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Genesys Intelligent Automation Help

Administration

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Administration

The **Administration** view allows you to create, modify, and delete settings and configurations that govern your Genesys Intelligent Automation environment.

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Companies

Companies are separate entities within your Intelligent Automation environment that have their own callflows, users, and reporting data. Companies are similar to subfolders within an operating system's root folder. All folders share a common set of configurations, but each folder can have its own files, permissions, and rules. Likewise, you can create separate companies if your business requires separate entities with unique user lists, reporting data, and callflows.

Important

The **Templates** company is created after you install Intelligent Automation to host the templates you need to create **products**. Genesys recommends you do not delete the **Templates** company.

Creating a company

To create a company:

1. Click **Create a New Company**.
2. In the **Company** section, specify the following information:

- **Company Name** - Enter a name for your company.
- **Contact Email Address** - Enter a general email address for your company. This email address is not used by Intelligent Automation, but it might be useful for support personnel.
- **Contact Phone Number** - Enter a general phone number for your company. This phone number is not used by Intelligent Automation, but it might be useful for support personnel.
- **Allowed Phone Numbers** - Specify which phone numbers can be dialled by this company's callflows. In most cases, users select **From Rol to Any** or **From UK to Any**, but you can create your own calling rules in the **Phone Numbers** tab and select it here.
- **New Company Logo** - Upload a company logo that you can display in the Intelligent Automation user interface.
- **Configuration Server Tenant DBID** - If users stored in the Genesys Configuration Database will be part of this company, enter the ID of the user's tenant that corresponds to this company. This ID will be used to determine the company that is to be loaded when a user who is not an Intelligent Automation user is logging in. See the **At login** section of the Intelligent Automation Reference Guide.

Important

This field will not appear unless the **Login.ExternalAuthenticationMode** server setting is set to ConfigServer.

- **Assign to Voice Cluster** - Select the voice **cluster** that this company uses. Most users select **Default Voice Cluster**.
 - **Assign to SMS Cluster** - Select the SMS **cluster** that this company uses. Most users select **Default SMS Cluster**.
 - **Assign to Mobile Cluster** - Select the mobile **cluster** that this company uses. Most users select **Default Mobile Cluster**.
 - **Assign to Messaging Cluster** - Select the messaging **cluster** that this company uses. Most users select **Default Messaging Cluster**.
 - **Cache Production Modules** - If enabled, Intelligent Automation uses cached versions of production modules to serve callers. Genesys recommends you enable this setting for consistent performance.
 - **Industries** - Optional. Select one of the boxes to identify the industry in which your company operates. This tag is not used elsewhere in Intelligent Automation and is descriptive only.
3. Click **Save**.

 **Company**

*** Company Name**

My Company

*** Contact Email Address**

general@mycompany.com

*** Contact Phone Number**

1234567890

*** Allowed Phone Numbers**

From RoI to Any ▼

New Company Logo

No file chosen

*** Assign to Voice Cluster**

Default Voice Cluster ▼

*** Assign to SMS Cluster**

Default SMS Cluster ▼

*** Assign to Mobile Cluster**

Default Mobile Cluster ▼

*** Assign to Messaging Cluster**

Default Messaging Cluster ▼

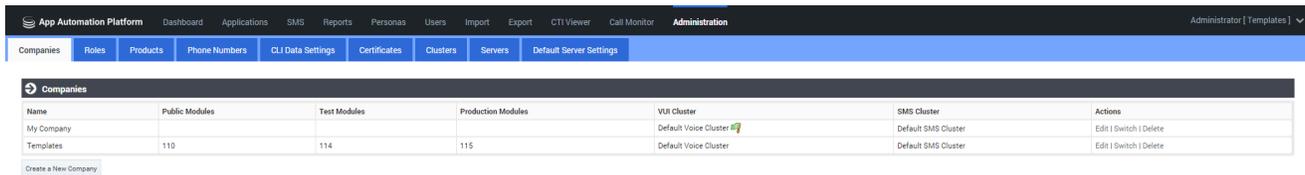
Caching Options

Cache Production Modules

Industries

- Automotive
- Consumer Electronics
- Distribution
- Education
- Entertainment
- Financial Services
- Government
- Healthcare
- Hospitality
- Manufacturing
- NonProfit
- Retail
- Technology
- Telecommunications
- Travel
- Utilities

The Companies list now displays the company you created.



