Genesys Administrator Extension Help

Agents

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Contents

Agents

Agents are Users who handle customer interactions directly.

Important

- If the Agents option does not appear in the GAX Header, change it by selecting **Agent Management** in System Preferences and changing **Mode** to **Premise**. See System Preferences for more information.
- If you used Cloud mode in a pre-8.5.25x version of GAX, you have automatically been converted to Hidden mode. Follow the steps in the previous point to make the Agents menu visible.

Agents View

The **Agents** view 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.

To filter the list:

- 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.
- Select a folder from the **Directory** drop-down list to filter based on folders (folder-based view). Folder-based view is not enabled by default. To enable folder-based view in the Agent Dashboard list view, go to **System Preferences** > **Agent Management** and then select **Show Folders**.

To sort the list, click in a column header. Clicking the header a second time reverses the sort order.

Bulk Operations on Agents

GAX provides some functionality that allows you to apply modifications to the Configuration Database in bulk, thereby speeding up the provisioning process. Currently, GAX supports the following bulk operations:

- Import/export .csv files to create new Agents and modify or delete existing Agents.

- Assign Skills to multiple Agents, including creating new Skills as required.

> **Important**
> Tenant users can update Agents for only the Tenant to which the user belongs.

Operations on Individual Agents

In the Agents view, you can:

- Add a new Agent from scratch, or create a copy of an Agent and modify it.
- Modify the properties of an existing Agent, or just toggle its State between `Enabled` or `Disabled`.
- Delete (remove) an existing Agent.

Create an Agent

> **Tip**
> If you have an existing Agent that has similar properties to the Agent that you want to add, you might want to copy the existing Agent and change its properties to create the new Agent. This will reduce your input time.

To create a new Agent, do the following:.

1. In the Agents view, click **Add**. The **Add Agent** window appears.
2. Enter the following information. For some fields, you can either enter the name or value or click **Browse** to select a value from a list:
   - Agent Information
     - **User Name**—The name that this Agent 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 Agent.
     - **Last Name**—The last name of this Agent.
     - **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 email address of this Agent.
- **Password**—A password no longer than 64-characters that this Agent 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 Security Deployment Guide* for more information.

- **Organization**—The folder in which the Person object for this Agent 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 Agent. Click **+** to add an Agent Login.
- **Number/DN**—The Number/DN of this Agent. This field appears once a Place is selected. Click **+** to add a DN.

- Add Agent 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.

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

Copy an Agent

You might have an existing agent that has similar properties of one that you are adding. Instead of creating that Agent from scratch, you can copy that Agent, and just modify it as required.

To copy an existing Agent, do the following:

1. In the Agents view, select the Agent that you want to copy.
2. Click **Clone**.
3. (Optional) Modify the Agent's information as required.
4. Click **Save** or **Cancel**, as appropriate.

Modify an Agent

To modify an Agent, do the following:

1. In the Agents view, select the Agent that you want to modify.
2. Click **Edit** and modify the Agent's information as required.
3. Click **Save** or **Cancel**, as appropriate.

Change the State of an Agent

To change only the State of an Agent, do the following:

1. In the Agents view, select the Agent for which you want to change its State.
2. Click **Enable** or **Disable**.
3. Click **Save** or **Cancel**, as appropriate.

Notes:

- Agents that are disabled appear grayed out in the list.
- When an Agent is disabled, GAX invalidates all sessions associated with this Agent. When the Agent next tries to use GAX, he or she will be redirected to the login page.

Delete (Remove) an Agent

To delete one or more Agents, do the following:

1. In the Agents view, select the Agents that you want to remove from your configuration.
2. Click **Delete**.
3. Click **Save** or **Cancel**, as appropriate.

Note: When deleting an Agent, GAX does not delete the DN, Place, or Agent Login objects associated with the Agent.