

Spotlight Admin Guide - 6.42

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Introduction

The **Admin** tab in Spotlight is used to manage:

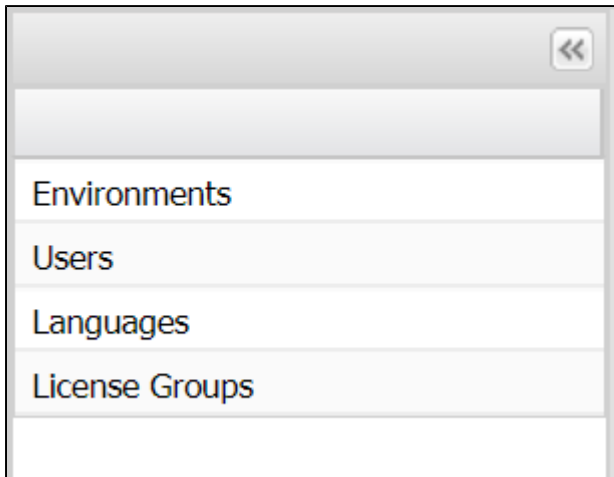
- Spotlight Environments
- Spotlight Users
- Languages
- SAM License Groups - when enabled

To access the Admin screen, select the **Admin** link in the top right-hand corner of any Spotlight screen.



NB: This section can only be accessed by Spotlight Admin Users.

The Admin screen displays four sections in the left navigation toolbar, which are used to access the individual components within Admin.



Users

The **Users** section of the Admin screen is used to **Add**, **Edit** and **Delete** Spotlight users.

Spotlight users are created in a Spotlight Environment, therefore if there are multiple Spotlight Environments, then a user of Spotlight will require to have a separate account to access each environment.

To view the details of a user:

- Select **Users**
- Select the **Environment Name**
- Select the **Name** of the user.

The upper section of the screen will display the user account details – **Name**, **Login**, **Email** & **Admin (Y/N)**.

A screenshot of the Admin screen showing user details. The 'Users' menu item is selected in the sidebar. The main area displays a table with columns: Environment, Name, Login, Email, and Administrator?. The 'Environment' column has a value 'DEMOSRV'. The 'Name' column has two values: 'Spotlight Loader' and 'Administrator'. The 'Login' column has values 'SpotlightLoader' and 'WIN-SDRUFQHQWV\Administrator'. The 'Email' column has a value 'gking111275@gmail.com'. The 'Administrator?' column has checkboxes, with the second one checked.

Environment	Name	Login	Email	Administrator?
DEMOSRV	Spotlight Loader	SpotlightLoader		<input type="checkbox"/>
	Administrator	WIN-SDRUFQHQWV\Administrator	gking111275@gmail.com	<input checked="" type="checkbox"/>

The lower section of the screen displays the users **Spotlight Permissions** and **Data Permissions**.

Spotlight Permissions	Data Permissions																								
<input checked="" type="checkbox"/> View Configuration <input checked="" type="checkbox"/> Configuration Package Execute <input checked="" type="checkbox"/> Baseline Management	<table> <thead> <tr> <th>Item Type</th><th>Allow?</th></tr> </thead> <tbody> <tr><td>Action Code</td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Alarm Condition</td><td><input checked="" type="checkbox"/></td></tr> <tr><td>App Template</td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Application</td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Business Attribute</td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Calling List</td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Campaign</td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Field</td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Filter</td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Folder</td><td><input checked="" type="checkbox"/></td></tr> <tr><td>Format</td><td><input checked="" type="checkbox"/></td></tr> </tbody> </table>	Item Type	Allow?	Action Code	<input checked="" type="checkbox"/>	Alarm Condition	<input checked="" type="checkbox"/>	App Template	<input checked="" type="checkbox"/>	Application	<input checked="" type="checkbox"/>	Business Attribute	<input checked="" type="checkbox"/>	Calling List	<input checked="" type="checkbox"/>	Campaign	<input checked="" type="checkbox"/>	Field	<input checked="" type="checkbox"/>	Filter	<input checked="" type="checkbox"/>	Folder	<input checked="" type="checkbox"/>	Format	<input checked="" type="checkbox"/>
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Format	<input checked="" type="checkbox"/>																								

Spotlight Permissions control whether the user can only view an environment and create **Configuration Packages**, or has access to the advanced features of **Configuration Package Execute**, **Baseline Management** and **License Reporting**

Data Permissions controls which item types (In CME) a user has access to within Spotlight.

