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# Genesys Customer Experience Insights User's Guide

Managing the MicroStrategy environment

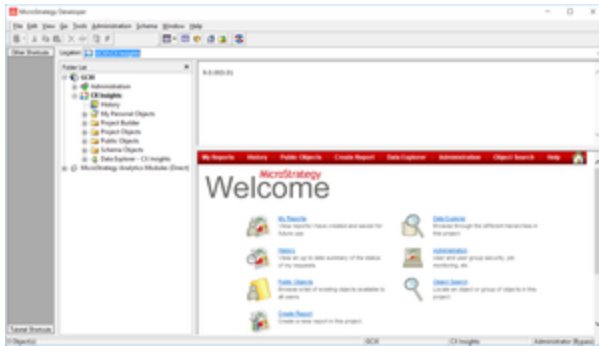
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# Managing the MicroStrategy environment



MicroStrategy Developer

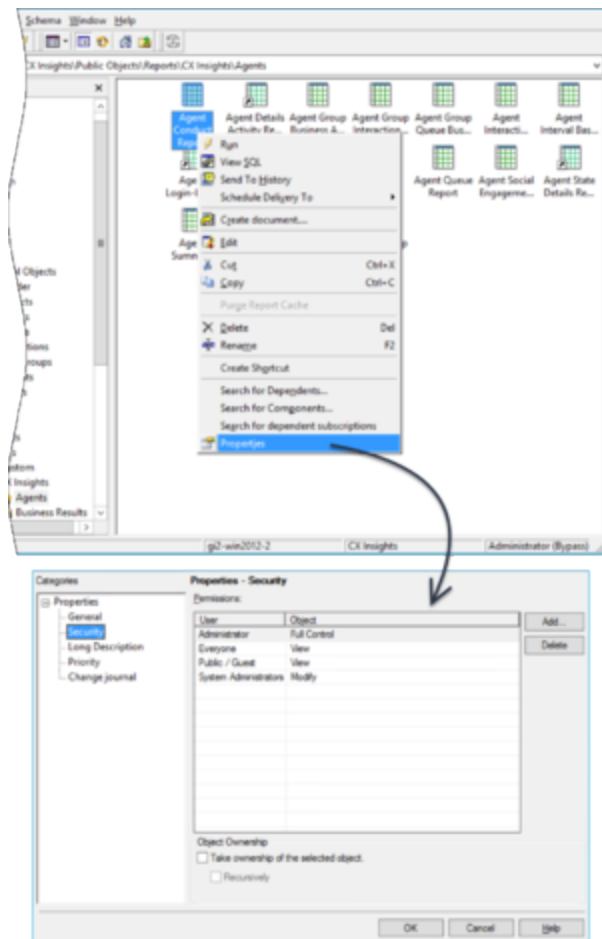
This page describes the MicroStrategy environment, and introduces MicroStrategy Developer, a web-based application that you can use to perform management activities. Other pages in this document discuss using MicroStrategy Developer to customize or create metrics or attributes. This page describes key administrative tasks you can perform using MicroStrategy Developer. For more information, or for information about other administrative tasks, see the [MicroStrategy System Administration Help](#).

## Important

In keeping with Genesys' commitment to diversity, equality, and inclusivity, beginning with release 9.0.019.01, some pod names are changed; this document refers to "gcxi-primary" and "gcxi-secondary" pods. In release 9.0.019.00 and earlier, these pods were named "gcxi-master" and "gcxi-slave".

The figure *MicroStrategy Developer* shows the MicroStrategy Developer Welcome screen, which summarizes the most popular tasks that administrators perform with this tool.

## Managing Folders



Setting Folder Permissions Within Developer

MicroStrategy software uses a hierarchy of folders to organize repository documents. You control access to these folders, and to specific items within them, by setting permissions. Subfolders of the CX Insights root folder house report and documentation subfolders. To set security permissions for an object or folder, right click and choose **Properties**, as shown in the figure *Setting Folder Permissions Within Developer*.

A MicroStrategy installation deploys many default folders that are not used by all GCXI report users. As the MicroStrategy administrator, you can optionally hide these folders to avoid confusion. To hide folders from select groups of users, apply **no-access** levels to those groups within the security profile of the folder's properties.

For additional information, refer to the [Setting Access at the object level](#) section of the *Genesys CX Insights Deployment Guide*.

