# Web Services and Applications Configuration Guide

Web Services and Applications 8.5.0

2/5/2022

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# Workspace Web Edition Configuration Guide

## RESTRICTED

**Note:** This is **restricted release** documentation, and therefore is subject to change and is not complete. Some features that are described in this documentation might not be fully implemented in the application.

This guide provides information about configuring the Workspace Web Edition agent interface. You must first deploy Workspace Web Edition & Web Services.

## Client-side Browser Support

Workspace Web Edition agent interface is accessed by a web browser. The following browsers are supported:

- Microsoft Internet Explorer 10
- Google Chrome

# Configuration And Administration By Using Options And Annexes

You can create Agents objects one at a time or in bulk by using Genesys Administrator (refer to the Genesys Administrator documentation) or one at a time by using the Supervisor Dashboard application (to use this application, your account must be configured to be a Supervisor). The Supervisor Dashboard enables you to associate skills with specific agents to allow interactions to be routed based on the skills of your agents.

You configure Agent objects to use specific functionality by setting values for configuration options that enable and control the features and functionality of the Workspace Web Edition application.

The option settings are applied to an agent upon login to the desktop interface in the following override order:

1. Default settings that are defined in the application code, which are overridden by:
2. Settings that are specified in the Application, which are overridden by:
3. Settings that are specified in the Tenant of the agent, which are overridden by:
4. Settings that are specified in the Agent Group(s) to which an agent belongs (in cases in which an agent is a member of more than one group, Workspace Web Edition considers the union of options that are set in each group; if an option is declared in two different groups, each of which has a different value, Workspace Web Edition uses built-in rules to resolve the conflict (see Conflict Resolution for Configuration Options for information about how such conflicts are resolved--**Note:** Virtual Agent Groups are not supported), which are overridden by:
5. Settings that are specified in the Person object that corresponds to the agent.

You can override options only in the `interaction-workspace` section. Therefore, you must replicate the `interaction-workspace` section to the annex of the object level at which you want the override to occur (Tenant, Group, User, or Transaction).

## Other Applicable Object Hierarchies

Some specific Workspace Web Edition options can be defined in other objects and object hierarchies, such as: Action Codes--for example: Not Ready reason codes. The hierarchy is defined by the order in which the objects or codes are listed.

## Overriding Options by Using a Routing Strategy

A routing strategy can be used to override configuration options that you have defined by using the hierarchies that are described above.

Workspace Web Edition uses Transaction Objects of type `object list`. You can attach a transaction name or a list of transaction names to your strategy. The transaction names in the list of transaction objects should be separated by commas. Workspace Web Edition reads the transaction objects at rendering time to override the static options.

Overriding options enable you to change the appearance of interactions and the interaction-related behavior of Workspace Web Edition based on key-value pairs that are defined in the annex of each listed transaction object. The attached list of objects contains the list of transaction objects to be used for the interaction.

Transaction objects are configured in Genesys Administrator or Composer, by using the standard approach that is used for other object types in the hierarchy.

Use the `interaction.override-options` option to define the key in which the Transaction object(s) are to be listed in attached data. If you set an override value, Workspace Web Edition will look for the transaction object that corresponds to the key-value pair.

Not all the options in the `interaction-workspace` section can be overridden by transaction objects. Refer to Configuration Options to determine which options support overriding by transaction objects. To apply this approach, you must replicate in the annex of the transaction object the structure that is used in the `interaction-workspace` section of the `CloudCluster` Application object. The option name must be the same key as in the `CloudCluster` Application object template.

## Conflict Resolution for Configuration Options

In the hierarchy that is described in the previous sections, conflicts might occur during the resolution of option inheritance. Typically, an agent can be a member of more than one Agent Group. If group options conflict with one another, Workspace Web Edition considers the conflict to be an administration error. An arbitrary resolution is applied.

### Value Option Types

The conflict resolution for value options proceeds as follows:

1. Agent Groups are sorted into ascending order by the name of the Agent Group.
2. The values of the options for each section are compared.
3. If there is a conflict, the value that is set for the agent corresponds to the value that is set for the group name that comes first in the sort order. For example, values that are set for options in the "Support" group take precedence over values that are set for options in the "Pre-Sales" group.

### Transaction Object Conflicts

If there is a conflict between transaction objects as specified by the list of override options, the first value that is set in a transaction, starting from the beginning of the list, is taken into account. All the subsequent values that are specified for the same option are ignored.

## Using Options in Workspace Web Edition

Each object in Genesys Framework, including agents and the `CloudCluster` application, can be configured by using Genesys Administrator. You must first set up your contact center and configure objects such as agents, groups, and applications.

All configuration options in Genesys applications are divided into sections. Sections are groups of related configuration options. Within a section, each option is named by its functional area, and then by its name or specific function.

Refer to the Configuration Options reference for a list of all the Workspace Web Edition options. It includes descriptions of their type and use.

## Effect Hierarchical Options on the Behavior of Workspace

The behavior of Workspace Web Edition is controlled by a compilation of settings in various systems and components of the Genesys suite. The behavior is controlled by the Option and Annex settings that are defined in the applicable objects of the Configuration Layer, and by the privileges that are associated with logged-in users of type administrator, agent, or supervisor.

# Setting Up Agents On The System

After you have created Agent objects you can set up your agents to use different features and functionality. The following procedures assume that you know how to use the Genesys Administrator application to configure agent objects.

Workspace Web Edition functionality is configured on the `CloudCluster` object in the `interaction-workspace` section. You must create this section and then create the individual configuration options that you need.

