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Contact Center Advisor and Workforce Advisor Administrator User's Guide

Base Object Configuration

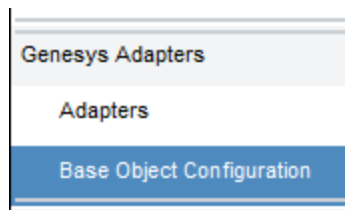
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Base Object Configuration

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Administration Module Navigation



Base Object Configuration link in the Administration Module Navigation Pane

The screenshot shows the link to the **Base Object Configuration** page on the Administration module navigation pane.

Access Permissions

Visibility of the agent groups and queues on the **Base Object Configuration** page is determined by the tenants to which the administrator has access. Note that the access permission is determined only at the tenant level. If the administrator has access to a given tenant, all the objects under that tenant are displayed in the **Base Object Configuration** page, irrespective of whether the administrator has access to individual objects in it. For an administrator to be able to view objects to publish in the **Base Object Configuration** page, either the user, or the user's access group, must be granted at least Read access permission to the tenants under which the administrator will be publishing the objects.

Configuring Genesys Objects

Statistics distribution is handled automatically by the Data Manager. The associations that display on the **Base Object Configuration** page are no longer tied to a selected adapter, but instead represent a global configuration for CCAdv/WA. For more information, see [Performance Management Advisors Deployment Guide](#).

Starting in release 8.5.0, you must deploy the Contact Center Advisor application (including XML Generator) and configure the Genesys metric sources before you can use the **Base Object Configuration** page in the Administration module. Data manager requests no statistics for pre-configured objects until the CCAdv module, XML Generator, and Genesys metric data sources are deployed and working.

On the **Base Object Configuration** page, you can:

- configure objects (queues and agent groups):
 - assign objects to filters on the **Base Object to Filter Mapping** tab

- assign filters to an object on the **Mapping to Base Object** tab

Important



Objects, such as queues or agent groups, display on the **Base Object Configuration** page irrespective of the state of those objects (enabled or disabled) in the Genesys Configuration Server. For example, if an ACD queue is disabled in Genesys Administrator Extension (GAX), that queue will still display on the **Base Object Configuration** page in the Advisors administration module. Restarting Advisors Platform has no effect; disabled queues or agent groups always display on the **Base Object Configuration** page.

- identify and filter objects by object type
- view the count of configured objects
- search each listbox

You require Read access to one or more tenants to use the **Base Object Configuration** page. You see only agent groups and queues in the **Base Object Configuration** page for the tenant(s) to which you have Read access permission.

The **Base Object Configuration** page prevents contradictory configuration. For example, if you select **No Filter** for an object, and later attempt to assign a filter, you receive an error message. You must de-select **No Filter** before a filter can be assigned to that object.

Filter categorization is not applicable for interaction queue statistics. **No Filter** is the only option you can successfully apply to interaction queues. If you attempt to combine filters with an interaction queue, the filters are discarded and the **No Filter** option is automatically selected again.

For detailed information about the filters and objects that display on the **Base Object Configuration** page, see [Data Manager content](#) in the *Performance Management Advisors Deployment Guide*.

Working with Filters on the Base Object Configuration Page

You can map filters to base objects on the **Base Object to Filter Mapping** and **Mapping to Base Object** tabs to segment a selected queue or agent group into one or more application or agent groups. The filters that are specified in the [Advisors Business Attributes section](#) in Genesys Configuration Server display on the **Base Object Configuration** page.

On the CCAdv dashboard, each filtered combination displays on a separate line. For example, if you select a queue, you can then use filter selection to achieve one of the following results:

1. If you select **No Filter** and save the No Filter/queue combination, you create an unfiltered application object.
2. If you select a specific filter and save the filter/queue combination, you create a filtered application object.

All application-level metrics are automatically filtered in the Stat Server based on the configured filtering criteria. Statistic values are reported for the filter conditions that are satisfied. For example, if the filter expression is "Agents in a Not Ready state with a reason code of Break", then only agents who satisfy that filter condition are considered when reporting the statistic value. These types of filters are applied to *all* metrics; therefore, your filter needs to be applicable to all or most metrics of a particular object type. If there are metrics that you want to exclude from the filter, then go to the **Report Metrics** administration page and select the **Exclude Base Object Filter** check box for those metrics. (Any metric that is excluded from the base object configuration

filter is shown on a separate line as an unfiltered metric for the selected agent group or queue.)

You can use this method to segment the queue into multiple application line items on the CCAdv/WA dashboard. For example, you might have filters that divide the queues into segments based on the service that is provided by the agents in those queues. Another example is the use of filters to segment the queues based on the call type. Typically, Stat Server filters are specified in terms of the call-level attached data, for which Stat Server can count the statistic values when the specific filter condition is satisfied. For more information about the filter expression syntax that you can use with Stat Server, consult the [Stat Server User's Guide](#).

If you select multiple filters, the result is multiple segments.

In addition, both tabs on the **Base Object Configuration** page include a **Filters** panel with which you can refine the list of filters and objects you view on the page. For example, if you want to view only filters that are assigned to objects, select the box beside **Selected** under **Filter** and ensure the box beside **Unselected** is not checked. The list of object filters now shows only filters that have been assigned to objects. Unassigned filters are hidden.

The **Filters** panel also includes a **Search** field. Use the **Search** field to quickly find a filter or object by typing its name in the field and clicking the icon beside the field.

Procedure: Map Objects to a Filter

Purpose: On the **Base Object to Filter Mapping** tab, you select a filter and map objects to it. Use this procedure to quickly assign multiple objects to one filter. If you select **No Filter** for an object, and later attempt to assign a filter, the system prevents you from proceeding. You must de-select **No Filter** before a filter can be assigned to that object.

Steps

1. Open the **Base Object to Filter Mapping** tab.
2. Select a filter.
The list of available agent groups and queues displays in the pane to the right.
The list of filters and available objects is configured in the Genesys Configuration Server. If you do not see a filter or object that you require, contact your system administrator. Object visibility is controlled by permissions.
3. Click the checkbox beside an object to select it and assign it to the filter.
4. After you have selected the objects to assign to the filter, click **Save** to save the assignments or click **Cancel** to discard the assignments.

Procedure: Map Filters to an Object

Purpose: On the **Mapping to Base Object** tab, you can select an object and map filters to it. Use this procedure to quickly assign multiple filters to an object, and to discover what filters are assigned to an object.

Steps

1. Open the **Mapping to Base Object** tab.
2. Select an object from the list of available agent groups or queues.
The list of relevant filters displays in the pane to the right. Filters that are already assigned to the selected object have a checkmark beside the filter name.
The list of filters and available objects is configured in the Genesys Configuration Server. If you do not see a filter or object that you require, contact your system administrator. Object visibility is controlled by permissions.
3. Click the checkbox beside a filter to select it and assign it to the object.
4. After you have selected the filters to assign to the object, click **Save** to save the assignments or click **Cancel** to discard the assignments.