



Delivering Outcomes

Perform Various User Mgmt Tasks On Genesys PureEngage

Readme

Version 1.0

28/Dec/2020

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1. Introduction

This document contains all essential information for the user to make full use of the Bot. This manual includes a description of the functions, capabilities, step-by-step procedures for setup and configuration of the Bot.

1.1 Overview

Bot will perform user management related task on the Genesys engage platform such as adding extension, places, agent login, user, creating skills, roles etc. This is a manual and time consuming activity. With the help of this bot the entire process will be automated without any human involvement.

The bot can be scheduled to run as per business requirement on predefined intervals which can be hourly/ daily/ weekly or any desired time and at the end of the execution a consolidated detailed report will be attached and send to respective configured email id.

Detailed steps are as follows:

- 1) Start of the process
- 2) Run Meta bot logic to verify bot license whether it's expired or not
- 3) Initialize the configuration file path, read and reinitialize all the key values and store into user created variable. Which can be used by the bot dynamically and hence there won't be tight coupling or code level any dependencies.
- 4) Create folder structure (Bot will create folders as per bot framework for example: - Error, logs, snapshots and output folders)
- 5) Delete all the downloaded CSV files during last/previous run
- 6) Copy GenesysUserActivitiesReport.xlsx and other import files such as ImportAddAgentLogin.csv, ImportAgent.csv, ImportExtensionDN.csv & ImportPlaces.csv from input folder to output folder
- 7) Open report excel file (GenesysUserActivitiesReport.xlsx) and activate sheet name "UserManagement Activity Reports"
- 8) Launch Genesys Gax webpage and login with user credential using credential vault.
- 9) Bot will go to DNS-> Sip_Switch-> Extension, import ExtensionDNs csv file and at last export added Extension DN details
- 10) Bot will go to Places option, import places csv file and export added Places details
- 11) Bot will go to Agent logins-> Sip_Switch->Agent logins, import AddAgentlogin csv file and export added Agent login details

12) Bot will go to Persons options, import person csv file and export added users/persons details

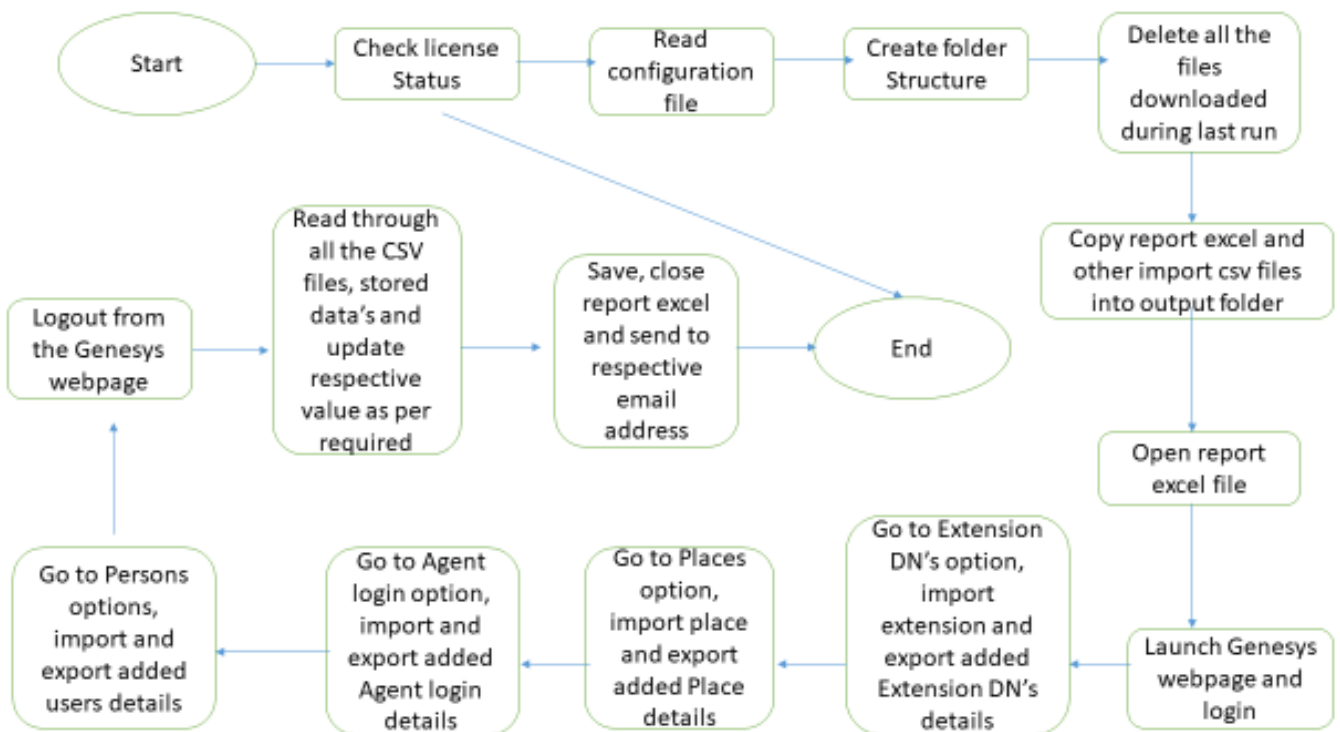
13) After capturing respective reports or status, Bot will logout from the Genesys Gax webpage