Add User

To add a new user to Spotlight:

- Select **Add User** in the top right-hand corner of the screen.

				<input checked="" type="button" value="Add User"/> <input type="button" value="Remove User"/>
Name	Logon	Email	Administrator?	
Spotlight Loader	SpotlightLoader		<input type="checkbox"/>	
Admin	WIN-SDRLFQMKNV\Administrator		<input checked="" type="checkbox"/>	
Grant King	WIN-SDRLFQMKNV\gking	gking@test.com	<input checked="" type="checkbox"/>	

- The **Add User** window opens where the user data can be set.

Add User

Name:

Logon:

Email:

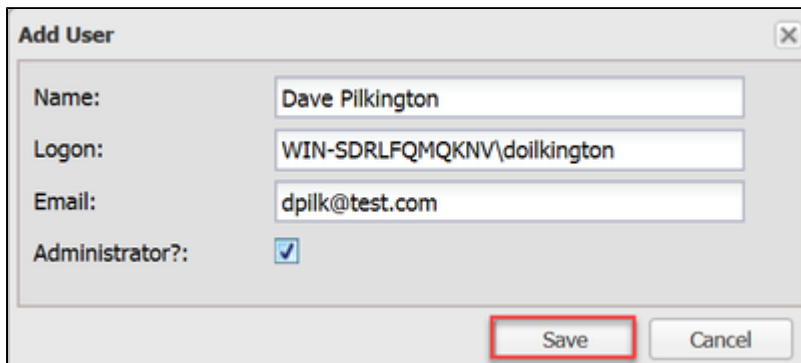
Administrator?:

☐

Save

Cancel

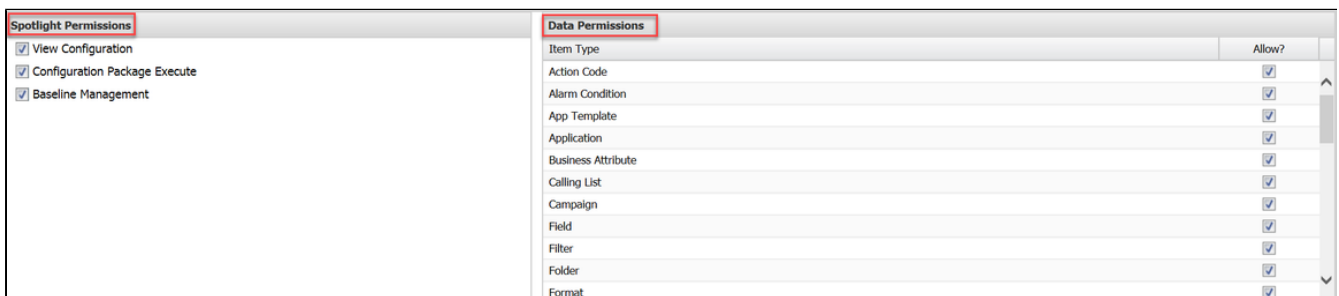
- Enter the following details for the user:
 - **Name** – Display name for the user
 - **Logon** – Server credentials used by Spotlight to authenticate the user. *The logon field should follow the format of: domain\domain username*
 - **Email** – email address used by the Spotlight watch list
 - **Administrator** – tick the check box if the user should have access to the **Admin** tab
- To create the user, select **Save**



The 'Add User' dialog box contains the following fields and controls:

- Name:** Dave Pilkington
- Logon:** WIN-SDRLFQMKNV\doilkington
- Email:** dpilk@test.com
- Administrator?:** ☒
- Buttons:** 'Save' (highlighted with a red box) and 'Cancel'.

