatory and custom fields from the assigned format. Each Calling List can have only one corresponding Format.

When database records are imported into a Calling List, data fills the mandatory and custom fields, conforming to properties established in the finished Format.

Display Options

The **Formats** list shows the formats that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Formats that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the magnifying glass button to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Format object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click the **More** button to perform the following tasks:

- **Clone**—Copy a Format.
- **Move To**—Move a Format to another **hierarchical structure**.
- Enable or disable Formats.
- Create a folder, configuration unit, or site. See **Object Hierarchy** for more information.

Click on the name of a Format to view additional information about the object. You can also set **options** and **permissions**, and view **dependencies**.

Procedure: Creating Format Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of the Format.
 - **Description**—A brief description of the Format.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
 - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. In the **Fields** tab, click **Add** to add a Field. In the pop-up window, you can create a new Field object by clicking **+**.
4. Perform one of the following actions after you have added a Field to the Format:

- Click **Save** to accept the changes and return to the object list.
 - Click **Apply** to accept the changes and remain in the tab.
 - Click **Cancel** to discard the changes.
5. Click **Save**.

Mandatory Fields

The following mandatory fields are required in all Calling List Formats. This list is sorted alphabetically by field name. Default values for these fields are defined in the Fields objects during configuration.

Field Name	Data Type	Description
agent_id	varchar(32)	Login identifier of the agent who handled the record.
app_id	integer	Empty, not used at this time.
attempt	integer	Number of attempts made to reach the customer.
call_result	integer	Final outcome of the record processing. See the Call Results table in the Defined Constants chapter of the Outbound Contact 8.1 Reference Manual .
call_time	integer	Latest date and time at which the record was processed (dialed), in UTC format.
campaign_id	integer	Configuration DBID of the Outbound Dialing Campaign, as a part of which the record has been processed.
chain_id	integer	Unique identification number of the chain to which the record belongs.
chain_n	integer	Unique identification number of the record within the chain.
contact_info	varchar(128)	Customer's contact information; phone number in the voice campaign.
contact_info_type	integer	Type of the contact information; phone type in the voice campaign. See the Phone Types

Field Name	Data Type	Description
		table in the Defined Constants chapter of the Outbound Contact 8.1 Reference Manual .
daily_from	integer	Earliest time of the day at which a customer can be contacted (seconds since midnight).
daily_till	integer	Latest time of the day at which a customer can be contacted (seconds since midnight).
dial_sched_time	integer	Date and time for which the processing of the record has been scheduled or rescheduled, in UTC format (seconds since midnight 01/01/1970).
email_subject	varchar(255)	Empty, not used at this time.
email_template_id	integer	Empty, not used at this time.
group_id	integer	Empty, not used at this time.
media_ref	integer	Empty, not used at this time.
record_id	integer	Unique identification number of a calling record.
record_status	integer	Current status of the record. See the Record Types table in the Defined Constants chapter of the Outbound Contact 8.1 Reference Manual .
record_type	integer	Type of the record. See the Record Types table in the Defined Constants chapter of the Outbound Contact 8.1 Reference Manual .
switch_id	integer	DBID of the Switch where the agent who handled the record had logged in.
treatments	varchar(255)	Treatments application history. For more information, see Treatments in the Outbound Contact Deployment Guide .
tz_dbid	integer	Configuration DBID of the Time Zone object associated with the calling record.

Related Links

- [Table Access](#)
- [Fields](#)
- [Treatments](#)

-
- [Campaign Groups](#)
 - [Campaigns](#)

Table Access

Table Access objects describe database tables of a specified **Format** and explain how to access these tables through Database Access Points (DAPs).

You cannot delete a Table Access object while it is associated with at least one **Calling List**.

Display Options

The **Table Access** list shows the Table Access objects that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Table Access objects that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the magnifying glass button to open the **Tenant Directory** filter panel. In this panel, click the 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.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Table Access object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Table Access object.
- **Move To**—Move a Table Access object to another **hierarchical structure**.

- Enable or disable Table Access objects.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Table Access object to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Table Access Objects

Steps

1. Click **New**.
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:
 - **Name**—The name of this Table Access object. It can contain up to 254-characters. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
 - **Description**—A brief description of the Table Access object.
 - **Table Type**—The type of Table Access object in the database. You must specify a value for this property. Once you set the value, you cannot change it.
 - **DB Access Point**—The Database Access Point through which to access the Table. You must specify a value for this property. The Database Access Point must serve the Tenant to which this Table Access object belongs.
 - **Format**—The Format of this Table. You must specify a value for this property for all Table types except **Log Table**. Once you set the value, you cannot change it.
 - **Database Table**—The name of this table as specified in the database. You must specify a value for this property. The name length depends on the DBMS type. Genesys recommends that you do not exceed the following vendor-defined limitations:
 - 18 characters—for DB2 and Informix databases
 - 128 characters—for Microsoft SQL databases
 - 30 characters—for Oracle and Sybase databases
 - **Update Every (seconds)**—The number of seconds an application waits before updating the table data in application memory. This value is required only if the **Cacheable** check box is checked.
 - **Cacheable**—Indicates whether the Table Access data is mirrored in application memory.
 - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.

- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. Click **Save**.

Table Access Types

Table Access Type	Description
ANI	An Automatic Number Identification table.
Calling List	A calling list table.
Country Code	A country code table.
Customer Defined Table	A user-defined table.
Do Not Call List	In Outbound, a list of customers who request not to be called is known as a Do Not Call (DNC) list. The DNC data in a Do Not Call list file includes the customer's phone number or a customer ID.
E-mail Contact List	In Outbound, a list of customers who are to be contacted.
Info Digits	An Information Indicator-Digits table.
LATA	A Local Access and Transport Area table.
Log Table	A log table.
NPA	A Numbering Plan Area table.
NPA-NXX	A table of a Numbering Plan Area with an identifier of the specific telephone company central office that serves that number.
State Code	A State or International code, for example, a U.S. or Canadian postal code, such as CA for California.

Related Links

- [Table Access](#)
- [Fields](#)
- [Treatments](#)
- [Campaign Groups](#)
- [Campaigns](#)

Treatments

A Treatment defines what Outbound Contact Server (OCS) should do with a call that does not reach the intended party. For example, the Treatment could instruct OCS to redial a number that returns a Busy call result.

Treatment objects are assigned to **Calling List** objects. If no Treatments are assigned to a call result, OCS changes the record status to Updated.

You can add or remove Treatments from a Calling List object while a Dialing Session for a **Campaign** is running. However, once a Treatment is in progress, it cannot be interrupted. Changes made to that Treatment are applied to the next record that receives the call result that prompts the Treatment.

Display Options

The **Treatments** list shows the Treatments that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

Important

Treatments that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges 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 the magnifying glass button to open the **Tenant Directory** filter panel. In this panel, click the 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. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Procedures

To **create a new Treatment object**, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check-box beside an object and click **Edit**. To delete one or more objects, click the check-box beside the object(s) in the list and click **Delete**. You can also delete

individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Treatment.
- **Move To**—Move a Treatment to another [hierarchical structure](#).
- Enable or disable Treatments.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

Click on the name of a Treatment to view additional information about the object. You can also set [options](#) and [permissions](#), and view [dependencies](#).

Procedure: Creating Treatment Objects

Steps

1. Click **New**.
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:
 - **Name**—(Required) The name of the Treatment.
 - **Description**—(Optional) A brief description of the Treatment.
 - **Call Result**—(Required) The call result associated with this Treatment.
 - **Apply to Record**—(Required) The action to apply to a Calling List record, based on the call result.
 - **Apply to Call**—(Optional) An alternate way to handle a call when a dialing attempt is answered or reaches an answering machine or a fax machine.
 - **Destination DN**—(Required, if **Apply to Call** is specified) The DN to which the call is connected or transferred. If **Apply to Call** is specified but **Destination DN** is not, OCS ignores the Treatment.
 - **Number in sequence**—(Required) The order in which this treatment is applied in a Treatment sequence. If it is a stand-alone treatment, specify a value of 1.
 - **Cycle Attempt**—(Required with value of greater than 0 (zero), when **Apply to Record** is set to **Next in chain**, **Next in chain after**, and **Next in chain at specified date**, or **Redial**) The maximum number of consecutive attempts to execute the Treatment on the record.
 - **Interval (Days:Hours:Minutes)**—(Required when **Apply to Record** is set to **Next in chain**, **Next in chain after**, **Redial**, or **Retry in**) A time interval, in minutes, that OCS waits between the first dialing attempt and the first Treatment attempt.

- **Increment (minutes)**—(Required when **Apply to Record** is set to **Next in chain, Next in chain after, Redial, or Retry in**) The number of minutes added to the previous redial time interval.
- **Date**—(Required when **Apply to Record** is set to **Next in chain at specified date, or Retry at specified date**) The date when another Treatment attempt is performed.
- **Time**—(Required when **Apply to Record** is set to **Next in chain at specified date, or Retry at specified date**) The time of day that another Treatment attempt is performed.
- **Range (Days:Hours:Minutes)**—Reserved for future use.
- **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. Click **Save**.

Related Links

- [Table Access](#)
- [Fields](#)
- [Treatments](#)
- [Campaign Groups](#)
- [Campaigns](#)

System Dashboard

The System Dashboard helps you to monitor your contact center. It shows a high-level summary of the current operations of your environment, which includes:

- Active Alarms—A summary of active alarms.
- Hosts—A summary of the hosts in your environment, and their status.
- Applications—A summary of the applications in your environment, and their status.
- Solutions—a summary of the solutions in your environment, and their status.

Important

- Dashboards are not supported if you are using Internet Explorer 8 or earlier.
- GAX must have a connection to Solution Control Server (SCS) for the System Dashboard to function. See the [Add SCS Connection](#) section in the Genesys Administrator Extension Deployment Guide for more information.

Click on a tab below to learn more.

Alarms

The Alarms widget shows a list of active Critical, Major and Minor alarms in the system, sorted by priority. The widget updates automatically when a new alarm is activated.

Important

An active alarm is visible only if you have access to the application which generated the alarm.

Click the contextual menu (three vertical dots) in the header of the widget to access options specific to this widget. These include:

- **Expand to Tab**—Expand this widget into a maximized tab to show more information and options.
- **Edit**—Edit the name of this widget.

Important

For Genesys Administrator Extension to monitor the system, Management Layer components must be deployed in the system, and Genesys Administrator Extension must be deployed with connections to the Solution Control Server. For detailed instructions, see the [Management Framework Deployment Guide](#).

Each Alarm in the list displays one of the following status:

- Critical
- Major
- Minor
- Unknown

Click **Expand to Tab** to change this widget into a tab. In the Alarms tab, you can perform the following action:

[+] Click to show section

Procedure: Clearing Alarms

Prerequisites

You are using the Alarms tab. If you are using the Alarms widget, click the contextual menu (three dots) and select **Expand to Tab**.

