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Web Services and Applications Configuration Guide

Enabling Internal And External Communications

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Procedure: Enabling an agent to use Team Communicator to call/conference/transfer a voice interaction to an agent, agent group, skill, or routing point by using a strategy

Purpose: To enable an agent to use Team Communicator to call, conference, or transfer to an agent, agent group, skill, or a routing point. This procedure is mandatory for agent group and skill targets.

Tip

No extra configuration is required to transfer an interaction to an agent.

Prerequisites

- A working knowledge of Genesys Administrator or Configuration Manager.
- A working knowledge of Interaction Routing Designer.
- A WIEWS Cluster application object exists in the Configuration Database.
- To transfer to skills, you must have skills defined in the Configuration Database.
- To transfer to agent groups, you must have agent groups defined in the Configuration Database.

Start

1. In the Configuration tab of the WIEWS Cluster 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 WIEWS Cluster application object.
4. Depending on the type of target for which you want to use routing-based transfer, use Configuration Manager or Genesys Administrator to set the value of the **intercommunication.voice.routing-based-targets** configuration options as follows:
 - To use T-Server to handle transfer to Agent, Routing Point, and Type Destination, and have all other transfers handled by a strategy, set the value of this option to "" (empty)
 - To use routing-based transfer for Agents, add the value Agent to this option.
 - To use routing-based transfer for Routing Point, add the value RoutingPoint to this option.
 - To use routing-based transfer for Type Destination (a dialed call), add the value TypeDestination to this option.
 - For agent groups and skills, it is not mandatory to set the routing-based target option because these target always use routing-based transfer.
5. By using **Interaction Routing Designer** (IRD), create a routing strategy that uses routing targets (agents, agent groups, skills, and so on) to process routing-based actions by using the following attached data:
 - IW_RoutingBasedOriginalEmployeeId — The employee ID of the agent who is transferring the interaction.

- `IW_RoutingBasedTargetId` — The ID (employee ID of another agent, AgentGroup name, Skill name, Routing Point name) of the target.
 - `IW_RoutingBasedTargetType` — The type of the target (Agent, AgentGroup, Skill, or RoutingPoint)
 - `IW_RoutingBasedRequestType` — Informs the strategy of the type of action is to be done (MakeCall, OneStepConference, InitConference, OneStepTransfer, InitTransfer)
6. Load the routing strategy on the Routing Point that is defined by the `intercommunication.voice.routing-points` option.
 7. Enable the agent to use the voice media by specifying the value true for the `privilege.voice.can-use` option.
 8. Enable agent presence to be displayed in the Team Communicator search results by specifying the value true for the `presence.evaluate-presence` configuration option.
 9. To enable agents to perform a Single Step Conference, in the interaction-workspace section, specify the list of targets (Agent, AgentGroup, RoutingPoint, Contact, and/or TypeDestination) that are enabled in Team Communication for a single-step conference by using the `intercommunication.voice.single-step-conference-enabled` configuration option.
 10. For small contact centers, where the number of potential transfer targets is low, you can configure Workspace to display all of the possible targets in the Team Communicator when an agent initiates a transfer or conference by searching in the Team Communicator. To enable this functionality, in the interaction-workspace section, specify the value true for the `teamcommunicator.show-all-internal-targets` configuration option. This option is limited by the value that is specified for the `teamcommunicator.max-size` option.

Important

Genesys strongly recommends that only small contact centers use this option. Agents in large contact centers will experience system performance issues if the `teamcommunicator.show-all-internal-targets` option is enabled.

End

Procedure: Enabling an agent to use Team Communicator to transfer a multimedia interaction to an agent, agent group, or skill by using a strategy

Purpose: To enable an agent to use Team Communicator to transfer a multimedia interaction (E-Mail and Chat) to an agent, agent group, or skill. This procedure is mandatory to transfer to agent groups and skills.

Prerequisites

- A working knowledge of Genesys Administrator or Configuration Manager.
- A working knowledge of Interaction Routing Designer.
- A `WWWS Cluster` application object exists in the Configuration Database.
- To transfer to skills, you must have skills defined in the Configuration Database.
- To transfer to agent groups, you must have agent groups defined in the Configuration Database.

