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Deployment Guide

Installing the Plug-in for Interaction Workspace

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Installing the Plug-in for Interaction Workspace

The Genesys Web Engagement Plug-in for Interaction Workspace allows you to enable chat and web callback engagement features in Interaction Workspace. See [Genesys Web Engagement Plug-in for Interaction Workspace Help](#) for details.

To install this plug-in, complete the following procedures:

1. [Installing the Plug-in for Interaction Workspace](#)
2. [Importing the Plug-in for Interaction Workspace Template](#)
3. [Adding a Connection to the Backend Server](#) if you are following the [Standalone](#) deployment scenario. If you are following the [Clustering](#) deployment scenario, complete [Adding a Connection to the Load Balancer for the Backend Servers](#).
4. [Configuring Role-Based Access Control](#)
5. Genesys Web Engagement can also work with agents who are Team Leads. For details about how to configure Team Leads, see the following topics in the Interaction Workspace Deployment Guide:
 - [Procedure: Enabling agents to be Team Leads](#)
 - [Monitoring Chat Interactions](#)

Installing the Plug-in for Interaction Workspace

Prerequisites

- Your environment includes Interaction Workspace. See [Genesys environment prerequisites](#) for compliant versions. For more information about installing Interaction Workspace, refer to the [Interaction Workspace Deployment Guide](#).

Start

1. In your installation package, locate and double-click the **setup.exe** file.
2. Click **Next**. The **Select Installed Application** screen appears.
3. Select your Interaction Workspace application.
4. Click **Next**. The **Ready to Install** screen appears.
5. Click **Install**. The Genesys Installation Wizard indicates it is performing the requested operation for the Genesys Web Engagement Plug-in for Interaction Workspace. When through, the **Installation Complete** screen appears.
6. Click **Finish** to complete your installation. As a result of the installation, the following files are copied to the Interaction Workspace installation directory:

- InteractionWorkspace\Genesyslab.Desktop.Modules.WebEngagement.dll
- InteractionWorkspace\Genesyslab.Desktop.Modules.WebEngagement.module-config
- InteractionWorkspace\Newtonsoft.Json.Net35.dll

End

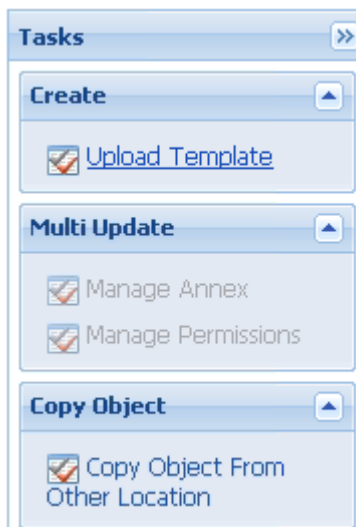
Importing the Plug-in for Interaction Workspace Template

Prerequisites

- You completed [Installing the Plug-in for Interaction Workspace](#)