## Managing Connections

The Genesys CX Insights installation routine copies a database connection object when it imports the CX Insights Project into the MicroStrategy repository. Genesys recommends that you modify this connection connection so that it links the CX Insights Project with your data source (your Info Mart database). Refer to the [Post-Installation steps](#) section of the *Genesys CX Insights Deployment Guide* for step-by-step instructions on how to link the CX Insights Project to your Data Mart.

## Managing the CX Insights Project

You control which users have write access to the CX Insights Project by setting user permissions appropriately in MicroStrategy Developer. Extend this permission only to those users who need it; editing the project can affect report results for all who receive them. See the [reports descriptions](#) for information about which metrics of the CX Insights Project are directly used in the Genesys CX Insights reports.

## Managing Users, Groups, and Privileges

To control what objects in the MicroStrategy repository are available to other *users* in your contact center, set up MicroStrategy accounts for users who will access the system, and assign the users to *groups*, which causes the users to inherit *privileges* from the groups. Assign users using either of the following methods:

- Assign users to the predefined CX Insights user groups using the predefined access levels.
- Assign users to groups that you create with custom permissions.

For instructions on how to assign users in a MicroStrategy environment, refer to [Managing MicroStrategy Users](#) and [MicroStrategy Security Roles](#). For more information about access restrictions, see [About Integrated Data Access Restrictions](#).

### Video: Changing your own password

#### [Link to video](#)

This video describes how to change your own password, if your permissions allow it. Note that some steps shown in this video can vary slightly depending on the release of Genesys CX Insights you have installed.

### Video: Managing users

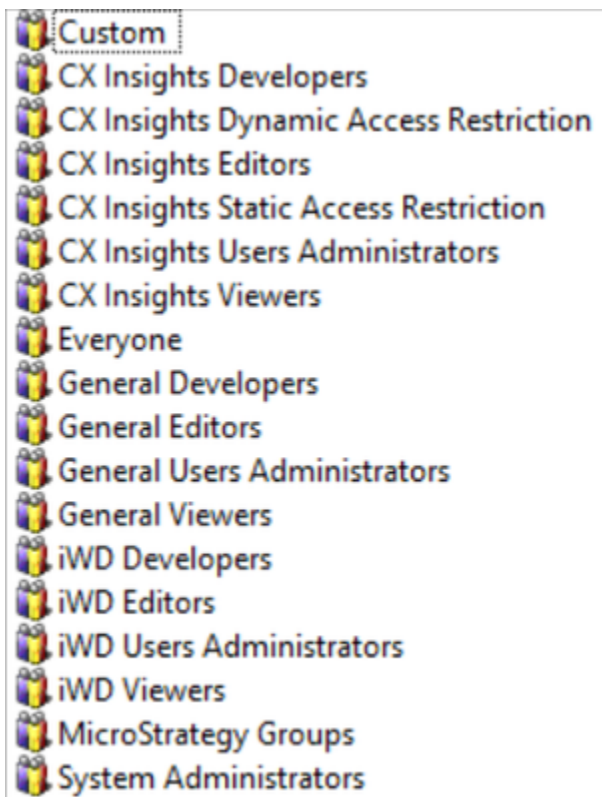
#### [Link to video](#)

This video describes how to manage users, including how to:

- create users
- delete users
- change users' passwords
- change users' permissions

Note that some steps shown in this video can vary slightly depending on the release of Genesys CX Insights you have installed.

## Predefined User Groups



Predefined User Groups

When you create a user, you must add them to at least one user group, thereby controlling the user's ability to work with reports and dashboards. Normally, you can do this by assigning users to the predefined user groups described in this section.

## Predefined user groups and privileges

If you require permissions different from those assigned to the predefined groups, Genesys recommends that you avoid modifying privileges for the predefined user groups, because these user groups are overwritten during upgrades. Instead, create custom groups by duplicating the user group you wish to modify, and edit the duplicate group. Note that the group structure in release 9.0.011 and later is unlike earlier releases of the software, and each group contains only users (and does not contain other groups).

