Predictive Routing Help

Settings: Configure Accounts

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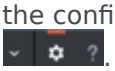
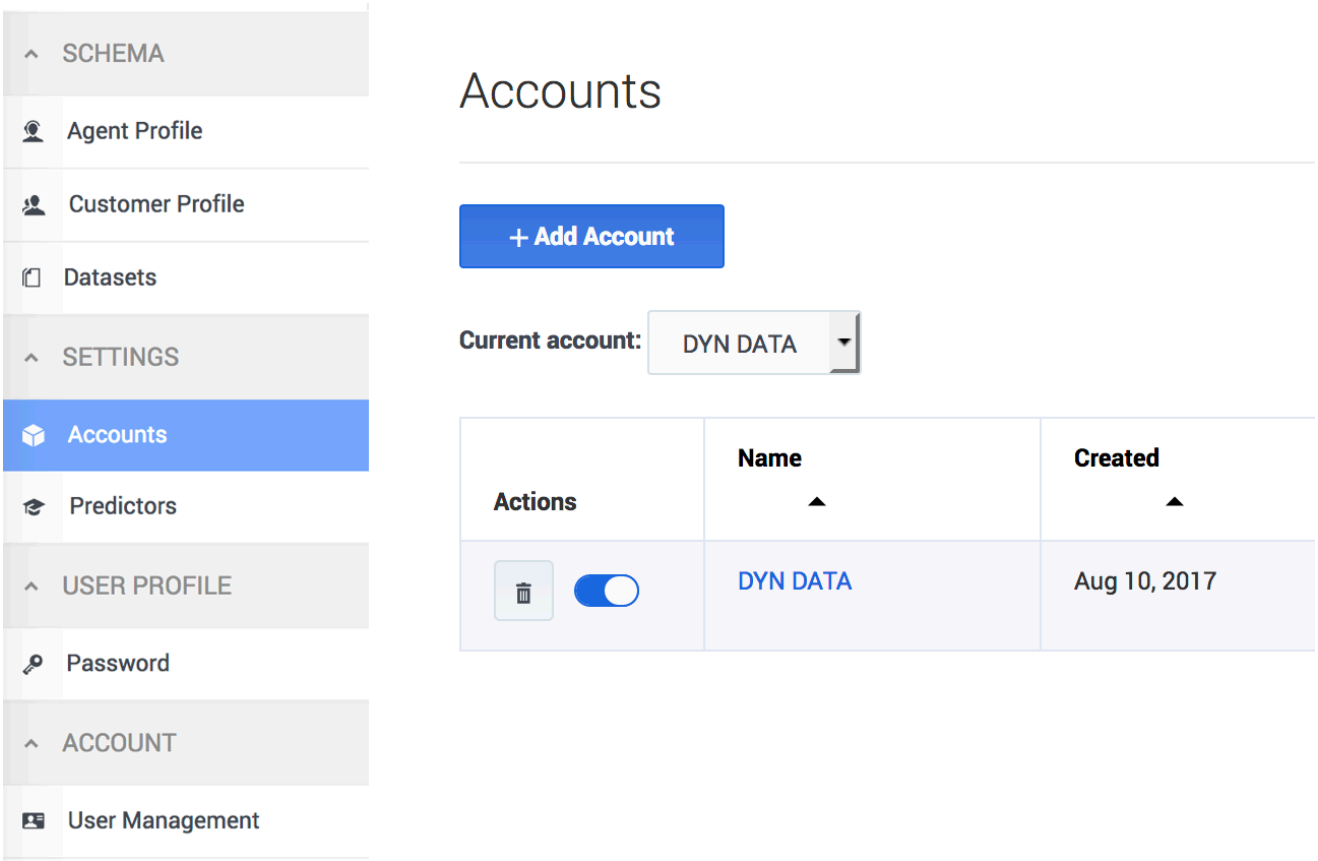
Settings: Configure Accounts

Accounts are managed on the **Settings > Accounts** tab. To open the configuration menu, click the **Settings** gear icon, located on the right side of the top menu bar:  .