14) Read stored value into user created variable, loop through all CSV files downloaded from the Genesys Gax webpage. Update respective data into Genesys Application monitoring report excel sheet as per filter, logic and conditions.

15) Save and close excel after updating the details. Then bot will send an email to the configured email id with Genesys User Activities report excel file attachment

16) End of the process

Visual Flow:



- **Example of a Sample Input & Output**

Input configuration file: -

```
Configuration.txt - Notepad
File Edit Format View Help
*****
Bot & Vendor Folder Names (Case Sensitive) :
*****

vBotName=Perform Various User Mgmt Tasks On Genesys PureEngage
VendorName=VIS Global Pty Ltd

*****
Input File & Webpage URL (Case Sensitive) :
*****

vGenesysUsermanagementActivitiesReport=GenesysUserActivitiesReport.xlsx
vGenesysEnagageUrl=http://172.16.0.85:8080/gax

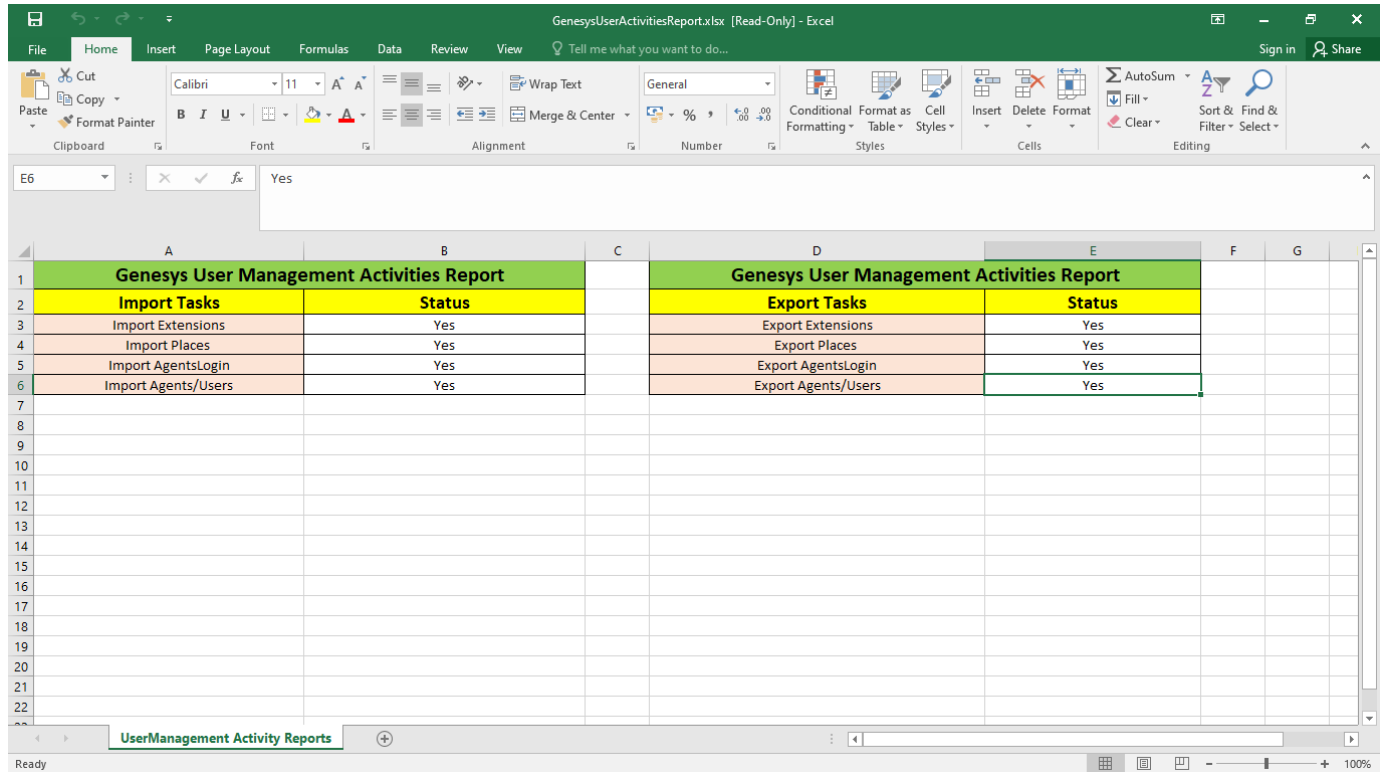
*****
Delay & Loop Command : (Case Sensitive) :
*****

vMsgUse=False
vLowDelay=2
vMidDelay=4
vHighDelay=5
vLoop=3
vSystem=VIS

*****
Output & Download File Names (Case Sensitive) :
*****

|
vGenesysUsermanagementActivitiesReport=GenesysUserActivitiesReport.xlsx
vImportAddAgentLogincsv=ImportAddAgentLogin.csv
vImportAgentcsv=ImportAgent.csv
vImportExtensionDNcsv=ImportExtensionDN.csv
vImportPlacescsv=ImportPlaces.csv
vExportAddAgentLogincsv=ExportAddAgentLogin.csv
vExportAgentcsv=ExportAgent.csv
vExportExtensionDNcsv=ExportExtensionDN.csv
vExportPlacescsv=ExportPlaces.csv
vEmailD=Botadmin@visnet.in
vSheet1=UserManagement Activity Reports
```

Output final report excel sheet: -



Genesys User Management Activities Report		Genesys User Management Activities Report	
Import Tasks	Status	Export Tasks	Status
Import Extensions	Yes	Export Extensions	Yes