- Next, alter the **Spotlight Permissions** and **Data Permissions** for the new user by selecting or deselecting the relevant tick boxes



The permissions configuration window is divided into two main sections:

- Spotlight Permissions:**
 - ☒ View Configuration
 - ☒ Configuration Package Execute
 - ☒ Baseline Management
- Data Permissions:**

Item Type	Allow?
Action Code	<input checked="" type="checkbox"/>
Alarm Condition	<input checked="" type="checkbox"/>
App Template	<input checked="" type="checkbox"/>
Application	<input checked="" type="checkbox"/>
Business Attribute	<input checked="" type="checkbox"/>
Calling List	<input checked="" type="checkbox"/>
Campaign	<input checked="" type="checkbox"/>
Field	<input checked="" type="checkbox"/>
Filter	<input checked="" type="checkbox"/>
Folder	<input checked="" type="checkbox"/>
Format	<input checked="" type="checkbox"/>

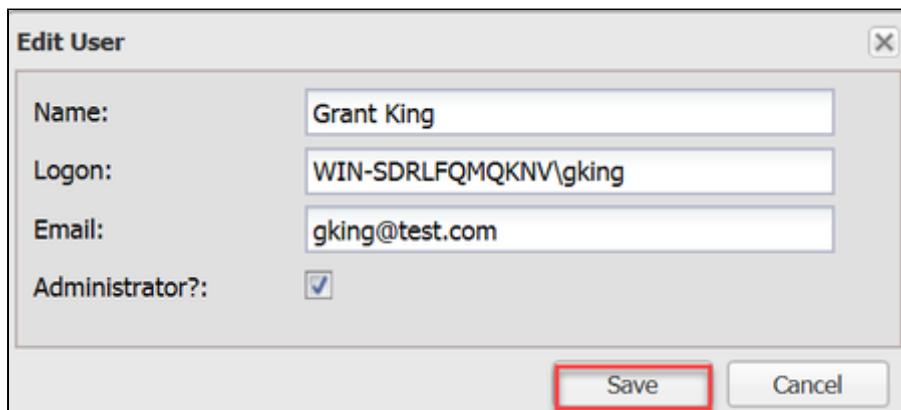
Edit User

To edit a user in Spotlight:

- Double click the **Name** of the user to edit

➕ Add User ➖ Remove User			
Name	Logon	Email	Administrator?
Spotlight Loader	SpotlightLoader		<input type="checkbox"/>
Admin	WIN-SDRLFQMKNV\Administrator		<input checked="" type="checkbox"/>
Grant King	WIN-SDRLFQMKNV\gking	gking@test.com	<input checked="" type="checkbox"/>

- The **Name**, **Logon**, **Email** and **Administrator** fields now become editable, alter them as required.
- When complete, select **Save**



The 'Edit User' dialog box contains the following fields and controls:

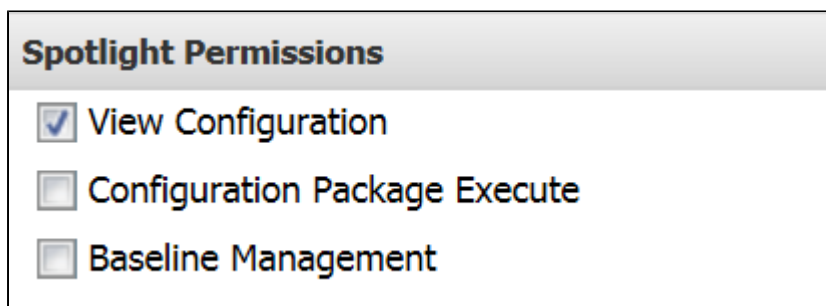
- Name:** Text field containing 'Grant King'
- Logon:** Text field containing 'WIN-SDRLFQMKNV\gking'
- Email:** Text field containing 'gking@test.com'
- Administrator?:** Check box that is checked (indicated by a blue checkmark icon).
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right. The 'Save' button is highlighted with a red rectangle.

You can also alter the **Spotlight Permissions** and **Data Permissions** for a user by selecting or deselecting the relevant tick boxes. These changes will be auto saved

Spotlight Permissions control the level of access that a Spotlight User has to the selected environment as follows -

- **View Configuration**- user can view the Dashboard, view configuration and create a Configuration Package.
- **Configuration Package Execute**- user can also deploy Configuration Packages.
- **Baseline Management**- user can create a baseline and restore a system using a Baseline.
- **License Reporting**- user can access and run the Spotlight License report.

Select or deselect the check boxes to determine the Spotlight Permissions for the selected user



The 'Spotlight Permissions' dialog box contains the following controls:

- View Configuration:** Check box that is checked (indicated by a blue checkmark icon).
- Configuration Package Execute:** Check box that is unchecked.
- Baseline Management:** Check box that is unchecked.

Data Permissions control which item types a user has access to within Spotlight.