Groups	Summary	Project Access Level*
Custom	Customer-defined user groups.	User-defined
CX Insights Developers	Members of this groups can create, edit, or view objects in the Genesys CX Insights project.	Genesys CX Insights
CX Insights Dynamic Access Restrictions	Security Filter you can use to restrict access to data based on user name, geographical location, line of business, or organizational role.	Genesys CX Insights
CX Insights Editors	Members of this groups can edit or view objects in the Genesys CX Insights project.	Genesys CX Insights
CX Insights Static Access Restrictions	Security Filter you can use you prevent members of specified user groups from viewing data for a list of objects you specify.	Genesys CX Insights
CX Insights User Administrators	Members of this group can manage users in the Genesys CX Insights project.	Genesys CX Insights
CX Insights Viewers	Members of this groups can view objects in the Genesys CX Insights project.	Genesys CX Insights
Everyone	The <i>Everyone</i> group provides a way for you to easily apply privileges, security role memberships, or permissions to all users. All users are automatically members of this group.	none
General Developers	Members of this group can create, edit, and view objects in any project.	all
General Editors	Members of this group can edit and view objects in any project.	all
General User Administrators	Members of this group can manage users in any project.	all
General Viewers	Members of this group can view objects in any project.	all
iWD Developers	Members of this group can create, edit, and view objects in	iWD

Groups	Summary	Project Access Level*
	the CX Insights for iWD project.	
iWD Editors	Members of this group can edit and view objects in the CX Insights for iWD project.	iWD
iWD User Administrators	Members of this group can manage users in the CX Insights for iWD project.	iWD
iWD Viewers	Members of this group can view objects in the CX Insights for iWD project.	iWD
MicroStrategy Groups	Built-in groups that are included in all MicroStrategy deployments.	none
System Administration	Members of this group have unrestricted management capabilities.	all
Some groups provide access only to a specific project: <ul style="list-style-type: none"> <li>'CX Insights' — membership in groups with this prefix allows users to work within the Genesys CX Insights project only.</li> <li>'General' — membership in groups with this prefix allows users to work in any project.</li> <li>'iWD' — membership in groups with this prefix allows users to work within the iWD project only.</li> </ul>		

## Permissions needed to manage other users

To manage the accounts of other users, you must be a member of one of the *Administrator* user groups described in the following table, which describes the types of accounts each of the Administrator types can manage, and the actions they can carry out on each.

The following table describes the permissions needed to manage users.

**Table: User management capabilities**

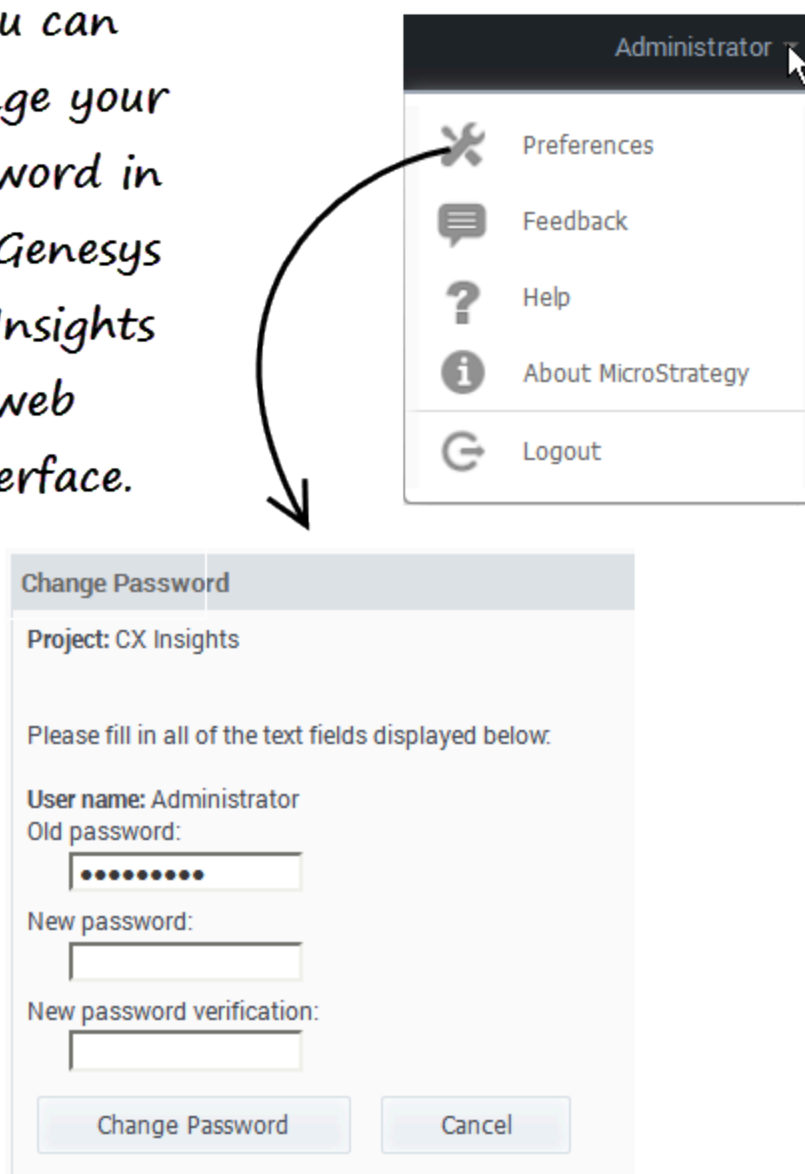
Managing Group	Administrator	General Users Administrators	CX Insights Users Administrators	iWD Users Administrators
<b>Managed Group</b>				
Custom	Full Control	Full Control	Full Control	Full Control
MicroStrategy Groups	Full Control	No Access	No Access	No Access
System Administrators	Full Control	No Access	No Access	No Access
Everyone	Full Control	View / Modify / Modify children	View / Modify / Modify children	View / Modify / Modify children
General	Full Control	View / Modify /	No Access	No Access



