GENESYS™

Genesys Administrator Extension Help

Configuration Manager

12/18/2025

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Configuration Manager

Configuration Manager is where you set up and maintain the configuration objects in your contact center. These objects, also referred to as Configuration Database objects, contain the data that Genesys applications and solutions require to operate in a particular environment.

About Configuration Objects

Configuration objects, also referred to as *Configuration Database objects*, contain the data that Genesys applications and solutions require to operate in a particular environment. You create and maintain the objects in Configuration Manager, and they are stored in the Configuration Database.

To view and manage configuration objects for a specific Tenant, click the cube icon and enter the name of the Tenant in the **Tenant Directory** field. By default, Configuration Manager lists configuration objects for the Tenant to which your user account belongs. When viewing objects by Tenant, if you choose to create a new object, that object is created in the directory for that Tenant.

Important

- The **Tenant Directory** field is not shown in a single-Tenant environment.

- Because most objects in the Configuration Database mirror physical objects in your contact center (for example, switches, agents, and installed applications), this document uses an initial capital letter for configuration objects. For example, the word switch appears in lowercase when it refers to a physical switch in your contact center, but it is capitalized when it refers to the configuration object that mirrors your physical switch. Similarly, the word application appears in lowercase when it refers to a physical installation in your contact center, but it is capitalized when it refers to the configuration object that mirrors the installed program.

Object Hierarchy

In Genesys Administrator Extension, objects are stored in folders, usually with one object type per folder.

To help you better manage your configuration environment, you can create a hierarchy by manually creating any combination of the following:

- Folders and subfolders—A folder contains objects of one type. For example, for Host objects, you might choose to create subfolders that group hosts by location.

- Business Units/Sites—Unlike folders, Business Units and Sites can contain objects of different types. For example, all configuration objects related to a specific site for your business can be grouped into a Site,

which then contains configuration objects within folders and subfolders.

In addition, the following objects include their parent objects as part of their hierarchy:

- Campaign Groups—Hierarchy includes Campaigns.
- IVR Ports—Hierarchy includes IVRs.
- Business Attribute Values—Hierarchy includes Business Attributes.
- Agent Logins—Hierarchy includes Switches.
- DNs—Hierarchy includes Switches.

Genesys Administrator Extension displays a navigation path (a set of breadcrumbs) that shows you where the displayed objects reside in your hierarchy. This path appears with all lists of objects, and is located directly above the list. You can click any element of this path to go quickly to that element.

Some object types might only exist under the root tenant or a Business Unit/Site. If you are viewing objects by Tenant, you might not see the following objects:

- Alarm Conditions
- Application Templates
- Applications
- Hosts
- Solutions
- Switching Offices

Required Permissions

The minimum permissions required to perform a task in Genesys Administrator Extension depend on the task. You must also be granted appropriate Role privileges to perform specific tasks on an object or group of objects.

Permission	Description	Prerequisites
Read	- To view a particular object, you must have Read permission for that object. - In Configuration Manager, you can view the object type. If you do not have Read permission for the object, you cannot see it in Configuration Manager. - In list views, you can view the following button: **Edit**. - You can click an object to view its details.	None

Permission	Description	Prerequisites
Create	• To create an object under a particular folder, you must have `Create` permission for that folder. The person who creates an object receives `Full Control` permissions for that object. Other accounts have the same access permissions for a newly created object as they do for the folder in which the object is created. • In list views, you can view the following buttons: **New**, **Clone**, and **Move To**. • In object detail views, you can view the following buttons: **Clone** and **Move to**. You can also view the following tabs: **Options**, **Permissions**, and **Dependencies**.	Read
Update	• To modify a particular object, you must have `Update` permission for that object. • In list views, you can view the following button: **Enable** or **Disable**. • In object detail views, you can view the following buttons: **Enable** or **Disable**, **Save**, and **Apply**.	Read
Delete	• To delete a particular object, you must have `Delete` permission for that object. • In list views, you can view the following button: **Delete**. • In object detail views, you can view the following button: **Delete**.	Read

Read Only Mode and Emergency Mode

The Read Only Mode and the Emergency Mode features enable you to restrict users from making changes to the Configuration Database during a Configuration Server maintenance. An appropriate

error message is displayed for any GAX user who attempts to update or save any configuration objects while the Configuration Server is in one of these two modes. Only Super Administrators can update the objects while the Configuration Server is in the Emergency Mode. For more information on the Read Only Mode and Emergency Mode, see Read Only Mode and Emergency Mode.