Steps

1. In the Alarms tab, select the check box beside the Alarm(s) that you want to clear.
2. Click **More** and select **Clear**.

Troubleshooting Alarms Viewing

If an event that is configured to generate an alarm does not result in an alarm, verify that:

- The corresponding Alarm Condition is configured correctly.
- The corresponding log event was generated. To verify this, check whether the log event appears in a local text file.

- The Application that generates the event is configured to send its log to a network Message Server.
- The network log output of the given Application is set to Interaction or Trace if the event is reported at either Interaction or Trace log-output level.
- Message Server is receiving log events that the given Application generated. Check the Message Server log.
- Solution Control Server is connected to Message Server.
- Solution Control Server receives alarm messages from Message Server. Check the Solution Control Server log.
- Genesys Administrator Extension is properly connected to Solution Control Server.

Applications

The Applications widget shows a list of the Applications in the system. Applications with a status of **Unknown** are shown at the top of the list. This widget updates automatically when the status of an Application changes. Click the contextual menu (three vertical dots) in the header of the widget to access options specific to this widget. These include:

- **Expand to Tab**—Expand this widget into a maximized tab to show more information and options.
- **Edit**—Edit the name of this widget.

Each Application in the list has a status, which is one of the following:

[+] Click to show section

Status Name	Description
Initializing	<p>Indicates that an application is performing the initialization steps, which involve:</p> <ul style="list-style-type: none"> • Starting the application. • Reading configuration data from the Configuration Database. • Checking this data for integrity and completeness. • Establishing connections with all the resources according to the given configuration data. <p>At this stage, the application is connected to the LCA (Local Control Agent) running on its host, but it is not ready to provide the service (for example, to accept client connections).</p>
Started	<p>Assigned from the moment an application is completely initialized; that is, when the application:</p> <ul style="list-style-type: none"> • Has read and checked its configuration. • Has established connections with all the

Status Name	Description
	<p>required resources.</p> <ul style="list-style-type: none"> • Is ready to provide its service. • Is connected to the LCA running on its host. <p>This status does not necessarily mean that the application is performing its function. To start working, some applications may require additional solution-specific control operations through their user interfaces. For information, refer to solution-specific documentation.</p>
Service Unavailable	Indicates that, although an application is running, it cannot provide the service, for some internal reason.
Start Pending	The application is being activated. Solution Control Server (SCS) has executed the Startup command, but the application has not yet connected to the LCA on its host. This status exists only for the interval between the command to start the application and the LCA report that the application is being connected.
Stopped	Indicates that an application is installed and configured in the system, but it has not started. In other words, the application either has not been activated or has terminated unexpectedly.
Stop Pending	The application is being shut down. The application has accepted the Stop command from SCS, but it has not yet disconnected from the LCA on its host. This status exists only for the interval between the instruction to stop the application and its actual termination. Typically, the Pending stage involves some application-specific wrap-up functions, closing of all open connections, termination, and detection of the termination by LCA.
Suspended	Indicates that an application has received a request to shut down gracefully, has stopped accepting new client connections, and has finished processing all current connections and requests.
Suspending	Indicates that an application has received a request to shut down gracefully and has stopped accepting new client connections and requests. It is still processing current connections and requests.
Unknown	<p>Indicates that the Management Layer cannot provide reliable information about the current application status. In other words, SCS is not connected to the LCA on the host where the application is configured to run. This status does not necessarily mean that the application cannot perform its function.</p> <div data-bbox="824 1755 1380 1839" style="border: 1px solid #ccc; background-color: #fff9c4; padding: 5px;"> <p>Important All GUI desktop applications are displayed with a</p> </div>

Status Name	Description
	status of Unknown.

Click **Expand to Tab** to change this widget into a tab. In the Applications tab, you can perform the following actions:

Start

[+] Click to show section

Warning

- Application startup through Genesys Administrator Extension does not necessarily mean that the Application immediately starts performing its function. Applications are components of higher-level structures called Solutions, and most of them function normally only as part of the Solutions to which they belong. Genesys recommends that you activate single Applications only for maintenance purposes or during online upgrades. In normal production mode, always start a complete Solution.
- You cannot start or stop an Application of the Database Access Point type.

Procedure: Starting an Application

Prerequisites

You are using the Applications tab. If you are using the Applications widget, click the contextual menu (three dots) and select **Expand to Tab**.

Steps

1. In the Applications tab, select the check box beside the Application(s) that you want to start.
2. Click **More** and select **Start**.

Genesys Administrator Extension notifies Solution Control Server, which uses Local Control Agent to activate the Application remotely.

Application startup takes some time, depending on:

- The amount of configuration data the Application must read from the Configuration Database.

- The amount of time it takes to check data integrity and completeness.
- The number of network connections the Application must set up to other system resources.

While an Application is being initialized, its status changes from Stopped to Pending. When the Application starts, its status changes from Pending to Running.

In some scenarios, an Application might depend on internal and/or external components to perform their functions. In these cases, the Application status may change as follows:

- From Stopped to Pending to Initializing and, possibly, to Service Unavailable.
- From either Initializing or Service Unavailable to Started only after all the internal and external components are ready.

Genesys Administrator reports a successful start of an Application only if the Application has reported either Started or Service Unavailable status within the configured timeout period.

Important

- You can start an Application only if its current status is Stopped.
- You can start an Application only if you have Execute permission for the Application configuration object.
- If you install an Application as a Service, it will be started as a Service.

Stop

[+] Click to show section

Warning

Stopping an Application can cause the stoppage of some or all of the running Solutions to which the Application belongs.

This action is similar to the **Graceful Stop** command in Genesys Administrator. When you stop an Application, the Application stops accepting new requests and finishes processing the requests in its queue.

You can stop an Application only if:

- Its current status is Started, Service Unavailable, or Pending. You cannot stop an Application gracefully if its status is Suspending or Suspended.
- You have Execute permission for the Application object.

Procedure: Stopping an Application

Prerequisites

You are using the Applications tab. If you are using the Applications widget, click the contextual menu (three dots) and select **Expand to Tab**.

Steps

1. In the Applications tab, select the check box beside the Application(s) that you want to stop.
2. Click **More** and select **Stop**.

Genesys Administrator Extension notifies Solution Control Server, which uses Local Control Agent to terminate the Application remotely.

Support of Graceful Shutdown

If you are not sure if an Application supports graceful shutdown, you can use the configuration option **suspending-wait-timeout** to configure a timeout. Doing so will ensure that the Application shuts down gracefully if it supports graceful shutdown; otherwise, it will be stopped ungracefully. Refer to the *Framework Configuration Options Reference Manual* for more information about this configuration option.

Force Stop

[+] Click to show section

Warning

Stopping an Application can cause the stoppage of some or all of the running Solutions to which the Application belongs.

When you stop an Application abruptly (ungracefully), the Application immediately stops processing all requests, both new and current. You can only stop an Application if:

- Its current status is Started, Service Unavailable, Pending, Suspending, or Suspended.
- You have Execute permission for the Application.

Procedure: Using Force Stop on an Application

Prerequisites

You are using the Applications tab. If you are using the Applications widget, click the contextual menu (three dots) and select **Expand to Tab**.

Steps

1. In the Applications tab, select the check box beside the Application(s) that you want to stop.
2. Click **More** and select **Force Stop**.

Genesys Administrator Extension notifies Solution Control Server, which uses Local Control Agent to terminate the Application remotely.

Switch Mode

[+] Click to show section

This action manually switches over from a Backup object to a Primary object.

To perform a manual switchover, you must:

- Have an appropriate license for the Management Layer to provide switchover. If no license is present, this option is disabled.
- Have Execute permission for that Application.

Important

Manual switchover is not be possible for Applications of the following types:

- Configuration Server
- Database Server
- Database Access Point
- Solution Control Server

Procedure: Using Switch Mode on an Application

Prerequisites

You are using the Applications tab. If you are using the Applications widget, click the contextual menu (three dots) and select **Expand to Tab**.

Steps

1. In the Applications tab, select the check box beside the Application(s) you want to manually switch from Backup to Primary.
2. Click **More** and select **Switch Mode**.

Tip

You can also start and stop applications by clicking on the status name in the Applications tab. For example, if an application has a status of **Started** and you click the status name, the application attempts to stop. Likewise, if an application has a status of **Stopped** and you click the status name, the application attempts to start.

Hosts

The Hosts widget shows a list of Hosts in your environment. This list updates automatically when the status of a Host changes. Click the contextual menu (three vertical dots) in the header of the widget to access options specific to this widget. These include:

- **Expand to Tab**—Expand this widget into a maximized tab to show more information and options.
- **Edit**—Edit the name of this widget.

Each Host in the list has a status, which is one of the following:

[+] Click to show section

Status Name	Description
Up	Indicates that Solution Control Server (SCS) has successfully connected to Local Control Agent (LCA) running on the given host and that it, therefore, can control and monitor all applications located on this host.
Down	Indicates that SCS cannot connect to LCA running

Status Name	Description
	<p>on the given host, or that it has lost a previously established connection. This status indicates one of the following:</p> <ul style="list-style-type: none"> • LCA has not started on the given host, has terminated, or has stopped responding. • LCA is not configured correctly in the Configuration Database. <p>If you cannot identify a problem, refer to the Management Layer Troubleshooter in <i>Framework Solution Control Interface Help</i> for assistance.</p>
Unavailable	Indicates that SCS cannot connect to LCA running on the given host, or that it has lost a previously established connection because the host is not started or has failed.
Unreachable	Indicates that SCS cannot connect to LCA running on the given host, or that it has lost a previously established connection because of a network connectivity problem between SCS and the host. Specifically, there is no route to the host.
Unknown	<p>Indicates one of two situations:</p> <ul style="list-style-type: none"> • In a Distributed SCS configuration, the SCS to which Genesys Administrator is connected cannot connect to, or has lost a previously established connection with, another distributed SCS that is assigned to the given host. • Genesys Administrator Extension cannot connect to, or has lost its connection with, SCS on the given host. In this case, Genesys Administrator Extension will show all hosts with a Unknown status.

Click **Expand to Tab** to change this widget into a tab. In the Hosts tab, you can perform the following action:

View Host Statistics

[+] Click to show section

Click the graph icon beside a Host to view statistics about that Host. In the **Host Information** window, you can view information in the following tabs:

- **Hosts**
- **Processes**

- **Services**
- **Charts**

Hosts

The Host tab displays information about CPU and memory usage in tabular format. Real-time information for each CPU is broken down as follows:

- **User Time (%)**
- **Kernel Time (%)**
- **Non-Idle Time (%)**

The tab also displays basic real-time memory information, in kilobytes:

- **Used Virtual Memory**
- **Total Virtual Memory**

Processes

The Processes tab displays all processes running on the host. For each process, the Processes tab displays the following:

- **Name**
- **PID** (process identifier)
- **CPU Usage (%)**
- **Mem Usage (MB)**
- **Priority**

Services

Important

This tab is only displayed for Windows-based hosts.

