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Cloud Basics for Administrators

Applications, roles, and permissions

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Learn about the applications available in Genesys Multicloud CX and who can access them.

Access to User Interfaces

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Genesys Portal is the main access point to all Genesys Multicloud CX user interfaces (UIs).

These interfaces are divided into three categories, which you can select by clicking the corresponding category links at the top of the Portal. The categories are:

User interfaces – User interfaces are standard Contact Server user interfaces, such as Agent Workspace, Workforce Management, and Reporting. These interfaces can be used by contact-center agents, supervisors, and managers.

Administration interfaces – Administration interfaces can be used by contact-center administrators, supervisors, and managers to configure users and applications based on their roles.

Support interfaces – Support interfaces are used by authorized contact-center administrators to submit requests with Genesys Customer Care, and to view the service status and schedule of service for Genesys applications.

User Documentation and **eLearning** are accessed via the Help (?) menu, located in the top-right corner of Genesys Portal.

Application	Application Description
Agent Workspace	Agent Workspace provides agents and knowledge workers with non-intrusive access to the information, processes, and applications they need to perform their jobs more efficiently.
Agent Scripting Administration	Agent Scripting Administration is a scripting tool that is used to prompt agents throughout the call-handling process with customers.
Designer	Genesys Designer helps you to design assisted service or Routing applications, as well as self-service or Interactive Voice Response (IVR) applications.
Genesys Customer Care	Genesys Customer Care is a portal for Genesys customers to locate resources, tools and information that will aid in resolving your issues, including the ability to create and track tickets based on Salesforce.
IVR Administration	IVR Administration assists your business with providing cost-effective customer interactions 24/7 for voice, video, and web-based interactions.

Application	Application Description
Outbound	Outbound Contact is an automated system for creating, modifying, running, and reporting on outbound campaigns for proactive customer contact. Outbound Contact Server (OCS) provides automated dialing and call-progress detection, so that an agent is required only when a customer is connected. OCS also intelligently uses customer data to ensure that campaigns are contacting the right customers, not just a large number of customers.
Agent Setup	Agent Setup helps you to manage your user accounts and configure settings to maintain your contact center.
Recording	Recording provides recording control via a host of integrations across the suite. The recorded segments are linked to the contact's account history, and include information about date and time, duration, and the parties involved for each segment.
Reporting	Reporting assists contact-center managers in: <ul style="list-style-type: none">• Assessing the day-to-day operations of their contact center resources for the routing and handling of interactions.• Better tuning resources to increase utilization and efficiency.• Benchmarking key performance indicators of quality and service.• Identifying corrective actions to help reduce costs and increase service.
Reporting Administration	Reporting Administration is used to provision new users for Reporting.
Workforce Management	Workforce Management (WFM) provides tools to enable contact-center managers to better manage their workforce. WFM enables managers to create accurate staffing plans that take into account projected contact volumes and average handle times, as well as the various skills and skill levels of the agent population. Contact center managers can achieve these goals, by using WFM's advanced forecasting, scheduling, and real-time adherence capabilities.

Role Access

Access to Genesys Portal applications is provided based on the following user roles:

Application/Role	Agent	Supervisor	CC Manager	Administrator
Agent Workspace		*	*	*
Agent Scripting Administration				
Agent Setup		++	+++	+
Callback		**	**	
Designer		***	***	
Genesys Customer Care				
IVR Administration				
Outbound				
Platform Administration	****			
Recording				
Reporting				
Reporting Administration				
Training				
Workforce Management	*****	*****	*****	*****

Important

* - Separate Agent accounts must be created for Supervisors, Managers, and Administrators. See How to create an Agent account for Supervisors, Managers, and Administrators with dual role in Platform Administration.

** - Supervisors and Managers have read-only access to callbacks and callback configuration.

*** - Supervisors and Managers only have access to modify Designer parameters.

**** - Agents only have the ability to change their own password in Platform Administration.

***** - Agents work on a different UI from Supervisors, Managers, and Administrators.

+ - Read and write access.

++ - Limited read and write access.

+++ - This role is not defined within Agent Setup.

Account Types

The following types of accounts are provisioned in Genesys Multicloud CX:

Account Type	Provisioned By	Provisioning Tool	LDAP enabled*	Note
Agent Scripting Administration Account	Genesys	Agent Scripting	No	
Customer Care Account	Genesys	Genesys Salesforce	No	
IVR Administration Account	Customer Administrator	IVR Administration	Yes	One per IVR Administration region
Outbound Account	Genesys	Genesys Multicloud CX	No	
Platform Account	Customer Administrator	Platform Administration	Yes	
Reporting Account	Customer Administrator	Reporting Administration	No	

Important

- Certain types of accounts – as specified in the table – can be configured to use authentication through customer LDAP-compatible directory service.
- It is recommended that all accounts for a particular user be created with the same user name and password. The table above outlines the different authentication and authorization systems where separate user accounts need to be created.
- The recommended naming convention for user accounts is the following: @, for example: john.bull@acme.com. It is important to include in the user name as unique name domain identifier.
- For supervisor/administrator users who need access to the Agent Workspace or Agent Workforce Management interface, the suggested naming convention is the following: @.agent

Password Rules

User accounts are required to meet the following password rules:

- **Password Length** - Must include a minimum of 8 characters.
- **Password Complexity** - Must include lowercase, uppercase and a number.
- **Password Lockout** - After 5 failed login attempts, the user account is locked for 30 minutes.
- **Password Changes** - Must be changed every 90 days.
- **Password Re-use** - Cannot re-use any of their last 5 passwords.

Managing User Passwords

A user may be configured to set a new password the first they log in, or after a system administrator has reset their password. In this case, the **Change Password** dialog box appears.

To change the password, the user must complete the following steps:

1. Enter a new password in the **New Password** field.
2. Enter the same password in the **Confirm Password** field.
3. Click **Ok**.

Changing a Password

If configured, a user can change their password at any time, using the following procedure:

1. Log in to the user account in Platform Administration.
The user's first name appears in the top header bar of the window.
2. Select the first name.
3. Click **Change Password**.
4. In the **Change Password** dialog box, enter the current password, enter a new password and confirm the new password.
5. Click **Save**.

Using Accounts in Applications

The table below lists correlation between account types and Genesys Multicloud CX applications.

Application/Account	Account	Notes on Provisioning
Agent Workspace	Platform Account	
Agent Scripting Administration	Agent Scripting Account	Account should be enabled by Genesys for use in this interface
Designer	Platform Account	
Genesys Customer Care	Customer Care Account	
IVR Administration	IVR Administration Account	
Outbound	Genesys Multicloud CX Account	Account should be enabled by Genesys for use in this interface
Platform Administration	Platform Account	
Recording	Platform Account	
Reporting	Reporting Account	
Reporting Administration	Reporting Account	
Training	No account needed	

Application/Account	Account	Notes on Provisioning
Workforce Management	Platform Account	Account should be assigned to security group in WFM by customer administrator