Common Object Properties

Almost all configuration objects have the following configuration properties and elements:

- **Name** property
- **State Enabled** property
- **Options** tab
- **Permissions** tab
- **Dependencies** tab

Name Property

Names uniquely identify objects within a certain range. Therefore, the name, which can be up to 255 characters, is a required parameter for most types of objects. The exceptions are:

- DNs and Agent Logins—Their unique numbers and codes identify them within a Switch.
- IVR Ports—Their unique port numbers identify them within an IVR.

The way you name objects in your environment is important. Consistent and sensible naming conventions make your configuration environment easier to understand and faster to browse, leading to a more maintainable and usable configuration.

> ### Important
> Although Genesys Administrator Extension supports the full character set in object names, the use of certain characters can cause problems in the behavior of other Genesys applications. Therefore, avoid spaces, dashes, periods, or special characters in object names. Consider using underscores where you might normally use spaces or dashes.

The names you set for some types of objects must match the names of the entities that those objects represent elsewhere in an environment. For example, the names of Hosts must match the names given to the computers they represent in the data network environment.

State Enabled Property

If checked, indicates that the entity represented by an object is in regular operating condition and

can be used without any restrictions. If not checked, indicates that the entity represented by an object is being used in a non-production environment. Customer interactions cannot be directed to this target, even if operating information indicates that this object is available.

Disabling a folder or an object that is a parent to other objects also disables all objects within the folder or all child objects of that parent object.

For example:

- Disabling a Switch disables all DNs and Agent Logins defined within this Switch.
- Disabling an Agent Group folder disables all Agent Groups configured within this folder.

However, if you disable a group of objects (for example, an Agent Group), the individual members of this group (in this example, Agents) remain enabled.

Options Tab

> ### Important
>
> Application and Application Template objects have an additional tab, **Application Options**, to set configuration options specific to these objects. These options are set, updated, or deleted in the same manner as regular options.

To view the options for an object, select an object and click the **Options** tab. Configuration options are listed in their sections, and you can expand or collapse a section to show or hide the options in the section. By default, all sections are collapsed when the **Options** (or **Application Options**) tab is opened, but you can click **Expand All** to expand (or collapse) all sections.

The particular section is also listed for each option in the Name column and in the Section column. This is particularly helpful in those cases where there are more options in one section than can be displayed on a single screen, in that you can never lose track of the section in which an option resides.

You can manage (add, update, remove) options for that object, either one-by-one, or in bulk, using the import/export functionality.

One-by-one:

- Add an option **[+] Show steps**

  1. Select an object, and click the **Options** tab.

  2. Click **Add**.

  3. Enter information in the **Section**, **Key**, and **Value** fields.

> **Important**
>
> The maximum limit for the `Section` and `Key` fields is 255 characters. The `Value` field can have the number of characters specified in the `var_char_max_limit` parameter in the `gax.properties` file.

4. Click **OK**.

5. Do one of the following:

   - Click **Save** to accept the changes and return to the object list.
   - Click **Apply** to accept the changes and remain in the **Options** tab.
   - Click **Cancel** to discard the changes.

- Update an option **[+] Show steps**

  1. Select an object, and click the **Options** tab.

  2. Select an option.

  3. Edit information in the **Section**, **Key**, and **Value** fields.

  4. Click **OK**.

  5. Perform one of the following actions:

     - Click **Save** to accept the changes and return to the object list.
     - Click **Apply** to accept the changes and remain in the **Options** tab.
     - Click **Cancel** to discard the changes.

- Delete an option **[+] Show steps**

  1. Select an object, and click the **Options** tab.

  2. Select an option.

  3. Click **Delete**.

  4. Perform one of the following actions:

     - Click **Save** to accept the changes and return to the object list.
     - Click **Apply** to accept the changes and remain in the **Options** tab.
     - Click **Cancel** to discard the changes.

In bulk:

- You can click **More** to import or export options. See Bulk Provisioning of Configuration Options for more information.

You can also click **More** to **Copy** selected application options and then **Paste** them in the options of any configuration object.

> ## Important
>
> - The **Section** and **Key** fields are required, and the values for these fields must be unique in the environment.
>
> - You can click **More** to import or export options. See the **Importing/Exporting Data** section in the Overview tab, above, for more information.