Select or deselect the check boxes to determine which **Item Types** a Spotlight User can view

Data Permissions	
Item Type	Allow?
Action Code	<input checked="" type="checkbox"/>
Alarm Condition	<input checked="" type="checkbox"/>
App Template	<input checked="" type="checkbox"/>
Application	<input checked="" type="checkbox"/>
Business Attribute	<input checked="" type="checkbox"/>
Calling List	<input checked="" type="checkbox"/>
Campaign	<input checked="" type="checkbox"/>
Field	<input checked="" type="checkbox"/>
Filter	<input checked="" type="checkbox"/>
Folder	<input checked="" type="checkbox"/>
Format	<input checked="" type="checkbox"/>

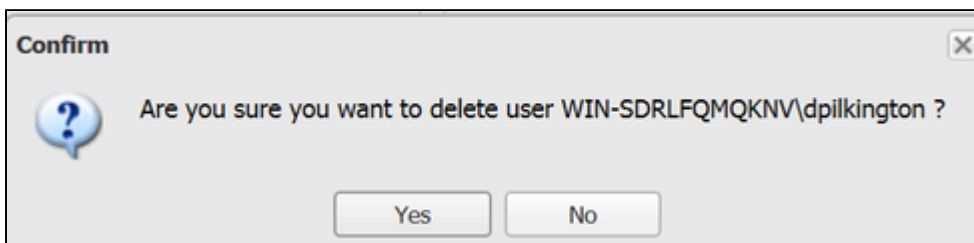
Delete User

A user can be deleted from Spotlight, to do so:

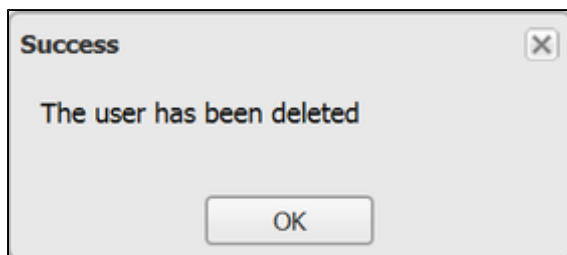
- Select their **Name**
- Selecting **Remove User**

				<input type="button" value="Add User"/> <input checked="" type="button" value="Remove User"/>
Name	Logon	Email	Administrator?	
Spotlight Loader	SpotlightLoader		<input type="checkbox"/>	
Admin	WIN-SDRLFQMKNV\Administrator		<input checked="" type="checkbox"/>	
Grant King	WIN-SDRLFQMKNV\gking	gking@test.com	<input checked="" type="checkbox"/>	
Dave Pilkington	WIN-SDRLFQMKNV\dpilkington	dpilk@test.com	<input type="checkbox"/>	

- You will receive a confirmation message asking if you wish to proceed with the removal
- Select **Yes** to continue or **No** to cancel.



- If Yes was selected, you will receive a success message confirming that the user has been deleted



Environments

The **Environments** tab of **Admin** is used to configure the URLs of Spotlight Reports.

Spotlight Reports are accessed through an external reporting tool – **Microsoft Reporting Services (SSRS)**.

When Spotlight is first installed, the URL of SSRS is configured, however this section of Admin, can be used to adjust the URL or add new URL links.

NB: Changes made in Spotlight to URLs simply adjust the links available when selecting the Reporting tab in Spotlight. These changes do not change SSRS.

To add a report URL:



- Select **Environments**
- Select the name of an **Environment**
- Select **Add**



- Enter a Reports **Name**
- Enter the **URL address**
- Select **Save**

General

Name: DEV

Reports		 Add  Remove
Name	Address	
DEV	http://192.168.67.128/Reports	
DEV 2nd LINK	http://192.168.67.128/Reports/dev2	

Existing URL addresses can be amended, to do so:

- Double clicking the existing **URL**
- Alter the **Address**
- Select **Save**

Name



DEV

PROD

QA

General

Name: DEV

Reports		 Add  Remove
Name	Address	
DEV	http://192.168.67.128/Reports	
DEV 2nd LINK	http://192.168.67.128/Reports/dev	✕

Save

To remove an existing URL:

- Select the **URL**
- Select **Remove**
- Select **Save**

Name



DEV

PROD

QA

General

Name: DEV

Reports		 Add  Remove
Name	Address	
DEV	http://192.168.67.128/Reports	
DEV 2nd LINK	✕ http://192.168.67.128/Reports/dev	

Save

Languages

Spotlight supports multiple languages, and also allows admin users to import their own language files and adjust existing language files.