Import Places	Yes	Export Places	Yes
Import AgentsLogin	Yes	Export AgentsLogin	Yes
Import Agents/Users	Yes	Export Agents/Users	Yes

1.2 Common Use cases

Apart from listed Genesys administrator user management activities such as addition of DNs extension, Places, agent login and person. Bot can also perform various administrator level configuration, campaign & calling list import for the outbound calls, switching & routing level configuration and so on

2. Requirements & Prerequisites

2.1 System Requirements

For the PC/Laptop or server where the bot needs to run;

- RAM: 8GB or higher
- PROCESSOR: 2.6+ GHz Intel Core i5 or higher and equivalent with 4 core processor
- Hard Disk: Up to 32GB+ of overall free space in the AA Client installation drive (C Drive 100 GB atleast)
- Network: 1GbE
- OS: Windows 10
- .Net Framework: 4.6+
- Microsoft VC 2013 or higher

2.2 Prerequisites

Software's needed;

- Genesys administrator 8.5.2.x (On-premise Pure engage)
- Windows OS or Linux OS (Windows Server 2003/2008/2012 or Red Hat Enterprise Linux 5.5/6.x)
- AA Enterprise Client 11.3.x
- Microsoft Excel 2013 or 2016

Accounts/License needed;

- Genesys administrator license
- Genesys administrator extension (GAX) admin user credential
- AA Enterprise client V11 License (Bot Runner)

2.3 Security Measures

There are some security best practice recommendations that you may follow with your bot;

- It is not recommended to provide Genesys administrator user credential access to the windows User Account executing the Bots. Instead advisable to create credential vault feature and provide user as a consumer of the credential vault.
- It is recommended to update/change Genesys administrator user credential every quarter to ensure data security.