Permissions Tab

The **Permissions** tab lists the Access Groups and Users that have been configured explicitly with permissions for this object. When you are setting permissions, it is normally performed with the User(s) or Access Group(s) for which you want to grant access. This feature improves the manner in which permissions are set, and the scope is limited to managing permissions for a single database object.

For additional instructions about granting, modifying, and removing permissions, refer to the *Genesys Security Deployment Guide*.

> ## Important
>
> Some configuration objects, such as Tenants and Folders, are parent objects to one or more child objects. When you access the **Permissions** tab for these parent objects, you can use the following additional options to set permissions:
>
> - **Propagate** check box—If **Propagate** is checked, the permission is propagated to every child object under this parent object. If **Propagate** is not checked, the permission is removed from every child object under this parent object, unless the permission has been modified in the child object.
>
> - **Replace Recursively** button—If **Replace Recursively** is clicked, the permissions of every child object are removed and replaced with permissions from the parent object.

You can perform the following actions:

Changing Members

[+] Show procedure

1. Select an object, and click the **Permissions** tab.

2. Click **Add User** or **Add Access Group**.

3. A new window appears to enable you to select a User or Access Group. You can find Users or Access Groups by using one of the following methods:

   - By Hierarchy—Click **Show Hierarchy** to see a list of all Users or Access Groups in your

environment, sorted by hierarchy.

- By List—Click **Show List** to see a list of all Users or Access Groups in your environment.

- By Quick Filter—Enter the name or partial name of the User or Access Group in the **Quick Filter** field.

4. Perform one of the following actions:

   - Click **Save** to accept the changes and return to the object list.

   - Click **Apply** to accept the changes and remain in the **Permissions** tab.

   - Click **Cancel** to discard the changes.

Changing Access Permissions

[+] Click here to reveal procedure

1. Select an object, and click the **Permissions** tab.

2. You can change any or all of the following options:

Property	Description
Create (C)	You can create objects of this type.
Read (R)	You can view details for this object.
Update (U)	You can change, or modify, this object.
Delete (D)	You can delete this object.
Execute (X)	You can deploy, start, stop, or otherwise activate this object.
Read Object Permissions (RP)	You can view access permissions granted for this object.
Change Object Permissions (CP)	You can change access permissions granted for this object.

3. Perform one of the following actions:

   - Click **Save** to accept the changes and return to the object list.

   - Click **Apply** to accept the changes and remain in the **Permissions** tab.

   - Click **Cancel** to discard the changes.

Removing Access Permissions

[+] Click here to reveal procedure

1. Select an object, and click the **Permissions** tab.

2. Select an Access Group or User for which to remove permissions.

3. Click **Remove**.

4. A dialog box appears to confirm deletion. Perform one of the following actions:

   - Click **Save** to accept the changes and return to the object list.

- Click **Apply** to accept the changes and remain in the **Permissions** tab.

- Click **Cancel** to discard the changes.

Dependencies Tab

The **Dependencies** tab displays a list of all objects that are dependent on this object, and by what property they are dependent.

For example, consider a scenario in which an Application object, **AppA**, is running on a Host object, **HostA**. **AppA** is dependent on **HostA** to function, so the **Dependencies** tab for **HostA** shows **AppA** as a dependent object, with the property being **Host**.

For all Users and Agents, the **Dependencies** tab also lists the Roles to which they are assigned.

Click any object in the list to view the properties of that dependent object. You can then modify its properties or create another object of the same type.

Common Object Property Operations

The following are operations that apply to most object properties, regardless of type. Where these operations differ for particular types, the alternate method is specified in the type-specific section later in this Help file. Additional operations are also described in the type-specific sections.

Expand/Collapse All

If available, this option allows you to **Expand** or **Collapse** all of the objects in the current view.

Add/Remove

To add an object, click **Add** to browse for an object to add to the currently selected property tab. To remove an object(s), select it and click **Remove**.

Copy/Paste

If you have the required permissions, you can click **More** to access the **Copy** and **Paste** functions. After selecting and copying an object(s), you can paste it in any location that supports an association with the copied object(s).

Security Certificates

Genesys supports the optional use of the Transport Layer Security (TLS) protocol to secure data exchange between Genesys components. The TLS protocol is implemented using security certificates, which must be configured in the Host objects and the Application objects representing these components.

> ### Important
>
> Before configuring secure data exchange, make sure that certificates are installed on the host computers on which the Genesys components run, and that the certificate information is available to you.

For detailed information and instructions for deploying TLS, refer to the "Secure Connections" section of the *Genesys Security Deployment Guide*.