

GENESYS

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Deployment Guide

Installing the Plug-in for Workspace Desktop Edition

4/25/2025

Installing the Plug-in for Workspace Desktop Edition

The Genesys Web Engagement Plug-in for Workspace Desktop Edition allows you to enable chat and web callback engagement features in Workspace Desktop Edition. See Genesys Web Engagement Plug-in for Workspace Desktop Edition Help for details.

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

- 1. Installing the Plug-in for Workspace Desktop Edition
- 2. Importing the Plug-in for Workspace Desktop Edition Template
- 3. Adding a Connection to the Web Engagement Cluster.
- 4. Adding a Connection to the Web Engagement Cluster using a load balancer option (an alternative approach to Adding a Connection to the Web Engagement Cluster).
- 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 Workspace Desktop Edition Deployment Guide:
 - Procedure: Enabling agents to be Team Leads
 - Monitoring Chat Interactions

Installing the Plug-in for Workspace Desktop Edition

Prerequisites

• Your environment includes Workspace Desktop Edition. See Genesys environment prerequisites for compliant versions. For more information about installing Workspace Desktop Edition, refer to the Workspace Desktop Edition 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 Workspace Desktop Edition 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 Workspace Desktop Edition. 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 Workspace Desktop Edition installation directory:

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

End

Importing the Plug-in for Workspace Desktop Edition Template

Prerequisites

• You completed Installing the Plug-in for Workspace Desktop Edition

Start

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

Tasks	>>
Create	
🐼 Upload Template	
Multi Update	
Manage Annex 🐼 Manage Permissions	
Copy Object	
Copy Object From Other Location	

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 *GWE_WDE_Plug-in.apd* file located in the **Templates** folder in your installation package. The **Configuration** tab for the new template opens.
- 5. Click Import Metadata.

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📑 Alarm Conditions				template
🗔 Scripts		* Name:	Web_Engagement_WDE_Plug-in	
Application Templates		* Туре:	Interaction Workspace	
Applications		* Version:	8.5.0	
- Hosts		Metadata:		
Solutions		Metadata Description:		

- 6. Select the **GWE_WDE_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 Web Engagement Cluster

Prerequisites

• You completed Importing the Plug-in for Workspace Desktop Edition Template

Start

- 1. In Genesys Administrator, navigate to **Provisioning > Environment > Applications**, select the Workspace Desktop Edition application, and click **Edit...**.
- 2. In the Connections section, click Add. The Browse Applications window opens.
- 3. Select the Web Engagement Cluster application and click **OK**. The cluster is added to the list of Connections.
- 4. Click Save & Close.

End

Adding a Connection to the Web Engagement Cluster using a load balancer option

(This is an alternative approach to Adding a Connection to the Web Engagement Cluster.)

Prerequisites

- You completed Importing the Plug-in for Workspace Desktop Edition Template
- Your Workspace Desktop Edition application already has a connection to an application cluster other than the Web Engagement Cluster.

Start

- 1. In Genesys Administrator, navigate to **Provisioning > Environment > Applications**, select the Workspace Desktop Edition 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 Web Engagement Cluster 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 Workspace Desktop Edition.

Prerequisites

• You completed Importing the Plug-in for Workspace Desktop Edition Template

Start

- 1. In Genesys Administrator, navigate to **Provisioning > Accounts > Roles**.
- 2. Edit or create a Role responsible for managing Web Engagement in Workspace Desktop Edition. 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 Workspace Desktop Edition and expand the Workspace Desktop Edition Web Engagement Privileges section.
- 5. Set the Allowed value for the **Agent Can Monitor Web Activity** option.

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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

• Tuning Role-Based Access in Genesys Administrator