## Procedure: Provisioning Workspace Web Edition for the Voice channel

**Purpose:** To enable an agent to log in to the Voice channel.

**Prerequisites**

- A working knowledge of Genesys Administrator.
- A `CloudCluster` object exists in the Configuration Database.
- T-Server with the associated switch and switching office.
- Agents with logins configured with DNs that correspond to agent devices in the switch.
- A Place that contains one or more DNs from the switch.

**Start**

For each agent that you want to configure to use the Voice channel, do the following:

1. Select at least one `AgentLogin` from the switch.
2. Reference a default place.
3. Check the `isAgent` flag.
4. Enable the Voice media in Workspace Web Edition & Web Services.
5. Configure the Voice options in the `interaction-workspace` section of the `CloudCluster` object.

**End**

## Procedure: Declaring and using new Not-Ready Reason codes

**Purpose:** To enable an agent to use custom Not-Ready Reason codes.

The only Not-Ready Reasons that Workspace Web Edition supports by default is `After Call Work`. Custom Not-Ready Reason codes are defined in the `Action Codes` folder of the `Desktop` folder in the `Provisioning` view of Genesys Administrator.

**Prerequisites**

- A working knowledge of Genesys Administrator.
- A CloudCluster object exists in the Configuration Database.

**Start**

1. Enable this feature by specifying the `NotReadyReason` value for the `agent-status.enabled-actions-by-channel` and `agent-status.enabled-actions-global` options.
2. Create a new Action Code in the following Genesys Administrator view: `Provisioning > Desktop > Action Code`.
3. Enable the new Action Code so that it can be used in the Configuration Layer.
4. To enable the Action Code to display in the Agent Interface, configure the `agent-status.enabled-actions-global` option in the `interaction-workspace` section of the `CloudCluster` object.

**End**

# Enabling Internal And External Communications

## Procedure: Enabling an agent to use Team Communicator to call/transfer to an agent group or a skill

**Purpose:** To enable an agent to use Team Communicator to call or transfer to an agent group or a skill.

**Prerequisites**

- A working knowledge of Genesys Administrator.
- A CloudCluster application object exists in the Configuration Database.

**Start**

1. In the `Configuration` tab of the `CloudCluster` application, add a connection to Stat Server.
2. In the connection, add a reference to the T-Server associated with the switch to which the agent logs in.
3. Configure the Team Communicator options in the `interaction-workspace` section of the `CloudCluster` application object.
4. In your routing configuration, configure a routing strategy that uses the routing targets that are connected to Workspace (see intercommunication.voice.routing-based-targets and intercommunication.voice.routing-points).
5. Load the routing strategy on the Routing Point that is defined by the intercommunication.voice.routing-points option.
6. Enable the agent to use the voice media by using the intercommunication.voice.routing-points.

**End**

## Procedure: Enabling an agent to use Team Communicator to call a contact

**Purpose:** To enable an agent to use Team Communicator to call a contact that is stored in the Universal Contact Server (UCS).

**Prerequisites**

- A working knowledge of Genesys Administrator.
- A `CloudCluster` application object exists in the Configuration Database.
- The `CloudCluster` application has a connection to Universal Contact Server.
- Procedure: Enabling agents to manage contacts.
- Procedure: Provisioning Workspace for the Voice channel.

**Start**

1. Configure the Team Communicator options in the `interaction-workspace` section of the `CloudCluster` application object.
2. Ensure that the UCS application to which `CloudCluster` is connected is configured to support index searches in the Contact database:
   - Set the `index\enabled` option to `true`.
   - Set the `index.contact\enabled` option to `true`.

   For more details about these settings, refer to the *eServices 8.1 Reference Manual*.

**End**

## Procedure: Enabling an agent to use E-Mail to correspond with a contact

**Purpose:** To enable an agent to use E-Mail to correspond with a contact that is stored in Universal Contact Server (UCS).

**Prerequisites**

- A working knowledge of Genesys Administrator.
- The `CloudCluster` application object exists in the Configuration Database.
- The `CloudCluster` application has a connection to Universal Contact Server and Interaction Server.
- Procedure: Enabling agents to manage contacts.

**Start**

1. Configure the E-Mail options in the `interaction-workspace` section of the `CloudCluster` application object.
2. Configure the e-mail queue options in the `email` section that are mandatory for basic e-mail processing: `email.default-queue` and `email.outbound-queue`.
3. Configure the Workbin options in the `interaction-workspace` section of the `CloudCluster` application object, them), in particular: workbin.email.in-progress and workbin.email.draft.

**End**

## Procedure: Enabling an agent to use Chat to chat with a contact

**Purpose:** To enable an agent to use Chat to chat with a contact that is stored in Universal Contact Server (UCS).

**Prerequisites**

- A working knowledge of Genesys Administrator.
- The `CloudCluster` application object exists in the Configuration Database.
- The `CloudCluster` application has a connection to Universal Contact Server and Interaction Server.

- Procedure: Enabling agents to manage contacts.

**Start**

1. Configure the Chat options in the `interaction-workspace` section of the `CloudCluster` application object.

**End**

## Procedure: Enabling an agent to use Agent Workbins

**Purpose:** To enable an agent to use Agent Workbins to receive and/or store contact interactions for future processing.

**Prerequisites**

- A working knowledge of Genesys Administrator.
- The `CloudCluster` application object exists in the Configuration Database.
- The `CloudCluster` application has a connection to Universal Contact Server and Interaction Server.
- Procedure: Enabling agents to manage contacts.

**Start**

1. Use Genesys Interaction Routing Designer (IRD) or Genesys Composer to create a Workbin.
2. In Genesys Administrator, declare the Workbin in the `interaction-workspace` section of the `Options` tab of the `CloudCluster` application object, following the generic rule:
   `workbin.<media_type>.<workbin-nick-name>=<workbin-script-name>`
   Refer to the Workbin configuration option reference for a list of Workbin options and a description of how to configure them.