Start

1. By using **Interaction Routing Designer** (IRD), configure a routed-based transfer workflow by using these steps:
 - a. Create an Interaction Queue/Interaction View pair. The Interaction Queue is used as a part of the workflow; however, Interaction Queues are not available as transfer targets in the agent interface.
 - b. Create a routing strategy to process routing-based actions. To help you write the appropriate strategy, Workspace Web Edition adds the following attached data to the interaction:
 - `IW_RoutingBasedOriginalEmployeeId` — The employee ID of the agent who is transferring the interaction.
 - `IW_RoutingBasedTargetId` — The ID (employee ID of another agent, AgentGroup name, Skill name) of the target.
 - `IW_RoutingBasedTargetType` — The type of the target (Agent, AgentGroup, or Skill)
 - `IW_RoutingBasedRequestType` — Informs the strategy of the type of action is to be done. This attached data has only one value available for this release: `OneStepTransfer`
 - c. Link the above Queue to the strategy.
 - d. Activate the strategy.
2. By using Configuration Manager or Genesys Administrator, set the values of the following configuration options to the Queue that you created in Step 1:
 - `interaction-workspace/intercommunication.email.queue`
 - `interaction-workspace/intercommunication.chat.queue`
3. Depending on the type of target for which you want to use routing-based transfer, use Configuration Manager or Genesys Administrator to set the values of the `intercommunication.chat.routing-based-targets` and `intercommunication.email.routing-based-targets` configuration options as follows:
 - To use Interaction Server to handle agent-to-agent transfer and have all other transfers handled by a strategy, set the values of these options to "" (empty)
 - To use routing-based transfer for Agents, set the values of these options to Agent.
 - For agent groups and skills, it is not mandatory to set the routing-based target options because these target always use routing-based transfer.
4. Log out agents and log them back in again.

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 `WWEWS` Cluster application object exists in the Configuration Database.

- The WVEWS Cluster 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 WVEWS Cluster application object.
2. Ensure that the UCS application to which WVEWS Cluster 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: Creating Corporate Favorites

Purpose: To enable the use of corporate favorites in the Team Communicator.

Administrators must create, edit, and remove favorites by using either Configuration Manager or Genesys Administrator. You can configure the system so that each agent is assigned one or more "quick dial" favorites lists. You do not have to assign the same list of favorites to every agent.

Start

1. By using either Configuration Manager or Genesys Administrator, create a new section and name it with the name of the Corporate Favorite that you want to create.
2. Configure the new Corporate Favorite section to be one of the following types:
 - Agent
 - Agent Group
 - Skill
 - Routing Point
 - Custom Contact

The Table **Corporate Favorite Options by Type** defines the Corporate Favorite types and the mandatory options.

Corporate Favorite Options by Type

| Type | Options | Mandatory | Valid values | Example |
|-------|----------|-----------|--------------------------------|----------------------------------|
| Agent | type | Yes | Agent | Agent |
| | id | Yes | <user name of the agent> | User123 |
| | category | Yes | <a semicolon-separated list of | CorporateCategory1;FavoriteAgent |

| Type | Options | Mandatory | Valid values | Example |
|----------------|--------------|-------------------|---|--|
| Agent Group | | | category names> | |
| | display-name | No | | Jim Brown |
| | type | Yes | AgentGroup | AgentGroup |
| | id | Yes | <name of the agent group> | Agent Group Meridian |
| | category | Yes | <a semicolon-separated list of category names> | CorporateCategory1;FavoriteAger |
| Skill | display-name | No | | Meridian |
| | type | Yes | Skill | Skill |
| | id | Yes | <name of the skill> | French |
| | category | Yes | <a semicolon-separated list of category names> | French Speaking Agents; Mandarin Speaking Agents |
| Routing Point | display-name | No | | French |
| | type | Yes | RoutingPoint | RoutingPoint |
| | id | Yes | DN number in the following format <DN>@<SwitchName> | 123@MySwitch |
| | category | Yes | <a semicolon-separated list of category names> | CorpRoutingPoint |
| Custom Contact | display-name | No | | Support |
| | type | Yes | CustomContact | CustomContact |
| | category | Yes | <a semicolon-separated list of category names> | External Resources |
| | firstname | No | <any string> | First |
| | lastname | No | <any string> | External |
| | phonenumber | | <a semicolon-separated list of phone numbers> | +1555234567890;+5551234543 |
| | emailaddress | Yes (one or both) | <a semicolon-separated list of e-mail addresses> | external1@mail.dom; external2@mail.dom |
| | display-name | No | | Angie Davis |

- In the configuration layer, in options of the related section (or Tenant/Agent Group/Agent annexes), configure the following options in the interaction-workspace section of agent, agent group, tenant, and/or application annexes:

- teamcommunicator.corporate-favorites** -- The list of corporate favorites (quick dial favorites) that are configured in Configuration Server for an Agent, Agent Group, Skill, Routing Point, or Custom Contact in the same tenant as the agent. Favorites that are configured at the agent level

take precedence over those that are configured at the agent group level, which take precedence over the tenant level, which takes precedence over the application level.

- `teamcommunicator.max-size` -- The maximum number of favorites to display to the agent in the Team Communicator drop-down view.