Further details on multi language support can be found in the [Spotlight Localisation Guide](#)

License Groups

The **License Group** tab can be used to create line of business groups that are used in the **Spotlight License Report**. These user defined groups can be based on **Tenant/Folders** or Agent Groups. License data is then displayed separately in the License Report for each of these groups.

Line of Business reporting is only available for the following license types

- CIMPlatform
- InboundVoice
- GenesysInfoMart
- GenesysInteractiveInsights
- HAGenesysInfoMart
- HACIMPlatform
- HAVoice
- InteractionWorkspace
- AgentConnector
- FrameworkStandaloneCTI
- HASIP
- SIPInteraction

With **License Groups**, users have the ability to:

- Create
- Modify
- Duplicate
- Change Group Type
- Rename
- Delete

To access these features:

- Select **License Groups**
- Select an **Environment** from the dropdown

Environment: DEMOSRV

Group

Environments

Users

Languages

License Groups

Create

To create a new group:

- Right click in the blank area beneath **Group** and select **Create Group**

Environment: DEMOSRV

Group

Create Group...

- From the drop down, select a **Group Type** - Folder/Tenant or Agent Group
- Enter a **Group Name**
- Select **Create Group**

Create Group

Group Type: Folder\Tenant

Enter new name:: Tenant

Create Group Cancel

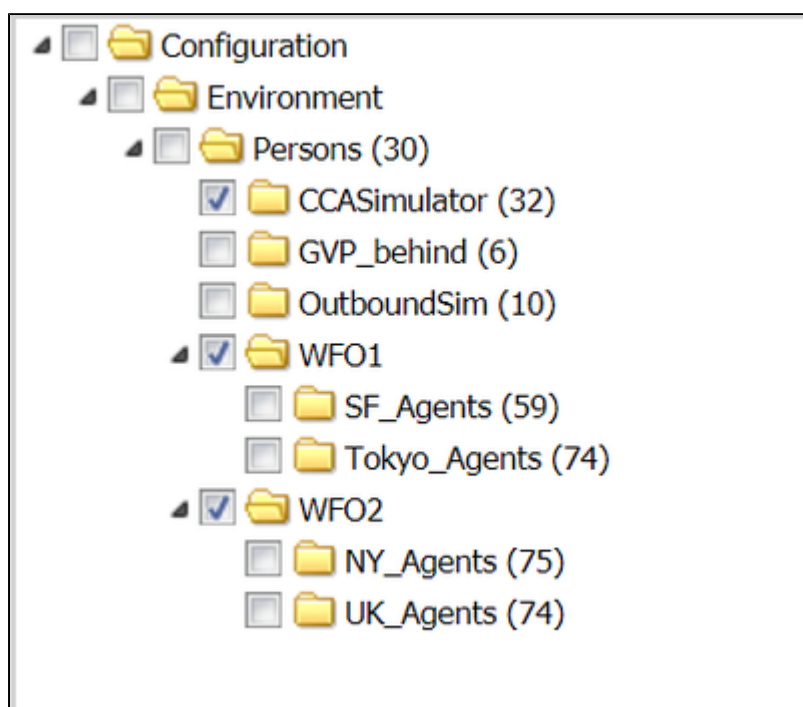
- The group will appear in the left pane, select it