**End**

## Procedure: Enabling agents to manage contact history

**Purpose:** To enable an agent to view and update the e-mail and chat interaction history of a contact.

**Prerequisites**

- A working knowledge of Genesys Administrator.
- The `CloudCluster` application object exists in the Configuration Database.
- The `CloudCluster` application has a connection to Universal Contact Server.

**Start**

1. Configure the Contact options in the `interaction-workspace` section of the `CloudCluster` application object.
2. Enable an index search on contacts to enable searches on contact interactions. For more information about enabling index searches, refer to the *eServices 8.1 User's Guide*.

**End**

## Procedure: Enabling an agent to use disposition codes

**Purpose:** To enable an agent to specify the outcome (disposition) of an interaction.

**Prerequisites**

- A working knowledge of Genesys Administrator.
- A `CloudCluster` application object exists in the Configuration Database.
- The agent object is configured to use one or more of the following media channels:
  - Voice
  - E-Mail
  - Chat

**Start**

1. In Genesys Administrator, create or update a Business Attribute in the tenant that contain(s) your agents.
   - The Type of the Business Attribute is `Interaction Operation Attributes`.
   - The `Display Name` of the Business Attribute is used as the name of the section in the Agent interface.
   - The Attribute values are the codes that are available for the agent:
     - `name`—Used in attached data.
     - `display name`—Used in the Agent interface.
2. In the `interaction-workspace` section, set the value of the `disposition.value-business-attribute` option to the name of the Business Attribute that you previously configured.
3. Configure the following Interaction options in the `interaction-workspace` section of the `CloudCluster` object:

- `interaction.disposition.is-mandatory`
- `interaction.disposition.is-read-only-on-idle`
- `interaction.disposition.key-name`
- `interaction.disposition.use-attached-data`
- `interaction.disposition.value-business-attribute`

**End**

## Procedure: Enabling an agent to edit case information

**Purpose:** To enable an agent to edit the contents of case information.

**Prerequisites**

- A working knowledge of Genesys Administrator.
- A `CloudCluster` object exists in the Configuration Database.
- One or more custom Case Information Business Attributes in the Configuration Layer.

**Start**

1. In Genesys Administrator, open a Case Information Business Attribute.
2. In the Attributes Values tab, open the attribute value that you want to enable Agent to edit.
3. Select the Options tab.
4. Add a new section named `interaction-workspace`.
5. Configure the option according to the values in the Editing Case Information table.
6. Save your updates.

**End**

# Enabling Agents to View KPIs and Contact Center Statistics

You can configure Workspace Web Edition to display Key Performance Indicators (KPIs) and Contact Center Statistics in the Workspace Web Edition interface so that your agents can receive warnings and errors based on their statistics. Web Service reports statistics based on the statistic names that you specify in the `statistics.yaml` file. You must configure the statistic names in the `CloudCluster` application object by using Genesys Adminstrator (or Configuration Manager). The name of the statistic must correspond to the value of `statistic-name` in the `statistics.yaml` file.

## Configuring KPIs and Statistics for Workspace Web Edition

To display statisctics (KPIs) in the My Statistics tab of the Workspace Web Edition interface, you must specify at least one statistic in the `kpi.displayed-kpis` option.

To display contact center statistics in the Contact Center Statistics tab of the Workspace Web Edition interface, you must specify at least one statistic in the `statistics.displayed-statistics` option.

The following attributes are available for each statistic that you specify:

- measurement-unit -- an optional display value
- statistic-name -- the name of the statistic to be displayed. This must correspond to the value of the `name` attribute in the `statistics.yaml` file.
- warning-level-high -- the maximum value of the statistic before a warning is raised. No warnings below this value.
- warning-level-low -- the minimum value of the statistic before a warning is raised. No warnings above this value.

The following is an example of a statistic (`TotalNumberOutboundCalls`) that you can define in the `statistics.yaml` file:

```
[KPI-OutboundCalls]
description=Total number outbound calls
statistic-name=TotalNumberOutboundCalls
warning-level-low=4
```

To display this statistic in the My Statistics tab, set the value of the `kpi.displayed-kpis` option to `TotalNumberOutboundCalls`.

### Statistics Reporting Configuration

Web Services uses several statistics internally to support contact availability and also provides a default set of statistics that are displayed in the agent and supervisor interfaces.

## HTCC Node Configuration

The value of the `nodeId` property must be set in the `server-settings.yaml` file. The value of this option must be a unique identifier for each node in a Web Services cluster. All nodes that share the same Cassandra storage read the contact centers that require statistic and divide the monitoring tasks among the nodes.

## Statistics Time-to-Live

You can define the time-to-live for statistic storage in `server-settings.yaml` file by using the `statistics`TTL property. If this optional parameter is not defined, the default value of 86400 (24 hours) will be used. This property defines the interval of time for which the value of the statistics are stored.

## statistics.yaml

The statistics that are specified in the `statistics.yaml` file define which statistics and object types Web Services requests from Stat Server. A default `statistics.yaml` file is included with Workspace Web Edition & Web Services. It contains all of the statistics that Web Services needs internally as well as those that are required by the agent and supervisor applications.

`statistics.yaml` is located in the main Web Services `config` folder (this is defined by the `config.path` variable, which is set to `/opt/jetty/genconfig` by default on the ubuntu voice machine).

## Stat Server Configuration

Any Stat Server application in a Genesys environment to which the Web Services node/cluster will connect must include a set of statistic definitions that match those that are specified in the `statistics.yaml` file.

