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Genesys Intelligent Automation Reference Guide

Roles in Intelligent Automation

Roles in Intelligent Automation

The role-based login system will be based primarily on the presence or absence of individual Permission IDs that are associated with a user. These permission IDs will be stored in the database and loaded into memory when a user logs in.

Roles are defined in the **roles** database table and each role is mapped to zero or more permissions via the **role_permissions** table.

Each role has a *level* which limits what other roles a particular admin user can assign to other users. For example, a **Company Administrator** with level 500 could create new users for their company with any level less than or equal to 500, such as **Application Designer**; they could not, however, create a user with the **Platform Administrator** role since it would have a higher level of 800. Note that only some roles have the ability to create users.

The initial roles table will look like this:

ID	Name	Level
1	CTI Agent	10
2	Reports Only User	30
3	Application Maintainer	70
4	Application Designer	200
5	Product Designer	300
6	Company Administrator	500
7	Platform Administrator	800
8	Full Administrator	1000

When you log in via the `User.login()` method, the GUI loads in all Permission IDs by joining the **users**, **roles**, and **role_permissions** tables.

An important consideration is that this set of available Permission IDs is further restricted by the Licensing Engine so, without the correct licenses, even a Full Administrator role would be unable to create new products or download raw report data.

Permission Mapping

The matrix below shows which individual permissions are assigned to each role.

Those permission IDs with an asterisk (*) are candidates for restriction via the Licensing Engine.

Some permission IDs are currently unused (legacy IDs) and are marked as such in the table. They may be re-assigned in future.

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maint	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
1	list_users							X	X	X	Base
2	view_current_user		X	X	X	X	X	X	X	X	Base
3	view_other_user							X	X	X	Base
4	create_user							X	X	X	Base
5	update_current_user	X	X	X	X	X	X	X	X	X	Base
6	update_other_user							X	X	X	Base
7	delete_user							X	X	X	Base
8	switch_to_userless_company								X	X	Base
9	update_company_contact_details	X			X	X	X	X	X	X	Base
10	download_raw_report_data*	X	X	X	X	X	X	X	X	X	Base
11	deploy_to_production			X	X	X	X	X	X	X	Base
12	list_products					X			X	X	Base
13	view_product*					X			X	X	Base
14	create_product*					X			X	X	Base
15	update_product*					X			X	X	Base
16	delete_product					X			X	X	Base
17	list_standard_grammars								X	X	Base
18	view_standard_grammar								X	X	Base
19	create_standard_grammar								X	X	Base
20	update_standard_grammar								X	X	Base
21	delete_standard_grammar								X	X	Base
22	list_companies								X	X	Base
23	view_company			X	X	X	X	X	X	X	Base
24	create_company								X	X	Base
25	delete_company									X	Base
26	switch_company									X	Base

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maint	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
27	list_clusters								X	X	Base
28	view_cluster								X	X	Base
29	create_cluster								X	X	Base
30	update_cluster								X	X	Base
31	delete_cluster								X	X	Base
32	list_servers								X	X	Base
33	view_server								X	X	Base
34	create_server								X	X	Base
35	update_server								X	X	Base
36	delete_server								X	X	Base
37	list_cpr_languages								X	X	Base
38	view_cpr_language								X	X	Base
39	add_or_update_cpr_language								X	X	Base
40	delete_cpr_language								X	X	Base
41	list_sites	X		X	X	X	X	X	X	X	Base
42	update_company_details								X	X	Base
43	create_site				X	X	X	X	X	X	Base
44	delete_site				X	X	X	X	X	X	Base
45	view_standard_reports *	X	X	X	X	X	X	X	X	X	Base
46	cti_viewer *	X	X	X	X	X	X	X	X	X	Base
47	call_monitor *				X	X	X	X	X	X	Base
48	view_callflow	X		X	X	X	X	X	X	X	Base
49	rename_block			X	X	X	X	X	X	X	Base
50	create_start_block				X	X	X	X	X	X	Base
51	view_start_block			X	X	X	X	X	X	X	Base
52	update_start_block				X	X	X	X	X	X	Base
53	delete_start_block				X	X	X	X	X	X	Base