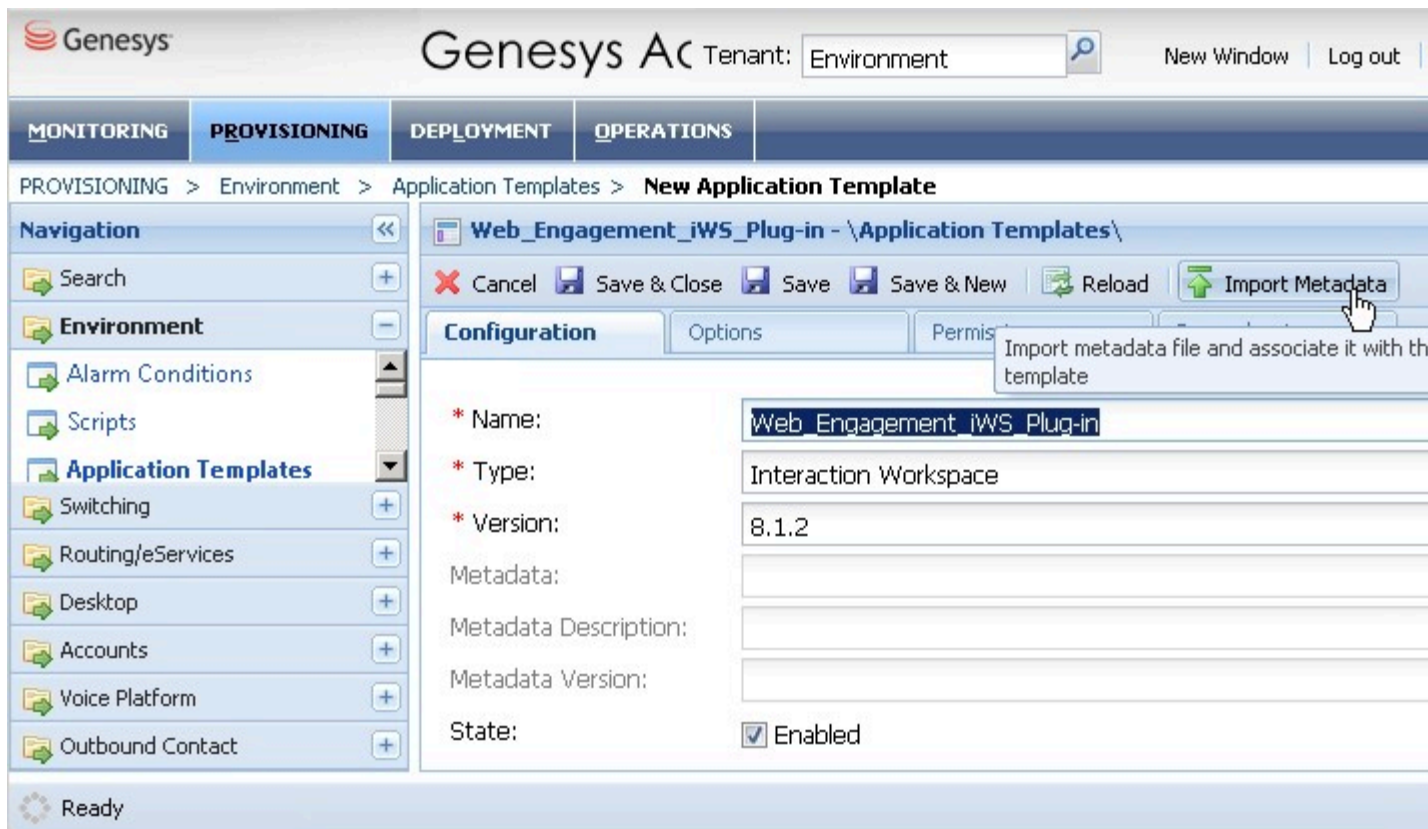
Start

1. In Genesys Administrator, navigate to **Provisioning > Environment > Application Templates**.
2. In the **Tasks** panel, click '**Upload Template**'.



Upload Template link in the Tasks panel

3. In the **Click 'Add' and choose application template (APD) file to import** window, click **Add**.
4. Browse to the **Web_Engagement_iWS_Plug-in.apd** file. The **Configuration** tab for the new template opens.
5. Click **Import Metadata**.



Click **Import Metadata**.

6. Select the **Web_Engagement_iWS_Plug-in.xml** metadata file and click **Open**. The metadata fields in the **Configuration** tab are now filled.
7. Click **Save & Close**.

End

Adding a Connection to the Backend Server

Prerequisites

- You completed [Importing the Plug-in for Interaction Workspace Template](#)
- You are following the **Standalone** deployment scenario and need to add a connection to a single Backend Server.

Start

1. In Genesys Administrator, navigate to **Provisioning > Environment > Applications**, select the Interaction Workspace application, and click **Edit...**
2. In the Connections section, click **Add**. The **Browse Applications** window opens.
3. Select the Web Engagement Backend Server application and click **OK**. The Backend Server is added to

the list of Connections.

4. Click **Save & Close**.

End

Adding a Connection to the Load Balancer for the Backend Servers

Prerequisites

- You completed [Importing the Plug-in for Interaction Workspace Template](#)
- You are following the [Clustering](#) deployment scenario and need to add a connection to the load balancer for the Backend Servers.

Start

1. In Genesys Administrator, navigate to **Provisioning > Environment > Applications**, select the Interaction Workspace application, and click **Edit...**
2. Select the **Options** tab and click **New**.
3. Set the following values:
 - **Location:** Options
 - **Section:** settings
 - **Name:** loadbalancer
 - **Value:** The address of your load balancer for the Backend Servers — for example, <http://198.51.100.12:8000>.
4. Click **OK**. The option is added to the **[settings]** section.
5. Click **Save & Close**.

