Web Services and Applications Configuration Guide

Setting Up Agents On The System

12/19/2025

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After you have created Agent objects you can set up your agents and supervisors 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 `WWEWS Cluster` object in the `interaction-workspace` section. You must create this section and then create the individual configuration options that you need.

Contents

> **Tip**
>
> For agents who also handle multimedia interactions or for multimedia-only agents, refer to Enabling Internal And External Communications

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 `WWEWS Cluster` 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. In Configuration Manager, check the `isAgent` flag. In Genesys Administrator, set the value of the `Agent` property to `True`.
4. Verify that the Voice media in Workspace Web Edition & Web Services is enabled.
5. Configure the Voice options in the `interaction-workspace` section of the `WWEWS Cluster` object.

End

Procedure: Declaring and using new Not-Ready Reason codes

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

Custom Not-Ready Reason codes must be defined by creating an Action Code in the `Action Codes` folder of the `Desktop` folder in the `Provisioning` view of Genesys Administrator or by using Configuration Manager.

Prerequisites

- A working knowledge of Genesys Administrator.
- A `WWEWS Cluster` object exists in the Configuration Database.

Start

1. In the Configuration Layer, create an Action Code of type Not Ready by using the Action Codes - NotReady procedure. Each Not Ready Reason Action Code object that you create must have a unique name and a Not Ready Reason code. You can create Action Codes only for the Tenant object.

2. Enable this feature by specifying the NotReadyReason as the value for the `agent-status.enabled-actions-by-channel` and `agent-status.enabled-actions-global` options.

End

Procedure: Declaring and using new After Call Work Reason codes

Purpose: To enable an agent to use custom After Call Work Reason codes.

The only After Call Work state that Workspace Web Edition supports by default is `After Call Work`. Custom After Call Work codes must be defined by creating an Action Code in the `Action Codes` folder of the `Desktop` folder in the `Provisioning` view of Genesys Administrator or by using Configuration Manager.

Prerequisites

- A working knowledge of Genesys Administrator.
- A `WWEWS Cluster` object exists in the Configuration Database.

Start

1. In the Configuration Layer, create an Action Code of type Not Ready by using the Action Codes - NotReady procedure. Each Not Ready Reason Action Code object that you create must have a unique name and a Not Ready Reason code. You can create Action Codes only for the Tenant object.

2. To define this Action Code as an After Call Work Reason code, perform the following steps:

   a. In the annex of the Action Code, create a section named: `htcc`

   b. In this section add the `workmode` option and specify the value `AfterCallWork`.

3. Enable this feature by specifying the value `AfterCallWork` for the `agent-status.enabled-actions-by-channel` and/or `agent-status.enabled-actions-global` options.

End

Procedure: Enabling integration of web applications in the agent interface

Purpose: To enable an agent to view or use a web application or website in the agent interface (Workspace level). This feature is available in two modes: as a tab in the agent interface and as part of an interaction (Case level).

For the Workspace level, the web application is displayed in a dedicated tab of the main agent workspace. The web application can be viewed and used when the agent clicks the tab to display it.

For the Case level, there are two display modes that depend on the display mode of the case (voice or multimedia).

- For voice, the website is displayed in the background (workspace area) when the interaction is selected. When the interaction is unselected or closed, the external web site is replaced with the previous panel that was displayed in background.

- For multimedia mode, the website is displayed in a dedicated area on the right side.

To avoid any conflict and security constraints between Workspace and the external web site or web application, the external web site or web application is displayed in a dedicated IFRAME.

Prerequisites

- A working knowledge of Genesys Administrator.

- A WWEWS Cluster object exists in the Configuration Database.

Start

1. For each web application that you want to use, you must create a section that is based on the name that you want to use to describe the Web Site. These sections must be created in the `WWEWS Cluster` object options, Tenant, Agent Group, or Agent annex. For example, create sections called `SearchEngine`, `MyCompanyWebApp` and `Search`.

2. For each Web Site in the corresponding section, you must create the following options:

   - `label` -- Specifies the label to be used for the name of the tab in the workspace or the button in multimedia interaction.

   - `url` -- Specifies the URL to be displayed in the workspace or interaction. This URL can contain field codes. If this attribute is left blank, no web site is displayed.

     The following field codes are supported for both the `label` and `url` options:

     - `Agent.Fullname`

     - `Agent.UserName`

     - `Agent.LastName`

     - `Agent.FirstName`

     - `Agent.EmployeeId`

     - `AttachedData.Y`

3. Configure one or both of the following options in the `interaction-workspace` section, depending on whether the application is to be displayed in the interaction view or the workspace view:

   - interaction.web-content—Defines the option section name that corresponds to the web extension view that is to be displayed in the interaction, for example: `Search`

   - workspace.web-content—Defines the list of option names that represent Web Applications which are configured to be displayed at the Workspace level, for example: `SearchEngine, MyCompanyWebApp`.

End

For example, in the tenant object, configure the following sections/options:

Section name: `SearchEngine`

Options:

- label=Bing
- url=http://www.bing.com

Section name: MyCompanyWebApp

Options:

- label=Genesys
- url=http://www.genesyslab.com

Section name: interaction-workspace

Options:

- interaction.web-content=Search
- workspace.web-content=MyCompanyWebApp,SearchEngine

Section name: Search

Options:

- label=Bing
- url=http://www.bing.com/search?q=$AttachedData.ContactName$

Procedure: Enabling a Supervisor to monitor agents

Purpose: To enable a supervisor to use the monitoring features to Listen (Monitor Next Interaction), Whisper (Coach Next Interaction), and Barge-in (join—available as a transition from the other modes) to agent voice interactions.

Prerequisites

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

Start

1. In the configuration layer, by using Configuration Manager or Genesys Administrator,, specify that the user type is Supervisor. In the annex of the person object, in the htcc section, specify the values Supervisor,Agent for the roles option.
2. In the annex of the person (or tenant, application, and so on) object, in the interaction-workspace section, specify the value true for the privilege.teamlead.can-use.
3. In the annex of the person (or tenant, application, and so on) object, in the interaction-workspace section, specify the scope of monitoring (call or agent) by using the teamlead.monitoring-scope option.

End