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maint	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
54	create_message_block				X	X	X	X	X	X	Base
55	view_message_block				X	X	X	X	X	X	Base
56	update_message_block				X	X	X	X	X	X	Base
57	delete_message_block				X	X	X	X	X	X	Base
58	create_menu_block				X	X	X	X	X	X	Base
59	view_menu_block				X	X	X	X	X	X	Base
60	update_menu_block				X	X	X	X	X	X	Base
61	delete_menu_block				X	X	X	X	X	X	Base
62	create_customquestion_block *					X	X	X	X	X	Base
63	view_customquestion_block *					X	X	X	X	X	Base
64	update_customquestion_block *					X	X	X	X	X	Base
65	delete_customquestion_block *					X	X	X	X	X	Base
66	create_script_block *					X	X	X	X	X	Base
67	view_script_block *					X	X	X	X	X	Base
68	update_script_block *					X	X	X	X	X	Base
69	delete_script_block *					X	X	X	X	X	Base
70	create_phonetransfer_block *				X	X	X	X	X	X	Base
71	view_phonetransfer_block *				X	X	X	X	X	X	Base
72	update_phonetransfer_block *				X	X	X	X	X	X	Base
73	delete_phonetransfer_block *				X	X	X	X	X	X	Base
74	create_urltransfer_block *				X	X	X	X	X	X	Base
75	view_urltransfer_block *				X	X	X	X	X	X	Base
76	update_urltransfer_block *				X	X	X	X	X	X	Base
77	delete_urltransfer_block *				X	X	X	X	X	X	Base

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maint	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
78	create_end_block				X	X	X	X	X	X	Base
79	view_end_block				X	X	X	X	X	X	Base
80	update_end_block				X	X	X	X	X	X	Base
81	delete_end_block				X	X	X	X	X	X	Base
82	view_output_node				X	X	X	X	X	X	Base
83	update_output_node				X	X	X	X	X	X	Base
84	login	X	X	X	X	X	X	X	X	X	Base
85	view_dashboard*		X		X	X	X	X	X	X	Base
86	download_recordings				X	X	X	X	X	X	Base
87	test_script*					X	X	X	X	X	Base
88	view_defaults_block				X	X	X	X	X	X	Base
89	update_defaults_block				X	X	X	X	X	X	Base
90	view_prompts		X		X	X	X	X	X	X	Base
91	update_prompts				X	X	X	X	X	X	Base
92	add_and_delete_custom_prompts					X	X	X	X	X	Base
93	import_callflow					X	X	X	X	X	Base
94	import_callflow_audio					X	X	X	X	X	Base
95	import_data					X	X	X	X	X	Base
96	import_data_audio					X	X	X	X	X	Base
97	export_callflow					X	X	X	X	X	Base
98	export_callflow_audio					X	X	X	X	X	Base
99	export_data					X	X	X	X	X	Base
100	export_data_audio					X	X	X	X	X	Base
101	view_product_specific_editors		X		X	X	X	X	X	X	Base
102	update_product_specific_editors				X	X	X	X	X	X	Base
103	delete_product_specific_editors				X	X	X	X	X	X	Base
104	view_product_specific_reports*		X		X	X	X	X	X	X	Base

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maint	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
105	view_cpr_prompt_list					X	X	X	X	X	Base
106	upload_cpr_prompts					X	X	X	X	X	Base
107	download_resource_files			X		X	X	X	X	X	Base
108	view_site_details					X	X	X	X	X	Base
109	update_site_details					X	X	X	X	X	Base
110	create_output_node			X		X	X	X	X	X	Base
111	delete_output_node			X		X	X	X	X	X	Base
112	save_callflow			X		X	X	X	X	X	Base
113	create_recording_block *					X	X	X	X	X	Base
114	view_recording_block *		X	X		X	X	X	X	X	Base
115	update_recording_block *					X	X	X	X	X	Base
116	delete_recording_block *					X	X	X	X	X	Base
117	view_settings								X	X	Base
118	update_settings								X	X	Base
119	use_shock_absorber *		X	X		X	X	X	X	X	Base
120	lock_unlock_callflow *						X		X	X	Base
121	update_locked_callflow *						X		X	X	Base
122	copy_production_site_to_test_site					X	X	X	X	X	Base
123	view_export					X	X	X	X	X	Base
124	view_import					X	X	X	X	X	Base
125	change_site_publicity *						X		X	X	Base
126	login_during_maintenance								X	X	Base
127	speak_tts			X		X	X	X	X	X	Base

