

# **GENESYS**

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## Deployment Guide

Configuring Genesys Rules System

# Configuring Genesys Rules System

Complete the procedures in the tabs below to tune Genesys Rules System to work with Web Engagement.

### Genesys Rules Authoring Tool

## Configuring Genesys Rules Authoring Tool

#### **Prerequisites**

• Your environment includes Genesys Rules Authoring Tool (GRAT). See Genesys environment prerequisites for compliant versions. For more information about installing GRAT, refer to the Genesys Rules System Deployment Guide.

#### Start

- 1. In Genesys Administrator, navigate to **Provisioning > Environment > Applications**, select the GRAT Server application (the application with type Business Rules Application Server), and click **Edit**.
- 2. In the Connections section, click Add....
- 3. Select the Genesys Web Engagement Cluster and click **OK**.

**Important:** If your version of GRAT does not recognize connections with your Application Cluster object, you can connect to any of your Web Engagement Server node applications instead.

You can determine whether your Application Cluster is recognized by seeing whether it shows up as a valid location in the rules package deployment scenario.

- 4. Select the Cluster in the list of connections and click Edit.
- 5. In the **Connection Info** window, select the correct port for the ID field, that is, /server/data/rules/ deploy. Click **OK**.

Advanced	Network Security	
Server:	GWE 85 Cluster	× P
<sup>*</sup> ID:	server/data/rules/deploy	~
Connection Protocol:		*
ocal Timeout:	0	
Remote Timeout:	0	
Trace Mode:	[Unknown Trace Mode]	~
Connection Type:		~

ID is set to the correct port.

- 6. Select the **Options** tab.
- 7. In the **[settings]** section, set **verify-deploy-address** to false. You must set this option because in Genesys Web Engagement, rule packages are deployed to the Cluster, not to Genesys Rules Engine. When set to false, this option prevents GRS from trying to verify that the server deploying the rules is Genesys Rules Engine.

С	onfiguration Options	Permissions	Dependencies	Alarms	Logs
ī	New 🙀 Delete ځ Export 禢 Import			View: Advanced View	v (Options)
	Name 🔺	Section	Option	Value	
T	Filter	Filter	Filter	Filter	
9	settings (6 Items) settings/group-by-level	settings	group-by-le	vel false	
	settings/max-connections	settings	max-connec	ctions 99	
	settings/session-timeout	settings	session-tim	eout 30	
	settings/session-timeout-alert-interval	settings	session-time	eout-aler 1	
	settings/strict-mode	settings	strict-mode	true	
	settings/verify-deploy-address	settings	verify-deplo	y-address false	

verify-deploy-address is set to false.

- 8. In the **Permissions** tab, set a user who has Read, Create, Change rights for the Scripts folder in **Log On As**. This user should also have: Read access to all tenants which are supposed to be used; Role with sufficient permissions (as detailed in Genesys Rules System Deployment Guide); Read access to Business Structure folder and associated nodes that are supposed to be used; Read access to Scripts folder and Scripts objects (which are representations of the rule templates).
- 9. Click Save & Close.

#### End

## (Optional) Configuring Roles Settings for Rules Management

You should complete this procedure if you need to import permissions to enable a user to create rules for Genesys Web Engagement. Once roles are imported, you can assigned them to the user who publishes the rule templates and creates rules for GWE.

You should not complete this procedure if you have already created a user who has permissions to create rules packages in Genesys Rules Authoring (as described in the "Role-based Access Control" chapter of the Genesys Rules System Deployment Guide).

#### Start

- 1. In Genesys Administrator, navigate to **Provisioning > Accounts > Roles** and click **New...**.
- 2. Enter a name for the new role. For example, GWE\_Rules\_Administrator.
- 3. In the Members section, you can specify who should have this role. Click **Add** to add as many access groups or users as you need.

GWE_Rules_Admin	nistrator - \Roles\				
🔀 Cancel 🛃 Save & Close 🛃 Save 🛃 Save & New 🛛 🔯 Reload 🛛 📀 Validate Permissions					
Configuration	Role Privileges Pe	rmissions			
─ <b>▲</b> * General					
* Name:	GWE_Rules_Admin	GWE_Rules_Administrator			
Description:	Description: in GRDT - import or create, modify and publish templates, in GRAT - create, modify, delete and de				e and dep:
Tenant:	Environment				
State:	📝 Enabled	Enabled			
Members —					
Users: 🔂 Add 🎲 Edit 🙀 Remove					
	User Name 🔺	Agent	Last Name	First Name	Em
Access Groups:     Image: Add give Edit Image: Remove					
	Name 🔺		Туре		Sta
Now Polo	No objects to display	/			

4. Select the **Role Privileges** tab and select Genesys Rules Authoring Tool. The privileges for GRAT are added to the GWE\_Rules\_Administrator role.