Developers		Modify children		
General Editors	Full Control	View / Modify / Modify children	No Access	No Access
General Viewers	Full Control	View / Modify / Modify children	No Access	No Access
General Users Administrators	Full Control	View / Modify / Modify children	No Access	No Access
CX Insights Static Access Restriction	Full Control	View / Modify / Modify children	View / Modify children	No Access
CX Insights Dynamic Access Restriction	Full Control	View / Modify / Modify children	View / Modify children	No Access
CX Insights Developers	Full Control	View / Modify / Modify children	View / Modify / Modify children	No Access
CX Insights Editors	Full Control	View / Modify / Modify children	View / Modify / Modify children	No Access
CX Insights Viewers	Full Control	View / Modify / Modify children	View / Modify / Modify children	No Access
CX Insights Users Administrators	Full Control	View / Modify / Modify children	View / Modify / Modify children	No Access
iWD Developers	Full Control	View / Modify / Modify children	No Access	View / Modify / Modify children
iWD Editors	Full Control	View / Modify / Modify children	No Access	View / Modify / Modify children
iWD Viewers	Full Control	View / Modify / Modify children	No Access	View / Modify / Modify children
iWD Users Administrators	Full Control	View / Modify / Modify children	No Access	View / Modify / Modify children

## Changing your own password

*You can  
change your  
password in  
the Genesys  
CX Insights  
web  
interface.*



The image shows a screenshot of the Genesys CX Insights web interface. At the top right, there is a dark header bar with the word 'Administrator' in white. Below this, a dropdown menu is open, displaying several options: 'Preferences' (with a wrench icon), 'Feedback' (with a speech bubble icon), 'Help' (with a question mark icon), 'About MicroStrategy' (with an information icon), and 'Logout' (with a circular arrow icon). A curved arrow points from the 'Preferences' option in the dropdown menu to a 'Change Password' dialog box below. The dialog box has a title bar 'Change Password' and contains the following text: 'Project: CX Insights', 'Please fill in all of the text fields displayed below.', 'User name: Administrator', 'Old password:' followed by a text field with masked characters, 'New password:' followed by a text field, and 'New password verification:' followed by a text field. At the bottom of the dialog box are two buttons: 'Change Password' and 'Cancel'.

Use the following steps to change your password. Not all users are permitted to change their password; contact your administrator to find out if the functionality described on this page is available for your use.