The Services tab displays programs installed to run as Windows Services on the selected host. This tab only displays information about host computers running a Genesys-supported Windows operating system.

For each service, the Services tab indicates:

- **Name**—the actual name of the program installed as a Windows Service.
- **Display Name**—the service name of the program, as it appears in the Services window.
- **State**—the current state of the service.

- **Win32 Exit Code**—the error code reported for an error occurring during a service startup or shutdown.
- **Svc Exit Code**—the service-specific error code reported for an error occurring during a service startup or shutdown.
- **Checkpoint**—the operation progress indicator that the service uses during a lengthy operation.
- **Wait Hint**—the interval, in milliseconds, during which the current operational step should be completed.

See the documentation for your Microsoft Windows operating system for more information.

Charts

The Charts tab displays a graph of memory and processor usage on the host.

Solutions

The Solutions widget shows a list of Solutions in your environment. This list updates automatically when the status of a Solution changes. Click the contextual menu (three vertical dots) in the header of the widget to access options specific to this widget. These include:

- **Expand to Tab**—Expand this widget into a maximized tab to show more information and options.
- **Edit**—Edit the name of this widget.

Each Solution in the list has a status, which is one of the following:

[+] Click to show section

Status Name	Description
Start Pending	Indicates that a request to start the solution was sent by SCS, but there are some applications that still need to be started in the solution.
Started	Indicates that a solution is ready to perform its major function; that is, all mandatory solution components have reported Started status. This status does not necessarily mean that the solution is actually performing its function. To start working, some solutions might require additional solution-specific control operations through their user interfaces. For information, refer to solution-specific documentation.
Stop Pending	Indicates that a request to stop the solution was sent by SCS, but there are some applications that still need to be stopped in the solution.
Stopped	Indicates that one or more of the solution's mandatory components do not have Started status; therefore, the solution cannot perform its function. Stopped status can indicate that a solution either has not been activated, or has failed because one of its mandatory components is unavailable.

Status Name	Description
Unknown	Indicates that the Management Layer cannot provide reliable information about the solution status. This status does not necessarily mean that the solution is unable to perform its function.

Click **Expand to Tab** to change this widget into a tab. In the Solutions tab, you can perform the following actions:

Start

[+] Click to show section

Important

You can start a Solution of type Default Solution Type or Framework from Genesys Administrator Extension only if the Solution was created using a Solution Wizard.

Procedure: Starting a Solution

Prerequisites

You are using the Solutions tab. If you are using the Solutions widget, click the contextual menu (three dots) and select **Expand to Tab**.

Steps

1. In the Solutions widget, select the check box beside the Solution(s) that you want to start.
2. Click **More** and select **Start**.

Genesys Administrator Extension sends the Startup command for each Solution to Solution Control Server (SCS). SCS starts Solutions in the order in which it reads their configuration from Configuration Server and processes each Startup command as it would for a Solution that was started individually.

Important

Complete Solution startup can take some time. The amount of time varies, depending on the number and location of Solution components and the time required to initialize

each component.

SCS checks the status of all the Solution's mandatory components that are configured to be controlled by the Management Layer.

Genesys Administrator Extension reports the successful start of a Solution after all these components have reported a status of Started within the configured timeout. When the Solution starts, its status changes from Stopped to Started.

Important

- You can start a Solution only if you have Execute permission for the Solution configuration object in the Configuration Layer.
- Because a number of Solutions can share the same applications, some Solution components may have a status of Started before you start the Solution.
- In redundant configurations, both primary and backup Solution components start simultaneously; they are assigned runtime redundancy modes according to their configuration.

Stop

[+] Click to show section

Important

You can stop a Solution of Default Solution Type or Framework from Genesys Administrator Extension only if the Solution was created using a Solution Wizard.

This action is similar to the **Graceful Stop** command in Genesys Administrator. When you stop a Solution gracefully, all of the Applications making up the Solution stop accepting new requests and finish processing those requests that each currently has in its queue.

You can stop a Solution gracefully only if you have Execute permission for the Solution object.

Procedure: Using Stop on a Solution

Prerequisites

You are using the Solutions tab. If you are using the Solutions widget, click the contextual menu (three dots) and select **Expand to Tab**.

Steps

1. In the Solutions widget, select the check box beside the Solution(s) that you want to stop.
2. Click **More** and select **Stop**.

Genesys Administrator sends the Stop command for each Solution to Solution Control Server (SCS). SCS uses Local Control Agents (LCA) to deactivate the Solution components in the reverse order from the component-startup order. (The component-startup order is defined in the Solution configuration object.)

Important

- Because a number of Solutions can share the same Applications, some Solution components may continue to have a status of Started after you stop the Solution, whether gracefully or ungracefully.
- In redundant configurations, both primary and backup Solution components stop simultaneously.

Force Stop

[+] Click to show section

Important

You can stop a Solution of type Default Solution Type or Framework from Genesys Administrator Extension only if the Solution was created using a Solution Wizard.

When you stop a Solution ungracefully, the Solution stops abruptly, and all of its composite applications immediately stop processing, both new and current.

You can stop a Solution in this way only if you have Execute permission for the Solution object.

Procedure: Using Force Stop on a Solution

Prerequisites

You are using the Solutions tab. If you are using the Solutions widget, click the contextual menu (three dots) and select **Expand to Tab**.

Steps

1. In the Solutions widget, select the check box beside the Solution(s) that you want to stop.
2. Click **More** and select **Force Stop**.

Genesys Administrator Extension sends the Stop command for each Solution to SCS, which uses Local Control Agents (LCA) to deactivate the Solution components in reverse order from the component startup. (The component-startup order is defined in the Solution configuration object.)

Important

*Because a number of Solutions can share the same applications, some Solution components may continue to have a status of Started after you stop the Solution, whether gracefully or ungracefully.

- In redundant configurations, both primary and backup Solution components stop simultaneously.

Tip

You can also start and stop solutions by clicking on the status name in the Solutions tab. For example, if a solution has a status of **Started** and you click the status name, the solution attempts to stop. Likewise, if a solution has a status of **Stopped** and you click the status name, the solution attempts to start.

Solution Deployment

Solution Deployment enables the user to fully deploy **solution definitions** and **installation packages** (IPs) to local and remote locations. This includes installation and configuration of all necessary applications and updates to existing multi-tenant applications, where appropriate.

A **solution definition** consists of an XML file that dictates the steps to install, upgrade, or configure **IPs** and system configurations to deploy a solution successfully.

Solution Deployment includes the following sections:

Installation Packages

These pages explain how to manage installation packages (IPs).

[Installation packages](#)

View [Deployed IPs](#)

Solution Definitions

These pages explain how to manage solution definitions.

[Solution definitions](#)

View a list of [deployed solutions](#)

Privileges

This page explains how to manage privileges.

[Privileges](#)

Installation Packages

This panel enables you to manage installation packages (IPs) by uploading IPs to a repository in GAX and deploying the IPs to hosts.

The **Installation Packages** panel on the left of the screen displays a list of IPs that you have permission to see in your environment. The list is sorted by groups. You can expand a group to see its list of IPs.

Important

Installation packages are stored in the database and not on the local file system.

Solution Deployment 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 the cube icon to open the **Tenant Directory** filter panel. In this panel, click the 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.

Display

The **Installation Packages** panel list displays the following information:

- **Name**—The name of the IP.
- **Version**—The version number of the IP.
- **Locale ID**—Indicates the language used by the plug-in.
- **Operating System**—The operating system and bit version that are required by the IP.
- **Status**—Indicates the current status of the IP. For example, a status of **Complete** indicates that the IP deployed successfully.
- **Update Time**—A timestamp that indicates when the IP was last updated.

Click an IP to reveal more details in a panel that opens to the right. This panel displays the following information about the IP:

- **Name**—The name of the IP.

- **Nickname**—The nickname for the IP.
- **Description**—An optional description of the IP; this can be modified, as required.
- **Version**—The version number of the IP.
- **Locale ID**—Indicates the language used by the plug-in.
- **Operating System**—The operating system that is required by the IP.
- **Status**—Indicates the current status of the IP. For example, a status of **Complete** indicates that the IP was deployed successfully.
- **Update Time**—A timestamp that indicates when the IP was last updated.
- **Group**—The group to which this IP belongs. If you change the group name, the IP is relocated to that group. If the group name you enter does not exist, it will be created. These actions take effect immediately in the **Installation Packages** list.

Procedures

You can perform the following actions from this panel:

- **Upload Installation Packages**—Upload an IP to the repository.
- **Copy to Tenants**—Copy the IP to tenant(s).
- **Deploy**—Deploy the IP to host(s).
- **Download**—Download a copy of the IP.
- **Delete**—Delete the IP.

Upload Installation Packages

[+] Click to show procedure

Procedure: Uploading Installation Packages

Steps

1. In the **Installation Packages** panel, click **+**. A new panel called **Software Installation Wizard** opens to the right.
2. In the **Software Installation Wizard** panel, select a method for importing the IP:

Important

If your installation package contains two or more templates, you must use the **Installation Package Upload (includes templates)** procedure.

- **Installation Package Upload (includes templates)**—Upload a file containing an installation package and its associated templates. These files are typically provided by Genesys Customer Care.
 - **Installation Package Upload (template uploaded separately)**—Upload an installation package and its associated template.
 - **UNC Path to Mounted CD or Directory**—Upload an IP stored on a mounted CD or network directory.
 - **UNC Path to an Existing Administrator Repository**—Upload an IP from an existing Genesys Administrator repository.
 - **UNC Path to Zipped IPs through Support**—Upload a .zip file provided by Genesys Customer Care that is stored on a mounted CD or network directory. This file contains an installation package and its associated templates.
3. The file(s) upload from your file system to Genesys Administrator Extension, and a progress bar displays to show the upload progress. The progress of the upload also displays in the Status column in the **Installation Packages** panel.

Important

When you upload a plug-in, GAX uses the template file (.tpl) to create an Application Template and extracts the default options for the plug-in. GAX stores these options in the database and merges them with the core GAX Application object upon deployment. During this merge, only new options are added—existing key value pairs are not overwritten.

Installation Package Upload (includes templates)

1. In the **Software Installation Wizard** panel, select **Installation Package Upload (includes templates)** and click **Next**.
2. The panel updates. Click **Choose File** to select the file to upload.
3. Click **Finish**.
4. The file begins uploading from your file system to Genesys Administrator Extension. When the upload is complete, the IP will be displayed in the **Installation Packages** list.