	GWE_Rules_Administrator - \Roles\	
×	Cancel 🛃 Save & Close 🛃 Save 🛃 Save & New 🛛 🔯 Reload 🛛 📀 Validate Permissions	
C	onfiguration Role Privileges Permissions	
	Allow All 💆 Export 🐺 Import	
Ad	d/Remove Products Interaction Workspace	1
	Genesys Rule Authoring Tool	1
	Genesys Administrator	•
	Name 🔺	Value
T	Filter	Filter
	Rule Authoring (4 Items)	
	Create Rule	
	Delete Rule	
	Modify Rule	
	View Rule	
	Rule Packages (4 Items)	
	Create Package	
	Delete Package	
	Deploy Package	
	Modify Package	
	Rule Templates (3 Items)	
	Create Template	
	Delete Template	
	Modify Template	
	Business Calendars (4 Items)	
	Create Calendar	
	Delete Calendar	
	Modify Calendar	
	View Calendar	

Imported Role Privileges

#### 5. Click Save & Close.

#### End

Members of the GWE\_Rules\_Administrator role can now do the following:

- Create, modify, and delete rules
- Create, modify, delete, and deploy rule packages

• Create, modify, and publish CEP rule templates

## Genesys Rules Development Tool

## Configuring Genesys Rules Development Tool

#### Prerequisites

- Your environment includes Genesys Rules Development Tool (GRDT), deployed as a Composer plug-in. See Genesys environment prerequisites for compliant versions. For more information about installing GRDT, refer to Installing the GRDT Component in the the Genesys Rules System Deployment Guide.
- You enabled the Galileo update site in GRDT, as described in Installing the GRDT Component.

#### Start

- 1. Open Genesys Rules Development Tool by starting Composer.
- 2. Navigate to **Window > Preferences**. The **Preferences** window opens.
- 3. Navigate to **Genesys Rules System > Configuration Server**. Edit the settings.
  - Enter the Configuration Server host name. For instance, localhost.
  - Enter the Configuration Server port. For instance, 2020.
  - Enter the application name for the Rules Authoring Client application. For instance, RulesAuthoringClient.
  - In the Authentication section, enter the name and password for a user who can connect to Configuration Server and click **Apply**.

Preferences		
type filter text	Configuration Server	← + ⇒ + +
<ul> <li>General</li> <li>Ant</li> <li>Composer</li> <li>Genesys Rules System</li> <li>Configuration Server</li> <li>Repository Server</li> <li>Template Types</li> <li>Help</li> <li>Install/Update</li> <li>Java</li> <li>Java EE</li> <li>JavaScript</li> <li>Plug-in Development</li> <li>Run/Debug</li> <li>Server</li> <li>Team</li> <li>Validation</li> <li>Web</li> <li>Web Services</li> <li>XML</li> </ul>	Settings for optionally connecting to a Configuration Server   Host configuration   Name: localhost   Port: 2020   Application: RulesAuthoringClient   Authentication   User name: default   Password ********     Advanced   Specify TCP client settings (not recommended)   Name:   Port: 65535   Test settings	faults Apply
?	OK	Cancel

GRDT settings for Configuration Server.

- 4. Navigate to **Genesys Rules System > Repository Server**. Edit the settings.
  - Enter the Repository Server host name. This is the name of the host specified for the GRS application (application with type Business Rules Execution Server) in the Genesys Configuration Layer. For instance, localhost.
  - Enter the Repository Server port. This is the port with the ID genesys-rules-engine that is specified for the GRS application (with type Business Rules Execution Server) in the Genesys Configuration Layer. For instance, 8020.
  - Enter the Servlet path as genesys-rules-authoring.
  - In the Authentication section, enter a name and password for a user who:
    - Has Read and Execute permissions for the Genesys Rules Authoring client application (set up in Configuration Server); this user must have explicit Read and Execute permissions or must belong to an access group with those permissions.
    - Belongs to a Role with the following privileges: Template Create, Template Modify, Template Delete.

5. Click **Apply**.

Preferences		
type filter text	Repository Server	$\mathbf{c} \bullet \bullet \to \bullet \bullet \bullet$
<ul> <li>General</li> <li>Ant</li> <li>Composer</li> <li>Genesys Rules System</li> <li>Configuration Server</li> <li>Repository Server</li> <li>Template Types</li> <li>Help</li> <li>Install/Update</li> <li>Java</li> <li>Java EE</li> <li>JavaScript</li> <li>Plug-in Development</li> <li>Run/Debug</li> <li>Server</li> <li>Team</li> <li>Validation</li> <li>Web</li> <li>Web Services</li> <li>XML</li> </ul>	Settings for connecting to a GRS repository         Host configuration         Name:       demosrv         Port:       8020         Servlet path:       genesys-rules-authoring         Use HTTPS:	aults Apply
?	OK	Cancel

GRDT settings for the Repository Server.

6. Navigate to **Genesys Rules System > Template Types**. If it is not present, add the **web\_engagement** template type and set **Event Support** to true. Click **Apply**.

Preferences			
type filter text	Template Types	<b>⇔</b> •	⇒
⊡ · General	Template types are used to determine operating r provide a grouping mechanism in the authoring to	node of a rule server, as ol	well as
E Genesys Rules System	Name	Event Support	New
Configuration Server	CONVERSATION_MGR	false	
Repository Server	iwd	false	Remove
Template Types	web_engagement	true	
Euro/Debug			
Team			
Validation			
	Show automatic type addition dialogs		
		Restore <u>D</u> efaults	Apply
?		ОК	Cancel

Template types in Composer

7. Click **OK**.

#### End

#### Next Steps

• Configure the Generic Cassandra Settings for your Web Engagement Server.