The screenshot shows the 'Administration' section of the App Automation Platform. The 'Companies' tab is selected, displaying a table with the following data:

| Name | Public Modules | Test Modules | Production Modules | VUI Cluster | SMS Cluster | Actions |
|------------|----------------|--------------|--------------------|-----------------------|---------------------|------------------------|
| My Company | | | | Default Voice Cluster | Default SMS Cluster | Edit Switch Delete |
| Templates | 110 | 114 | 115 | Default Voice Cluster | Default SMS Cluster | Edit Switch Delete |

Below the table is a button labeled 'Create a New Company'.

Other actions

Important

Your user account must be assigned to either the **Platform Administrator** or **Full Administrator** role before you can perform the actions below.

In the **Actions** column, you can click:

- **Edit** - Edit company details.
- **Switch** - Switch to this company. When using Intelligent Automation, if your user account has **sufficient privileges**, you can switch between using one company and another.
- **Delete** - Delete the company and all information related to the company, such as callflows and user accounts.

Roles

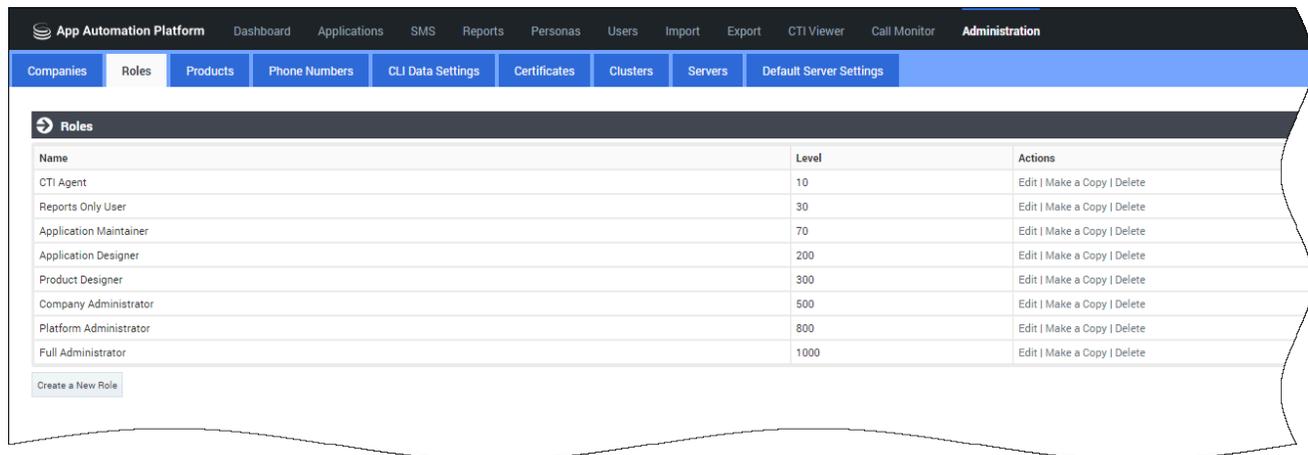
Roles govern what a user can do in Intelligent Automation. In effect, they determine what a user can do to what he or she can see. For example, a user with the **Full Administrator** role has full permissions to configure Intelligent Automation, from creating companies, users, server settings, and much more. However, a user with the **Reports Only User** role can view information related to reports but cannot create applications.

This section describes how Roles are managed for users stored in the Intelligent Automation database. If you are going to work with users stored in the Genesys Configuration Database, the Roles to which they are subject are defined by the Genesys Configuration Server. See **User Authentication and Authorization** for more information.

Important

For ease of use and effective troubleshooting, Genesys recommends that you do not modify the standard user roles in Intelligent Automation. Instead, click **Make a Copy** beside the role you want to modify and create a new role with modified permissions.