- Accounts are equivalent to tenants. A user with STAFF or ADMIN rights can manage how the accounts existing in your environment interact with Predictive Routing (GPR).
- GPR supports the following capabilities:
  - LDAP-enabled accounts
  - Audit trails
  - Password policy configuration
  - User role assignments

Adding a new account



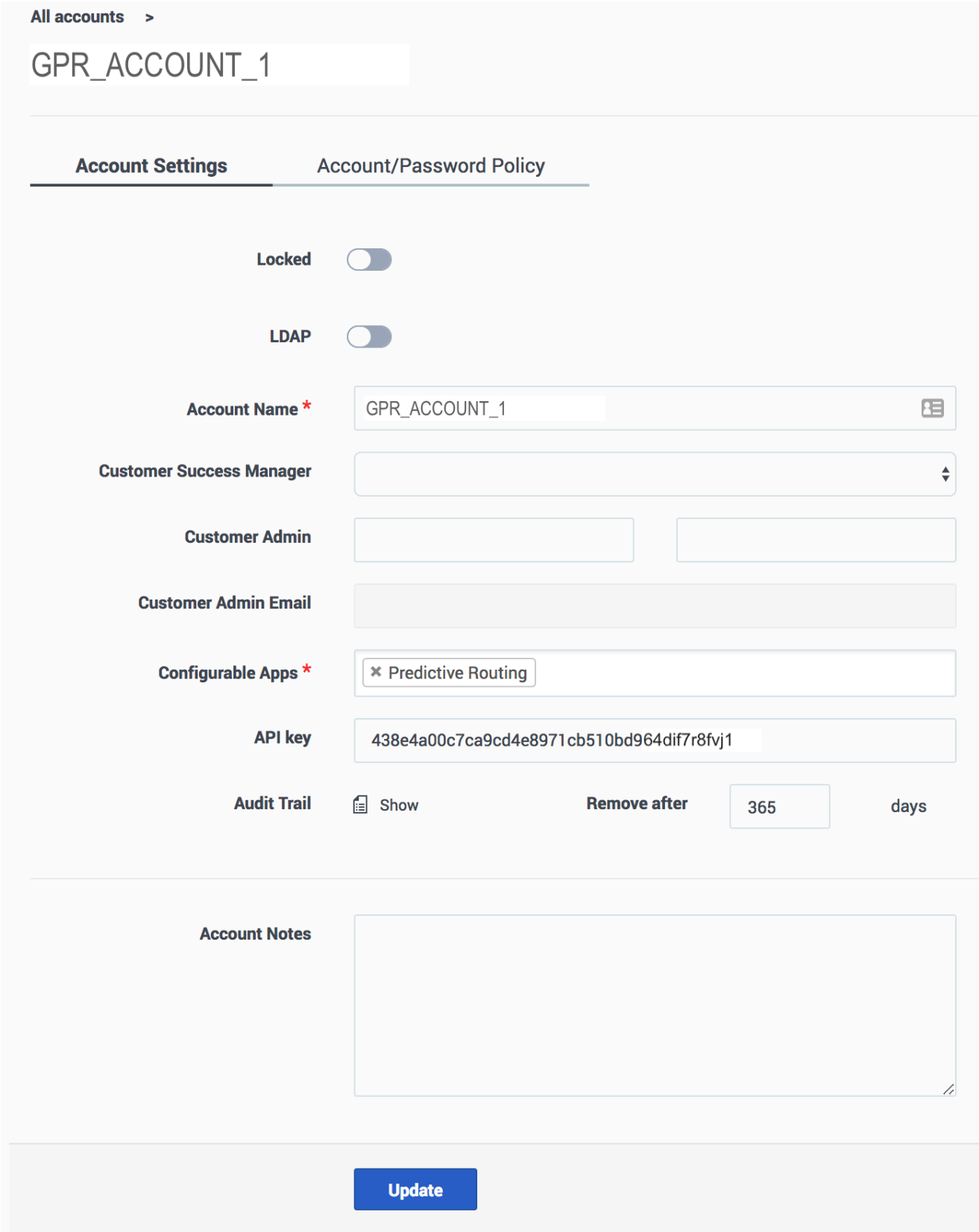
When you initially deploy the AI Core Services (AICS), the set-up process creates a default account with the name "Predictive Routing". The Predictive Routing application is automatically added to this account.

> **Important**
>
> When you initially log into the GPR web application you must use the superuser account set up when you deployed AI Core Services. Genesys strongly advises that you do not use the superuser account for any day-to-day business involving GPR. Use the instructions on this page to create users with the appropriate roles to perform all necessary tasks.

If you need to create additional new accounts, perform the following steps:

1. Click the **Settings** > **Accounts** tab.
2. Click **Add Account**.
3. Specify a name for the account (normally the name of the organization represented by the account).
4. If you are using LDAP authentication, select the **LDAP Authentication** check box. See LDAP-enabled accounts, below, for configuration instructions.
5. Click **Create**.