Installation Package Upload (template uploaded separately)

1. In the **Software Installation Wizard** panel, select **Installation Package Upload (template uploaded separately)** and click **Next**.
2. The panel updates and displays three boxes: **Upload a package**, **Upload an XML template**, and **Upload an APD template**. Click **Choose File**.
 - Upload a package—A file that contains the installation package.
 - Upload an XML template—The XML template file for this installation package. This is the template that is referenced by the installation package description file. This file should not be modified from the version in the template directory.
 - Upload an APD template—The APD template file for this installation package. This is the template that is referenced by the installation package description file. This file should not be modified from the version in the template directory.

The panel updates.

3. Click **Finish**.
4. The file begins uploading from your file system to Genesys Administrator Extension. When the upload is complete, the IP will be displayed in the **Installation Packages** list.

UNC Path to Mounted CD or Directory

1. In the **Software Installation Wizard** panel, select **UNC Path to Mounted CD or Directory**.
2. In the text field, type the path for where the IP is stored.
3. Click **Next** to open the path.
4. The panel updates to display the IP(s) found at the specified location. Click the check box(es) beside the IP(s) to upload.
5. Click **Finish**.
6. The panel updates to display a progress bar for the upload process. You can click **Close** at any time to close the panel without interrupting the upload procedure. The status of the IP upload will be displayed in the **Installation Packages** list.

UNC Path to an Existing Administrator Repository

1. In the **Software Installation Wizard** panel, select **UNC Path to an Existing Administrator Repository**.

2. In the text field, type the path for the existing Genesys Administrator repository.
3. Click **Next** to open the path.
4. The panel updates to display the IP(s) found at the specified location. Click the check box(es) beside the IP(s) to upload.
5. Click **Finish**.
6. The panel updates to display a progress bar for the upload process. You can click **Close** at any time to close the panel without interrupting the upload procedure. The status of the IP upload will be displayed in the **Installation Packages** list.

UNC Path to Zipped IPs through Support

1. In the **Software Installation Wizard** panel, select **UNC Path to Zipped IPs through Support**.
2. In the text field, type the path for where the IP is stored.
3. Click **Next**.
4. The panel updates to display the IP(s) found at the specified location. Click the check box(es) beside the IP(s) to upload.
5. Click **Finish**.
6. The panel updates to display a progress bar for the upload process. You can click **Close** at any time to close the panel without interrupting the upload procedure. The status of the IP upload will be displayed in the **Installation Packages** list.

Important

- A green progress bar represents a successful upload of the installation package. A red progress bar represents a failed upload of the installation package. You can review which step failed in the **Status** field in the **Installation Packages** list.
- You cannot upload an IP to the repository if a version of the IP already exists in the repository. You must have the **Replace IPs and SPDs** privilege enabled to overwrite an IP in the repository.

Copy Installation Packages to Tenants

[+] Click to show procedure

Procedure: Copying Installation Packages to Tenants

Steps

1. Click the name of an installation package to select it. A new panel opens to the right.
2. In the **Installation Package** details panel, click **Related** and select **Copy to Tenants**. A new panel called **Copy to Tenants** opens to the right.
3. In the **Copy to Tenants** panel, type the name of a Tenant in the **Quick Filter** field, or click **Browse** to browse a list of Tenants in your environment. A new panel called **Tenants** opens to the right.
4. Click the check box beside each Tenant that is to receive the IP. The name of the Tenant will appear in the **Copy to Tenants** panel, in the **Targeted Tenants** section.
5. Click **Next** at the bottom of the **Copy to Tenants** panel.
6. Click **Finish** to copy the IP to the Tenant(s).

Deploy Installation Packages

[+] Click to show procedure

Procedure: Deploying Installation Packages

Steps

1. Click the name of an installation package to select it. A new panel opens to the right.
2. In the Installation Package details panel, click **Related** and select **Install**. A new panel called **IP Deployment Wizard** opens to the right.
3. Follow the steps in the Deployment Wizard. Click the Deployment Wizard tab, above, for more information.

Important

- You cannot upload an IP to the repository if a version of the IP already exists in the repository. You must have the **Replace IPs and SPDs** privilege enabled to overwrite an IP in the repository.
- IP deployment does not require the use of an **SPD** file.

Download Installation Packages

[+] Click to show procedure

Procedure: Downloading Installation Packages

Steps

1. Click the name of an installation package to select it. A new panel opens to the right.
2. Click **Download**. Genesys Administrator Extension initiates the download procedure in your browser.

Delete Installation Packages

[+] Click to show procedure

Procedure: Deleting Installation Packages

Steps

1. Click the name of an installation package to select it. A new panel opens to the right.
2. In the **Installation Package** details panel, click **Delete**.
3. A dialog box appears to confirm deletion. Perform one of the following actions:
 - Click **OK** to delete the IP permanently.
 - Click **Cancel** to cancel deletion of the IP.

Important

This action is available only if the user has the **Delete IPs and SPDs** privilege.

Important

- If the component metadata XML file contains questions that must be answered during the installation of an IP, the user is prompted to answer those questions during installation.
- IP deployment does not require the use of an **SPD** file.

Deployment Wizard

The **Automated Deployment Wizard** deploys an installation package (IP) or solution definition to the specified hosts and installs and configures the service as directed by the Service Package Definition.

Before You Begin

While you are using the **Automated Deployment Wizard**, take note of the following:

- Most of the fields in the Wizard are auto-complete fields. You can enter only part of the value in the field, and then you are presented with a list of all entries that contain the text that you entered; you can then select the appropriate item.
- The Wizard verifies the IPs, based on the operating system of the intended hosts. When you are

selecting hosts, make sure that you select those that are running the required operating system.

- If an IP is already installed on a host, by default the Wizard will reinstall the IP. All parameters entered during the previous deployment are saved by Genesys Administrator Extension and automatically prepopulated in the Wizard.
- When upgrading an existing IP, the IP's permissions and connections are updated to the new Application object.

Items That Can Be Merged

For scenarios in which the existing IP and the new IP have conflicting values, the existing IP's values are maintained. If the existing IP does not contain a value, the value of the new IP is used. The following values are available to be merged:

- options
- annex
- connections
- ports
- timeout
- autorestart
- commandlinearguments
- commandline
- state
- shutdowntimeout
- attempts
- redundancytype
- isprimary
- startuptimeout

Plug-ins are installed using the same procedures as IPs, but take note of the following:

- The plug-in install profile automatically fetches GAX Application objects for selected Host objects.
- Plug-in options are merged into the affected GAX Application objects.
- Some input fields do not appear, such as those relating to **Application Object**, **App Port**, and **Tenant Object**.

Procedures

The following are possible scenarios that you may perform by using the **Automated Deployment Wizard**:

- [Installing an Installation Package](#)
- [Upgrading an Installation Package](#)
- [Rollback an Installation Package](#)

Installing an Installation Package

[+] Click to show procedure

Procedure: Installing an Installation Package

Steps

1. In the **Installation Packages** panel, select the IP to use for the install.
2. A new panel with additional information about the IP appears to the right. Click **Related** and select **Install**.
3. The **Automated Deployment Wizard** panel displays to the right. Click **Next**.
4. The panel updates to show the **Host set selection** list. Select the host to receive the IP. Click **Next**.
5. The panel updates to show the **Application Parameters** list. In the **GAX Application object for host** field, select the Genesys Administrator Extension Application object.
6. Click **Next**.
7. The panel updates to display the **Installation Parameters (silent.ini)** list. You can set the target installation path in the field.
8. Click **Next**.
9. The panel updates to display the **Deployment** report. Review the settings, and perform one of the following actions:
 - Click **Finish** to install the IP.
 - Click **Previous** to return to a previous panel and modify settings.
10. The panel updates to display a progress bar of the deployment. This information also displays in the **Deployed IPs** panel.

Important

If a deployment fails, you can review a log of the deployment by selecting the IP from the **Deployed IPs** panel. A new panel displays with additional information

about the IP. Click **Deployment Action Log**.

Upgrading an Installation Package

[+] Click to show procedure

Procedure: Upgrading an Installation Package

Steps

1. In the **Deployed IPs** panel, select the IP to use for the upgrade.
2. A new panel with additional information about the IP appears to the right. Click **Deploy Profile:upgrade to (version number)**.
3. The **Automated Deployment Wizard** panel displays to the right. Click **Next**.
4. The panel updates to show the **Host set selection** list. Select the host to receive the IP. By default, the host that received the previous version of the IP is already selected. Click **Next**.
5. The panel updates to show the **Application Parameters** list. Values from the previous version of the IP deployment may be displayed in the following fields:
 - **Existing Application Object**—This field is automatically generated by Genesys Administrator Extension for each host to which an IP is targeted. This is the Application object in Configuration Server for which Genesys Administrator Extension will update connections.
 - **Tenant Object**—This is the Tenant that is set on an IP Application object. Click **Browse** to select a Tenant from a list.
 - **App port**—Specify a port number for the Application object to use.
 - **Primary Configuration Server**—Click **Browse** to select the Primary Configuration Server to use. This field defaults to a Genesys Administrator Extension Application object.
 - **Backup Configuration Server**—Click **Browse** to select the Backup Configuration Server to use. This field defaults to a Genesys Administrator Extension Application object.
 - **Skip IP Re-install**—Choose one of the following options:
 - **True**—Reinstall the IP only if the Application object does not exist in Configuration Server.

- **False**—Always reinstall the IP.
6. Click **Next**.
 7. The panel updates to display the **Silent.ini Parameters** list. These values are prepopulated from the previous version of the IP, but the settings can be modified, if necessary.
 8. The panel updates to display the **Deployment Summary** report. Review the settings, and perform one of the following actions:
 - Click **Finish** to upgrade the IP.
 - Click **Previous** to return to a previous panel and modify settings.
 9. The panel updates to display a progress bar of the upgrade deployment. This information also displays in the **Deployed IPs** panel.

Important

If a deployment fails, you can review a log of the deployment by selecting the IP from the **Deployed IPs** panel. A new panel displays with additional information about the IP. Click **Deployment Action Log**.

Rolling Back an Installation Package

[+] Click to show procedure

Procedure: Rolling Back an Installation Package

Steps

1. In the **Deployed IPs** panel, select the IP to roll back.
2. A new panel with additional information about the IP appears to the right. Click **Deploy Profile:rollback to (version number)n**.
3. The **Automated Deployment Wizard** panel displays to the right. Click **Next**.
4. The panel updates to show the **Host set selection** list. Select the host to receive the IP. By default, the host that previously received the IP is already selected. Click **Next**.

