# Web Services and Applications Configuration Guide

## Web Services and Applications 8.5.2

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# Web Services and Applications Configuration Guide

Welcome to the *Web Services and Applications Configuration Guide*. Here you'll find everything you need to configure the user interfaces that are included in Web Services and Applications. The following UIs are currently offered:

- Workspace Web Edition
- Gplus Adapter for Salesforce

**Before you get started, you must first follow the steps in the Web Services and Applications Deployment Guide.**

| Workspace Web Edition | Gplus Adapter for Salesforce |
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| Configuration and Administration by Using Options and Annexes | Provisioning Gplus Adapter for Salesforce |
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# What is Web Services and Applications?

Web Services and Applications is a set of REST APIs and user interfaces that provide a web-based client interface to access Genesys services. The following UIs are currently offered:

- Workspace Web Edition
- Gplus Adapter for Salesforce

This guide provides information about how to configure the UIs that are included in Web Services and Applications. Before you get started, make sure you've completed the steps in the Web Services and Applications Deployment Guide.

## Workspace Web Edition

Workspace Web Edition is an HTML 5 thin-client application that provides agents and knowledge workers with non-intrusive access to the information, processes, and applications that they need to perform their jobs more efficiently and to ensure increased customer satisfaction.

## Gplus Adapter for Salesforce

Gplus Adapter for Salesforce is an integrated solution that enables Salesforce users to handle contact center interactions seamlessly within Salesforce. The adapter currently includes two separate modes:

### Standard Mode

In Standard Mode, Gplus Adapter for Salesforce is available in either Salesforce Classic and Salesforce Console. It provides voice and chat functionality, along with Salesforce-specific features such as updating activity history, screen pops, and click-to-dial.

### Workspace Web Edition Mode

In Workspace Web Edition Mode, Gplus Adapter for Salesforce is available in Salesforce Console and Lightning Experience modes. It provides all the functionality available in Workspace Web Edition, along with additional Salesforce-specific features such as updating activity history, screen pop, and click-to-dial, along with the full Workspace Web Edition user interface and the following features:

- Voice
- Chat
- Email
- Outbound Preview
- Voice and Chat Supervision (monitoring, coaching, barge-in)

# Configuration and Administration by Using Options and Annexes

You can create Agents objects one at a time or in bulk by using Genesys Administrator Extension (refer to the Genesys Administrator Extension documentation).

> **Important**
> 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 upon login to the desktop interface in the following override order:

1. Settings that are specified in the Person object that corresponds to the agent, which overrides:
2. Settings that are specified in the annexes of Virtual Agent Groups (taken alphabetically, with precedence given to the name closest to the end of the alphabet), which overrides:
3. Settings that are specified in the annexes of Agent Groups (taken alphabetically, with precedence given to the name closest to the end of the alphabet), which overrides:
4. Settings that are specified in the Tenant of the agent, which overrides:
5. Cluster Application options.
6. If no instance of an option is identified in these objects, then the default value defined in the WWE code is applied.

> **Important**
> You can override options only in the `interaction-workspace` section. Therefore, you must replicate the `interaction-workspace` section from the `WS_Cluster` Application object 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

You can override a Workspace option by using a routing strategy that overrides the configuration option based on attached data and Transaction objects. This 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.

Workspace Web Edition uses Transaction Objects of the `object list` type. 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.

Before you begin, ensure that Web Services is deployed and you have a strategy that routes to your agent workstations.

1. Configure one or more Transaction objects, of `list` type, in Genesys Administrator or Composer, by using the standard approach that is used for other object types in the hierarchy.

   Transaction objects 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. Therefore, you must replicate the `interaction-workspace` section to the annex of the Transaction objects.

2. Configure the interaction.override-option-key option to define the key where the Transaction objects 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.

## 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 that are associated with logged-in users of type administrator, agent, or supervisor.

# Provisioning Workspace Web Edition

Review the following topics for details about how to provision Workspace Web Edition:

- Introduction To Configuration Options
- Enabling Privileges and Features
- Setting Up Agents On The System
- Setting Up Supervisors On The System
- Agent Login And Authentication
- Enabling Internal And External Communications
- Handling Interactions
- Email Quality Assurance
- Enabling Agents To Manage Contacts
- Outbound Contact - Provisioning Case Data
- Interaction Management
- Enabling Co-browse Sessions

# Introduction To Configuration Options

As with all other Genesys 8 applications, the Workspace Web Edition configuration options are loaded into the configuration layer by using an XML metadata file that is delivered with Genesys Administrator. Use Genesys Administrator to view, access, and configure Workspace configuration options.