Configuring or updating an account

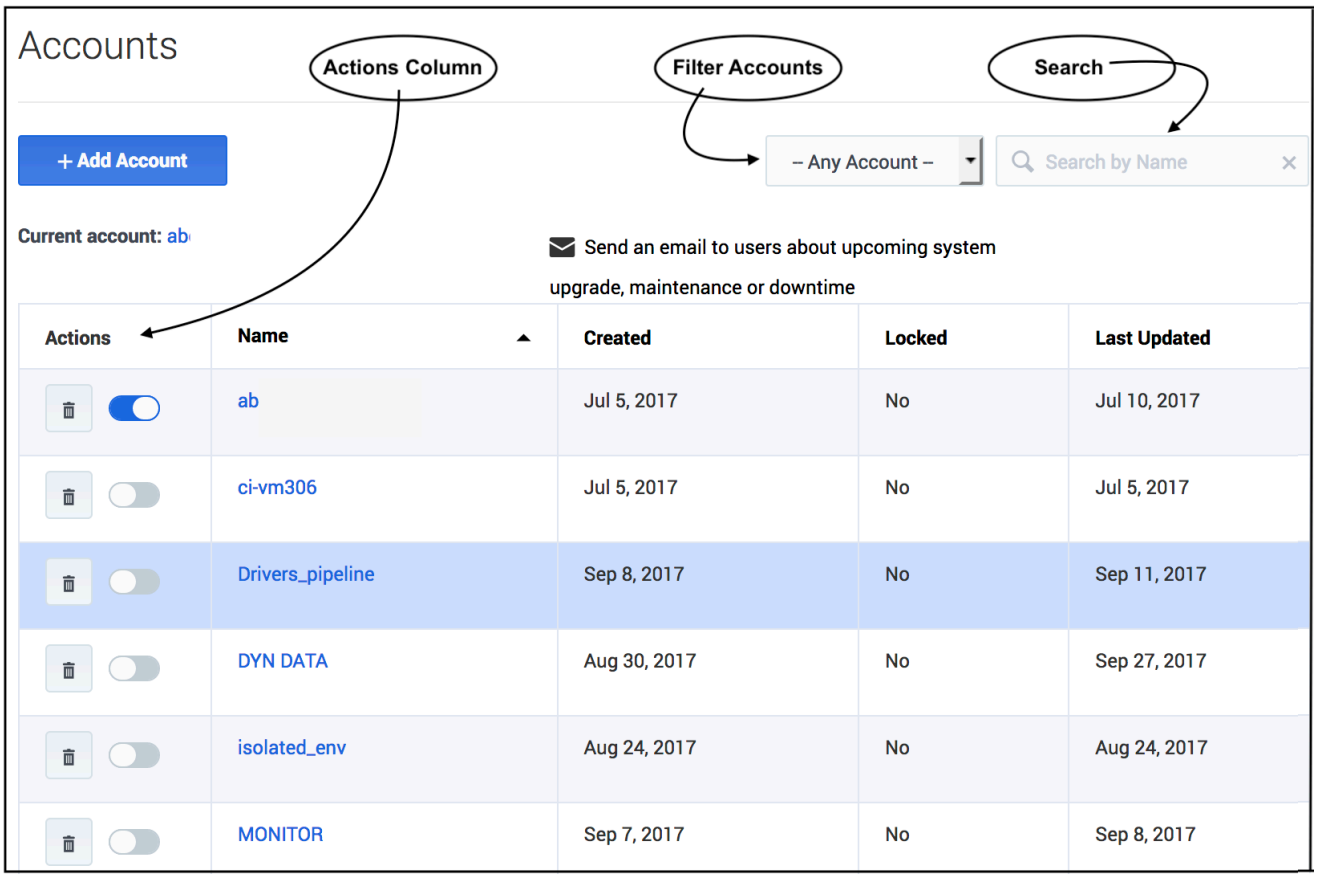

All accounts >
GPR_ACCOUNT_1
Account Settings
Account/Password Policy
Locked
LDAP
Account Name *
GPR_ACCOUNT_1
Customer Success Manager
Customer Admin
Customer Admin Email
Configurable Apps *
Predictive Routing
API key
438e4a00c7ca9cd4e8971cb510bd964dif7r8fvj1
Audit Trail
Show
Remove after
365
days
Account Notes
Update

Click an account name to configure the account. The following parameters are located on the **Accounts Settings** tab. For help with the **Account/Password Policy** tab, see Password policy configuration.