5. The panel updates to show the **Application Parameters** list. Values from the previous IP deployment may be displayed in the following fields:
 - **Existing Application Object**—This field is automatically generated by Genesys Administrator Extension for each host to which an IP is targeted. This is the Application object in Configuration Server for which Genesys Administrator Extension will update connections.
 - **Tenant Object**—The Tenant that is set on an IP Application object. Click **Browse** to select a Tenant from a list.
 - **App port**—Specify a port number for the Application object to use.
 - **Primary Configuration Server**—Click **Browse** to select the Primary Configuration Server to use. This field defaults to a Genesys Administrator Extension Application object.
 - **Backup Configuration Server**—Click **Browse** to select the Backup Configuration Server to use. This field defaults to a Genesys Administrator Extension Application object.
 - **Skip IP Re-install**—Choose one of the following options:
 - **True**—Reinstall the IP only if the Application object does not exist in Configuration Server.
 - **False**—Always reinstall the IP.
6. Click **Next**.
7. The panel updates to display the **Silent.ini Parameters** list. These values are prepopulated from the previous deployment of the IP, but the settings can be modified, if necessary.
8. The panel updates to display the **Deployment Summary** report. Review the settings, and perform one of the following actions:
 - Click **Finish** to roll back the IP.
 - Click **Previous** to return to a previous panel and modify settings.
9. The panel updates to display a progress bar of the deployment. This information also displays in the **Deployed IPs** panel.

Important

If a deployment fails, you can review a log of the deployment by selecting the IP from the **Deployed IPs** panel. A new panel displays with additional information about the IP. Click **Deployment Action Log**.

Related Links

- [Deployed IPs](#)
- [Deployed IPs](#)

- [Installation Packages](#)
- [Installation Packages](#)

Deployed IPs

The **Deployed IPs** panel displays a list of Installation Packages (IPs) that have been deployed and that you have the required role privileges to view. This list provides the following information about each deployed IP:

- **Name**—The name of the IP.
- **Version**—A version number that is assigned by the person who deployed the IP.
- **Current**—Indicates the IP is the latest successful deployment for the tenant.
- **Profile**—The profile type of the IP.
- **State**—Indicates whether the deployment succeeded or failed.
- **Ended**—The date and time at which the deployment of the IP finished.

Tenancy Permission Settings

Solution Deployment 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 the **Tenant Filter** button to open the **Tenant filter** panel. In this panel, click the check box(es) beside the tenants that you want to select. Use the **Quick Filter** field in this panel to filter the tenant list.

You can sort the IPs in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

Other Actions

To view additional information, click an IP in the list. A new panel opens to the right. The following actions are available:

- To remove a deployment instance from the list, click **Delete**. This does not delete the IP from the database; it just removes the corresponding history item from the list that is displayed in this screen.
- To redeploy an already deployed IP or restart a previously run deployment, click **Redeploy**. This launches the deployment wizard and populates its fields with the values that were used to deploy the IP. You can alter these values, as required. You will have to provide your credentials for the deployment; these values are not populated.
- To export a file that contains the properties, summary, and actions of an IP for auditing purposes, select an IP and click **Export**.
- View the change history of the deployment in the **Deployment Log** panel by clicking the **Related** button and selecting **Deployment Log**.

Some IPs might have additional versions available that allow you to upgrade or roll back the currently deployed IP. If so, you will see additional buttons called **Deploy Profile:upgrade to (version number)** and/or **Deploy Profile:rollback to (version number)**. Clicking these buttons will activate the deployment wizard to complete the action.

During a deployment, the **Actions** panel is displayed to the right of the **Deployed IPs** list. During the deployment, actions are listed as they are completed. After the deployment is complete, you can view the list in its entirety by scrolling through it.

Related Links

- [Deployed IPs](#)
- [Deployed IPs](#)
- [Installation Packages](#)
- [Installation Packages](#)

Solution Definitions

A solution definition is an XML file that describes what is being deployed, how the deployment is to be executed, as well as any necessary pre- and post-installation procedures.

Tip

The Hosted Provider Edition software CD includes four Service Package Definitions for use by Genesys Administrator Extension. They are for the basic deployment of four services: eServices, Inbound Voice, Outbound Voice, and Workforce Management. These files are located in the following folder: `\service\asd\spdFiles\`

This screen displays a list of all solution definition files for which you have the required role privileges to view. To refresh the list at any time, click **Refresh**. Click a solution definition in the list, and the **Details** panel is displayed to the right of the list. Actions that are available for each solution definition are applied from the **Details** panel.

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

- Type the name or partial name of an object in the **Quick Filter** field.
- Click **Tenant Filter** to open the **Tenant Filter** panel. In this panel, click the check box(es) beside the tenants that you want to select. Use the **Quick Filter** field in this panel to filter the tenant list.
- You can sort the solution definitions in the list by clicking on a column head. Clicking a column head a second time reverses the sort order.

Display

A solution definition file defines the Genesys component installation packages (IPs) that are required to provide the service, and how they are to be deployed and configured. The IPs that are deployed as part of the solution are the actual software that provide the solution. When you select a solution definition, a new panel is displayed to the right and displays additional information:

- **Name**—The name of the solution definition.
- **Version**—The version of the solution definition
- **Description**—An optional description of the solution definition; this can be modified, as required.
- **Notes**—An optional field for notes about the solution definition; this can be modified, as required.
- **Deployable**—Indicates whether the solution definition can be deployed.

Important

When you are creating a solution definition file, you must give it a unique name and version number. Genesys Administrator Extension will not allow you to import a solution definition if its name or version number is the same as an existing one. Likewise, if you modify a solution definition that is already uploaded, you must increment the version number.

The **IP Availability** area is where you verify that the IPs have been uploaded into the IP repository.

Prerequisites

Before you start deploying a Solution Package by using Genesys Administrator Extension, make sure that you have performed the following tasks:

- Install the latest version of Local Control Agent (LCA) on the target hosts. This also installs and configures the Genesys Deployment Agent on each host. Refer to the [Framework Deployment Guide](#) for instructions.
- Install Java SDK on the target hosts to enable them to process the deployment instructions.
- Upload the necessary IPs into the IP Repository.

Refer to the [Genesys Administrator Extension Deployment Guide](#) for a complete list of prerequisites required for Genesys Administrator Extension and Solution Deployment.

Procedures

You can perform the following actions:

- [Create Solution Definitions](#)
- [Modify Solution Definitions](#)
- [Copy Solution Definitions to Tenants](#)
- [Deploy Solution Definitions](#)
- [Download Solution Definitions](#)
- [Delete Solution Definitions](#)
- [View the History of Solution Definitions](#)

Create Solution Definitions

[+] Click to show procedure

Procedure: Creating Solution Definitions

Prerequisites

Before you create a solution definition file by using Genesys Administrator Extension, you must perform the following tasks:

- Prepare the solution definition file.
- Upload all of the **Genesys-component installation packages** (IPs) that are required to provide the solutions into an IP repository to which Genesys Administrator Extension has access.

Important

When you create a solution definition file, you must give it a unique name and version number. Genesys Administrator Extension will not allow you to import a solution definition if its name or version number is the same as the name or version number of an existing one. Likewise, if you modify a solution definition that is already uploaded, you must increment the version number.

Steps

1. In the **Solution Definitions List** screen, click **+**.
2. In the **Upload Solution Definition** area that is displayed to the right of the **Solution Definition List**, click **Browse** to browse to and select the solution definition for this solution definition file.
3. Click **Upload**. The name of the solution definition file, as defined in the solution definition, is displayed in the list.
4. To verify that the solution definition file can be deployed, perform the following steps:
 - a. In the list of solution definition files, click the solution definition file that you imported in the previous steps.
 - b. Verify that the solution definition file can be deployed by selecting **Check IP Availability** from the **Related** menu.
 - c. The required IPs that were found in the IP repository and those that are missing are displayed in the **IP Availability** area that is displayed. Missing IPs must be uploaded to the IP repository before this solution definition file can be deployed. When all IPs are found, the solution definition file is complete and can be marked as **Deployable**.

5. If there are no missing IPs, in the **Properties** area of the **Details** panel, check the **Deployable** check box.
6. Click **Save** to save your changes or **Cancel** to leave the solution definition file unchanged.

Modify Solution Definitions

[+] Click to show procedure

Procedure: Modifying Solution Definitions

Steps

1. In the **Solution Definition List** screen, select the solution definition that you want to modify.
2. In the **Properties** area that is displayed to the right of the **Solution Definition List**, modify the following fields, as required:
 - **Description**
 - **Notes**
 - **Deployable**
3. Click **Save** to save your changes or **Cancel** to leave the solution definition unchanged.

Copy Solution Definitions to Tenants

[+] Click to show procedure

Procedure: Copying Solution Definitions to Tenants

Steps

1. Click the name of a solution definition to select it. A new panel opens to the right.
2. In the new panel, click **Related** and select **Copy to Tenants**. A new panel called **Copy to Tenants** opens to the right.
3. In the **Copy to Tenants** panel, type the name of a Tenant in the **Quick Filter** field, or click **Browse** to browse a list of tenants in your environment. A new panel called **Tenants** opens to the right.
4. Click the check box beside each tenant that is to receive the solution definition. The name of the Tenant appears in the **Copy to Tenants** panel, in the **Targeted Tenants** section.
5. Click **Next** at the bottom of the **Copy to Tenants** panel.
6. Click **Finish** to copy the solution definition to the tenant(s).

Deploy Solution Definitions

Deploying a solution installs and configures the solution at a local or remote location, as directed by the solution definition.

[+] Click to show procedure

Procedure: Deploying Solution Definitions

Steps

1. In the **Solution Definition List** screen, select the solution definition file that you want to deploy.
2. In the **Properties** area that is displayed to the right of the **Solution Definition List**, click **Related** and select **Install** or **Deploy Profile**.
3. Follow the steps in the Deployment Wizard.

Important

The **Deploy Profile** type varies, depending on the profile specified in the solution definition file. For example, **profile name="upgrade"** would produce a

Deploy Profile: upgrade button.

Download Solution Definitions

[+] Click to show procedure

Procedure: Downloading Solution Definitions

Steps

1. Select the solution package for which you want to export the solution definition. A new panel opens to the right.
2. Click **Download**. Genesys Administrator Extension initiates the download procedure in your browser.

Delete Solution Definitions

When you delete a solution definition file, the solution definition file is not deleted from the database, nor are the IPs deleted from the IP repository.

[+] Click to show procedure

Procedure: Deleting Solution Definitions

Steps

1. In the **Solution Definition List** screen, select the solution definition file that you want to delete.

2. In the **Properties** area that is displayed to the right of the **Solution Definition List**, click **Delete**.
3. In the Confirm Deletion dialog box, do one of the following:
 - To remove the solution definition file from the database, click **OK**.
 - To keep the solution definition file and not remove it from the database, click **Cancel**.

View the History of Solution Definitions

Solution packages might change over time. They might be upgraded (up-versioned) to include both minor and major changes in the solution definition. New solutions might be added, removed, or retired. Genesys Administrator Extension enables you to generate reports to track these changes.

