

GENESYS

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Deployment Guide

Installing the Plug-in for Interaction Workspace

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.

- 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.
- 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

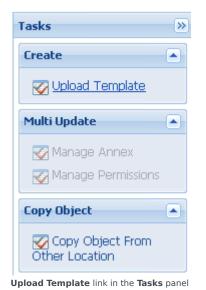
End

Importing the Plug-in for Interaction Workspace Template

Prerequisites

• You completed Installing the Plug-in for Interaction Workspace

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



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

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		15
PROVISIONING > Environment >	Application Templates > New A	pplication Template
Navigation	Web_Engagement_iW	S_Plug-in - \Application Templates\
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潯 Environment	Configuration Op	tions Permis Import metadata file and associate it with th
Alarm Conditions		template
📑 Scripts	* Name:	Web_Engagement_iWS_Plug-in
Application Templates	Type:	Interaction Workspace
😝 Switching	 Version: 	8.1.2
Routing/eServices	+) Metadata:	
😝 Desktop	+	
😝 Accounts	+ Metadata Description:	
S Voice Platform	+ Metadata Version:	
Soutbound Contact	+ State:	🔽 Enabled
🔅 Ready		

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.

- 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

- 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.

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📄 Agent can monitor Web Engageme \Roles\							
💢 Cancel 🚽 Save & Close 🚽 Save 🚽 Save & New 🛛 🔀 Reload 🛛 📀 Validate Permissions							
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Name 🔺				Value			
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Outbound - Can Use Push Preview							
Outbound - Push Preview Can Decline							
Interaction Workspace Standard Response Privileges (1 Item)							
	Standard Response Library - Can Us						
Interaction Workspace Team Communicator Privileges (4 Items)							
	Team Communicator - Can Manage F						
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	Team Communicator - Can View Recent Calls			[Upperiapped]			
Interaction Workspace Web Engagement Privileges (1 Item)			[Unassigned] Allowed				
	Agent - Can monitor Web Activity			[Unassigned]			

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