# Enabling Agents To Manage Contacts

## Procedure: Enabling agents to manage contacts

**Purpose:** To enable an agent to view and manage contact information.

**Prerequisites**

- A working knowledge of Genesys Administrator.
- The `CloudCluster` application object exists in the Configuration Database.
- The `CloudCluster` application has a connection to Universal Contact Server.
- The agent object is configured to use one or more of the following media channels:
  - E-Mail
  - Chat

**Start**

1. In the `CloudCluster` application, enable the api-multimedia feature.
2. Configure the Contact options in the `interaction-workspace` section of the `CloudCluster` application object.

**End**

# Configuration Options

To override options based on Attached Data an Transaction object, see the Overriding Configuration Options topic. All options supporting this feature, have in the description: "This option can be overridden by a routing strategy as described in this Deployment Guide."

To use these configuration options, use Genesys Administrator (or in Configurations Manager) to add the `interaction-workspace` section to the `CloudCluster` application object, then create the configuration options that you want to use in the `interaction-workspace` section.

## Agent status

### agent-status.enabled-actions-by-channel

- Default Value: Ready,NotReady,NotReadyReason,AfterCallWork,Dnd,LogOff
- Valid Values: Comma-separated list of action names from the following list: Ready, NotReady, NotReadyReason, AfterCallWork, Dnd, LogOn, LogOff.
- Changes take effect: When the session is started or restarted.
- Description: Defines the available agent state actions in the My Channels contextual menu. The actions are displayed in the order in which they appear in the list.

### agent-status.enabled-actions-global

- Default Value: Ready,NotReady,NotReadyReason,AfterCallWork,Dnd,LogOff
- Valid Values: Ready, NotReady, NotReadyReason, AfterCallWork, Dnd, LogOff
- Changes take effect: When the session is started or restarted.
- Description: Defines the available agent states in the global Status menu. The agent state commands are displayed in the order in which they appear in the list.

## Application

### alert.timeout

- Default Value: 10
- Valid Values: An integer value greater than or equal to 0.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the duration, in seconds, that contextual warning messages are displayed in the windows of the application.

### system.cometd.timeout

- Default Value: 60000

- Valid Values: An integer value greater than or equal to 0.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the duration, in milliseconds, before the session is considered closed when the connection with the server is lost.

## Case Data

### case-data.float-separator

- Default Value: .
- Valid Values: A valid float separator. Typical float separators are: '.' ',' '\'
- Changes take effect: When the session is started or restarted.
- Description: Specifies the float separator that is used for Case data. This option should be used when the decimal symbol in the regional settings of the agent's workstation or browser is different from the one provided by the database.

## Chat

### chat.agent.prompt-color

- Default Value: #385078
- Valid Values: Valid Hexadecimal (HTML) color code
- Changes take effect: When the session is started or restarted.
- Description: Specifies the color of the prompt for the messages that are entered by the agent in the Chat view.

### chat.agent.text-color

- Default Value: #385078
- Valid Values: Valid Hexadecimal (HTML) color code
- Changes take effect: When the session is started or restarted.
- Description: Specifies the color of the text of the messages that are entered by the agent in the Chat view.

### chat.auto-answer

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether a chat interaction is automatically accepted and joined when a Interaction Server Invite event is received. This option can be overridden by a routing strategy as described in this Deployment Guide.

## chat.client.prompt-color

- Default Value: #166FFF
- Valid Values: Valid Hexadecimal (HTML) color code
- Changes take effect: When the session is started or restarted.
- Description: Specifies the color of the text of the messages that are entered by the target client in the Chat view.

## chat.client.text-color

- Default Value: #166FFF
- Valid Values: Valid Hexadecimal (HTML) color code
- Changes take effect: When the session is started or restarted.
- Description: Specifies the color of the client text in the Chat view.

## chat.enable-auto-disconnect

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether the chat session is automatically disconnected if the agent is the last party remaining in the chat session.

## chat.nickname

- Default Value: $Agent.UserName$
- Valid Values: A string that contains a compilation of characters and field codes from the following list: $Agent.UserName$,$Agent.LastName$,$Agent.FirstName$,$Agent.FullName$,$Agent.EmployeeId$.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the nickname that is used to join the chat session (presented to the customer) by a string that can contain regular characters and the field codes.
  This option can be overridden by a routing strategy as described in this Deployment Guide.

## chat.prompt-for-done

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies if the application prompts a confirmation message when a user click Done. This option is only available for interaction open media. This option can be overridden by a routing strategy as described in this Deployment Guide.

## chat.prompt-for-end

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies if the application prompts a confirmation message when a user clicks End. This option can be overridden by a routing strategy as described in this Deployment Guide.

## chat.system.text-color

- Default Value: #8C8C8C
- Valid Values: Valid Hexadecimal (HTML) color code.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the color of the text for system messages in the Chat view.

## chat.time-stamp

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether the time stamp is displayed in the Chat transcript area.

## chat.typing-is-enabled

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether typing notification is enabled. It should be disabled for Chat Server lower than 8.0.1.

## chat.typing-timeout

- Default Value: 10
- Valid Values: From 0 to MAXINT
- Changes take effect: When the session is started or restarted.
- Description: Defines the duration, in seconds, that the typing notification is displayed after the last keystroke and before the agent or contact sends their message.

## privilege.chat.can-use

- Default Value: true

- Valid Values: true, false.
- Changes take effect: When the session is started or restarted.
- Description: When the value is set to `true`, the agent is permitted to use the Chat channel.

## Contact

### contact.available-directory-page-sizes

- Default Value: 5,10,25,50
- Valid Values: A comma-separated list of numbers that define the number of rows per result page from which the agent can make selections.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the possible values for the number of rows per page in the contact directory search result view.