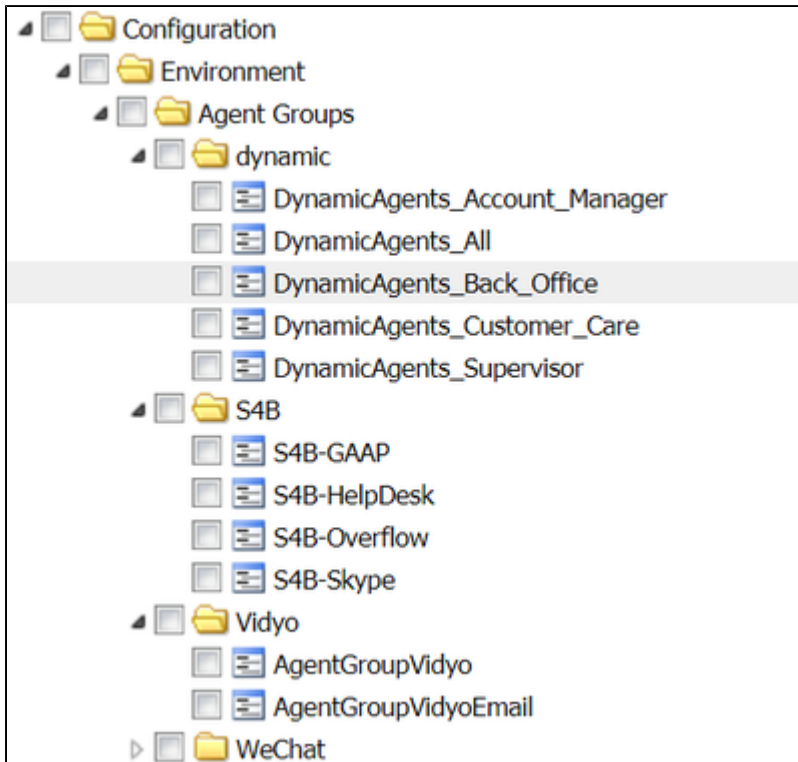
Environment: DEMOSRV

Group

Tenant

- The right pane can now be used to select Tenants or Person Folders (If Folder/Tenant group type) or Agent Groups (if Agent Group group type), to add to the group by selecting the relevant check box.





- All selections made are auto saved

NB: In order for the License Report to utilize the new groups, the Spotlight Loader and SLS loader require to be restarted

Modify

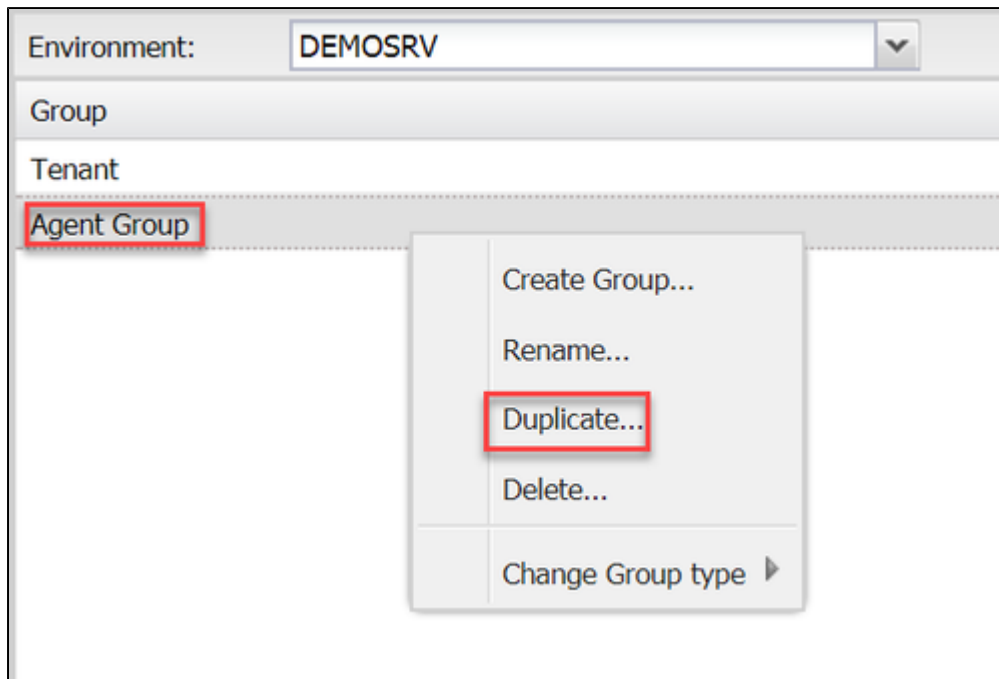
To modify an existing group:

- Select the Group Name
- Adjust the relevant check boxes

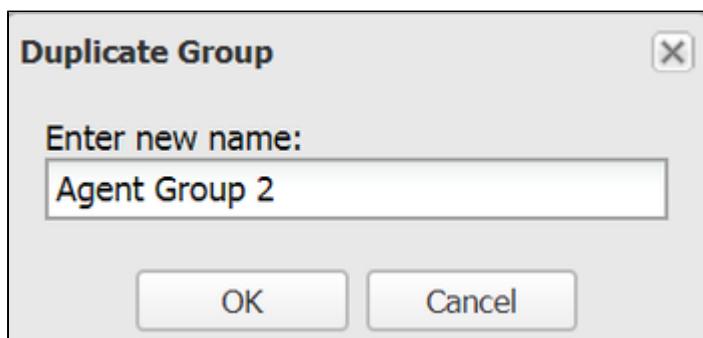
Duplicate

To duplicate a group:

