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Deployment Guide

Installing the Plug-in for Workspace Desktop Edition

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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.
5. 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

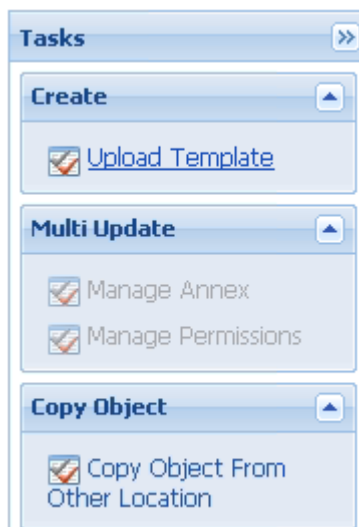
Importing the Plug-in for Workspace Desktop Edition Template

Prerequisites

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

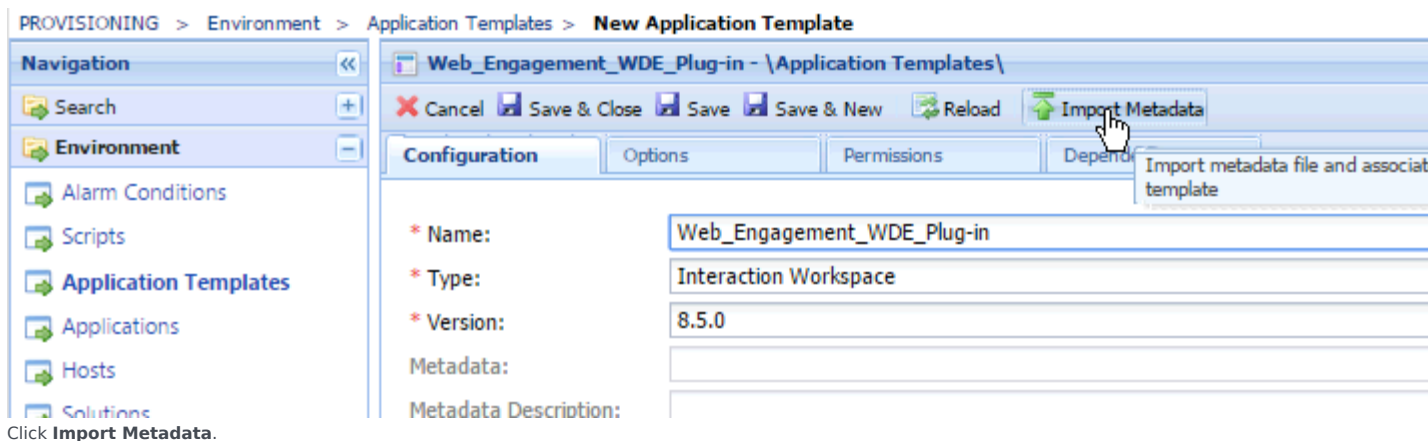
Start

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



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**.



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

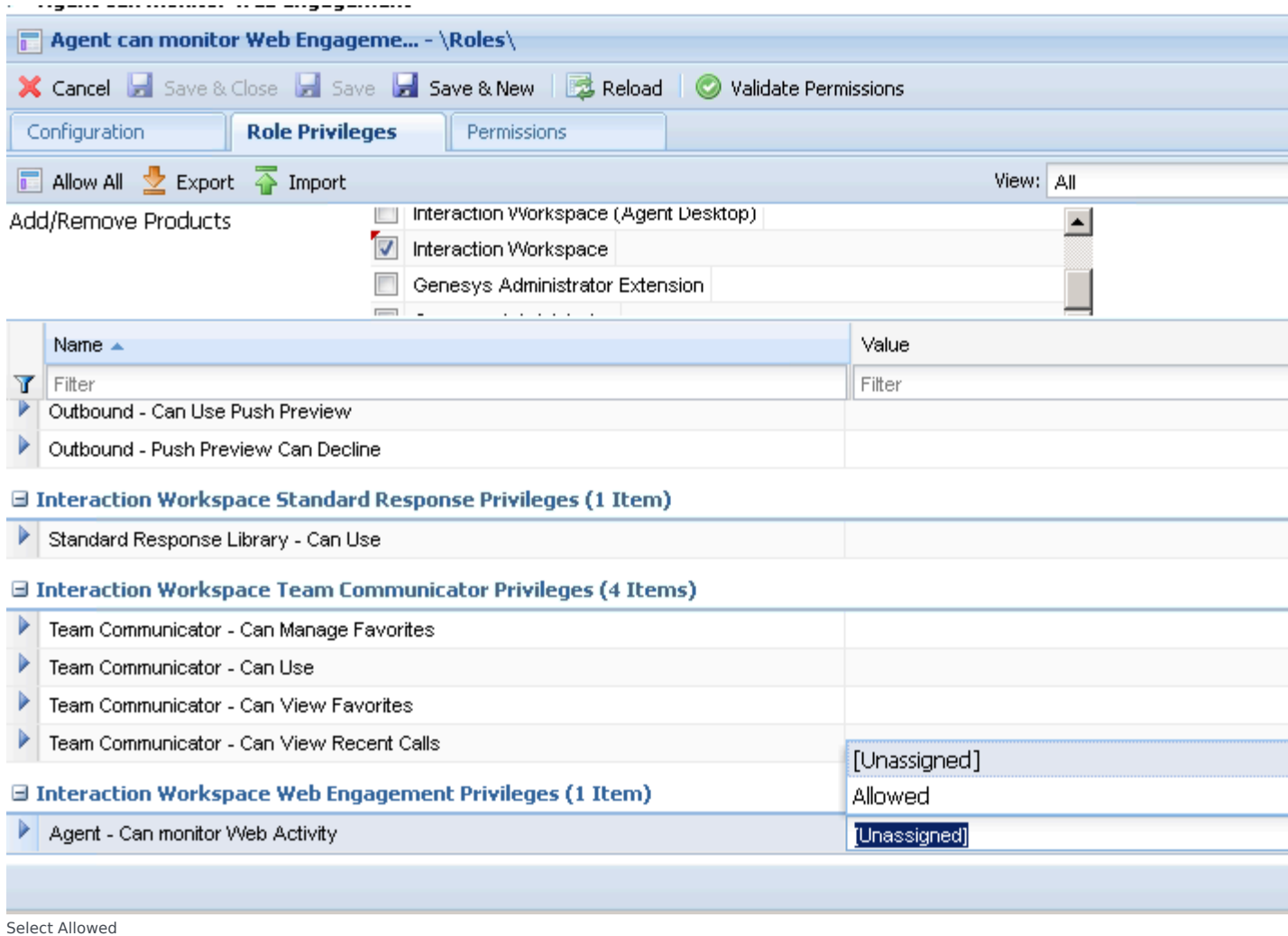
Complete this procedure to allow specific users or groups to manage Web Engagement in Workspace Desktop Edition.

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.



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

End

Next Steps

- [Tuning Role-Based Access in Genesys Administrator](#)