### contact.cache-timeout-delay

- Default Value: 600
- Valid Values: An integer from 1 through 3600.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the delay, in seconds, before the cache of the result of a Universal Contact Server request is cleared.

### contact.default-directory-page-size

- Default Value: 10
- Valid Values: An integer from 1 through 50.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the default value for the number of rows per page in the contact directory search result view. The value must be defined in the option `contact.available-directory-page-size`.

### contact.directory-default-mode

- Default Value: ListView
- Valid Values: ListView, GridView
- Changes take effect: When the session is started or restarted.
- Description: Specifies which view of the Contact Directory is displayed by default. ListView: Quicker search performance and tokenized search items, but no sort on the result. GridView: Results are sortable result, but the search is less powerful, and the search items are non-tokenized.

### contact.mandatory-attributes

- Default Value: FirstName,LastName
- Valid Values: A comma-separated value list of Attribute Value names that correspond to contact field names--for example: LastName, FirstName, PhoneNumber, EmailAddress.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of Contact fields that must be completed for a contact.

## Contact Center Statistics

### statistics.displayed-statistics

- Default Value: An empty string.
- Valid Values: A comma-separated list of Statistic names.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the statistics that are displayed in the Contact Center Statistics tab. The statistics specified by this option match the names of the statistics defined in the options of the Application sections.

## Email

### email.auto-answer

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether an e-mail interaction is automatically accepted when a Interaction Server Invite event is received. This option can be overridden by a routing strategy as described in this Deployment Guide.

### email.default-queue

- Default Value: An empty string.
- Valid Values: A valid name of a Script of type Interaction Queue.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the Interaction queue in which new or reply outbound e-mails are submitted.

### email.from-addresses

- Default Value: An empty string.
- Valid Values: Letters A to Z and a to z. Numbers 0 through 9. The underscore and space characters.
- Changes take effect: When the session is started or restarted.

- Description: Specifies a character string that specifies the name of the Business Attribute which contains the Attribute Values that are used as available addresses. These come from the addresses of e-mail interactions.

## email.html-format

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies the format of a new outbound e-mail. When set to 'true', new e-mail will be formatted in HTML.

## email.include-original-text-in-reply

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether the text of the original inbound e-mail is included in the outbound reply e-mail. This option can be overridden by a routing strategy, as described in this Deployment Guide.

## email.outbound-queue

- Default Value: An empty string.
- Valid Values: A valid name of a Script of type Interaction Queue.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the Interaction Queue in which outbound e-mails are placed when agents click 'Send' or 'Send Interim'. This options is used only when Interaction Workflow does not set 'Queue for New Interactions' when it is routing Inbound E-mails to Agents.

## email.prompt-for-done

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies if the application prompts a confirmation message when the user clicks Done. This option is only available for interaction open media. This option can be overridden by a routing strategy, as described in this Deployment Guide.

## email.quote-char

- Default Value: >
- Valid Values: Any valid character string.
- Changes take effect: When the session is started or restarted.

- Description: For outbound e-mail that is formatted as plain text, specifies the characters that are used to quote the contents of the inbound e-mail interaction in the outbound e-mail interaction body.

## email.quote-header

- Default Value: On <date>, <contact> wrote:
- Valid Values: Any valid character string.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the character string that is used to introduce the quoted inbound e-mail content in the body of the outbound e-mail. The following tags can be used: <contact>, <date>. These tags are replaced respectively by the contact name and the date and time of the interaction when they appear in the outbound e-mail.

## email.reply-format

- Default Value: auto
- Valid Values: auto, html, plain-text
- Changes take effect: When the session is started or restarted.
- Description: Specifies the format of an outbound e-mail reply:
    - auto: outbound e-mail reply format is the same as corresponding inbound e-mail.
    - html: outbound e-mail reply format is forced to html.
    - plain-text: outbound e-mail reply format is forced to plain text.

## email.reply-prefix

- Default Value: Re:
- Valid Values: Any valid character string.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the reply-prefix that is added to subject of the inbound e-mail.

## email.signature.line-<n>

- Default Value: An empty string.
- Valid Values: Any valid character string.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the row number of the signature by a string that can contain regular characters and the following field codes: $Agent.LastName$,$Agent.FirstName$,$Agent.FullName$. <n> is starting at 0. This option can be overridden by a routing strategy as described in this Deployment Guide.

## privilege.email.can-use

- Default Value: true

- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: When the value of this option is set to `true`, the agent is permitted to use the E-mail channel.

## Expression

### expression.phone-number

- Default Value: ^[\(\)\-\.\+\d\s*#]*[0-9]+[\(\)\-\.\+\d\s*#]*$
- Valid Values: A regular expression.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the regular expression that identifies a phone number in the chat or SMS transcript. This option can be overridden by a routing strategy as described in this Deployment Guide.

### expression.phone-number.supported-characters

- Default Value: 0123456789+
- Valid Values: Letters A to Z and a to z. Numbers 0 through 9. All special characters that are valid Windows file names.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the characters that are permitted when building a request to the T-Server that relies on a phone number. Any other characters from the original string coming from the User Interface are removed. This option can be overridden by a routing strategy as described in this Deployment Guide.

## Facebook

### privilege.facebook.can-use

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: When the value of this option is set to `true`, the agent is permitted to use the Facebook channel.

## Interaction

### interaction.case-data.content

- Default Value: History,CaseData
- Valid Values: History, CaseData

- Changes take effect: When the session is started or restarted.
- Description: Defines the content of the Case Information area in the interaction. The CaseData key enables the display of the attached data that is defined by the `interaction.case-data.format-business-attribute` option. The History key enables the display of interaction history information. This option can be overridden by a routing strategy, as described in the Deployment Guide.