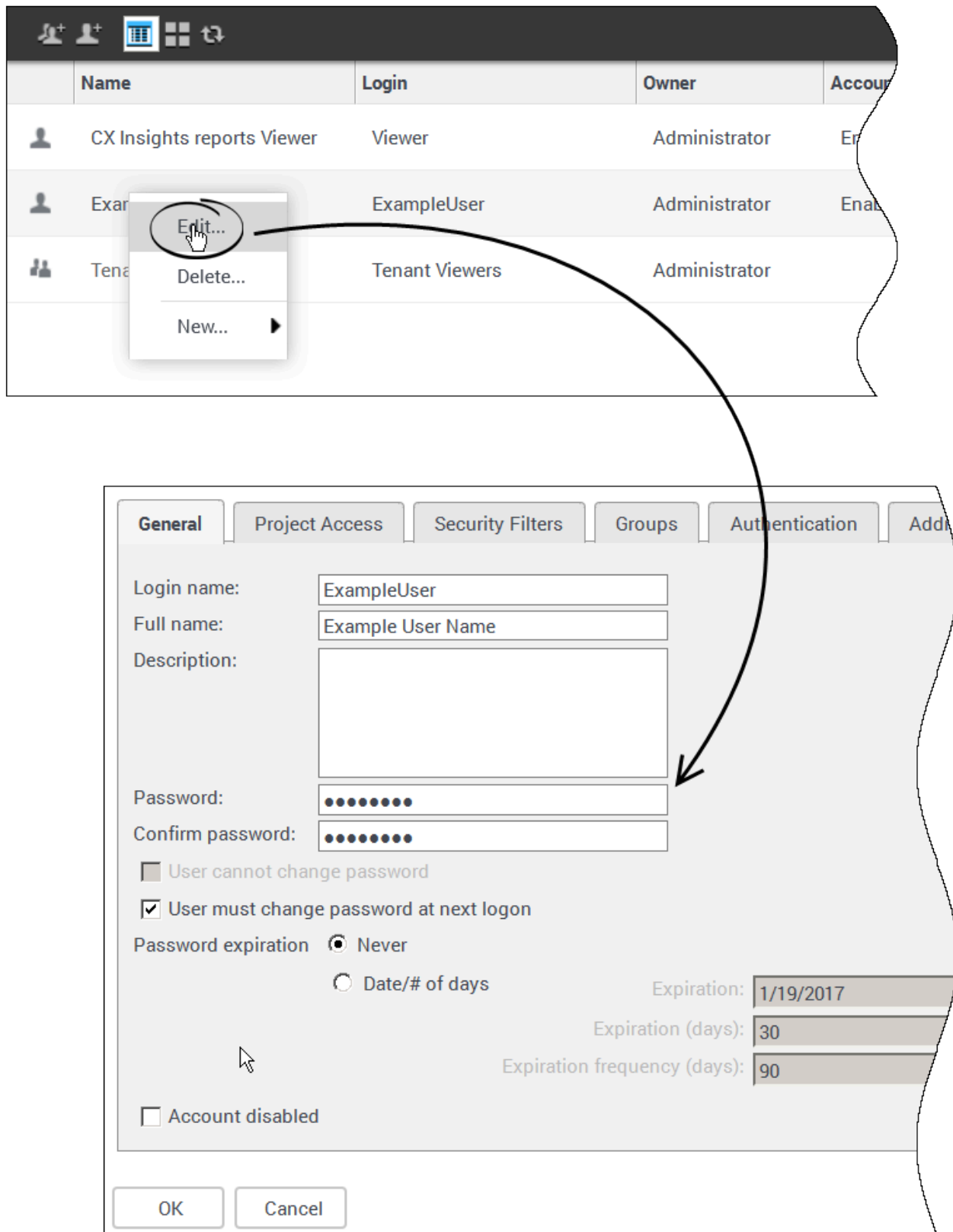
### Important

If you have forgotten your password, or otherwise cannot log in in, contact your

administrator / next level of support.

1. Log in to MicroStrategy Web.
2. On the menu bar, click your user name, and click **Preferences**.
3. Click **Change Password**.
4. In the **Old Password** field, type your current password.
5. In the **New Password** field, type your new password, and re-type it in the **New Password Verification** field.
6. Click **Change Password**.

## Changing another user's password



Use the following steps to change a password for another user (for example when they have forgotten their password) or to otherwise manage an existing user account.

To edit another user's account, you must log in as a member of a group that has the **Create And Edit Users And Groups** privilege.

### Tip

For users who are created without membership in any group other than Everyone, only the administrator who created the user can change the user's password. New users must always be members of at least one group, other than Everyone.

1. In your web browser, open the MicroStrategy Web Administrator page:  
`http://<hostname>:<port>/MicroStrategy/servlet/mstrServerAdmin`
2. On the page that appears, select your server.
3. On the MicroStrategy Web Administrator login screen, enter your user name and current password, and click **Login**. The **Tools** page opens.
4. Click **User Manager**.
5. Click a group of which the user is a member. A list appears, showing all the users in that group.
6. Right-click the user's name, and in the menu, click **Edit**.
7. In the **Password** field, enter the new password, and enter it again in the **Confirm Password** field.
8. Select **User must change password at next login**, and make any other changes if required.
9. Click **OK**.