Lists of privileges are currently implemented as Boolean options in the Annex of individual agents.

For information on how to secure your deployment, see the Security options that are contained in the *Genesys 8 Security Deployment Guide*.

For general information on configuring and extension, refer to Configuration And Administration By Using Options And Annexes.

For general procedures on how to configure specific agent functionality, refer to the Provisioning section of this guide.

Some options can be configured on the `Application`, the `Tenant`, an `Agent Group`, or an `Access Group`, while others must be configured on a `Person` object in the Agent Annex. The description of each configuration option specifies to what object the option is applicable. Options that are specific to the `Person` object (Agent Annex) are listed separately in this appendix.

Refer to *Framework 8.1 Genesys Administrator Help* and *Genesys 8 Security Deployment Guide* for detailed information on how to use Genesys Administrator and Management Framework to configure access permissions.

# Enabling Privileges and Features

To enable functionality like media channels and supervisor capabilities in Workspace Web Edition, you typically need to enable related Workspace privileges **and** Web Services features.

Check out the table below for details about which privileges and features you should enable for a given task or functionality:

| Functionality | Workspace Privileges | Web Services Features |
|---|---|---|
| Voice | • privilege.voice.can-use<br>• privilege.voicemail.can-use<br>• privilege.outbound.can-use<br>• privilege.teamlead.can-use | • api-voice |
| Chat | • privilege.chat.can-use<br>• privilege.teamlead.can-use<br>• privilege.SRL.can-use<br>• privilege.contact.can-use | • api-multimedia-chat |
| Universal Contact Server (USC) Contacts for Voice Interactions | • privilege.SRL.can-use<br>• privilege.contact.can-use | • api-ucs-voice |
| Email | • privilege.email.can-use<br>• privilege.workbins.can-use<br>• privilege.my-team-workbins.can-use<br>• privilege.interaction-management.can-use<br>• privilege.SRL.can-use<br>• privilege.contact.can-use<br>• privilege.contact.can-open.email.from-history | • api-multimedia-email |
| Facebook | • privilege.facebook.can-use<br>• privilege.SRL.can-use | • api-multimedia-facebook |

| Functionality | Workspace Privileges | Web Services Features |
|---|---|---|
| | • privilege.contact.can-use | |
| Instant Messaging | • privilege.im.can-use | • api-voice-instant-messaging |
| Twitter | • privilege.twitter.can-use<br>• privilege.SRL.can-use<br>• privilege.contact.can-use | • api-multimedia-twitter |
| WebRTC | • privilege.web-rtc.can-use | • api-devices-webrtc<br>• api-voice |
| Workitems | • privilege.workitem-channels.can-use<br>• privilege.<media-type>.can-decline<br>• privilege.<media-type>.can-mark-done<br>• privilege.<media-type>.can-move-to-workbin<br>• privilege.<media-type>.can-one-step-transfer<br>• privilege.<media-type>.can-set-interaction-disposition<br>• privilege.contact.can-open.<media-type>.from-history | • api-multimedia-workitem |
| Supervisor * | • privilege.myagents.can-use | • api-supervisor-agent-control |

* - You must also set the statisticsMonitorMultimediaChannelStates option to `true` in the **server-settings.yaml** file so that `My Agents` has states for multimedia channels. **Note:** `My Agents` is only supported if the supervisor and agents are configured under the same switch.

## Enabling features by editing the Feature Definition file

You can enable features by editing the Feature Definition file. For full instructions, see Enabling features in the Feature Definition file in the *Web Services and Application Deployment Guide*.

# Setting Up Agents On The System

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 Extension application to configure agent objects.

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

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

## 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 Extension.
- A `WS_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 (Workspace supports only one DN per Place).

**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 Extension, set the value of the `Agent` property to `True`.
4. Verify that the Voice media in Web Services is enabled.
5. Configure the Voice options in the `interaction-workspace` section of the `WS_Cluster` object.

**End**

## Enabling Workspace to use ring tones

**Purpose:** To enable Workspace to use ring tones for incoming interactions and state changes. You can set different tones for different types of interactions using either absolute URLs that point to custom sounds or the set of aliases Workspace provides for standard sounds:

- BELL
- RING
- CHORD
- WARNING

**Prerequisites**

- A working knowledge of Genesys Administrator Extension.
- A `WS_Cluster` object exists in the Configuration Database.