End

Assignment of Favorites

When you create corporate favorites, you assign to them a type that is based on the scope to which it is applied: agent, agent group, tenant, or application. You can create multiple favorites and assign them in a hierarchy. For example, you create four favorites: fav1, fav2, fav3, and fav4. You then make the following assignments:

1. application—`teamcommunicator.corporate-favorites="fav1; fav2"`
2. tenant—`teamcommunicator.corporate-favorites="fav4"`
3. agent—`teamcommunicator.corporate-favorites="fav1; fav3"`

The final list of favorites that are assigned to the agent are: "fav1; fav3"

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 WUEWS Cluster application object exists in the Configuration Database.
- The WUEWS Cluster application has a connection to Universal Contact Server and Interaction Server.
- [Procedure: Enabling agents to manage contacts](#).
- A [capacity rule](#) that allows Agents to receive e-mail interactions.

Start

1. Configure the [E-Mail](#) options in the interaction-workspace section of the WUEWS Cluster 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 WUEWS Cluster application object, them), in particular: `workbin.email.in-progress` and `workbin.email.draft`.
4. To control the size of an attachment that agents are allowed to attach to an external e-mail interaction, configure the `email.max-attachment-size` option in the interaction-workspace section of the WUEWS Cluster application object.
5. To control the total size of attachments that agents are allowed to attach to an external e-mail interaction, configure the `email.max-attachments-size` option in the interaction-workspace section of the WUEWS Cluster application object.

End

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

Purpose: To enable an agent to use the Chat channel to handle inbound chat interactions from a contact that is stored in Universal Contact Server (UCS).

Prerequisites

- A working knowledge of Genesys Administrator.
- The WUEWS Cluster application object exists in the Configuration Database.
- The WUEWS Cluster application has a connection to Universal Contact Server and Interaction Server.
- [Procedure: Enabling agents to manage contacts](#).
- A [capacity rule](#) that allows Agents to receive chat interactions.

Start

1. Configure the [Chat](#) options in the interaction-workspace section of the WUEWS Cluster application object.
2. To enable Chat transfer *without* a [strategy](#), in the [Chat Media Type Object](#), set the value of the delivering-timeout option to 20 seconds or less.

End

Procedure: Enabling an agent to use Facebook to correspond with a contact

Purpose: To enable an agent to use the Facebook channel to handle inbound Facebook interactions from a contact that is stored in Universal Contact Server (UCS).

Prerequisites

- A working knowledge of Genesys Administrator.
- The WUEWS Cluster application object exists in the Configuration Database.
- The WUEWS Cluster application has a connection to Universal Contact Server and Interaction Server.
- [Procedure: Enabling agents to manage contacts](#).
- A [capacity rule](#) that allows Agents to receive Facebook interactions.

Start

1. Configure the [Facebook](#) options in the interaction-workspace section of the WUEWS Cluster application object.
2. Configure the Facebook queue options in the interaction-workspace section that are mandatory for basic Facebook processing: [facebook.default-queue](#) and [facebook.outbound-queue](#).
3. Configure the [Workbin](#) options in the interaction-workspace section of the WUEWS Cluster application object, them), in particular: [workbin.facebook.in-progress](#) and [workbin.facebook.draft](#).

End

Procedure: Enabling an agent to use Twitter to correspond with a contact

Purpose: To enable an agent to use the Twitter channel to handle inbound Twitter interactions from a contact that is stored in Universal Contact Server (UCS).

Prerequisites

- A working knowledge of Genesys Administrator.
- The WUEWS Cluster application object exists in the Configuration Database.
- The WUEWS Cluster application has a connection to Universal Contact Server and Interaction Server.
- [Procedure: Enabling agents to manage contacts](#).
- A [capacity rule](#) that allows Agents to receive Twitter interactions.

Start

1. Configure the [Twitter](#) options in the interaction-workspace section of the WUEWS Cluster application object. To enable the Twitter channel, configure the [privilege.twitter.can-use](#) configuration option.
2. To specify whether or not a Twitter interaction is automatically accepted when a Interaction Server Invite event is received, configure the [twitter.auto-answer](#) option.

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 WUEWS Cluster application object exists in the Configuration Database.
- The WUEWS Cluster 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 WUEWS Cluster 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 WIEWS Cluster application object exists in the Configuration Database.
- The WIEWS Cluster application has a connection to Universal Contact Server.

Start

1. Configure the **Contact** options in the interaction-workspace section of the WIEWS Cluster 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 WIEWS Cluster 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**
 - **Facebook**
 - **Twitter**

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 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 `interaction.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 WIEWS Cluster 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 WIEWS Cluster 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