2.4 Disclaimers

Instructions: User/Bot should use Genesys administrator user credential stored in the credential vault only rather than hard coded, user variable or configuration file key values.

3. Getting Started

3.1 Skill Matrix

The functionality of the Bot has been divided into set of skills.

Below is an overview of how the task bots and metabots map to these skills:

Skill	Task Files	MetaBot Files
Open Genesys administrator extension (GAX) webpage, perform various user management tasks and export detailed reports	GenesysUserManagementTasks.atmx	No Metabot used
Integrating License using MetaBot Utility for Task Bot	GenesysUserManagementTasks.atmx	LicenseHelper.mbot

3.2 Installation Hierarchy

Once the bot is downloaded and installed, the installer creates the files in the folder structure as shown below.

Folder Structure on your Machine

Folder Structure	Description
<p><AA Application Path></p> <p>1. My Tasks</p> <p> 1.1. Bot Store</p> <p> 1.1.1. Perform Various User Mgmt Tasks On Genesys PureEngage - VIS Global Pty Ltd</p> <p> Error Folder</p> <p> • Logs</p>	<p><AA Application Path> is the location where AA files are stored on your machine</p> <p>1. My Tasks My Task Folder is the default directory where Bot Files are saved.</p> <p>1.1 Bot Store Bot Store Folder contains the Bot Name Folder which the installer creates while Installation of the Bot.</p> <p>1.1.1 Perform Various User Mgmt Tasks On Genesys PureEngage - VIS Global Pty Ltd This folder gets created by the installer and contains files and folders needed for the bot</p>

<ul style="list-style-type: none"> o Error logs Month-Day-Year Hour Min Sec.txt <ul style="list-style-type: none"> • Snapshots o Error Snap Month-Day-Year.png <ul style="list-style-type: none"> Input Folder <ul style="list-style-type: none"> • Configuration.txt • GenesysUserActivitiesReport.xlsx My Tasks <ul style="list-style-type: none"> • GenesysUserManagementTasks.atmx <p>2. My MetaBots</p> <p>LicenseHelper.mbot</p>	<p>execution.</p> <p>Error folder is where logs and snapshots of screens will be placed if something goes wrong with the bot during execution</p> <p>Input Folder is where the input files that the bot needs for execution of the use case is saved</p> <ul style="list-style-type: none"> • Configuration.txt is where the values need to be setup for the bot to run. • GenesysUserActivitiesReport.xlsx provides an example of the type of content that can be provided as an input to the bot. <p>My Tasks folder contains all the Developed Platform Source Code</p> <p>2. My MetaBots folder contains the Developed Metabots needed for the bot execution.</p>
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3.3 Quick Start

3.3.1 Setup

Step-1: Download Genesys Engage Extension software from Genesys help portal

Download URL: <https://docs.genesys.com/Documentation/OnPremises>

Step-2: Other document links;

Document URL: <https://docs.genesys.com/Documentation/GA/8.5.2/Dep/Welcome>

<https://docs.genesys.com/Documentation/GA/8.5.2/dev/Welcome>

Note: - After following above 2 Genesys administrator related software and document which you can setup/install in your server with the help of lab admin or document provided by Genesys. Also you can visit <https://help.genesys.com/> and search for more Genesys administrator related docs.