[+] Click to show procedure

Procedure: View the History of Solution Definitions

Steps

1. Select a solution from the **Deployed Solution List**.
2. Click **Related** and select **History**. The **History** panel is displayed to the right of the **Deployed Solutions List**. You can filter reports by one or more of the following criteria: **Time**, **User**, **Tenant**, and **Change**.

Related Links

- [Deployed Solutions](#)
- [Solution Definitions](#)
- [Deployed Solutions](#)
- [Solution Definitions](#)

Deployed Solutions

The **Deployed Solutions** screen displays a list of solution packages that have been deployed and that you have the required role privileges to view. The **Deployed Solution List** table provides the following information about each deployed solution:

- **Name**—The name of the solution package.
- **Version**—A version number that is assigned by the person who deployed the solution.
- **Progress**—A graphical indicator of the progress of each deployment.
- **Current**—Indicates the solution package is the latest successful deployment for the tenant.
- **Profile**—The profile type of the solution.
- **State**—Indicates whether the deployment succeeded or failed.
- **Deployed by Tenant**—The name of the tenant that deployed the solution.
- **Deployed by User**—The login name of the person who deployed the solution.
- **Started**—The date and time at which the deployment of the solution was started.
- **Ended**—The date and time at which the deployment of the solution finished.
- **Key**—The tenant that received the deployed solution.

Tenancy Permission Settings

Solution Deployment 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 the **Tenant Filter** button to open the **Tenant filter** panel. In this panel, click the check box(es) beside the tenants that you want to select. Use the **Quick Filter** field in this panel to filter the tenant list.

Sort the solutions in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

Other Actions

The **Deployed Solutions** screen also features the following actions:

- To refresh the list at any time, click **Refresh**.
- To view deployment information for a deployment instance, click a solution definition file in the list. Deployment information for that deployment instance is displayed to the right of the list.
- To remove a deployment instance from the list, click **Delete**. This does not delete the solution definition file from the database; it just removes the corresponding history item from the list that is displayed in

this screen.

- To redeploy an already deployed solution definition file or to restart a previously run deployment, click **Redeploy**. This launches the deployment wizard and populates its fields with the values that were used to deploy the solution definition file. You can alter these values, as required. You will have to provide your credentials for the deployment; these values are not populated.
- To export a file that contains the properties, summary, and actions of a deployed solution for auditing purposes, select a Deployed Solution and click **Export**.
- View the change history of the Deployment in the **Deployment Log** panel by clicking the **Related** button and selecting **Deployment Log**.

During a deployment, the **Actions** panel is displayed to the right of the **Deployed Solution List**. During the deployment, actions are listed as they are completed. After the deployment is complete, you can view the list in its entirety by scrolling through it.

Important

You cannot use the **Redeploy** button to redeploy a solution definition that has been deleted.

Related Links

- [Deployed Solutions](#)
- [Solution Definitions](#)
- [Deployed Solutions](#)
- [Solution Definitions](#)

Privileges

The **Privileges** section displays a list of all privileges that are stored in Genesys Administrator Extension (GAX). It is sorted in a hierarchy by application and privilege grouping.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order. You can add or remove columns by clicking the Select Columns button.

The **Privileges** section contains the following information:

- **Display Name**—The name of the privilege
- **Since Version**—The first version of the installation package that uses this privilege
- **Prerequisite**—Any other privilege that might be required

Roles and their privileges define what you can do in a given application. In GAX, roles and their privileges are controlled by the use of Role objects, which are assigned to **Users** (including Agents) and **Access Groups**.

For a sectioning of role privileges for GAX, refer to the [Genesys Administrator Extension Deployment Guide](#). For more information about role privileges specifically, and role-based access control in general, refer to the [Genesys 8.1 Security Deployment Guide](#).

Privileges are imported into GAX during the upload of an installation package (IP). All privileges defined in the metadata of the IP are imported into the GAX database. Privileges are defined as "task" elements in the metadata XML of the IP.

Click **Browse** to add privileges from the **Privileges** panel. To remove a privilege from the **Assigned Privileges** list, highlight the item, and click **Remove**.

Operational Parameter Management

Operational Parameter Management (OPM) enables the creation of parameters (called Operational Parameters) that are stored in the Configuration Database as part of Transaction objects. Operational Parameters can be used in parameterized Routing Strategies and other applications that are capable of reading Transaction objects, in which the values of the parameters are defined at runtime and integrated into the call flow.

In the case of Universal Routing Server type routing, Operational Parameter Management proceeds as follows—however, OPM also works in a similar way with other routing types, such as voice applications and Genesys Orchestration:

- The Service Provider defines the Operational Parameter by specifying its type and a name by which it is referenced in a strategy, voice application, or other routing strategy.
- The Service Provider groups Operational Parameters into a Parameter Group Template. One Operational Parameter can be associated with one or more templates.
- The Service Provider deploys Parameter Group Templates to Tenants, at which time each Parameter Group Template becomes a Parameter Group for the Tenant. One Parameter Group Template can be deployed to more than one Tenant. Each Parameter Group in a Tenant is unique.
- The Tenant administrator, or a user with the appropriate permissions and role privileges, enters values for the Operational Parameters in the Parameter Group, enabling control of active strategies. Genesys Administrator Extension stores those values in the Configuration Database as part of a Transaction object.
- The Universal Routing Server Application executes a Routing Strategy, which reads the values of the Operational Parameters in the Parameter Groups with which it is associated, and integrates them into the call flow.

Operational Parameter Management respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

This chapter includes the following sections:

Parameters

This page explains how to manage operational parameters.

[Parameters](#)

Parameter Groups

This page explains how to manage parameter groups.

[Parameter groups](#)

Parameter Group Templates

This page explains how to manage parameter group templates.

[Parameter Group Templates](#)

Parameters

Operational Parameters are parameters used to customize Routing Strategies. In Operational Parameter Management, the Service Provider defines Operational Parameters and groups them into Parameter Group Templates. Tenants to whom the Parameter Group Templates are subsequently deployed customize the values of the Operational Parameters, which are then read by a Routing Strategy and incorporated into the call flow.

Display

This screen displays a list of all defined Operational Parameters for which you have the required role privileges to view. To refresh the list at any time, click **Refresh**. Click an Operational Parameter in the list. Its properties, including its type, is displayed to the right of the list. You can filter the contents of this list in several ways:

- Type the name or partial name of the Parameter, Key, Type, or Tenant in the Quick Filter field.
- Click the **Tenant Filter** button (the icon with the circle and horizontal bar) to open the Tenant filter panel. In this panel, click the checkbox(es) beside the tenants that you want to select. Use the Quick Filter field in this panel to filter the tenant list.
- You can sort the Parameter in the list by clicking on a column head. Clicking a column head a second time reverses the sort order.

Properties

Properties of Operational Parameters

Property	Description
Display Name	The name of the parameter. It must be unique in the system.
Key Name	The name of the parameter as it would be entered in the Annex/Options tab of the Transaction object in Genesys Administrator. If this field is left blank, the name that is displayed under Display Name is used.
Type	The parameter.
Object Type	This field appears only for parameters of Type Configuration Object, and specifies the type of configuration object. Optionally, when Configuration Object is selected, you can check the checkbox named Multiple Types to select multiple configuration objects to add to this parameter. If the checkbox named Global is checked, a separate panel will open to allow you to select which tenants will receive the parameter.

Property	Description
DN Type	This field appears only for parameters of Type Configuration Object and Object Type DN, and specifies the type of DN.
Custom List Custom Value	<p>These properties apply only to parameters of type Custom List and specify the members of the Custom List. Define the list, as follows:</p> <ul style="list-style-type: none"> To add an item to the list, enter it in the Custom Value edit box, and click Add. To modify an item in the list, select the value, make the change, and click OK. <div style="border: 1px solid orange; padding: 5px; margin: 10px 0;"> <p>Important If you want the display value of an item in the Custom List to be different from the actual value stored in the transaction object, enter that information in the Key field.</p> </div> <ul style="list-style-type: none"> To remove an item from the list, select it, and click Delete. To reorder the items in the list, select an item in the list and use the Up and Down arrow buttons to move it up or down in the list. For integers, dates, and times, you can define minimum and/or maximum values (limits).
Mandatory	Specifies whether the parameter is mandatory or optional. If checked, a value must be entered for this parameter before it is saved. If not checked, the parameter is considered optional and can be saved without a value. This property can be modified later (for example, to change a mandatory parameter to an optional parameter).
Global	If checked, this parameter is unique in the entire system and is shared across all tenants. Its actual value must be defined at the time of creation, and can be changed only by the Service Provider.
Value	If this parameter is Global, this is the actual value of the parameter and cannot be changed. A default value can be set that is not propagated to deployed Parameter Group instances. Providing of a default value is optional.
Help Text	Optional text describing the parameter or providing additional information.

Types

The Operational Parameter type appears in the Type field of the properties of a parameter.

Type	Description
Audio Resource	The ARID of an Audio Resource.
Boolean	True or false only.
Configuration Object	<p>The type of a configuration object, which is specified in the Object Type field of the parameter's properties. Optionally, when Configuration Object is selected, you can check the checkbox named Multiple Types to select multiple configuration objects to add to this parameter. If the checkbox named Global is checked, a separate panel will open to allow you to select which tenants will receive the parameter. The following types are supported:</p> <ul style="list-style-type: none"> • Agent Group • DN • Person (more often referred to as User) • Place • Place Group • Skill • Stat Server • Transaction
Custom List	Valid values are limited to the values that are specified in a user-defined list, specified in the Custom List/Custom Value field of the properties of the parameter.
Date	A date value, in the format yyyy-mm-dd.
Integer	A 0 (zero), negative, or positive number with no decimal value.
Personality	The name of a Personality, given by the Personality Identifier value that is specified in the list of Personalities.
Schedule	Enables users to configure date and time ranges.
String	A string of characters, both alphanumeric and symbols.
Time	A time value, in the format hh:mm.

Schedule Parameter

[+] Click to show section

The Schedule parameter enables users to specify a series of date and time ranges for parameter groups. For example, the Schedule parameter can specify opening and closing hours for each Tenant.

Procedure:

Steps

1. On the **Parameter List** panel, click **+**.
2. On the **+** panel that is displayed to the right of the **Parameter List** panel, define the properties of the new parameter.
3. In the **Type** field, select **Schedule**. A new section called **Schedule** appears below the **Type** field.
4. In the **Schedule** section, click **Add**.
5. In the **Date** panel that appears to the right, select the **Schedule** type. You can select **Date**, to select a specific date, or you can select **Day of Week**, to select a day of the week.