- Right click the group and select **Rename**



- Enter a new name for the duplicate group and then select **OK**

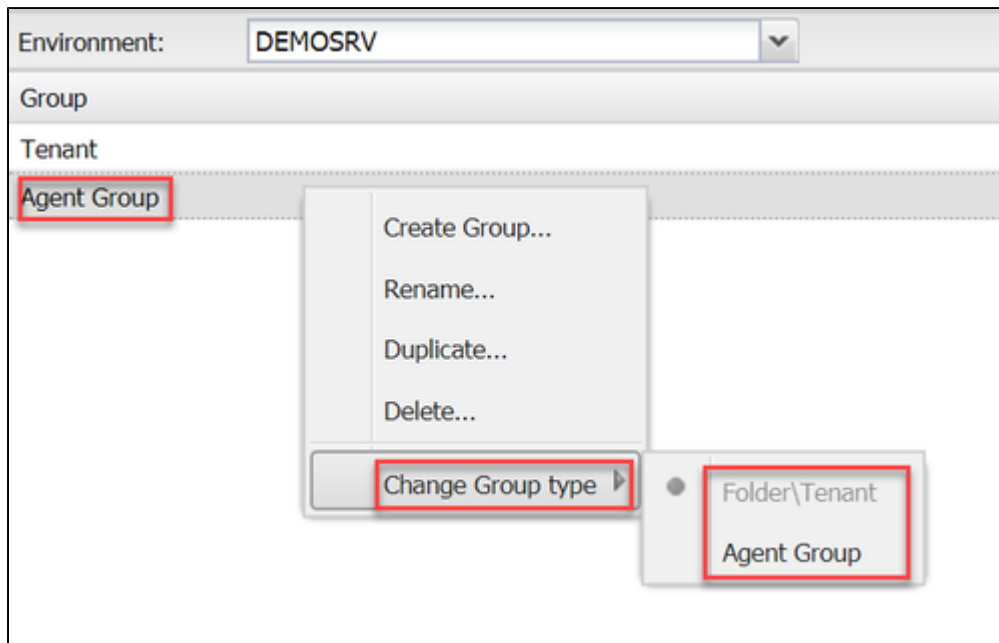


- The configuration of the group will match the existing group. Adjust as necessary

Change Group Type

To change the type of existing groups:

- Right click the group and select **Change Group Type**
- Select the new **Group Type**
- The current group type is greyed out



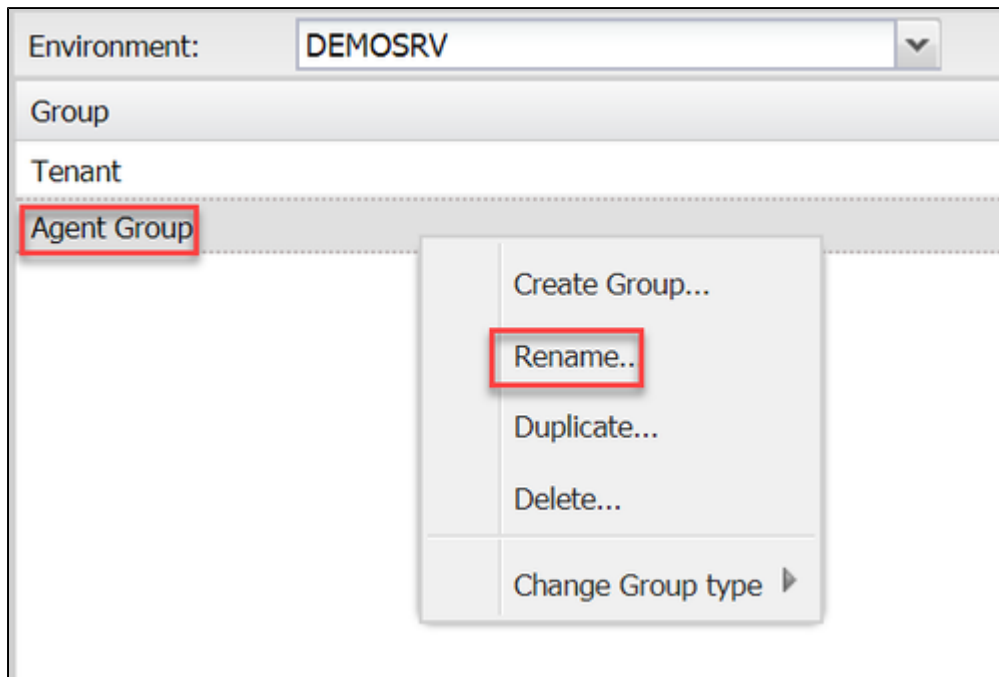
- Reconfigure the group by selecting the relevant check boxes, depending on what type has now been selected

