Genesys Administrator Extension Help

User Accounts

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User Accounts

The `User Accounts` panel is a central location for creating, provisioning, and managing user accounts.

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 who are created in Genesys Administrator Extension receive the same set of default permissions and access privileges that Configuration Server grants.

Display Options

Display Options

The `User Accounts` list is organized by tenants, configuration units, sites, and folders.

Account 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 tenant that you want to select. Use the `Quick Filter` field in this panel to filter the tenant list.

You can also sort the list by clicking the `Group By` button. You can choose from among the following criteria:

- Folder—Lists the users by: `Tenant > Application Folder`.
- Agent Group—Lists the users by: `Tenant > Agent Group Folder > Agent Group`.

  Notes:

    - When sorting by agent group, only user accounts that are identified as agents appear in the list.
    - When sorting by agent group, it is possible that some user accounts might be displayed multiple times, if those user accounts belong to multiple agent groups.
    - You can click on the name of a user account and drag it to another agent group within the same tenant to add the user account to that group. A dialog box displays to ask you to confirm the action. Click the `OK` button to execute the action. The user interface refreshes to display the change.

- Role—Lists the users by: `Tenant > Role Folder > Role`.

  Notes:

    - When sorting by role, it is possible that some user accounts might be displayed multiple times, if those user accounts belong to multiple roles.
    - You can click on the name of a user account and drag it to another role within the same tenant to add the user account to that role. A dialog box displays to ask you to confirm the action. Click the `OK` button to execute the action. The user interface refreshes to display the change.

- Access Group—Lists the users by: `Tenant > Access Group Folder > Access Group`.

  Notes:

    - When sorting by access group, it is possible that some user accounts might be displayed multiple times, if those user accounts belong to multiple access groups.
    - You can click on the name of a user account and drag it to another access group within the same tenant to add the user account to that group. A dialog box displays to ask you to confirm the action. Click the `OK` button to execute the action. The user interface refreshes to display the change.

- Skill—Lists the users by: `Tenant > Skills > Access Group`.

  Notes:

    - The `Level` header appears when sorting by skills. The `Level` value is related to the user account's rating for that skill.
    - When sorting by skills, it is possible that some user accounts might be displayed multiple times, if those user accounts have multiple skills.
    - You can click on the name of a user account and drag it to another skill within the same tenant to add the user account to that skill. A dialog box displays to ask you to confirm the action. Click the `OK` button to execute the action. The user interface refreshes to display the change.

- Supervisor—Lists the users by: `Tenant > Supervisors > Folder`.

  Notes:

    - The `Agent Group` header appears when sorting by supervisor.
    - When sorting by supervisor, it is possible that some user accounts might be displayed multiple times, if those user accounts have multiple supervisors.
    - You can click on the name of a user account and drag it to another supervisor's agent group within the same tenant to add the user account to that group. A dialog box displays to ask you to confirm the action. Click the `OK` button to execute the action. The user interface refreshes to display the

change.

You can also sort the list by clicking a header at the top of the list.

Agents and non-agents are visually identifiable in the list by different icons.

User accounts that are disabled appear grayed out in the list.

Procedures

Possible Procedures from this Panel

Clicking a User account will open a new panel on the right. This panel lists additional details about the User account (see Creating User Accounts for more information about this panel). You can also edit options and access control. For more information about options and privileges that are related to User accounts, see the Genesys Administrator Extension Deployment Guide.

You can also perform the following actions:

Creating Agents

[+] Click here to reveal procedure

To create an Agent, perform the following actions:

1. Go to `Accounts` > `System` > `User Accounts`.
2. Click the `New` button.
3. Follow the steps that are outlined in the Creating User Accounts section, and ensure the `Agent` check box is selected.
4. After the User account has been saved, select the User account in the `User Accounts` panel. A new panel opens to the right and displays information about the User account.
5. In the new panel, click the `Related` button and select `Agent Information`. A new panel opens to the right.
6. 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:
   - `Default Place`—The Place assigned to this agent by default. This optional parameter applies to a limited number of configurations, in particular those in which 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 `Capacity Rule` type that defines the ability of this agent to handle multiple interactions.
   - `Site`—The site to which this Agent belongs.
   - `Cost Contract`—The Cost Contract associated with this Agent. Refer to the Objective Tables page for more information about Cost Contracts.

- Agent Logins——The Agent Login that is associated with this agent.

7. Enter Skills in the Skill Levels section. Click the New button to open a new panel and add Skills. See the Agent Skills section for more information.
8. Click the Save button.

Creating User Accounts

[+] Click here to reveal procedure

To create a User account, perform the following steps:

1. In the header, go to Accounts > System > User Accounts.
2. In the User Accounts panel, click the New button.
3. Enter information in the following fields:
    - User Name—The User name that will be used to log in.

> **Important**
> The User Name field must be unique in the environment.

- First Name—The first name of the User.
- Last Name—The last name of the User.
- E-mail Address—The e-mail address of the User.
- Tenant and Folder—The Tenant and folder to which this User belongs. You can type the name of a Tenant in the Quick Filter field, or you can click the Browse icon to select a Tenant from a list.
- Agent—A check box that you can select to indicate that this User is an Agent.
- Employee ID—The ID number of the employee.

> **Important**
> The Employee ID field must be unique in the environment.