- Locked—Only ADMIN users of an account can lock it. Once locked, the account cannot be edited.
- LDAP—Toggle this control ON to enable LDAP authentication. See LDAP-enabled accounts, below, for configuration instructions.
    - If you convert an account to LDAP authentication, you must also convert the user accounts for those who should use LDAP authentication. User configuration is done in the **Settings > User Management** window.
- Account Name—The name you assigned to the account.
- Customer Success Manager—The person who created the account in Predictive Routing, and who can function as a contact person in case of issues with account configuration.
- Customer Admin and Customer Admin Email—The name and email for the employee who is responsible for making account updates.
- API key—The API key required to access the Predictive Routing API.
- Audit Trail—The information logged that documents actions performed in the current account.
    - To view the audit trail, click **Show**.
    - Enter a number from 1-365 to specify how many days the audit log records should be kept.
    - For details on what is recorded in the audit trail, refer to Audit trails.
- Account Notes—Any information important to keep about this account.

This window also enables you to create a new account instead of editing the currently-selected one.

The accounts list



If your environment includes multiple accounts, they appear in a table when you click **Settings > Accounts**. You can perform the following actions from this table view:

- **Activate/Deactivate** - The radio button in the **Actions** column enables you to activate or deactivate an account.
- **Delete** - Click the trash can icon in the **Actions** column to delete an account.
- **Sort** - Click any column header (except the **Actions** column) to sort the table based on the values in that column.
- **Filter** - Choose whether to view all accounts, test accounts only, or production accounts only, using the drop-down selector above and to the right of the table.
- **Search** - Type an account name into the **Search** field to locate a specific account.

Configuring LDAP-Enabled Accounts

Accounts configured to use LDAP authentication require you to specify the login credentials that Users should enter to gain access to Predictive Routing. The credentials must comply with the LDAP User DN pattern that you establish in the **Account** settings window. This pattern creates a distinguished name (DN) for each user, and has a format similar to the following:

```
cn=*,ou=people,dc=example,dc=com
```

When a user logs in, they enter the actual user ID in place of the asterisk (*) shown in the pattern example above. You can use the following distinguished names in the User DN pattern:

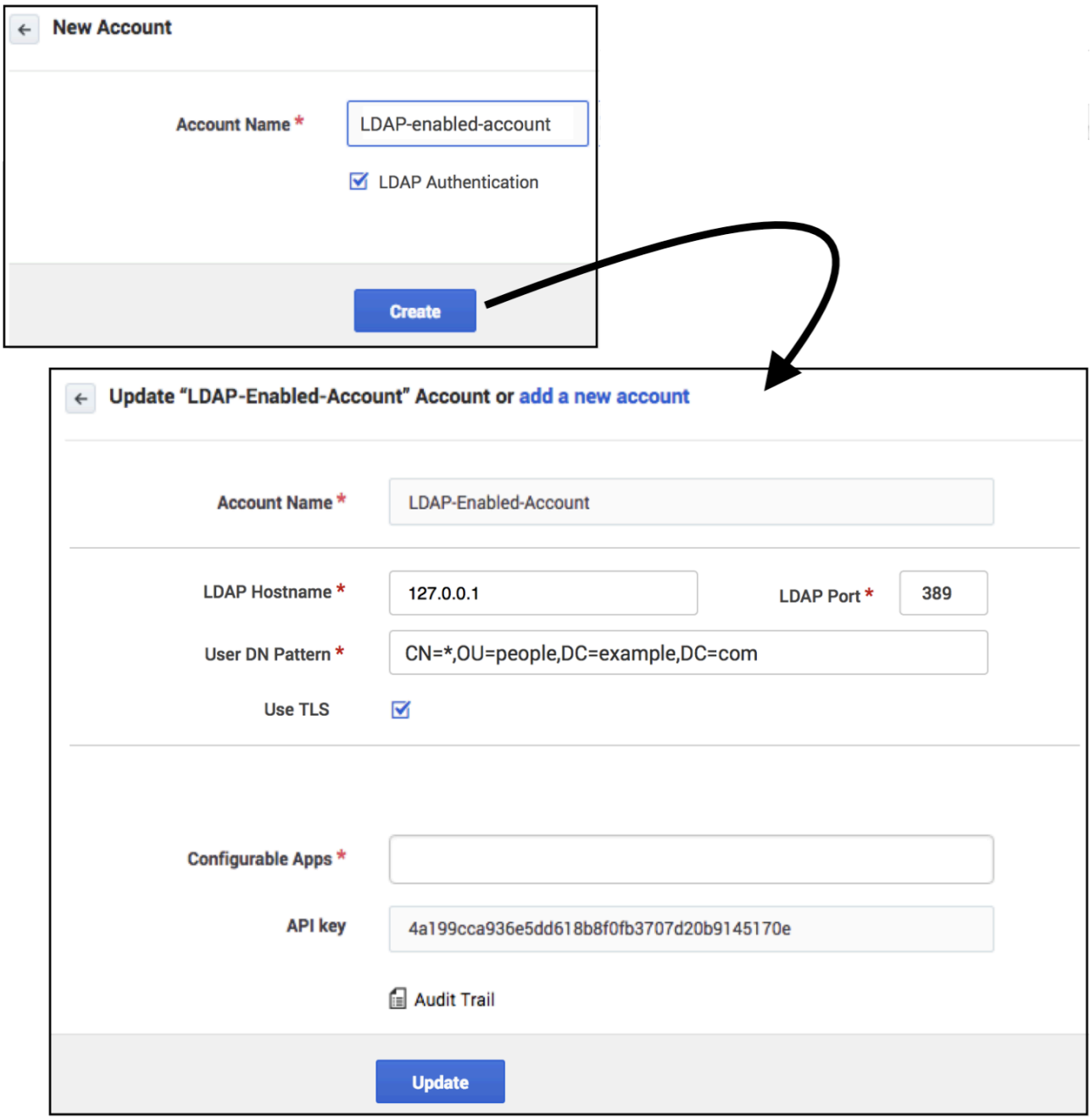
String	Attribute type
DC	Domain Component
CN	Common Name
OU	Organizational Unit Name
O	Organization Name
UID	User ID