If you select **Date**:

- a. You must select the **Year, Month, Day, and Time Zone** (optional) to apply the Schedule parameter. If you do not select a **Time Zone**, the system's local time zone will be used.
- b. The **Time Ranges** field is optional. This field graphically represents the time range for the Schedule parameter, based on a 24-hour clock. If the **Time Ranges** field is empty, the Schedule parameter will apply to the entire day.
- c. To specify a time range, move your mouse cursor to the time for which you want this Schedule parameter to begin.
- d. Click and drag the mouse cursor to the end time for this Schedule parameter. A box will appear to visually display the times for which this Schedule parameter will apply.
- e. Click the **Save** button.

If you select **Day of Week**:

- a. You must select the **Day of Week** and **Time Zone** (optional) to apply the Schedule parameter. If you do not select a **Time Zone**, the system's local time zone will be used.
- b. The **Time Ranges** field is optional. This field graphically represents the time range for the Schedule parameter, based on a 24-hour clock. If the **Time Ranges** field is empty, the Schedule parameter will apply to the entire day.
- c. To specify a time range, move your mouse cursor to the time for which you want this Schedule parameter to begin.
- d. Click and drag the mouse cursor to the end time for this Schedule parameter. A box will appear to visually display the times for which this Schedule parameter will apply.
- e. Click **Save**.

6. In the **+** panel, do one of the following:

- To save the new parameter, click **Save**.
- To cancel the new parameter and not save it in the database, click **Cancel**.

Procedures

You can perform the following tasks in this screen:

- [Define new parameters](#)
- [Modify parameters](#)
- [Delete parameters](#)

Defining Parameters

Normally, the Service Provider defines new operational parameters. Tenant administrators can also define their own, but these can be added only to Parameter Group Templates in the same tenant.

[+] Click to show procedure

Procedure: Defining Parameters

Steps

1. On the **Parameter List** panel, click +.
2. On the + panel that is displayed to the right of the **Parameter List** panel, define the properties of the new parameter.
3. Do one of the following:
 - a. To save the new parameter, click **Save**.
 - b. To cancel the new parameter and not save it in the database, click **Cancel**.

Modifying Parameters

[+] Click to show procedure

Procedure: Modifying Parameters

Steps

Important

Follow the instructions in this topic to modify any property of an Operational Parameter except **Value**. To set or change the actual value of an Operational Parameter in a Parameter Group, see the topic [Setting and Modifying Values in Parameter Groups](#) in the Procedures tab of the [Parameter Groups](#) page.

When you modify an Operational Parameter, the changes are propagated to any Parameter Group Templates that contain the modified parameter. However, the changes are not propagated to any deployed Parameter Groups.

1. On the **Parameter List** panel, select the parameter that you want to modify.
2. On the <parameter name> panel that is displayed to the right of the **Parameter List** panel, modify the properties of the parameter, as required.
3. Click **Save** to save your changes, or click **Cancel** to leave the parameter unchanged.

Deleting Parameters

You can delete only Operational Parameters that are not assigned to Parameter Group Templates.

[+] Click to show procedure

Procedure: Deleting Parameters

Steps

1. On the **Parameter List** panel, select the parameter that you want to delete.
2. On the <parameter name> panel that is displayed to the right of the **Parameter List** panel, click **Delete**.

3. In the Confirm Deletion dialog box, do one of the following:
 - a. To remove the Operational Parameter from the database, click **OK**.
 - b. To keep the Operational Parameter and not remove it from the database, click **Cancel**.

Related Links

- [Parameter Groups](#)
- [Parameter Group Templates](#)
- [Parameters](#)
- [Parameter Groups](#)
- [Parameter Group Templates](#)

Parameter Groups

Parameter Groups are sets of Operational Parameters that are associated with a Routing Strategy. They are deployed as Parameter Group Templates by the Service Provider to the Tenant. The Tenant administrator then assigns values to the Operational Parameters in the Parameter Group. When the URS application executes a Routing Strategy, the values of the Operational Parameters in the associated Parameter Group are incorporated into the call flow.

Access to each Parameter Group is based on the access control settings of the Configuration Transaction object. The following are general guidelines:

- If a user has **Update** permission to the Transactions folder, where the related Configuration Transaction object will be saved, the user can create a new Parameter Group.
- If a user has **Read** permission to the related Configuration Transaction object, the user can view the Parameter Group.
- If a user has **Update** permission to the related Configuration Transaction object, the user can save the Parameter Group.
- If a user has **Delete** permission to the related Configuration Transaction object, the user can delete the Parameter Group.

It is possible to modify values of Parameter Groups from applications other than GAX (for example, Genesys Administrator or the Configuration Layer). When this occurs, a message appears on the Parameter Group details panel to alert you that the Parameter Group is out of synchronization. You are asked to choose a value from one of the following options:

- **Value from Database**—The value stored in the Genesys Administrator Extension database will be used.
- **Value from Transaction Object**—The external value will be used.

Click the **Save** button to synchronize the Parameter Group.

Display

This screen displays a list of all Parameter Groups for which the tenant that is associated with the logged-in user is associated, and for which you have the required role privileges to view. To refresh the list at any time, click **Refresh**. You can filter the contents of this list in several ways:

- Type the name or partial name of an object in the **Quick Filter** field.
- Click the **Tenant Filter** button to open the **Tenant filter** panel. In this panel, click the checkbox(es) beside the tenants that you want to select. Use the **Quick Filter** field in this panel to filter the tenant list.
- You can sort the Parameter Groups in the list by clicking on a column head. Clicking a column head a second time reverses the sort order.

Click on the name of a Parameter Group to display more information about the Parameter Group in a new panel that opens to the right. Users can click **Access Control** to change the permissions for the Parameter Group, provided that they have **Update** permission for the object.

Procedures

You can perform the following tasks in this screen:

- Set or modify the values of the Operational Parameters in the Parameter Group
- Change the template that a Parameter Group uses to another Template as its basis
- Delete a Parameter Group

Set or Modify Values

The Operational Values in Parameter Groups might be assigned default values. It is the responsibility of the Tenant administrator, or someone with the appropriate role privileges, to assign values to these Operational Parameters that are applicable to the Tenant.

[+] Click to show procedure

Procedure: Setting and Modifying Values in Parameter Groups

Steps

1. On the **Parameter Group List** screen, select the Parameter Group that you want to modify.
2. On the **Parameters** panel that is displayed to the right of the **Parameters Group List** screen, enter or modify values for each of the Operational Parameters, as required.
3. Click **Save** to save the changes, or click **Cancel** to cancel the changes and leave the Parameter Group unchanged.

Important

It is possible to modify values of Parameter Groups from applications other than GAX (for example, Genesys Administrator or the Configuration Layer). When this occurs, a message appears on the Parameter Group details panel to alert you

that the Parameter Group is out of synchronization. You are asked to choose a value from one of the following options:

- **Value from Database**—The value stored in the Genesys Administrator Extension database will be used.
- **Value from Transaction Object**—The external value will be used.

Click **Save** to synchronize the Parameter Group.

Change the Template

You can change the Parameters that are associated with a Parameter Group and which designated applications the group uses. This cannot be done directly in the Parameter Group, nor in the Parameter Group Template that was used to deploy the Parameter Group.

[+] Click to show procedure

Procedure: Changing the Template of a Parameter Group

Steps

1. Create a new Parameter Group Template by copying the current Parameter Group Template of the Parameter Group that you want to change. Select the Parameter Group Template.
2. In the **<Parameter Group name>** panel that is displayed to the right, click **Change Template**.
3. In the **Change Template** panel that is displayed to the right, select the new Parameter Group Template from the **Targeted Parameter Group Template** field.
4. Click **Next**.
5. Review the Summary in the **Change Template** panel.
6. Click **Finish**.
7. Click **Close**.

If the existing parameters and/or the designated applications are in the new Parameter Group Template that you want to change them to, then they will be reused. The following content is

removed from the changed Parameter Group:

- Parameters that are not in the new Parameter Group Template to which you want to change
- Designated Applications that are not in the new Parameter Group Template to which you want to change

The transaction object that represents the Parameter Group is updated with new parameter set.

Delete a Parameter Group

When you delete a Parameter Group from the database, the Parameter Group Template and its Operational Parameters are not removed from the database. Likewise, the Routing Strategy with which it is associated is not deleted. The main impact of this action is that when URS executes this Routing Strategy for this Tenant, the Operational Parameter values in the Group will not be incorporated in the call flow.

[+] Click to show procedure

Procedure: Deleting a Parameter Group

Steps

1. On the **Parameter Group List** screen, select the Parameter Group that you want to delete.
2. On the <Parameter Group name> panel that is displayed to the right of the Parameter Group List panel, click **Delete**.
3. In the Confirm Deletion dialog box, do one of the following:
 - a. To remove the Parameter Group from the database, click **OK**.
 - b. To keep the Parameter Group and not remove it from the database, click **Cancel**.

Related Links

- [Parameter Groups](#)
- [Parameter Group Templates](#)
- [Parameters](#)

- [Parameter Groups](#)
- [Parameter Group Templates](#)

Parameter Group Templates

Parameter Group Templates are sets of Operational Parameters that can be deployed to one or more Tenants, and are defined by the Service Provider. A parameter can be grouped into more than one Group Template. You can also group sets of parameters into sections within a Parameter Group Template to enable you to create Parameter Group Sections within your parameter groups.

Display

This screen displays a list of all defined Parameter Group Templates for which you have the required role privileges to view. To refresh the list at any time, click **Refresh**. Click a Parameter Group Template in the list, and its properties are displayed to the right of the list. 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. The list dynamically updates to show items that match the text in the **Quick Filter** field.
 - Click **Tenant Filter** to open the **Tenant filter** panel. In this panel, click the checkbox(es) beside the tenants that you want to select. Use the **Quick Filter** field in this panel to filter the tenant list.
 - You can sort the Parameter Group Templates in the list by clicking on a column head. Clicking a column head a second time reverses the sort order.

Properties

Properties of Parameter Group Templates

Property	Description
Name	The name of the Parameter Group Template. It must be unique in the system.
Description	Optional text describing the Parameter Group Template or providing additional information.
Parameters	<p>A list of Operational Parameters that have been added to the Parameter Group Template. The Section(s) to which this Parameter Group Template belongs is also displayed here.</p> <div style="border: 1px solid orange; padding: 5px;"> <p>Important</p> <p>Sections can be deleted. Deleting a section only deletes the section grouping, and does not delete the set of parameters previously within that section.</p> </div>
Used	(Read-only) Used to deploy a parameter group.

Procedures

You can perform the following tasks in this screen:

- [Create Parameter Group Templates](#)
- [Modify Parameter Group Templates](#)
- [Delete Parameter Group Templates](#)
- [Manage the list of Operational Parameters in a Parameter Group Template](#)
- [Distribute Parameter Group Templates](#)
- Associate applications
- Determine where a Parameter Group Template is used and then change the Parameter Group Template that a Parameter Group uses to a different Parameter Group Template
- View the change history of the Parameter Group Template in the History panel by clicking **Related** and selecting **History**

Create Parameter Group Templates

The Service Provider creates Parameter Group Templates, and assigns Operational Parameters to them.