3.3.2 Configuration

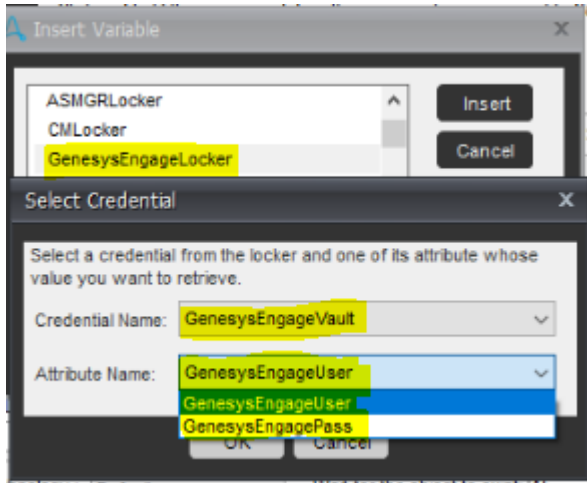
- **Locker, Credential vault creation and assigning consumer role to runner machine user;**

For the procedure, please follow Automation Anywhere provided document and create locker, credential vault with attributes as mentioned below for your reference

Locker Name= GenesysEngageLocker

Credential Name= GenesysEngageVault

Credential attributes name= GenesysEngageUser and GenesysEngagePass



○ **For External File –**

CREDENTIAL VARIABLES: Credential Variables to be mentioned in this Table				
Variable Name	Type	Mandator y	Purpose	Example Input
GenesysEngageLocker	Text	Yes	User has to provide same locker name as mentioned on Control room	NA
GenesysEngageVault	Text	Yes	User has to provide same credential name as mentioned on Control room	NA
GenesysEngageUser	Text	Yes	User has to provide same credential attribute name as mentioned on Control room	NA

GenesysEngagePass	Number and Text	Yes	User has to provide same credential attribute name as mentioned on Control room	NA
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INPUT VARIABLES: Input Variables to be mentioned in this Table				
Variable Name	Type	Mandator y	Purpose	Example Input
vAccessCode	Text	Yes	Used to store Access Code and has to provide to run bot	An example of the Input access code= 10126eab68e1ec30ff044d30cf34b.....
vBotName	Text	Yes	Used to store bot name	Example=Perform Various User Mgmt Tasks On Genesys PureEngage
vGenesysUsermanagementActivitiesReport	Text	Yes	Used to store Genesys Gax user management activities report excel sheet name	Example= GenesysUserActivitiesReport.xlsx
vGenesysEngageUrl	Url	Yes	Used to store Genesys Gax webpage url	Example url: https://GenesysIp:8080/gax/
vEmailID	Text	Yes	Used to store email id for sending mail	Example: Botadmin@visnet.in

<i>vErrorFolder</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store error folder path</i>	<i>Example= C:\Users\VIS\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Perform Various User Mgmt Tasks On Genesys PureEngage – Vis Global Pty Ltd\Error Folder</i>
<i>vErrorHandling</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store error status as true if any error occur</i>	<i>Example =true</i>
<i>vExportAddAgentLogincsv</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Export Add Agent Login csv file name</i>	<i>Example= ExportAddAgentLogin.csv</i>
<i>vExportAgentcsv</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Export Agent csv file name</i>	<i>Example= ExportAgent.csv</i>
<i>vExportAgentLogin</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Export Agent login status</i>	<i>Example= Yes/No</i>
<i>vExportExtension</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Export extension status</i>	<i>Example= Yes/No</i>
<i>vExportExtensionDNcsv</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Export extension DN csv file name</i>	<i>Example= ExportExtensionDN.csv</i>

<i>vExportPlaces</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Export places status</i>	<i>Example= Yes/No</i>
<i>vExportPlacescsv</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Export places csv file name</i>	<i>Example= ExportPlaces.csv</i>
<i>vExportUser</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Export user status</i>	<i>Example= Yes/No</i>
<i>vHighDelay</i>	<i>Number</i>	<i>Yes</i>	<i>Used for dynamic delay in task</i>	<i>Example= 8</i>
<i>vImportAddAgentLogincsv</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Import add agent login csv file name</i>	<i>Example= ImportAddAgentLogin.csv</i>
<i>vImportAgentcsv</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Import agent csv file name</i>	<i>Example= ImportAgent.csv</i>
<i>vImportAgentLogin</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Import agent login status</i>	<i>Example= Yes/No</i>