## Change administrator passwords

Genesys recommends that you change the default administrator password.

### Procedure: Changing the MicroStrategy Administrator password

**Purpose:** Use this procedure to create a new password for the default MicroStrategy Administrator account.

### Steps

1. Open the **gcxi.properties** file for editing. Note: If you use **gcxi-secrets.yaml** to store secrets, edit it instead of **gcxi.properties** in this procedure, and, after step 3, delete and recreate your secrets, by executing `kubectl delete -f k8s/gcxi-secrets.yaml` and `kubectl create -f k8s/gcxi-secrets.yaml`.

2. Enter values in the following fields:

`MSTR_PASSWORD_OLD=<old_password>`

`MSTR_PASSWORD=<new_password>`

where:

`<old_password>` is the existing password.

`<new_password>` is a the password.

3. Enter the following commands to delete and reload **configmap gcxi-config**

```
kubectl delete configmap gcxi-config
```

```
kubectl create configmap gcxi-config --from-env-file=<path>/gcxi.properties --namespace genesys
```

where:

`<path>` is the path to the directory where your **gcxi.properties** file is stored.

4. Enter the following commands to stop currently running containers:

```
kubectl scale deploy/gcxi-secondary --replicas=0
```

```
kubectl scale deploy/gcxi-primary --replicas=0
```

5. Enter the following commands to start the containers:

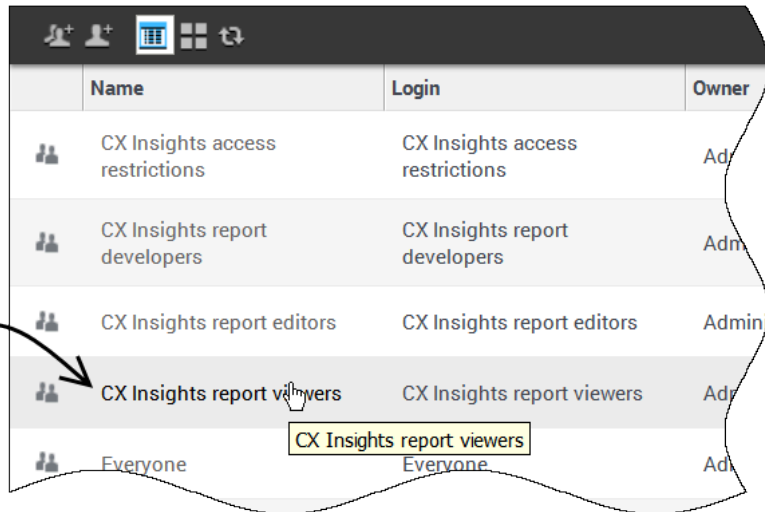
```
kubectl scale deploy/gcxi-primary --replicas=1
```

```
kubectl scale deploy/gcxi-secondary --replicas=1
```