The same distinguished name pattern must be configured on the client's LDAP server. Authorized Predictive Routing users should be described at that path.

> ## Important
>
> To configure users who should be enabled for LDAP authentication, or to move a user from one account to another, see the LDAP-specific steps in the Account: User Management topic.

- A single user cannot log in with both LDAP authentication and a standard Predictive Routing username/password combination.
- Only a user with the STAFF role can change a user from one form of authentication to the other.
- If necessary, you can associate STAFF users with multiple LDAP-enabled Predictive Routing accounts. Such users will encounter a two-step login process, during which they select the account they want to log into.

Create an LDAP-enabled account



Use the following steps to create the account:

1. Click the **Settings** > **Accounts** tab.
2. Click **Add Account**.

3. Provide an account name.
4. Select the **LDAP Authentication** check box.
5. Provide the fully qualified hostname or IP address for your LDAP server.
6. Provide the port for your LDAP server. The default value, 389, is used if you do not specify a port number.
7. Provide the User DN Pattern, as explained above.
8. To enable Secure LDAP (LDAPS), select the **Use TLS** check box.
9. Click **Update**.

The new account appears in the **Accounts** list.

The Password Policies Tab

STAFF users can use this tab to specify how GPR handles user passwords and login attempts. It contains the following fields:

Field name	Default Value	Valid Values
Password expires after [x] days	90	1 - 90 days
Password cannot be changed until after [x] hours	24	1 - 72 hours
Show password expiration reminder [x] days before password expiry	7	1 - 14 days
Password cannot be the same as the [x] previous passwords	5	5 - 15 previous passwords
Account is locked after [x] invalid login attempts	6	3 - 6 invalid login attempts
Unlock user account after [x] minutes	60	30 - 300 minutes
Block inactive user after [x] days	45	1 - 90 days
Message to show blocked users:	This user account was blocked due to too many failed login attempts. Please try again later.	Leave the default, edit the message to be displayed to blocked users, or leave the text box empty to omit a notification message.

Using Audit Trails

To view audit trail specifics, click the **Show** icon on the **Accounts Settings** tab. GPR provides an audit record for the following activities:

- Actions (see the list below) carried out by any user who has access to the current account.
- Any time someone accesses the audit trail.
- Login attempts.
- Reset of audit login.
- Creation or deletion of objects in the system.

For each activity the following information is stored:

- The user ID of the person who performed the action.
- The date and time of the action.
- The result of the operation (failure, success).
- What interface was used to initiate the action (the GPR application or the API).
- The GPR components affected by the action.

GPR stores the specified data for the following objects:

- **Datasets**
  - create
  - sync
  - accept/decline sync
  - append
  - delete
- **Agent Profiles and Customer Profiles**
  - create (but only if created using the Predictive Routing application; profiles created using the API are not added to the audit trail)
  - sync
  - accept/decline sync
  - append
- **Users/Accounts**
  - create/update
  - delete
- **Predictors**
  - create
  - update
  - generate training data
  - purge training data
  - copy

- **Models**
  - create
  - delete
  - train
  - activate
  - suspend
  - import