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maint	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
128	delete_cpr_folder					X	X	X	X	X	Base
129	test_inbound_sms_script *					X	X	X	X	X	Base
130	view_admin_menu						X		X	X	Base
131	list_inbound_sms_rules *		X		X	X	X	X	X	X	Base
132	update_inbound_sms_rule *					X	X	X	X	X	Base
133	delete_inbound_sms_rule *					X	X	X	X	X	Base
134	create_inbound_sms_rule *					X	X	X	X	X	Base
135	view_inbound_sms_rule *		X		X	X	X	X	X	X	Base
136	flush_server_settings								X	X	Base
137	list_roles								X	X	Base
138	view_role								X	X	Base
139	update_role								X	X	Base
140	create_role								X	X	Base
141	delete_role								X	X	Base
142	list_phone_number_rulesets								X	X	Base
143	view_phone_number_ruleset								X	X	Base
144	update_phone_number_ruleset								X	X	Base
145	create_phone_number_ruleset								X	X	Base
146	delete_phone_number_ruleset								X	X	Base
147	export_product *						X		X	X	Base
148	import_product						X		X	X	Base
149	list_opening_hours_rules			X	X	X	X	X	X	X	Base
150	view_opening_hours_rule			X	X	X	X	X	X	X	Base
151	update_opening_hours_rule			X	X	X	X	X	X	X	Base

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maint	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
152	create_opening_hours_rule				X	X	X	X	X	X	Base
153	update_weights*					X	X	X	X	X	Base
154	export_standard_grammar								X	X	Base
155	import_standard_grammar								X	X	Base
156	create_interceptor_block*				X	X	X	X	X	X	Base
157	view_interceptor_block*		X		X	X	X	X	X	X	Base
158	update_interceptor_block*				X	X	X	X	X	X	Base
159	delete_interceptor_block*				X	X	X	X	X	X	Base
160	remember_input_block_results*				X	X	X	X	X	X	Base
161	list_outbound_campaigns*		X		X	X	X	X	X	X	3.0.1
162	create_outbound_campaigns*				X	X	X	X	X	X	3.0.1
163	update_outbound_campaigns*				X	X	X	X	X	X	3.0.1
164	delete_outbound_campaigns*				X	X	X	X	X	X	3.0.1
165	startstop_outbound_campaigns*		X		X	X	X	X	X	X	3.0.1
166	view_callflow_xn_tree				X	X	X	X	X	X	3.1.0
167	view_question		X		X	X	X	X	X	X	3.1.0
168	create_question				X	X	X	X	X	X	3.1.0
169	update_question				X	X	X	X	X	X	3.1.0
170	delete_question				X	X	X	X	X	X	3.1.0

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maint	App Design	Product Design	Comp Admin	Platform Admin	Full Admin	Added in Version
171	view_answer	X			X	X	X	X	X	X	3.1.0
172	create_answer				X	X	X	X	X	X	3.1.0
173	update_answer				X	X	X	X	X	X	3.1.0
174	delete_answer				X	X	X	X	X	X	3.1.0
175	change_site_callflow_editor*						X		X	X	3.1.0
176	store_input_block_results*				X	X	X	X	X	X	3.0.2
177	associate_input_block_with_task*				X	X	X	X	X	X	3.0.2
178	view_cli_data_settings								X	X	3.0.2
179	update_cli_data_settings								X	X	3.0.2
180	view_cpr_uploads				X	X	X	X	X	X	3.1.0
181	select_cpr_upload				X	X	X	X	X	X	3.1.0
182	download_cpr_upload				X	X	X	X	X	X	3.1.0
183	change_site_vertical_name						X		X	X	3.1.6
184	create_template_site*						X		X	X	3.1.6
185	create_mobileapp_block									X	3.1.6
186	update_mobileapp_block									X	3.1.6
187	view_mobileapp_block									X	3.1.6
188	delete_mobileapp_block									X	3.1.6
189	view_mobile_apps*									X	3.1.6
190	create_mobile_apps*									X	3.1.6
191	delete_mobile_apps*									X	3.1.6
192	edit_mobile_apps_flow									X	3.1.6
193	edit_mobile_apps_screen									X	3.1.6
194	lock_unlock_visualflow									X	3.1.6