## interaction.case-data.format-business-attribute

- Default Value: An empty string.
- Valid Values: Letters A to Z and a to z. Numbers 0 through 9. The underscore and space characters.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the name of the Business Attribute that contains the Business Attribute values that are used to filter and render attached data in the interaction.
  This option can be overridden by a routing strategy as described in this Deployment Guide.
  You can define the display order of Business Attribute Values by creating an `interaction-workspace` section in the annex of the Business Attribute, then add the `interaction.case-data.order` option. This option is a comma-separated list of Business Attributes Value Names that specifies the order of the Business Attribute Values. The Attributes Values that are not listed in `interaction.case-data.order` option are put at the bottom of the list.

## interaction.case-data.frame-color

- Default Value: #FFBA00
- Valid Values: Valid Hexidecimal (HTML) color code.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the color of the border of the Case Data view frame. Examples: #FFBA00 for a Gold color, #6F7074 for a Silver color, #B8400B for a Bronze color. This option can be overridden by a routing strategy as described in this Deployment Guide.

## interaction.case-data.header-foreground-color

- Default Value: #15428B
- Valid Values: Valid Hexidecial (HTML) color code
- Changes take effect: When the session is started or restarted.
- Description: Specifies the color of the foreground of the Case Data view header. Example #FFFFFF for white color. This option can be overridden by a routing strategy as described in this Deployment Guide.

## interaction.disposition.is-mandatory

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether it is mandatory for the agent to set a disposition code before Marking Done an interaction. This option can be overridden by a routing strategy as described in this Deployment Guide.

## interaction.disposition.is-read-only-on-idle

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Prevents changes to the disposition code after a voice interaction has been released. This option can be overridden by a routing strategy as described in this Deployment Guide.

## interaction.disposition.key-name

- Default Value: DispositionCode
- Valid Values: Letters A to Z and a to z. Numbers 0 through 9. The underscore and space characters.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the key that is used to populate attached data or a user event when a disposition code is submitted to the back-end system, such as T-Server, Interaction Server, and Contact Server. This option can be overridden by a routing strategy as described in this Deployment Guide.

## interaction.disposition.use-attached-data

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Enables the adding of attached data to the interaction in UserEvent. This option can be overridden by a routing strategy as described in this Deployment Guide.

## interaction.disposition.value-business-attribute

- Default Value: DispositionCode
- Valid Values: Letters A to Z and a to z. Numbers 0 through 9. The underscore and space characters.
- Changes take effect: When the session is started or restarted.
- Description: Specifies a character string that specifies the name of the Business Attribute that contains the Attribute Values that are used as an enumerated value for a disposition code. This option can be overridden by a routing strategy as described in this Deployment Guide.

## interaction.override-option-key

- Default Value: An empty string.
- Valid Values: An attached data key name (string). The list is provided in the Attached Data in the strategy.
- Changes take effect: When the session is started or restarted.
- Description: Enables the overriding of certain application options by using a transaction object. This option provides the key name of the attached data that contains the list of transaction objects.

## Intercommunication

### intercommunication.chat.queue

- Default Value: An empty string.
- Valid Values: Name of a valid Script object of type Interaction Queue
- Changes take effect: When the session is started or restarted.
- Description: Specifies the name of the Interaction Queue that is used by the 'routing-based' feature for Chat. The following attached data are added by Worskpace: IW_RoutingBasedOriginalEmployeeId,IW_RoutingBasedTargetId,IW_RoutingBasedTargetType,IW_RoutingBasedRequest

### intercommunication.chat.routing-based-actions

- Default Value: OneStepTransfer
- Valid Values: A comma-separated list of valid operation names from the following list: OneStepTransfer.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of 'routing-based' actions that an agent is allowed to perform.

### intercommunication.chat.routing-based-targets

- Default Value: An empty string.
- Valid Values: Blank or a comma-separated list of valid object types from the following list: Agent
- Changes take effect: When the session is started or restarted.
- Description: Defines the list of targets that are contacted through the 'routing-based' mechanism for the requests that are defined in the option `intercommunication.chat.routing-based-actions`. **Note:** The targets 'AgentGroup' and 'Skill' are always addressed through routing; therefore, they are not affected by this option.

### intercommunication.email.queue

- Default Value: An empty string.
- Valid Values: The name of a valid Script object of type Interaction Queue
- Changes take effect: When the session is started or restarted.
- Description: Specifies the name of the Interaction Queue that is used by the 'routing-based' feature for E-Mail. The following attached data are added by Worskpace: IW_RoutingBasedOriginalEmployeeId,IW_RoutingBasedTargetId,IW_RoutingBasedTargetType,IW_RoutingBasedRequest

### intercommunication.email.routing-based-actions

- Default Value: OneStepTransfer
- Valid Values: A comma-separated list of valid operation names from the following list: OneStepTransfer.
- Changes take effect: When the session is started or restarted.

- Description: Specifies the list of 'routing-based' actions that an agent is allowed to perform.

## intercommunication.email.routing-based-targets

- Default Value: An empty string.
- Valid Values: A comma-separated list of valid object types from the following list: Agent
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of targets that are contacted through the 'routing-based' mechanism for the requests that are defined in the option `intercommunication.email.routing-based-actions`.
  **Note:** The targets 'AgentGroup' and 'Skill' are always addressed through routing; therefore, they are not affected by this option.

## intercommunication.voice.routing-based-actions

- Default Value: MakeCall,OneStepConference,InitConference,OneStepTransfer,InitTransfer
- Valid Values: A comma-separated list of valid operation names from the following list: MakeCall, OneStepTransfer, InitTransfer, InitConference, OneStepConference.
- Changes take effect: When the session is started or restarted.
- Description: Defines the list of routing-based actions that an agent may perform.