End

Configuring Role-Based Access Control

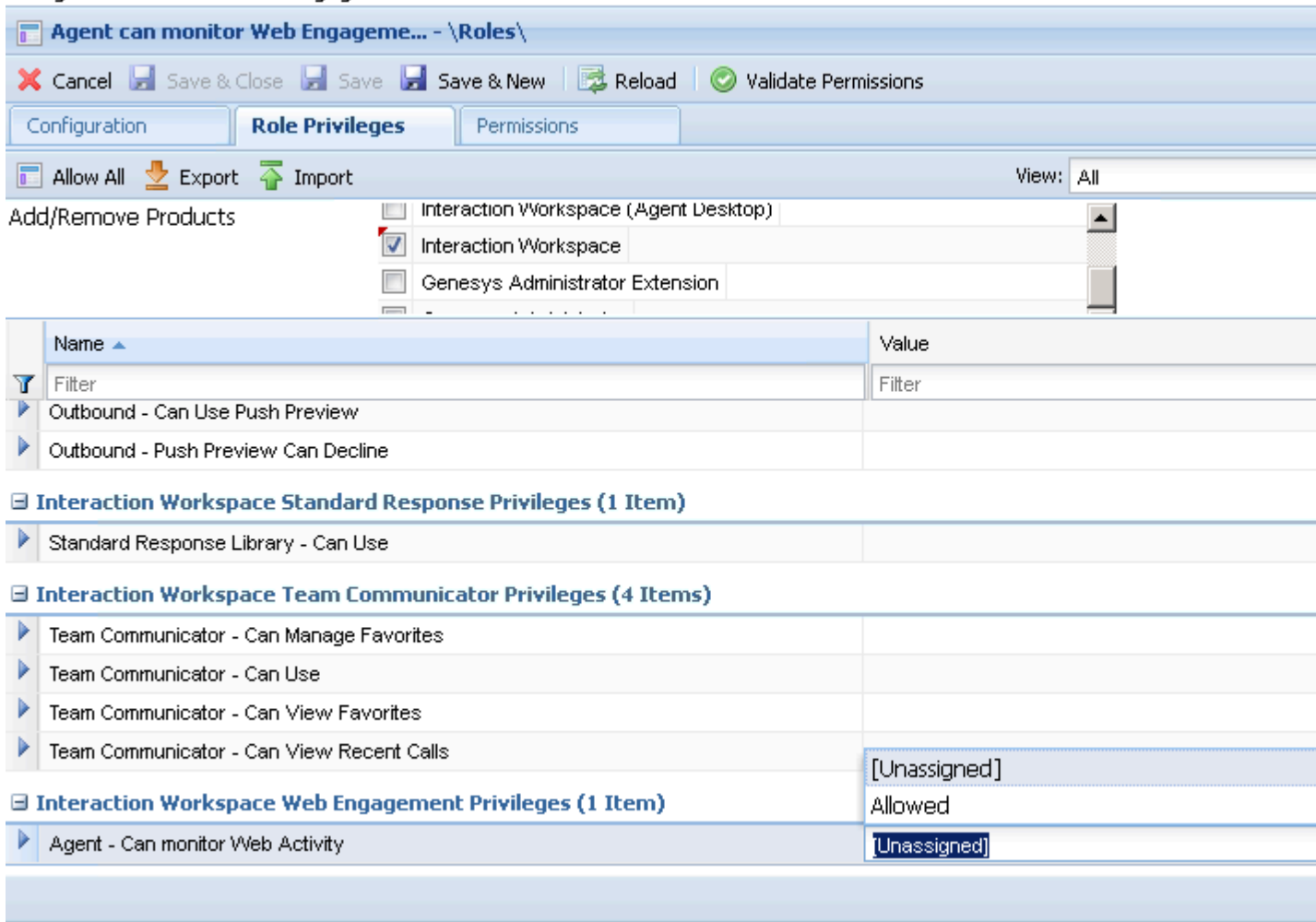
Complete this procedure to allow specific users or groups to manage Web Engagement in Interaction Workspace.

Prerequisites

- You completed [Importing the Plug-in for Interaction Workspace Template](#)

Start

1. In Genesys Administrator, navigate to **Provisioning > Accounts > Roles**.
2. Edit or create a Role responsible for managing Web Engagement in Interaction Workspace. For instance, create the Agent can Monitor Web Engagement role by clicking the **New** button.
3. Select the **Role Privileges** tab.
4. In the **Add/Remove Products** top panel, enable Interaction Workspace and expand the Interaction Workspace Web Engagement Privileges section.
5. Set the Allowed value for the **Agent - Can Monitor Web Activity** option.



Select Allowed

6. In the Members section of the **Configuration** tab, add the users or groups who should get this role.
7. Click **Save & close**.

End

Next Steps

- [Installing the Plug-in for Genesys Administrator Extension](#)