[+] Click to show procedure

Procedure: Creating Parameter Group Templates

Steps

1. On the **Parameter Group Template List** panel, click +.
2. On the + panel that is displayed to the right of the **Parameter Group Template List** panel, enter the properties (including adding parameters) of the new template.
3. Optionally, you can click **Add Section** to add the Parameter Group Template to a section in the **Parameter Group Template** list. A new panel opens to the right. Perform the actions below:
 - In the new panel, type the name for the new section in the **Name** field.
 - Type the key name for the new section in the **Key Name** field.

Important

These fields must be unique in the Parameter Group Template.

4. Click **Save** to save the new Parameter Group Template, or click **Cancel** to cancel the new template and not save it in the database.

Modify Parameter Group Templates

Changes that you make to a Parameter Group Template are not propagated to Parameter Groups that use that template.

[+] Click to show procedure

Procedure: Modifying Parameter Group Templates

Steps

1. On the **Parameter Group Template List** panel, select the Parameter Group Template that you want to modify.
2. On the <Parameter Group Template name> panel that is displayed to the right of the **Parameter Group Template List** panel, modify the properties of the Parameter Group Template, as required.
3. When you are finished modifying the Parameter Group Template, click **Save** to save your changes, or click **Cancel** to cancel your changes and leave the Parameter Group Template unchanged.

Delete Parameter Group Templates

You cannot delete a Parameter Group Template that is currently deployed.

[+] Click to show procedure

Procedure: Deleting Parameter Group Templates

Steps

1. On the **Parameter Group Template List** panel, select the Parameter Group Template that you want to delete.
2. On the <Parameter Group Template name> panel that is displayed to the right of the Parameter Group Template List panel, click **Delete**.
3. In the Confirm Deletion dialog box, do one of the following:
 - a. To remove the Parameter Group Template from the database, click **OK**.
 - b. To keep the Parameter Group Template and not remove it from the database, click **Cancel**.

Manage the list of Parameters

In a Parameter Group Template, you can manage the list of Operational Parameters in the following ways:

[+] Adding Operational Parameters to a Parameter Group Template

Procedure: Adding Operational Parameters to a Parameter Group Template

Steps

1. Select the Parameter Group Template to which the Operational Parameter is to be added in the list of Parameter Group Templates.
2. In the **Parameters** list, click **Add**.
3. In the **Parameters** panel that is displayed to the right, select the Operational Parameter(s) that you want to add. The selected Operational Parameter(s) are now displayed in the **Parameters** list.
4. Click **Save**.

[+] Change the order of the Operational Parameters in the list of Selected Parameters

Procedure: Change the order of the Operational Parameters in the list of Selected Parameters

Steps

To change the order of Operational Parameters in a Parameter Group Template:

1. Select the Parameter Group Template in which the order of Operational Parameters is to be changed.
2. In the **Parameters** list, select a parameter that you want to move, and click the up or down arrow to change its order in the list. You can also drag the parameter and drop it into a new position in the order.
3. Click **Save**.

[+] Removing Operational Parameters from a Parameter Group Template

Procedure: Removing Operational Parameters from a Parameter Group Template

Steps

1. Select the Parameter Group Template from which the Operational Parameter is to be removed.
 2. In the **Parameters** list, select a parameter that you want to remove and click **Remove**.
 3. Click **Save**.
-

Distribute Parameter Group Templates

The Service Provider deploys Parameter Group Templates to Tenants. At this point, the Parameter Group Template becomes a Parameter Group and is associated with a Routing Strategy.

[+] Click to show procedure

Procedure: Distributing Parameter Group Templates

Steps

1. On the **Parameter Group Template List** panel, select the Parameter Group Template that you want to deploy.
2. On the <Parameter Group Template name> panel that is displayed to the right of the **Parameter Group Template List panel**, click **Deploy**.
3. In the **Parameter Group Deployment** panel, provide the following information:
 - a. Parameter Group Name — The name that is assigned to this Parameter Group.
 - b. Tenant — The tenant to which this Parameter Group belongs.
 - c. Application — The Routing Strategy that will be used by this tenant and is associated with this Parameter Group. Click **Search** to select from a list of Routing Strategies.
4. Click **Next**.
5. In the **Tenant** panel, select the name of the tenant(s) to which you want to deploy the Parameter Group.
6. Click **Next**.
7. In the **Parameter Group Deployment** panel, specify the application(s) that you want to enable on this parameter group by clicking **Add**.
8. In the **Designated Applications** panel, select the name of the application(s) that you want to add.
9. Click **Next**.
10. Preview the deployment in the Summary. If you are satisfied with the deployment, click **Finish**. To make changes, click **Previous**.
11. Click **Close**.

Important

You can modify a Parameter Group Template after it has been deployed. For example, you can add, remove, re-order, and/or modify the parameters in an already deployed Parameter Group Template. Once saved, you can synchronize the changes and all Parameter Groups of the Parameter Group Template will be updated to the current structure.

Related Links

- [Parameter Groups](#)
- [Parameter Group Templates](#)
- [Parameters](#)
- [Parameter Groups](#)
- [Parameter Group Templates](#)

Audio Resource Management

Audio Resource Management (ARM) enables you to manage personalities and their associated audio resources (announcements and music files).

You can create Personalities to help you organize which files belong to a particular speaker. For example, you might have a personality called John that uses dialog spoken in English by a male speaker. Or, you might have a personality called Marie that uses dialog spoken in French by a female speaker.

You can upload two types of audio resources:

- **Announcements**—These are files that contain spoken dialog that will be played for customers. For example, you might have an announcement file that tells customers about your business hours.
- **Music**—These are files that play music for customers. For example, you might have a music file that plays music for customers who are about to be transferred to an Agent.

The **Audio Resources** window in Genesys Administrator Extension (GAX) is a unified list of your personalities and audio resources. For each audio resource, GAX displays the following:

- A logo to indicate whether the file has been designated as Announcement or Music.
- The name of the audio resource.
- The Audio Resource ID (ARID).
- Additional columns, one for each personality, to indicate which personality is using this audio resource.

Click **Show Quick Filter** and type the name or partial name of an object in the **Quick Filter** field. The list updates dynamically to show items that match the text in the **Quick Filter** field.

ARM is integrated with [Operational Parameters Management \(OPM\)](#) to allow users to dynamically select personalities and audio resources to be used with a parameterized strategy or orchestration application, or a parameterized routing or voice applications.

Access to ARM is based on both role privileges and Tenant access control permissions, as follows:

- User access to screens or certain ARM functionality is managed by role privileges.
- Access control permissions define which audio resources can be viewed or modified by an authenticated user. Access to audio resources is granted by Tenant. Users have access to all audio resources for each Tenant to which they have access.

For Service Providers, see [Audio Resources \(Configuration Manager\)](#) for information on how to share resources with Tenants.

Click on a tab below to learn more.

Personalities

Creating a Personality

To create a new Personality, click **New**.

[+] Show Procedure

Procedure: Creating a Personality

Steps

1. Click **New** and select **Add Personality**.
2. Enter the following information:
 - **Personality Name**—The name of this personality.
 - **Language**—The language spoken by this personality.
 - **Description**—A description of this personality.
 - **Gender**—Select whether this personality is Male, Female, or Not Specified.
3. Click **Save**.

Uploading Audio Resources

[+] Show Procedure

Procedure: Uploading Audio Resources

Steps

1. Identify which audio resource and personality to assign to the file. Once identified, select or hover over the table cell that is shared by the target audio resource and personality.
2. Click **Upload Audio File**.
3. Your browser opens a dialog box to select an audio resource to upload. Select a file to upload.
4. The audio resource is uploaded to GAX and assigned to the personality.

Other Actions

Once you create a personality, you can:

- Edit the personality—Click **Edit** beside a personality to edit personality properties.
- Delete the personality—Click **Edit** to view personality properties. In the **Edit Personality** window, click **Delete** to delete the personality.

Important

You cannot delete a Personality that is a part of one or more Audio Resource Files.

- Manipulate the audio resource—Once an audio resource is assigned to the personality, several options become available to manipulate the file.
 - Play the file—Click the play button to listen to the file.
 - **Delete**—Delete the file. This does not delete the associated personalities, but it does delete the original audio files. A file can only be removed if the audio resource to which it has been assigned has not been deployed. If the user performing this operation is a Service Provider, the file can only be removed if the file was not created by a Tenant.
 - **Reprocess**—Reprocessing recreates an audio resource file from the original audio file that was uploaded (if it has not been deleted from the database and/or target storage). It also performs any necessary conversion between audio formats.
 - **Download**—Download the file to your computer.
 - **Encodings**—View information about how the file was encoded by GAX. When audio files are uploaded, GAX automatically encodes them to the following formats: μ -law, A-law, and GSM.

Audio Resources

Creating an Audio Resource

To create an Audio Resource, click **New**.

[+] Show Procedure

Procedure: Creating an Audio Resource

Steps

1. Click **New** and select **Add Message**.
2. Enter the following information:
 - **Name**—The name of this audio resource.
 - **Description**—A description of this audio resource.
 - **Type**—Select whether this audio resource is Music (a music file) or Announcement (an announcement file).
3. Click **Save**.

Uploading Audio Resources

[+] Show Procedure

Procedure: Uploading Audio Resources

Steps

1. Identify which audio resource and personality to assign to the file. Once identified, select or hover over the table cell that is shared by the target audio resource and personality.
2. Click **Upload Audio File**.
3. Your browser opens a dialog box to select an audio resource to upload. Select a file to upload.
4. The audio resource is uploaded to GAX and assigned to the personality.

Deleting Audio Resources

[+] Show Procedure

Procedure: Deleting Audio Resources

Steps

1. Click the check box beside the audio resource that you want to delete.
2. Click **Delete**.

Important

- If you delete an audio resource, all files that are associated with it are also deleted.
- If you are deleting an audio resource that is being used by Operational Parameter Management, and this Audio Resource being used by one or more parameters or Parameter Groups, a message is displayed that indicates this fact. When this happens, you can only cancel the deletion—you cannot force the deletion.

Other Actions

Once you upload a file, you can select or highlight over the file and choose one of the following actions:

- **Play the file**—Click the play button to listen to the file.
- **Delete**—Delete the file. This does not delete the associated personalities, but it does delete the original audio files. A file can only be removed if the audio resource to which it has been assigned has not been deployed. If the user performing this operation is a Service Provider, the file can only be removed if the file was not created by a Tenant.
- **Reprocess**—Reprocessing recreates an audio resource file from the original audio file that was uploaded (if it has not been deleted from the database and/or target storage). It also performs any necessary conversion between audio formats.
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