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Genesys Administrator Extension Help

Users (Persons)

12/20/2025

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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.

Managing Users vs. Managing Agents

You can create agents in either the Persons window (as described here) or in the **Agents** window. The result is the same—an agent of type Person is created and stored in the Configuration Database, and you can manage that agent in the Persons window or Agents window.

If at any time you want to work only with agents, you can select Agents in the GAX menu bar. This shows you a list of only the agents in your contact center, filtering out all non-agent users and giving you a shorter list to work with.

Important

If the Agents option does not appear in the GAX Header, change it in System Preferences by selecting the Agent Management category and changing the Mode from **Hidden** to **Premise**. See **System Preferences** for more information.

Viewing Users

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. 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 heading. Clicking it 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**.

Keyboard shortcuts

GAX implements the following keyboard shortcuts, which can be used in the **Persons** page to quickly execute common actions.

- **Alt + S**: Save
- **Alt + Y**: Apply
- **Alt + X**: Cancel
- **Tab**: Navigate forward
- **Shift + Tab**: Navigate back
- **Enter**: Click on an object
- **Up Arrow** or **Down Arrow**: Navigation in a combo box

Working with Users

To create a new User object, click **New**. To view or edit details of an existing object, click 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.

- **Edit Skills**—Edit skills of one or more Users. When you select **Edit Skills** in the **More** menu, the **Edit_<n>_Agents** dialog box opens. This dialog box is where you can change the skills of the Users.
- Create a folder, configuration unit, or site. See [Object Hierarchy](#) for more information.

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

Creating New Users

To create a new user, do the following:

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 email 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 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 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

From 8.5.260.11, GAX now saves user preferences in the Person object by default. If the **[general] userpreference_in_transaction** GAX application option is set to true, then GAX saves user preferences in the Transaction object in the **Transactions/UserPreference** folder.

In this case, GAX copies only the annex sections starting with the option **ga_preferences.**, from the Person annex to the Transaction annex.

When GAX creates the Transaction object, GAX removes all access permissions (for users and access groups) to the Transaction object, except the default user and the current user.

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).

CSV File for Importing and Exporting

You can use the Bulk Import/Export functionality to import Users from, and export Users to, a comma-separated value (CSV) file. The import file used for importing and the export file created by exporting data are fully compatible, and a single file can be used for both importing and exporting. Or, if you wish, you can create the import file yourself, using the general CSV information in this Help file, and the object-specific information contained in this section.

Fields in the CSV File

The source file is a text file in a comma-separated (CSV) format, with an extension of **.csv**.

In the source file, each line represents a single User. The same User can appear in the source file only once. The unique identifier of the User in the scope of the source file is the Employee ID field.

The columns in the file are the properties of a User and any other objects with which they might be associated. The first row in the file has column names to identify the fields. The order of the columns is not important. A comma is inserted after each column header or value, or if the column does not have a value, immediately after the previous comma. Any non-mandatory column can be omitted from the source file, depending on user preference and/or the purpose of the file.

The source file contains the following properties for each User:

Important

- Field names are case-sensitive.
- Except for the Username field name, whitespace is permissible between the words for the First Name, Last Name, Employee Id, and Is Agent field names.

Name	Type	Mandatory	Description
Action	ADD, UPDATE, DELETE	Yes	Specifies the action to be taken with this User data, either create a new User (ADD) or modify the existing User (UPDATE) or delete a User (DELETE). This column is added automatically by GAX when a file is exported, with a value of UPDATE for all records in it. If you create the source file from scratch, you must add this column manually. In either case, this field is mandatory, and you must provide a value for each record.
FirstName	String	Yes	User's first name.
LastName	String	Yes	User's last name.
Username	String	Yes	Username of the User.
EmployeeID	String	Yes	Unique ID assigned to this User.
Is Agent	String	Yes	Whether User is an Agent, either Y or N. Script functionality differs between an

