

Roles & Permissions (RBAC)

“ Genesys Cloud uses a Role-Based Access Control (RBAC) model. Permissions are the individual "keys" that unlock specific actions. Roles are the "keyrings" — pre-packaged bundles of permissions assigned to users. Roles also control licensing: the license assigned to a user corresponds to the most expensive permission in any role they hold.

Navigation Path

Task	Path
Manage roles and permissions	Admin → People & Permissions → Roles/Permissions
Assign roles to a user	Admin → People & Permissions → People → select user → More → Edit Person → Roles tab
View permissions assigned to a user	Admin → People & Permissions → People → select user → More → Edit Person → View Permissions tab

1. How RBAC Works in Genesys Cloud

Organization

└ User

└ Role A (e.g., Employee) → permissions bundle

└ Role B (e.g., User/Agent) → permissions bundle

└ Role C (e.g., Supervisor) → permissions bundle

└ Each role scoped to a Division (optional)

Concept	Description
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Permission	A single granular toggle — e.g., <code>Routing > Queue > Edit</code> . Genesys Cloud has over 2,000 individual permissions.
Role	A named bundle of permissions. Assigned to users.
Division	An optional scope applied to a role assignment. Limits the role's power to objects in that division only. See the Divisions & Access Control page.
License	Automatically determined by the most expensive permission in any role assigned to the user. You don't choose a license directly — it follows the role.

“ **⏏ Permission changes can take up to 5 minutes to take effect** after being saved.

2. The Golden Rule of Default Roles

“ **⚠ Never modify the permissions of a default role directly.**

Instead:

1. Find the default role closest to what you need
2. Click **More** → **Copy Role**
3. Rename the copy
4. Add or remove permissions from the copy

Why: Default roles receive automatic permission updates from Genesys as new features are released. If you modify a default role, you may lose those updates — or receive them unexpectedly. Keeping your custom logic in copied roles protects you from both problems.

To restore a default role to its original state: `Admin → Roles/Permissions → find role → Edit Role → Restore Default Role`

“ **⚠ Restoring a default role removes any permissions you added and restores any you deleted.** There is no partial restore.

3. Default Roles Reference

Foundation Roles (All Orgs)

Role	Auto-Assigned?	Can Be Removed?	Purpose
Employee	<input type="checkbox"/> Yes — all users	<input type="checkbox"/> No	Baseline role. Allows basic system access: read org data, edit own profile, use Collaborate (chat). Does NOT allow receiving ACD queue calls.
Admin	<input type="checkbox"/> Yes — org creator only	<input type="checkbox"/> Yes (from others)	Full org control. Manages global settings, invites users, assigns roles. Automatically assigned to whoever creates the organization.
Master Admin	<input type="checkbox"/> No	<input type="checkbox"/> Yes	All permissions needed to administer the entire organization including contact center. Commonly assigned to partner/vendor support users who need full access. Has all Admin permissions plus contact center administrative rights.
People Admin	<input type="checkbox"/> No	<input type="checkbox"/> Yes	HR-style user management. Create, edit, and delete users; manage role and permission assignments. Only exists in organizations created after June 1, 2022.

Contact Center Roles

Role	Purpose	Key Requirement
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User	The agent role. Required for anyone who needs to be a member of an ACD queue and receive routed interactions. Without this role, a user cannot be added to a queue.	Must be assigned alongside Employee
Supervisor	Floor manager. Monitor live calls, manage agent queues, view real-time dashboards, handle wrap-up codes, view Queue and Agent dashboards and reports.	Requires CX license
Outbound Admin	Manages outbound dialing campaigns, contact lists, DNC (Do Not Call) lists, and call analysis rules.	Requires Outbound license
Outbound Agent	Frontline role for outbound campaign agents. Gives the agent the specific interface to receive outbound dialing interactions.	Requires Outbound license
Quality Administrator	Manages encryption keys, recording policies, evaluation forms, and calibrations. Can be scoped by queue using permission conditions.	Requires CX 3
Quality Evaluator	Listens to recordings, fills out evaluation forms, annotates recordings, provides coaching feedback.	Requires CX 3
Script Designer	Builds the agent scripting pop-up screens that display customer data and talking points during interactions.	—
Planner Admin	Workforce Management role. Handles forecasting, agent scheduling, and adherence monitoring.	Requires WFM license
Wallboard User	Minimal permissions. Designed for a dedicated display computer showing real-time queue statistics on a wall screen.	—