## intercommunication.voice.routing-based-targets

- Default Value: An empty string.
- Valid Values: A comma-separated list of valid object types from the following list: Agent, RoutingPoint, TypeDestination.
- Changes take effect: When the session is started or restarted.
- Description: Defines the list of targets that are contacted through the 'routing-based' mechanism for the requests that are defined in the option `intercommunication.voice.routing-based-actions`.
  **Note:** The targets 'AgentGroup' and 'Skill' are always addressed through routing; therefore, they are not affected by this option.

## intercommunication.voice.routing-points

- Default Value: An empty string.
- Valid Values: A call number name in the following format: $dn_name$.
- Changes take effect: When the session is started or restarted.
- Description: Determines the call number that is used by the routing-based feature. The following attached data are added by Worskpace:
  IW_RoutingBasedOriginalEmployeeId,IW_RoutingBasedTargetId,IW_RoutingBasedTargetType,IW_RoutingBasedRequest

## KPI

### kpi.displayed-kpis

- Default Value: An empty string.
- Valid Values: A comma-separated list of KPI names.
- Changes take effect: When the session is started or restarted.
- Description: Defines the KPIs that are displayed to the agent. The KPI names refer to the names of the Application Option sections that are defining the KPIs.

## Login Voice

### login.voice.auto-not-ready-reason

- Default Value: An empty string.
- Valid Values: A valid NotReady Reason.
- Changes take effect: When the session is started or restarted.
- Description: If the Voice channel is automatically set to NotReady when the agent logs in, this option defines the NotReady Reason code.

### login.voice.is-auto-ready

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether the voice channels are in the Ready state at login.

## Team Communicator

### teamcommunicator.always-clear-textbox-on-new-interaction

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: When this option is set to `true`, Workspace clears the team communicator search text box when the interaction is initiated by pressing 'Enter' or by clicking on one of the medias of team communicator results. When it is set to false, this option clears the team communicator search text box only when the interaction is initiated by pressing 'Enter'

### teamcommunicator.list-filter-showing

- Default Value: Agent,AgentGroup,RoutingPoint,Skill,Contact

- Valid Values: A comma-separated value list of filter items to be displayed in the team communicator, for example: Agent,AgentGroup,RoutingPoint,Skill,Contact.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of filters that an agent can use to search for contacts and internal targets by using the team communicator. The object types are presented in the specified order.

### teamcommunicator.max-suggestion-size

- Default Value: 10
- Valid Values: An integer value from 1 through 50.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the maximum size of the suggestion list that is displayed while an agent is entering a contact or target name.

### teamcommunicator.recent-max-records

- Default Value: 10
- Valid Values: An integer value from 1 through 50.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the number of recent internal targets to display in the list of recent targets.

### teamcommunicator.request-start-timer

- Default Value: 500
- Valid Values: An integer value from 1 through 5000.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the request start timer wait interval, in milliseconds, between the last key pressed and the beginning of the search through the contact database.

## Toast

### toast.case-data.content

- Default Value: History,CaseData
- Valid Values: History, CaseData
- Changes take effect: When the session is started or restarted.
- Description: Defines the content of the Case Information area in the toast interaction preview. The CaseData key enables the display of the attached data that is defined by the `toast.case-data.format-business-attribute` option. The History key enables the display of interaction history information. This option can be overridden by a routing strategy, as described in the Deployment Guide.

### toast.case-data.format-business-attribute

- Default Value: An empty string.
- Valid Values: Letters A to Z and a to z. Numbers 0 through 9. The underscore and space characters.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the name of the Business Attribute that contains the Business Attribute Values that are used to filter and render attached data in the toast interaction preview.
  This option can be overridden by a routing strategy as described in this Deployment Guide.
  You can define the display order of Business Attribute Values by creating an `interaction-workspace` section in the annex of the Business Attribute, then add the `toast.case-data.order` option. This option is a comma-separated list of Business Attributes Value Names that specifies the order of the Business Attribute Values The Attributes Values that are not listed in option `toast.case-data.order` are put at the bottom of the list.

## Voice

### privilege.voice.can-use

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: When the value of this option is set to `true`, the agent is permitted to use the Voice channel.

### voice.auto-answer

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether a voice interaction is automatically answered when a EventRinging message is received. This option can be overridden by a routing strategy as described in this Deployment Guide.

### voice.mark-done-on-release

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies if an interaction should be closed automatically if a Release message is received. This option can be overridden by a routing strategy as described in this Deployment Guide.

### voice.prompt-for-end

- Default Value: false

- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether Workspace displays a confirmation message when the agent clicks 'End'. This option can be overridden by a routing strategy as described in this Deployment Guide.

## Workbin

### workbin.email.draft

- Default Value: An empty string.
- Valid Values: The name of a valid Script object of type Interaction Workbin that is owned by Agents.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the name of the workbin to be used to store draft e-mail.

### workbin.email.in-progress

- Default Value: An empty string.
- Valid Values: Specifies the name of a valid Script object of type Interaction Workbin that is owned by Agents.
- Changes take effect: When the session is started or restarted.
- Description: The name of the workbin that is to be used to store inbound e-mail for later processing, after an agent explicitly saved the e-mail or submitted an outbound reply.

# Overriding Configuration Options

## Modifying A Routing Strategy To Override Configuration Options Based On Attached Data

The following procedure assumes that you know how to configure access permissions for Genesys applications.

### Procedure: Modifying a routing strategy to override a configuration option based on attached data

**Purpose:** To override previously defined configuration options by using a routing strategy.

A Routing Strategy can be used to override configuration options that you have defined by using the hierarchies described in Configuration And Administration By Using Options And Annexes.