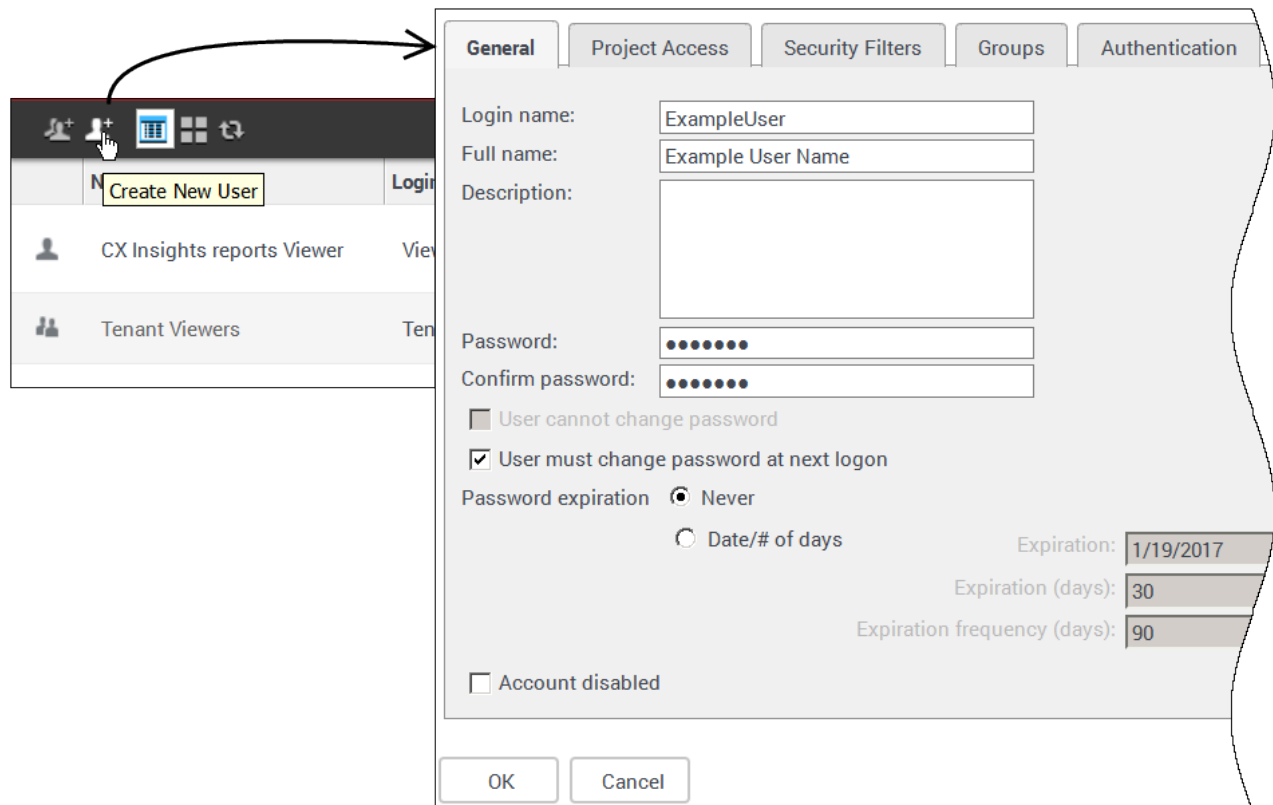
6. Open the **gcxi.properties** file for editing.
7. Once both pods are running, log in the Genesys CX Insights web interface with the new password.

## Creating a new user

*To simplify the process of creating a new user, select the group (for example, CX Insights reports Viewers) before you click Create New User.*



	Name	Login	Owner
	CX Insights access restrictions	CX Insights access restrictions	Adm
	CX Insights report developers	CX Insights report developers	Adm
	CX Insights report editors	CX Insights report editors	Admin
	CX Insights report viewers	CX Insights report viewers	Adm
	Everyone	Everyone	Adm



**Create New User**

General | Project Access | Security Filters | Groups | Authentication

Login name:

Full name:

Description:

Password:

Confirm password:

☐ User cannot change password

☒ User must change password at next logon

Password expiration ☒ Never

☐ Date/# of days

Expiration:

Expiration (days):

Expiration frequency (days):

☐ Account disabled

OK Cancel

Use the following steps to create a new user account.