The **Roles** list shows the roles available in your company. The **Levels** column is descriptive only and is meant to illustrate the relative permission levels between each role.



| Name | Level | Actions |
|------------------------|-------|-----------------------------|
| CTI Agent | 10 | Edit Make a Copy Delete |
| Reports Only User | 30 | Edit Make a Copy Delete |
| Application Maintainer | 70 | Edit Make a Copy Delete |
| Application Designer | 200 | Edit Make a Copy Delete |
| Product Designer | 300 | Edit Make a Copy Delete |
| Company Administrator | 500 | Edit Make a Copy Delete |
| Platform Administrator | 800 | Edit Make a Copy Delete |
| Full Administrator | 1000 | Edit Make a Copy Delete |

Create a New Role

The following is a general description of what each role can do in Intelligent Automation. Unless otherwise noted, each successive role in the list builds upon the permissions of the previous role:

- **CTI Agent** - Can access the **CTI Viewer** view.
- **Reports Only User** - Can also access the **Dashboard**, **Applications**, and **Reports** views.
- **Application Maintainer** - Can also access the **Personas** view and modify certain aspects of callflows.
- **Application Designer** - Can also access the **Import**, **Export**, and **Call Monitor** views and create callflows.
- **Product Designer** - Can also access the **Products** tab in the **Administration** view.
- **Company Administrator** - Cannot access the **Products** tab in the **Administration** view, but can edit company details in the **My Account** page.
- **Platform Administrator** - Can also access the **Administration** view and switch **companies**.
- **Full Administrator** - Can access any page or setting in Intelligent Automation.

Creating a role

If needed, you can create roles to fulfill particular business needs. In most cases, Genesys recommends creating a copy of an existing role and modifying its permissions. Click **Make a Copy** beside the role you want to modify. If necessary, you can choose to create a new role by clicking **Create a New Role**. For both methods, do the following:

- **Role Name** - Enter a descriptive name for the role.
- **Level** - Enter a numerical value to help describe the relative permission level of this role. For example, if you are making a copy of the **Application Designer** role but you want to add some additional permissions, you can set a higher level value (for example, **250** instead of the original **200**) to show this role has more permissions.
- **Role Permissions** - Enable or disable various permissions for the role.

Click **Save**.

Other actions

In the **Roles** list, you can select one of the following in the **Actions** column:

- **Edit** - Edit the role.
- **Make a Copy** - Make a copy of the role.
- **Delete** - Delete the role. You cannot delete a role that is assigned to at least one user account.

Products

Products are prebuilt modules that you can insert into your applications. Although you can't edit product modules, you can set parameters to customize them for your business needs.

The **Products** list shows the products available in your environment. The products in this list are governed by your Intelligent Automation license, so the list can differ from one company to another.

Deleting a product

You can delete a product that is no longer in use. Click **Delete** beside the product you want to remove.

Importing a product

You can import a new product supplied by Genesys by going to the bottom of the **Products** list and clicking **Import a Product**.

Maintenance

Important

Ensure that data is backed up before performing any maintenance options.

The **Maintenance** tab allows you to perform maintenance tasks for databases. The following operations are supported:

- Trimming iHub tables: This option allows you to delete iHub processes before the specified date.
- Trimming Aggregate tables: This option allows you to remove Aggregate table entries before the specified date. See [Aggregate tables in Oracle](#) and [Aggregate tables in MSSQL](#) for list of tables. If you want to modify the block count, set the **Maintenance.AggregateTable.BlockDeleteSize** server

setting to a desired value. Changing the default value to a higher value could impact performance.

- Cleaning up Aggregate tables in Microsoft SQL tables: The **Purge Duplicates** option allows removing duplicate entries in the Aggregate tables.

Phone Numbers

The **Phone Numbers** tab allows you to specify rules for which phone numbers can be called by Intelligent Automation callflows. For example, you might want callflows to use a ruleset that prohibits calls to mobile numbers.

The following rule sets are installed with Intelligent Automation:

- **From RoI to Any** - Allows calls from the Republic of Ireland to anywhere in the world.
- **From RoI to RoI Landlines** - Allow calls only from the Republic of Ireland to landline numbers in the Republic of Ireland.
- **From RoI to RoI Landlines and Mobiles** - Allow calls only from the Republic of Ireland to landline and mobile numbers in the Republic of Ireland.
- **From UK to Any** - Allows calls from the United Kingdom to anywhere in the world.
- **From UK to UK Landlines** - Allow calls only from the United Kingdom to landline numbers in the United Kingdom.
- **From UK to UK Landlines and Mobiles** - Allow calls only from the United Kingdom to landline and mobile numbers in the United Kingdom.

Creating a new rule set

Click **Create a New Ruleset** to define a new set of rules. In the **Phone Number Ruleset** section, configure the following:

- **Ruleset Name** - Enter a descriptive name for the rule set.
- **Rules** - Define the rules that govern this rule set. Click **Add row** to add a new rule.
 - **Is Allowed?** - Select **Yes** to allow calls that match the rule, or **No** to prohibit calls that match the rule.
 - **Prefix** - Specify the prefix of the phone number for the rule.
 - **Min Length** - Specify the minimum number of phone-number digits for the rule.
 - **MaxLength** - Specify the maximum number of phone-number digits for the rule.