NB: Currently, all groups must be of the same group type.

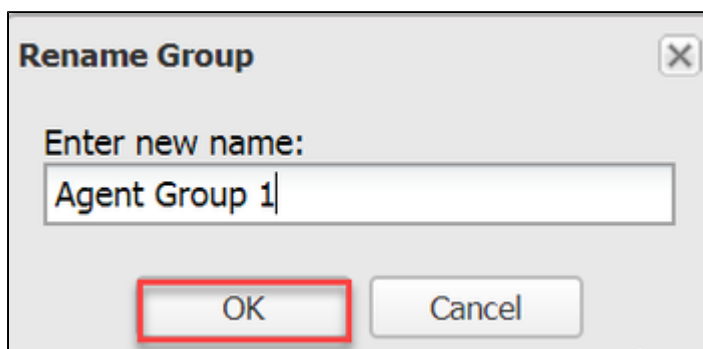
Rename

To rename a group:

- Right click the group and select **Rename**



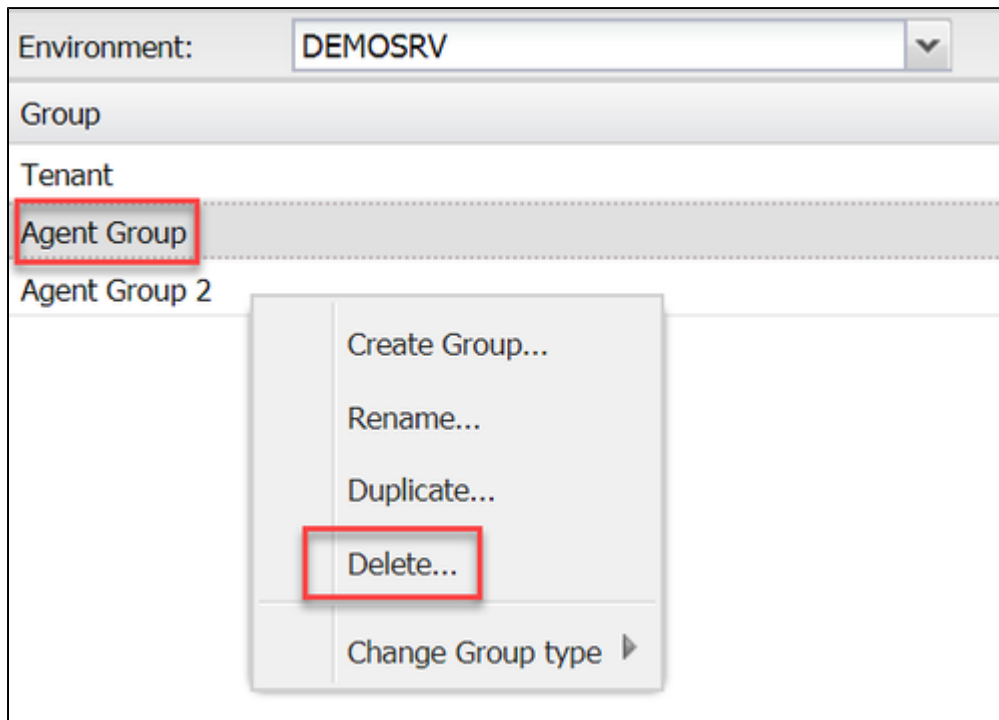
- In the new window, enter a new name and then select **OK**
- The current group type is greyed out



Delete

To delete a group:

- Right click the group and select **Delete**



- Select **Yes** to continue or **No** to cancel