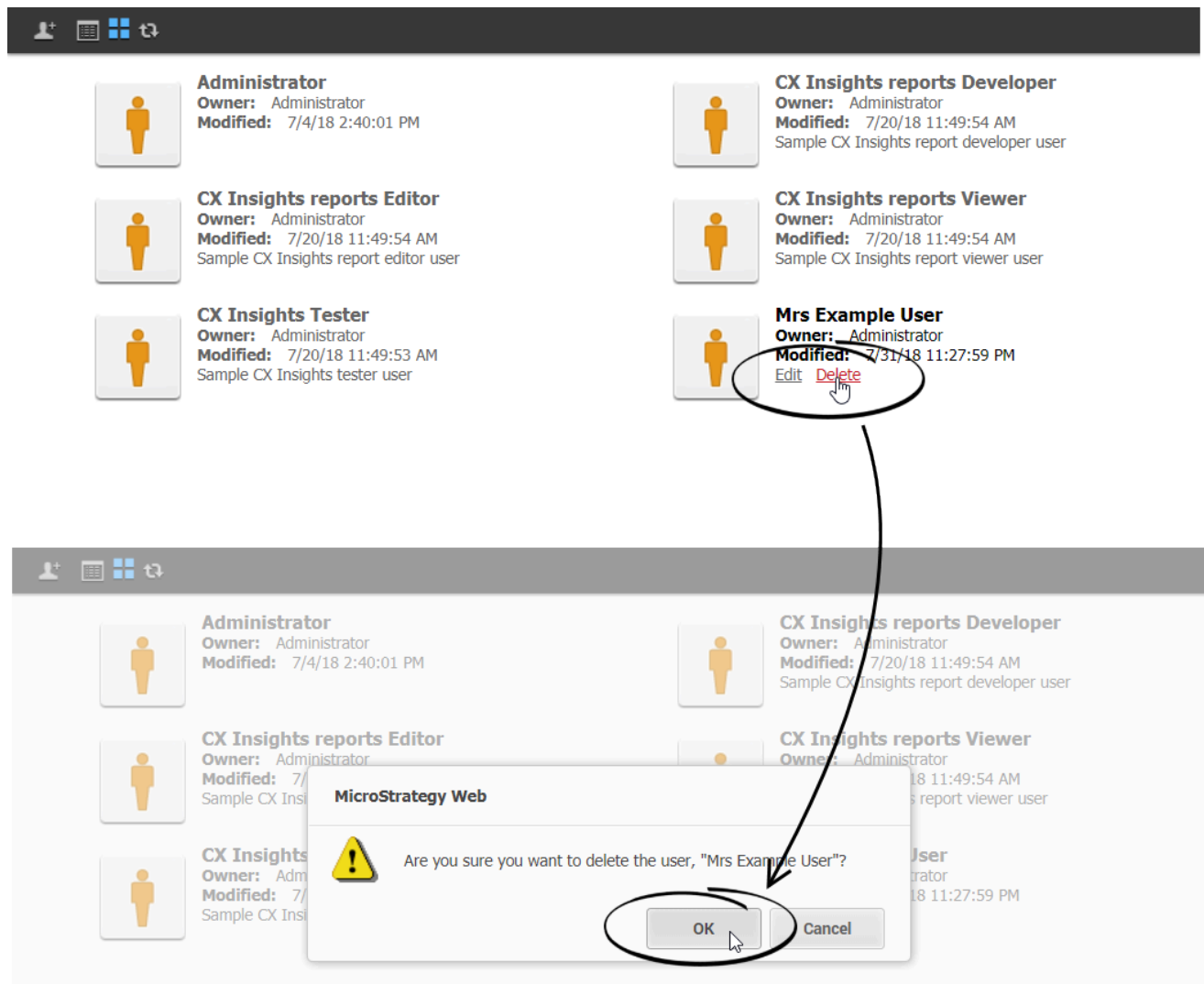
To edit another user's account, you must log in as a member of a group that has the **Create And**



### Edit Users And Groups privilege.

1. In your web browser, open the MicroStrategy Web Administrator page:  
`http://<hostname>:<port>/MicroStrategy/servlet/mstrServerAdmin`
2. On the page that appears, select your server.
3. On the MicroStrategy Web Administrator login screen, enter your user name and current password, and click **Login**. The **Tools** page opens.
4. Click **User Manager**.
5. On the menu, click **Create New User**.
6. Specify user information as appropriate, on each tab in the editor. If you need more information about any field, see the MicroStrategy Web Administrator Help. Be sure to:
  1. Include a **Login Name, Full Name, Password, Confirm Password** and other selections in accordance with your password policies (on the **General** tab).
  2. Assign at least one **Group** (on the **Groups** tab). By default, all users are also members of the group **Everyone**, but you must assign at least one group, or the new user account will not be editable by other administrators.
7. Click **OK**.
8. To verify that the user was created, open one of the groups to which you added the user (or open the group **Everyone**).

## Deleting a user



Use the following steps to delete a user account.

To edit another user's account, you must log in as a member of a group that has the **Create And Edit Users And Groups** privilege.

1. In your web browser, open the MicroStrategy Web Administrator page:  
`http://<hostname>:<port>/MicroStrategy/servlet/mstrServerAdmin`
2. On the page that appears, select your server.
3. On the MicroStrategy Web Administrator login screen, enter your user name and current password, and click **Login**. The **Tools** page opens.
4. Click **User Manager**.

5. Open a group of which the user is a member, for example **Everyone**.
6. Hover over the user you plan to delete, and click **Delete**.
7. Click **OK**.

For more information, see the [MicroStrategy web site](#).