Telephony & Technical Roles

Role	Purpose
Telephony Admin	Manages telephony infrastructure: Sites, Edge devices, phone stations, extension pools, and call routing. Focuses on the "pipes."
Genesys Cloud Voice Admin	For customers using Genesys as their carrier. Allows purchasing phone numbers, managing number inventory, and viewing voice billing.

Role	Purpose
Integration Server	Technical role used by Bridge Connectors (local software) to communicate securely with the Genesys Cloud API.
SCIM Integration	Provides the API permissions needed for System for Cross-domain Identity Management — used to auto-sync users from Azure AD, Okta, or similar IdPs.
Developer	For technical staff building custom integrations and external applications against the Genesys Cloud API.

Communication Roles

Role	Purpose
Communicate User	Allows a user to have a phone extension and make/receive standard business calls. Non-ACD only — not for queue agents.
Communicate Admin	Manages the non-contact-center telephony side: user-to-user calling, company-wide alerting.
Trusted External User	Minimum-permission guest role for users from a different Genesys Cloud organization granted temporary access for support or collaboration. Only available in orgs created on or after May 17, 2017.

“ **Legacy role names:** If your organization was created before 2020, you may see old role names. The current names are: `User` (formerly PureCloud User / Engage User) and `Supervisor` (formerly PureCloud Supervisor / Engage Supervisor).

4. Roles and Licensing

“ **△** The license assigned to a user is determined by the **most expensive permission** in any role they hold. You do not manually assign licenses — they follow the roles.

Example	Result
User has only Employee role	Collaborate license (lowest cost)

Example	Result
User has Employee + Communicate User	Communicate license
User has Employee + User (Agent)	CX 1 or higher (depends on queue config)
User has Quality Evaluator	CX 3 license triggered
Master Admin assigned to a digital-only org	May trigger full CX 2/CX 3 voice license — requires manual permission removal

“ If you run a **digital-only organization** (no voice), be careful with the Master Admin role. Its default permissions include voice-related rights that will trigger a full CX 2 or CX 3 license. Remove the voice permissions from Master Admin or use a custom role instead.

5. Custom Roles

When no default role fits your need exactly, create a custom role:

Navigation: Admin → Roles/Permissions → Add Role

Step	Action
1	Click Add Role (build from scratch) or find a similar default role and click More → Copy Role
2	Enter a name and optional description
3	Click the Permissions tab and select the checkboxes for each permission needed
4	Click Save

Best practices:

Practice	Reason
Copy an existing role rather than building from scratch	Faster, less risk of missing required permissions
Keep the number of roles minimal	Simpler to audit and maintain
Modify existing roles rather than creating new ones when possible	Reduces role sprawl
Only create a new role when a subset of users genuinely needs different permissions	Avoids unnecessary complexity

6. Assigning Roles to a User

Navigation: Admin → People & Permissions → People → select user → More → Edit Person → Roles tab

Step	Action
1	Under View , select All to see all available roles
2	Search for the role name
3	Click the toggle in the Assigned column to enable it
4	Optionally, click the Divisions box to scope the role to specific divisions
5	Click Save

“ ” You can also assign roles in bulk from the role side: Admin → Roles/Permissions → find role → More → Change Membership .

7. Minimum Role Set for a Standard Agent

Every agent in an ACD contact center needs at minimum:

Role	Why
Employee	Auto-assigned. Cannot be removed. Baseline access.
User	Required to be a member of an ACD queue and receive routed interactions.

Without the **User** role, you cannot add the person to a queue.

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