Click **Save**.

Other actions

In the **Phone Number Rulesets** list, you can select one of the following in the **Actions** column:

- **Edit** - Edit the rule set.
- **Delete** - Delete the rule set.

CLI Data Settings

Important

This section describes how to use the **Built-in** CLI Data Mechanism. Contact your Genesys representative if you want information for how to integrate this feature with Genesys Conversation Manager.

The **CLI Data Settings** tab allows you to use regular expressions to define allowed phone numbers against which to store CLI data in the database.

You can configure the following:

- **Positive Pattern for Valid CLIs** - Enter a regular expression to define a range of allowed phone numbers against which CLI data *can* be stored.
- **Negative Pattern for Valid CLIs** - Enter a regular expression to define a range of allowed phone numbers against which CLI data *cannot* be stored.

Certificates

The **Certificates** tab allows you to import and create certificates for use with HTTPS connections in your Intelligent Automation environment.

Importing a certificate

Click **Import a new Certificate** to import a certificate from a machine on your network. You must provide the IP or FQDN of the server that has the certificate, along with the appropriate port number. Click **Get Certificate**.

If the certificate is found, Intelligent Automation displays details about the certificate to be imported. Enter a description to describe the purpose of the certificate, then click **Save**.

Creating a self-signed certificate

Click **Create a Self Signed Certificate** and enter the following information:

- **Server(s)** - Enter the server IP or FQDN that will host the certificate.

- **Pass Phrase** - Enter a pass phrase for the certificate. Note this value for future use.
- **Add to Trusted Certificates List** - If enabled, the self-signed certificate is trusted. This might prevent certain security warnings from appearing in your browser.

As this is a self-signed certificate, you do not need to enter information in the fields **Organisation Unit**, **Organisation**, **City**, **State**, and **Two-Letter Country Code** unless directed to do so by Genesys or your company.

Click **Generate**.

Important

After you generate the certificate, you must update the password on the host machine.

1. Open the file **server.xml** in the following location: **C:\SpeechStorm\Platform\TomcatVUI\conf**.
2. Update the **SSLPassword** value to the pass phrase you entered when you created the self-signed certificate.
3. Restart the server.

Other actions

In the **Certificates** list, you can select one of the following in the **Actions** column:

- **Edit** - Edit the certificate's details.
- **Delete** - Delete the certificate.

Clusters

The **Clusters** tab allows you to group servers to reflect your business needs. For example, you might want to create a cluster of VUI servers assigned to a particular load balancer to better manage your call volume. Or, if you are in a multi-tenant environment, you can use clusters to segregate groups of servers to particular tenants and ensure resources for one company are not shared with another.

The **Clusters** list shows the clusters in your environment, and the **load balancer** and **resources cluster** to which each cluster is assigned.

Creating a cluster

Click **Create a New Cluster** and select a cluster type.

Enter the following information:

- **Cluster Name** - Enter a descriptive name for the server.
- **Load Balancer Configuration** - Select one of the following options:
 - **No load balancer** - Do not use a load balancer with this cluster.
 - **Use internal Load Balancer cluster** - Select a load balancer that you previously created in the **Servers** tab.
 - **Use an external Load Balancer** - Select an external load balancer. You must provide a URL and port number to which this cluster must send traffic.

Click **Save**.

Using load balancers

You can assign clusters to use load balancers to better manage Messaging Server traffic on your network. Intelligent Automation provides an internal load balancer that you can use, or you can provide your own solution.

To create a load balancer, click **Create a New Cluster** and select **New Load Balancer Cluster** in the pop-up menu. You must configure the following:

- **Cluster Name** - Provide a descriptive name.
- **Load Balancer Servers Will Balance Requests Arriving at This Port** - Specify the protocol (HTTP or HTTPS) and server port number for the load balancer.
- **Hostname Used in External Links to this Cluster** - Provide a hostname that programs and services can use to connect to the load balancer. For example, do not provide an internal IP address or hostname that cannot be accessed by customers who click links to WebIVR applications.

Click **Save**.

To assign clusters to use a load balancer, click **Edit** beside a cluster and select the load balancer, and then click **Save**.