<i>vImportExtension</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Import extension status</i>	<i>Example= Yes/No</i>
<i>vImportExtensionDNcsv</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Import extension DN csv file name</i>	<i>Example= ImportExtensionDN.csv</i>
<i>vImportPlaces</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Import places status</i>	<i>Example= Yes/No</i>
<i>vImportPlacescsv</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Import places csv file name</i>	<i>Example= ImportPlaces.csv</i>
<i>vImportUser</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store Import user status</i>	<i>Example= Yes/No</i>
<i>vInputFolder</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store input folder path</i>	<i>Example= C:\Users\VIS\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Perform Various User Mgmt Tasks On Genesys PureEngage – Vis Global Pty Ltd \Input Folder</i>
<i>vLogFolder</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store log folder path</i>	<i>Example= C:\Users\VIS\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Perform Various User Mgmt Tasks On Genesys PureEngage – Vis Global Pty Ltd \Error Folder\Logs</i>

<i>vLowDelay</i>	<i>Number</i>	<i>Yes</i>	<i>Used for dynamic delay in task bot</i>	<i>Example = 2</i>
<i>vMidDelay</i>	<i>Number</i>	<i>Yes</i>	<i>Used for dynamic delay in task bot</i>	<i>Example= 4</i>
<i>vMsguse</i>	<i>Text</i>	<i>Yes</i>	<i>Used for dynamic message box</i>	<i>Example= True/ False</i>
<i>vLoop</i>	<i>Number</i>	<i>Yes</i>	<i>Used to store loop value</i>	<i>Example=3</i>
<i>vOutputFolder</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store output folder path</i>	<i>Example= C:\Users\VIS\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Perform Various User Mgmt Tasks On Genesys PureEngage – Vis Global Pty Ltd \Output Folder</i>
<i>vProjectFolder</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store project folder path</i>	<i>Example= C:\Users\VIS\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Perform Various User Mgmt Tasks On Genesys PureEngage – Vis Global Pty Ltd</i>
<i>vProjectName</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store project name</i>	<i>Example= Perform Various User Mgmt Tasks On Genesys PureEngage – Vis Global Pty Ltd</i>

<i>vRootFolder</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store configuration file path</i>	<i>Example= C:\Users\VIS\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Perform Various User Mgmt Tasks On Genesys PureEngage – Vis Global Pty Ltd \Input Folder\Configuration File.txt</i>
<i>vSheet1</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store excel file sheet name</i>	<i>Example= UserManagement Activity Reports</i>
<i>vSnapshotFolder</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store snapshot folder path</i>	<i>Example= C:\Users\VIS\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Perform Various User Mgmt Tasks On Genesys PureEngage – Vis Global Pty Ltd \Error Folder\Snapshots</i>
<i>vSystem</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store local machine user name</i>	<i>Example= VIS</i>
<i>vVendorName</i>	<i>Text</i>	<i>Yes</i>	<i>Used to store vendor name</i>	<i>Example= Vis Global Pty Ltd</i>

OUTPUT VARIABLES: Output Variables to be mentioned in this Table.				
Variable Name	Type	Mandatory	Purpose	Example Output
<i>vValidationOutput</i>	<i>Text</i>	<i>Yes</i>	<i>use to check whether license is still valid or not while running paid bot</i>	<i>True/False</i>

4. Reports

There are no Bot Insight Reports generated for this Bot

5. Logs

In case of Errors, Error Logs & Screenshots are generated within Error Folder (Highlighted below in yellow)