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maintenance	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
	*										
195	change_mobile_apps_publicity *									X	3.1.6
196	change_mobile_apps_active_status *									X	3.1.6
197	edit_mobile_apps_name									X	3.1.6
198	edit_mobile_apps_description									X	3.1.6
199	deploy_mobile_apps *									X	3.1.6
200	rollback_mobile_apps *									X	3.1.6
201	upload_theme *									X	3.1.6
202	edit_test_numbers *									X	3.1.6
203	list_mobile_apps *									X	3.1.6
204	export_callflow_grammars					X	X	X	X	X	3.1.7
205	import_callflow_grammars					X	X	X	X	X	3.1.7
206	view_customer_journey_reports *		X			X	X	X	X	X	3.1.7
207	lock_or_unlock_user							X	X	X	3.1.8
208	update_user_forcepassword_status							X	X	X	3.1.8
209	list_personas				X	X	X	X	X	X	3.2.0
210	view_persona				X	X	X	X	X	X	3.2.0
211	edit_persona				X	X	X	X	X	X	3.2.0
212	create_persona				X	X	X	X	X	X	3.2.0
213	delete_persona				X	X	X	X	X	X	3.2.0
214	assign_personas_to_site				X	X	X	X	X	X	3.2.0
215	reset_company_health_date *				X	X	X	X	X	X	3.2.0

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maintenance	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
216	display_health_error_thresholds*				X	X	X	X	X	X	3.2.0
217	update_health_error_thresholds*				X	X	X	X	X	X	3.2.0
218	create_mobile_start_block*					X	X	X	X	X	3.2.0
219	update_mobile_start_block*					X	X	X	X	X	3.2.0
220	delete_mobile_start_block*					X	X	X	X	X	3.2.0
221	view_mobile_start_block*	X			X	X	X	X	X	X	3.2.0
222	create_mobile_settings_block*					X	X	X	X	X	3.2.0
223	update_mobile_settings_block*					X	X	X	X	X	3.2.0
224	delete_mobile_settings_block*					X	X	X	X	X	3.2.0
225	view_mobile_settings_block*	X			X	X	X	X	X	X	3.2.0
226	create_mobile_tabs_block*					X	X	X	X	X	3.2.0
227	update_mobile_tabs_block*					X	X	X	X	X	3.2.0
228	delete_mobile_tabs_block*					X	X	X	X	X	3.2.0
229	view_mobile_tabs_block*	X			X	X	X	X	X	X	3.2.0
230	create_mobile_link_block*					X	X	X	X	X	3.2.0
231	update_mobile_link_block*					X	X	X	X	X	3.2.0
232	delete_mobile_link_block					X	X	X	X	X	3.2.0

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maint	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
	*										
233	view_mobile_link_block*		X		X	X	X	X	X	X	3.2.0
234	create_mobile_screen_block*					X	X	X	X	X	3.2.0
235	update_mobile_screen_block*					X	X	X	X	X	3.2.0
236	delete_mobile_screen_block*					X	X	X	X	X	3.2.0
237	view_mobile_screen_block*		X		X	X	X	X	X	X	3.2.0
238	view_mobile_apps_details*					X	X	X	X	X	3.2.0
239	update_mobile_apps_details*					X	X	X	X	X	3.2.0
240	view_mobileflow*		X		X	X	X	X	X	X	3.2.0
241	save_mobileflow*			X	X	X	X	X	X	X	3.2.0
242	update_locked_mobileflow*						X		X	X	3.2.0
243	create_template_mobile_apps*						X		X	X	3.2.0
244	create_mobile_logon_block*					X	X	X	X	X	3.2.0
245	update_mobile_logon_block*					X	X	X	X	X	3.2.0
246	delete_mobile_logon_block*					X	X	X	X	X	3.2.0
247	view_mobile_logon_block*		X		X	X	X	X	X	X	3.2.0
248	view_company_health_details*		X		X	X	X	X	X	X	3.2.0