Using resource clusters

You can use resource clusters to provide a central storage location for all your customer-specific resource files, such as audio files. Otherwise, Intelligent Automation stores these files in the **resources** folder of the current VUI (for example, C:\SpeechStorm\Platform\TomcatVUI\webapps\fish-vui\resources).

To create a resource cluster, click **Create a New Cluster** and select **New Resources Cluster** in the pop-up menu. Provide a descriptive name in the **Cluster Name** field and click **Save**. Before you can use the cluster, you must create a resources server in the **Servers** tab and assign this server to the resource cluster.

To assign VUI servers or clusters to use the resource cluster, click **Edit** beside a voice cluster and select the resource cluster in the **Resources Cluster**, and then click **Save**.

Other actions

In the **Clusters** list, you can select one of the following in the Actions column:

- **Edit** - Edit the cluster settings.
- **View Statistics** - View statistics about how many modules and applications are using the cluster.
- **Delete** - Delete the cluster from the Intelligent Automation environment.

Servers

The **Servers** tab allows you to monitor and manage the servers in your Intelligent Automation environment. You typically use this tab when taking a server off **Active** status so you can upgrade to a newer version of Intelligent Automation.

| ID | Name | Type | Protocol | Hostname | Port | Cluster | Active | Checks | Active Sessions | Sessions Today | Online Since | Actions |
|----|------------------------------|----------------------|----------|-------------|------|--------------------------------|--------|--------|-----------------|----------------|-------------------|---------------------------------|
| 1 | Default VUI Server | Voice Server | http | 10.26.10.11 | 8080 | Default Voice Cluster | | Online | 0 | 0 | 14 Sep 2018 16:09 | Edit Reload Settings Delete |
| 3 | Default Admin Server | Admin Server | https | localhost | 8443 | Default Admin Cluster | | Online | 1 | 1 | 14 Sep 2018 16:09 | Edit Reload Settings Delete |
| 6 | Default Messaging Server | Messaging Server | http | localhost | 8080 | Default Messaging Cluster | | Online | 0 | 0 | 14 Sep 2018 16:07 | Edit Reload Settings Delete |
| 7 | Default-load-balancer-server | Load Balancer Server | https | localhost | 8443 | default-load-balancing-cluster | | Online | 0 | 0 | 14 Sep 2018 16:10 | Edit Reload Settings Delete |
| 8 | Default-integration-server | Integration Server | https | localhost | 8443 | default-integration-cluster | | Online | 0 | 0 | 14 Sep 2018 16:08 | Edit Reload Settings Delete |

The **Servers** list shows various information about each server, such as:

- The server type
- The protocol used by the server (HTTP or HTTPS)
- The server's hostname
- The port used by the server
- The **cluster** to which the server belongs
- Whether the server is active and able to process calls and other tasks
- Whether the server is online
- The number of active sessions currently, and the number of total active sessions today
- The date when the server came online.

Taking a server offline

When upgrading Intelligent Automation, you must take a server offline so it is not active and able to take news calls. Once a server is no longer active, it finishes its current calls but is no longer able to accept new calls. Monitor the **Active Sessions** value for the server, which tracks the number of calls

currently being processed by the server. Once the **Active Sessions** value is **0**, the server has finished processing calls and you can take it offline for upgrading.

To take an active server offline:

1. Click **Edit** beside the server.
2. Clear the **Active** check box.
3. Click **Save**.

When you are ready to put the server online again, follow the steps above and ensure you select the **Active** check box, and then click **Save**. In the **Servers** list, the server has a green flag in the **Active** column to show the server is active and able to process calls.

Creating a server

You can create a server to add functionality to your Intelligent Automation environment. For example, you might add a Messaging server to support Web IVR, or another VUI server to handle future call loads.

Click **Create a New Server** and select a server type.

Enter the following information:

- **Server Name** - Enter a descriptive name for the server.
- **Server Connection Details** - Select a connection type (HTTP or HTTPS) and enter a hostname and port. If you select HTTPS and the server has a self-signed certificate, you must add that certificate to the certificate store by using the [Certificates](#) tab.
- **Cluster** - Specify which cluster to attach this server. Typically, this setting is unchanged from the default cluster.
- **Server Status** - Select the **Active** check box to make this server active and able to process requests.
- **Settings** - Add one or more server settings specific to this server. These settings supersede those set in the [Default Server Settings](#) tab.

Click **Save**.