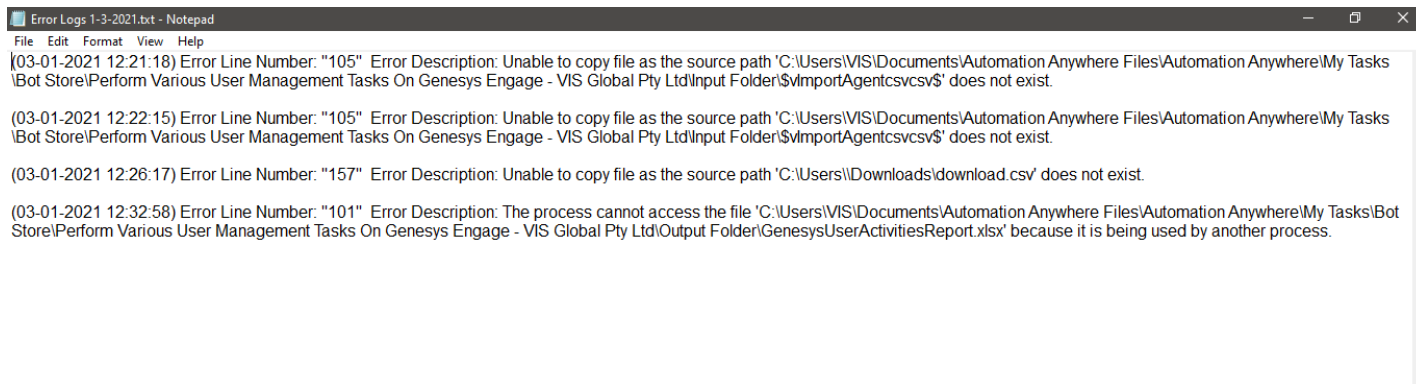
o My Tasks

- Bot Store
 - Bot Name
 - Error Folder
 - Logs (Folder)
 - o Error Logs Month-Day-Year.txt
 - Snapshots (Folder)
 - o Error Snap Month-Day-Year HourMinSec.png

Error Logs will contain the below information;

- Error Line Number
- Error Description
- Generated Timestamp

Example of Log File:



```
File Edit Format View Help
(03-01-2021 12:21:18) Error Line Number: "105" Error Description: Unable to copy file as the source path 'C:\Users\VIS\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Perform Various User Management Tasks On Genesys Engage - VIS Global Pty Ltd\Input Folder\ImportAgentcsvs$' does not exist.

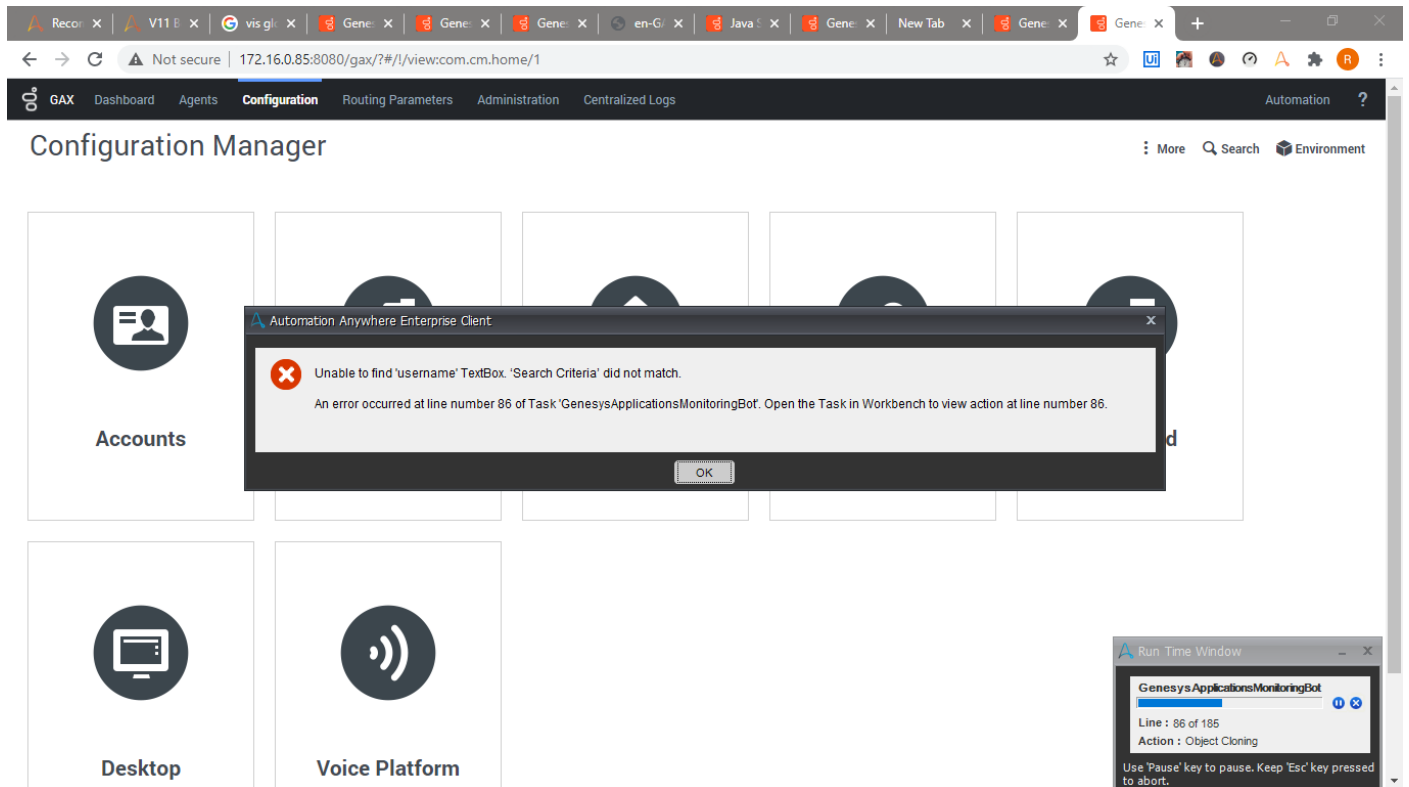
(03-01-2021 12:22:15) Error Line Number: "105" Error Description: Unable to copy file as the source path 'C:\Users\VIS\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Perform Various User Management Tasks On Genesys Engage - VIS Global Pty Ltd\Input Folder\ImportAgentcsvs$' does not exist.

(03-01-2021 12:26:17) Error Line Number: "157" Error Description: Unable to copy file as the source path 'C:\Users\Downloads\download.csv' does not exist.

(03-01-2021 12:32:58) Error Line Number: "101" Error Description: The process cannot access the file 'C:\Users\VIS\Documents\Automation Anywhere Files\Automation Anywhere\My Tasks\Bot Store\Perform Various User Management Tasks On Genesys Engage - VIS Global Pty Ltd\Output Folder\GenesysUserActivitiesReport.xlsx' because it is being used by another process.
```