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maint	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
249	view_demo_menu*									X	3.2.1
250	populate_dashboard_demo_data*									X	3.2.1
251	delete_dashboard_demo_data*									X	3.2.1
252	view_cli_data_records					X	X	X	X	X	3.2.2
253	update_cli_data_records					X	X	X	X	X	3.2.2
254	clear_cli_data_records					X	X	X	X	X	3.2.2
255	view_integration		X	X				X	X	X	3.2.2
256	create_integration		X					X	X	X	3.2.2
257	update_integration		X					X	X	X	3.2.2
258	delete_integration		X					X	X	X	3.2.2
259	export_excel_prompt_list		X	X	X	X	X	X	X	X	3.2.2
260	import_excel_prompt_list		X	X	X	X	X	X	X	X	3.2.2
261	call_monitor_generate_cyara_testcase					X	X	X	X	X	3.2.2
262	list_certificates								X	X	3.2.3
263	update_certificate								X	X	3.2.3
264	delete_certificate								X	X	3.2.3
265	create_certificate								X	X	3.2.3
266	view_certificate								X	X	3.2.3
267	generate_certificate								X	X	3.2.3
268	virtual_call					X	X	X	X	X	3.2.3
269	edit_site_parameters					X	X	X	X	X	3.2.4
270	list_visual_apps			X	X	X	X	X	X	X	3.2.4
271	create_visual_apps				X	X	X	X	X	X	3.2.4
272	delete_visual_apps				X	X	X	X	X	X	3.2.4
273	view_visual_apps_details			X	X	X	X	X	X	X	3.2.4
274	update_visual_apps_details				X	X	X	X	X	X	3.2.4
275	list_themes	X		X	X	X	X	X	X	X	3.5.0

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maint	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
276	create_themes					X	X	X	X	X	3.5.0
277	edit_themes					X	X	X	X	X	3.5.0
278	delete_themes					X	X	X	X	X	3.5.0
279	view_company_authentication_key					X	X	X	X	X	3.5.0
280	view_indy_sharedscripts	X		X		X	X	X	X	X	9.0.003.00
281	create_indy_sharedscripts	X		X		X	X	X	X	X	9.0.003.00
282	update_indy_sharedscripts	X		X		X	X	X	X	X	9.0.003.00
283	delete_indy_sharedscripts	X		X		X	X	X	X	X	9.0.003.00
284	view_indy_httpsettings	X		X	X	X	X	X	X	X	9.0.003.00
285	create_indy_httpsettings	X		X	X	X	X	X	X	X	9.0.003.00
286	update_indy_httpsettings	X		X	X	X	X	X	X	X	9.0.003.00
287	delete_indy_httpsettings	X		X	X	X	X	X	X	X	9.0.003.00
288	view_indy_envsettings	X		X	X	X	X	X	X	X	9.0.003.00
289	create_indy_envsettings	X		X	X	X	X	X	X	X	9.0.003.00
290	update_indy_envsettings	X		X	X	X	X	X	X	X	9.0.003.00
291	delete_indy_envsettings	X		X	X	X	X	X	X	X	9.0.003.00
292	create_indy_deployments	X		X		X	X	X	X	X	9.0.003.00
293	delete_indy_deployments	X		X		X	X	X	X	X	9.0.003.00
294	rollback_indy_deployments	X		X		X	X	X	X	X	9.0.003.00
295	import_indy_integrations	X		X		X	X	X	X	X	9.0.003.00
296	export_indy_integrations	X		X		X	X	X	X	X	9.0.003.00
297	indy_deploy_to_production	X		X	X	X	X	X	X	X	9.0.003.00
298	view_indy_jdbcconfigs	X		X	X	X	X	X	X	X	9.0.003.00
299	create_indy_jdbcconfigs	X		X	X	X	X	X	X	X	9.0.003.00
300	update_indy_jdbcconfigs	X		X	X	X	X	X	X	X	9.0.003.00
301	delete_indy_jdbcconfigs	X		X	X	X	X	X	X	X	9.0.003.00
302	configure_number_entry_retry_timeout_prompts	X		X		X	X	X	X	X	9.0.101.00
303	update_protected_callflow										9.0.104
304	view_phrasehints			X	X	X	X	X	X	X	9.0.108

ID	Permission	CTI Agent	Report Viewer	Integration Dev	App Maint	App Design	Product Design	Company Admin	Platform Admin	Full Admin	Added in Version
305	create_phrasehint_group					X	X	X	X	X	9.0.108
306	delete_phrasehint_group					X	X	X	X	X	9.0.108
307	create_phrasehint_upload					X	X	X	X	X	9.0.108
308	delete_phrasehint_upload					X	X	X	X	X	9.0.108
309	download_phrasehints				X	X	X	X	X	X	9.0.108