Important

Remember to update the appropriate **local.properties** file for the server you create to reference the Server ID number in Intelligent Automation. For more information, refer to the [Genesys Intelligent Automation Migration Guide](#).

Other actions

In the **Servers** list, you can select one of the following in the Actions column:

- **Edit** - Edit the server settings.

- **Reload Settings** - If you have made changes to this server, click this option to reload the settings.
- **Delete** - Delete the server from the Intelligent Automation environment.

The following two buttons are also available:

- **Re-run Server Checks** - Polls each server again to check its status.
- **Reload Settings on All Servers** - Reloads settings for all servers.

Renewing server connections

Important

- This feature applies only to the Genesys Engage platform.

You can renew the connections cache that Intelligent Automation uses to interact with Genesys servers. For example, this might be useful when you are testing or troubleshooting your environment, or if a backup server has become a primary server and Intelligent Automation needs to renew the connection.

Click **More Options** to access the **Genesys Servers** list. You can renew the following connections:

- [Interaction Server](#)
- [Flex Chat](#) (Chat Server)
- [Interaction Server External Service](#)
- [Universal Contact Server](#)
- [UCS External Service](#)

The screenshot shows the 'Administration' section of the Intelligent Automation console. The 'Servers' tab is active, displaying a table of server configurations. Below the table, there are buttons for 'Create a New Server', 'More Options', 'Re-run Server Checks', and 'Reload Settings on All Servers'. The 'Genesys Servers' section below shows a table with columns for 'Type', 'Renew Connection', and 'Status', with checkboxes for renewing connections for various server types.

| ID | Name | Type | Protocol | Hostname | Port | Cluster | Active | Checks | Active Sessions | Sessions Today | Online Since | Actions |
|----|------------------------------|----------------------|----------|-------------|------|--------------------------------|--------|--------|-----------------|----------------|-------------------|---------------------------------|
| 1 | Default VUI Server | Voice Server | http | 10.26.10.11 | 8080 | Default Voice Cluster | | Online | 0 | 0 | 14 Sep 2018 16:09 | Edit Reload Settings Delete |
| 3 | Default Admin Server | Admin Server | https | localhost | 8443 | Default Admin Cluster | | Online | 1 | 1 | 14 Sep 2018 16:09 | Edit Reload Settings Delete |
| 6 | Default Messaging Server | Messaging Server | http | localhost | 8080 | Default Messaging Cluster | | Online | 0 | 0 | 14 Sep 2018 16:07 | Edit Reload Settings Delete |
| 7 | Default-load-balancer-server | Load Balancer Server | https | localhost | 8443 | default-load-balancing-cluster | | Online | 0 | 0 | 14 Sep 2018 16:10 | Edit Reload Settings Delete |
| 8 | Default-integration-server | Integration Server | https | localhost | 8443 | default-integration-cluster | | Online | 0 | 0 | 14 Sep 2018 16:08 | Edit Reload Settings Delete |

| Type | Renew Connection | Status |
|-------------------------------------|--------------------------|--------|
| Interaction Server | <input type="checkbox"/> | |
| Flex Chat | <input type="checkbox"/> | |
| Interaction Server External Service | <input type="checkbox"/> | |
| Universal Contact Server | <input type="checkbox"/> | |
| UCS External Service | <input type="checkbox"/> | |

Renewing a connection does not disrupt an active connection. Rather, the connection cache is renewed so that Intelligent Automation uses the new connection cache data the next time it attempts to connect to the relevant servers.

Important

You can manage the timeout for renewing the Genesys server connections cache by configuring the default server setting **Caching.ReloadGenesysServerCaches.HttpTimeout**. The default value is 5000 milliseconds.

The **Genesys Servers** section shows the connections in use by Intelligent Automation. You can:

- Renew selected connections by selecting one or more checkboxes and clicking **Renew Selected Server Connections**.
- Renew all connections by clicking **Renew All Server Connections**.

Tip

For more information on some of the server connections used by Intelligent Automation, refer to these pages:

- [User Authentication and Authorization](#)
- [Using WebIVR MicroApps](#)
- [Apple Business Chat](#)

Default Server Settings

Default Server Settings manage various settings and configurations for how Intelligent Automation operates in your environment.

This section will list settings that you can configure. Updates to this section are made outside of the Intelligent Automation release cycle, so check back often for more information.

Contact your Genesys representative for questions about how to use Default Server Settings.