- Password—The password that will be used to log in.
- Confirm Password—Re-enter the password to confirm accuracy. This value must match the value that is entered in the Password field.
- Force Password Reset on Next Login—A check box that, if selected, will prompt 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. Please see the Genesys 8.1 Security Deployment Guide for more information about resetting passwords.

- `External ID`—The external ID of the employee.
- Enter application ranks in the `Application Ranks` section. Click the New button to add an application rank. A new panel opens to the right and contains two drop-down menus: `Application Type` and `Application Rank`. Select an application in the `Application Type` drop-down menu, and then select a rank in the `Application Rank` drop-down menu. Click the OK button to add the settings to the `Application Ranks` section.

> **Important**
>
> - The `Application Ranks` functionality allows GUI applications to control which of their functions are available to the currently logged-in User. Consult the manuals for the Genesys GUI applications to see if those applications are using ranks to enable or block certain functions. If a manual does not have any references to ranks, the related applications do not use ranks in any way, and you do not need to specify the User's ranks with respect to the related application.
> - Do not confuse application ranks with Configuration Database permissions. Applications themselves verify ranks, which specify what functionality is available to a User with regard to an application. Configuration Server verifies permissions, which specify a level of access to the objects in the Configuration Database.

4. Click the Save button.

> **Important**
>
> Users automatically receive Read and Update permissions for their User object. These permissions allow the User to save his or her User preferences in GUI-based programs such as GAX or Interaction Workspace.

Deleting User Accounts

[+] Click here to reveal procedure

There are multiple methods to delete a User account. Choose a procedure below:

Deleting a Single User Account

1. In the header, go to `Accounts > System > User Accounts`.

2. In the User Accounts panel, click the name of the User to delete. A new panel opens to the right.
3. In the new panel, click the Delete button to delete the User account.
4. A dialog box displays to confirm the action:
    - Click the OK button to continue.
    - Click the Cancel button to discard the action.

Deleting Multiple User Accounts

1. In the header, go to Accounts > System > User Accounts.
2. In the User Accounts panel, select the check box beside each User Account that you want to delete.
3. Click the Bulk Change button. A pop-up menu will appear. Select Delete.
4. A dialog box displays to confirm the action:
    - Click the OK button to continue.
    - Click the Cancel button to discard the action.

Setting and Resetting Passwords

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There are multiple methods to change or reset a password. Choose a procedure below:

Resetting a Password for a Single User

1. In the header, go to Accounts > System > User Accounts.
2. In the User Accounts panel, click the name of the User for whom to reset the password. A new panel opens on the right.
3. In the new panel, select the Force Password Reset on Next Login check box.
4. Click the Save button.

Important

- The Force Password Reset button is grayed out if the password has already been flagged to be reset by the User. It remains grayed out until the User logs in and clears the flag by resetting the password.
- The Force Password Reset on Next Login option displays only if Genesys Administrator Extension connects to Management Framework 8.1.1 or higher. Please see the Genesys 8.1 Security Deployment Guide for more information about resetting passwords.

Specifying a New Password for a Single User

1. In the header, go to Accounts > System > User Accounts.
2. In the User Accounts panel, click the name of the User for whom to change the password. A new panel opens on the right.
3. In the new panel, click the Change Password button at the bottom of the panel.
4. Type the new password in the New Password field.
5. Confirm the new password by retyping it in the Confirm Password field.
6. Click the Save button.

Resetting Passwords for Multiple Users

1. In the header, go to Accounts > System > User Accounts.
2. In the User Accounts panel, select the check box beside each User for whom to reset the password.
3. Click the Bulk Change button. A pop-up menu appears. Select Reset Password.
4. A dialog box displays to confirm the action:
    - Click the OK button to continue.
    - Click the Cancel button to discard the action.

> **Important**
> The Password Reset button is grayed out for those Users whose passwords have already been flagged to be reset. It remains grayed out until the Users log in and clear the flag by resetting their passwords.

Setting Accessible Objects

[+] Click here to reveal procedure

To see the objects to which a User account has access, perform the following actions:

1. In the header, go to Accounts > System > User Accounts.
2. In the User Accounts panel, click the name of a User account. A new panel opens to the right.
3. Click the Related button and select Accessible Objects. The Accessible Objects panel opens to the right.
4. Click the drop-down menu at the top of the Accessible Objects panel to view the object types to which the User account has access. Selecting an object type refreshes the list to display only the objects that are related to the object type. See Access Control for more information about the Accessible Objects panel.

Enabling or Disabling User Accounts

[+] Click here to reveal procedure

There are multiple methods to enable or disable a User account. Choose a procedure below:

Enabling or Disabling a Single User Account

1. In the header, go to `Accounts` > `System` > `User Accounts`.
2. In the `User Accounts` panel, click the name of a User accountto enable or disable. A new panel opens on the right.
3. In the new panel, perform one of the following actions:
    - If the User Account is currently enabled, click the `Disable` button.
    - If the User Account is currently disabled, click the `Enable` button.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.

Enabling or Disabling Multiple User Accounts

1. In the header, go to `Accounts` > `System` > `User Accounts`.
2. In the `User Accounts` panel, select the check box beside each User account that you want to enable or disable.
3. Click the `Bulk Change` button. A pop-up menu will appear. Select `Enable` to enable the selected User accounts, or `Disable` to disable the selected User accounts.
4. A dialog box displays to confirm the action:
    - Click the `OK` button to continue.
    - Click the `Cancel` button to discard the action.