Note: There are no Custom Logs generated for this Bot.

Example of Screenshot Generated Error File:



6. Troubleshooting & Support

6.1 Support

User can reach out to provided support email ID for the further setup, help desk and production support

Note: - Free bots and trial bots are currently not supported directly.

6.2 FAQs

Please get connect to our email for further or any type of supports.

Support Contact

vikul.furia@visglobal.com.au

ravindra.muduli@visglobal.com.au

Sales Contact

saurabh.burman@visglobal.com.au

arijit.sen@visglobal.com.au

Appendix A: Record of Changes

No.	Version Number	Date of Change	Author	Notes
1	1.0	28/12/2020	Ravindra Kumar	Version 1 Release

Appendix B: Acronyms

No.	Acronym	Description
1	AA	<i>Automation Anywhere</i>
2	CR	<i>Control room</i>
3	PC	<i>Personal Computer</i>
4	RAM	<i>Random Access Memory</i>
5	OS	<i>Operating System</i>
6	CSV	<i>Comma Separated File</i>
7	<i>Genesys Gax (Pure Engage)</i>	<i>Genesys Administrator Extension (Pure Engage)</i>
9	CR	<i>Credential Vault</i>
10	GB	<i>Gigabytes</i>

Appendix C: References

No.	Topic	Reference Link
1	System Requirements – Client hardware	https://docs.automationanywhere.com/bundle/enterprise-v11.3/page/enterprise/topics/aae-architecture-implementation/deployment-planning/requirements-server-hardware.html#Zj0vY2F0ZWdvcnkvZXhwbG9yZT9wPUV4cGxvcmU=
2	System Requirements – Client OS	https://docs.automationanywhere.com/bundle/enterprise-v11.3/page/enterprise/topics/aae-architecture-implementation/deployment-planning/requirements-operating-system-compatibility.html#Zj0vY2F0ZWdvcnkvZXhwbG9yZT9wPUV4cGxvcmU=
3	A people Community Site	https://apeople.automationanywhere.com/s/?language=en_US
4	Product Documentation portal	https://docs.automationanywhere.com/