Workspace Web Edition uses Transaction Objects of type `object list`. Attach a transaction name or list of transaction names to the interaction in your strategy. The transaction names in the list must be separated by commas. Workspace Web Edition reads the transaction objects at rendering time to override the static options.

Overriding options enables you to change the appearance of interactions per line of business based on a key-value pair that is defined in the annex of Transaction objects. The attached data contains the name of the transaction object(s) to be used for the interaction.

**Prerequisites**

- Workspace Web Edition & Web Services is deployed
- You have a strategy that routes to your agent workstations.

**Start**

1. Configure one or more Transaction objects, of type `list`, in Genesys Administrator or Composer, by using the standard approach that is used for other object types in the hierarchy (these rely on the option reference to determine if a particular option can be overridden in a Transaction).
   You can only override options in the `interaction-workspace` section of the `CloudCluster` application. Therefore, you must replicate the `interaction-workspace` section to the annex of the Transaction objects.
2. Configure the option `interaction.override-options` to define the key where the Transaction object(s) are to be listed in attached data.
3. Using either Interaction Routing Designer (IRD) or Composer, edit your routing strategy by adding an "Attach" or "Multi-attach" block that attaches the key value pair that is defined below:
   - key -- The name of the key that you defined in the option set in Step 2.

- `value` -- One or several comma-separated Transaction objects, as defined in Step 1.

**End**

# Customer Case

The concept of a Customer Case enables the grouping of all the information about the active interactions of all types for a single customer in one location. The Customer Case facilities enable agents to store all information about the following actions in one location, as well as:

- Handle two voice calls simultaneously.
- Toggle between two calls.
- Transfer/conference one or all interaction(s).

## Evolution and Behavior of Attached Data or Case Data

Attached data that is relevant to a call evolves and changes as a call progresses through the system in a contact center. For example, during a Transfer or Conference, information about who transferred a call and when, is attached to the case data.

## Editing Case Information

You can configure Workspace Web Edition to have the ability to edit the case and interaction information that is attached to an interaction. You can specify which key-value pairs are editable by an agent by adding a new section called `interaction-workspace` to the attribute of the key-value pair in Genesys Administrator, and then defining its properties. When you define the properties of an attribute in a Business Attribute, you can also specify whether it has the property `readonly` or not. Attributes that are not `readonly` can be edited by agents.

An agent can only edit case information key-value pairs of those attributes that are displayed to the agent. The table **Editing Case Information** lists the case information business-attribute keys that can be configured to be editable. For each key-value pair attribute, add a new section named `interaction-workspace`, then define the options according to the type (Boolean, string, integer, list, float, and date) of the attribute.

**Editing Case Information**

| Attribute type | Option | Valid Values | Default Value | Description |
|---|---|---|---|---|
| Boolean | display-type | bool | bool (for this type) | |
| | read-only | true, false | true | Specifies whether this key name can be modified |
| | bool.default-value | | | |
| | bool.false-value | | false | Value accepted for false |
| | bool.true-value | | true | Value accepted for true |
| string | display-type | string | string (for this type) | |

| Attribute type | Option | Valid Values | Default Value | Description |
|---|---|---|---|---|
| | read-only | true, false | true | Specifies whether this key name can be modified |
| | string.default-value | | | |
| | string.max-length | 0 to Max Length | 255 | Maximum number of characters that are accepted for this option |
| integer | display-type | int | int (for this type) | |
| | read-only | true, false | true | Specifies whether this key name can be modified |
| | string.default-value | | | |
| | int.min-value | integer | 0 | Minimum value accepted |
| | int.max-value | integer | 9007199254740992 | Maximum value accepted |
| | int.storage-type | in or string | string | Type storage of the value |
| enum | display-type | enum | enum (for this type) | |
| | read-only | true, false | true | Specifies whether this key name can be modified |
| | enum.default-value | | | |
| | enum.business-attribute | (link to business attributes) | (none) | Link to a business attribute that defines the enum value. Items in this list are sorted alphabetically. |
| float | display-type | float | float (for this type) | |
| | read-only | true, false | true | Specifies whether this key name can be modified |
| | float.default-value | | | |
| | float.min-value | float | 0 | Minimum value accepted |
| | float.max-value | float | 1.7976931348623157e308 | Maximum value accepted |
| date | display-type | date | date (for this type) | Only the following format is |

| Attribute type | Option | Valid Values | Default Value | Description |
|---|---|---|---|---|
| | | | | supported: m/d/yy hh:MM:ss TT |
| | read-only | true, false | true | Specifies whether this key name can be modified |

## Displaying Active URLs in Case Information

You can configure Interaction Workspace Web Edition to render some key-values as clickable hyperlinks in the Case Information area and also enable previewing of web pages by tooltip on the clickable hyperlinks.

Use the following configuration option to control the way that hyperlinks are displayed, whether they are active or not, and to enable the display of a tooltip that displays a preview of the web page.

- `expression.url`--The option is configured by default to display most valid URLs as clickable hyperlinks.

To control the display of hyperlinks in the Case Information area, format the attached data:

- If the attached data contains a raw URL, the hyperlink will be displayed as a raw URL (for example, http://<your web site>).
- If the attached data is formatted in the following way, the TITLE is displayed as a clickable hyperlink, and the target is the URL:
  - <a href="URL" title="TITLE" />
  - <a href="URL">TITLE<a/>

## Add Key-Value Pair to the Case Information

You can enable the ability to edit the case information to add key-value pairs that are missing from the case information. For example, the country or region contact information might be missing. If the agent obtains this information, the agent can edit the Case Information view to add the data value.

**Prerequisite:**

- To enable a key to be added, the key must be configured as editable (refer to Editing Case Information).