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Name	Type	Mandatory	Description
			Agent and a non-Agent.
Password	String	No	Password to be used with username.
Password change	String	No	Whether this User must change their password at their next login (Y) or not (N).
External Id	String	No	A unique external ID for this User.
Email address	String	No	Email address of this User; normally it is the same as the Username.
Enabled	String	No	Whether this User is enabled, either Y or N.
Section Option Value	String	No	User options associated with this User. Note: Any special characters in the key/value are escaped by using a back slash (\). For example: \\,=\\,\\, where "," (comma) is the key and "\\,," (comma,comma) is the value.
Capacity Rule	String	No	Applies only if Is Agent=Y. The default Capacity Rule with which this User is associated.
Cost Contract	String	No	Applies only if Is Agent=Y. The default Cost Contract with which this User is associated.
Site	String	No	The default Site with which this User is associated.
Default Place	String	No	Applies only if Is Agent=Y. The default Place with which this User is associated.

Relational Columns

In addition to the properties and folders in the table above, each row may contain relations between this User and other configuration objects, in particular **Access Groups**, **Agent Groups**, **Agent Logins**, **Application Ranks**, and **Skills**. Every instance of an Access Group, Agent Group, Agent Login, Application Rank, and Skill object will have a separate column in the source file. For example, if there are 10 Agent Groups, 1 Switch, 15 Skills and 4 Access Groups, there will be 30 additional

columns in the source file, each column representing each configuration object. All relational columns are optional.

Each header for a relational column consists of the object type and the object name, which will form a unique column name. So, for example, there cannot be two Skills which have the same name, but a Skill object may have the same name as some Switch object.

Naming and value rules of relational columns are given in the following table:

Relational Columns

Type	Column Name	Valid Values	Description
Access Group	AccessG:<access group name>	Y – Add this User/Agent to this Access Group N – Remove this User/Agent from this Access Group <empty> - No action	The name of the Access Group to which this User belongs. This User can belong to as many Access Groups as required, but only one Access Group can appear in each column. Important The Default Access Group specified in System Preferences does not apply when using bulk uploads, since the Access Group for the User is specified in the CSV file.
Agent Group	AgentG:<agent group name>	Y – Assign this User to this Agent Group N – Remove this User from this Agent Group <empty> - No action	Applies only if Is Agent=Y. The name of the Agent Group to which this User belongs. This User can belong to as many Agent Groups as required, but only one Agent Group can appear in each column.
Agent Login	AgentL:<switch name> / <agent login name>	<wrap-up time> – Assign this Agent Login to this User, with the stated wrap-up time. <empty> – No change. N – Remove this Agent Login from this User.	Applies only if Is Agent=Y. The Agent Login assigned to this User.
Application Rank	ApplicationR:<application name>	<rank> – Assign this Application type to this User with this Rank. Possible Ranks are Administrator, Designer, Super Administrator, Service Administrator, User, Unknown.	The default Rank with respect to the given Application type.

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		<empty> - No action N - Remove this Rank from this User	
Skill	Skill:<skill name>	<number> - Assign this Skill to this User with this Skill Level <empty> - No action N - Remove this Skill from this User	Applies only if Is Agent=Y. The proficiency of this User at the given Skill.

Example

The following data is to be uploaded to GAX to modify two new Users:

Action	FirstName	LastName	EmployeeID	Username	Is Agent	Enabled	Skill:Outgoing	Skill:Winback
UPDATE	John	Fraser	1234	JohnF	Y	Y	4	5
UPDATE	Susan	Smith	5757	SusanS	Y	Y	N	

The contents of the CSV file for this data looks like this:

```
Action,FirstName,LastName,EmployeeID,Username,Is Agent,Enabled,Skill:Outgoing,Skill:Winback
UPDATE,John,Fraser,1234,JohnF,Y,Y,4,5
UPDATE,Susan,Smith,5757,SusanS,Y,Y,N,
```