**Start**

1. In the Configuration Layer, you can set any of the following options to enable ring tones on incoming interactions and state changes:
    - accessibility.agent-state-change-bell
    - accessibility.interaction-state-change-bell
    - accessibility.outbound-campaign-state-change-bell
    - accessibility.warning-message-bell
    - chat.new-message-bell
    - chat.ringing-bell
    - email.ringing-bell
    - facebook.ringing-bell
    - outbound-callback.ringing-bell
    - twitter.ringing-bell
    - voice.ringing-bell

**End**

## 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 Extension or by using Configuration Manager.

**Prerequisites**

- A working knowledge of Genesys Administrator Extension.
- A `WS_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**

## 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 Extension or by using Configuration Manager.

**Prerequisites**

- A working knowledge of Genesys Administrator Extension.
- A `WS_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**

# Enabling integration of web applications in the agent interface

**Purpose:** To enable an agent to view or use a third-party web application or website in Workspace Web Edition as either a tab, a popup window, in the background at the interaction level, or hidden.

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

> **Warning**
>
> The embedded web application should not use confirmation dialogs that are based on the **onbeforeunload** Javascript handler as these can negatively impact some Workspace functionality.

**Prerequisites**

- A working knowledge of Genesys Administrator Extension.
- A `WS_Cluster` object exists in the Configuration Database.

**Start**

1. You must create a new option section for each third-party web application that you want to use in Workspace. These sections must be created in the `WS_Cluster` object options, Tenant, Agent Group, or Agent annex. For example, create sections called `SearchEngine`, `MyCompanyWebApp` and `SearchLocation`.
2. In each 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 of the web application. This URL can contain field codes.

     > **Important**
     >
     > - If this attribute is left blank, Workspace does not display the web application.
     > - If you configured Web Services to use HTTPS (for example, the URL for Workspace is in the following format: `https://<host>:<securePort>/ui/ad/v1/index.html`), then the URL for the external web application must also be in HTTPS.

     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` (**Note:** This field code is only applicable for the **interaction.web-content** option.)
- `Interaction.Id` (**Note:** This is a client-side ID that is lost on the next session or refresh. This field code is only applicable for the **interaction.web-content** option.)

An external web site URL can be defined using the `$AttachedData.Y$` parameter to have flexible text in the URL where Y represents an attached data name.

> **Warning**
>
> - If the `$AttachedData.Y$` parameter is specified for the external website URL, and Y is not part of the attached data associated with an interaction, the external website is not displayed.
> - If an agent manually adds the attached data to the interaction (or if it's added by any other means), then the external website tab is displayed with the content of the external website.

For example, the external website specified as follows:

```
label = Customer Location
url = http://www.bing.com/search?q=$AttachedData.CustomerLocation$
```

With this URL, if an interaction is received with a `CustomerLocation` attached data with the value of `Paris`, then the external website will be displayed in a dedicated tab called **Customer Location**, and the external web site will be `http://www.bing.com/search?q=Paris`

- `mode`: Specifies the mode Workspace uses to display the web application. The default value is `INTERNAL`. The possible values are:
  - `INTERNAL`: The web application is displayed in a dedicated tab in Workspace. It can be viewed and used when the agent clicks the tab to display it. This is the default behavior.
  - `EXTERNAL`: The web application is displayed in a popup window.
  - `BACKGROUND`: The web application is displayed in the background (Workspace area) when the interaction is selected. When the interaction is deselected or closed, the third-party website is replaced with the previous panel that was displayed in the background. This mode is only applicable at the interaction level.
  - `HIDDEN`:The web application is loaded but not displayed in Workspace. You can use this mode to integrate Workspace with a non-web application.
- `attached-data-update-handle-mode`: Specifies how to handle attached data changes when an external website is configured with attached data. The possible values are:
  - `0` (default value): Specifies that when the attached data is updated or deleted, the external website is not updated.
  - `1`: Specifies the following actions to occur:
    - When the attached data is updated, the external website is updated with the new URL.

        - When the attached data is deleted, the external website is not updated.
    - 2: Specifies the following actions to occur:
        - When the attached data is updated, the external website is updated with the new URL.
        - When the attached data is deleted, the external website disappears.

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 list of option section names that represent Web Applications which are configured to be displayed at the interaction level. For example: `SearchLocation`
    - workspace.web-content: Defines the list of option section 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 and options:

```
[SearchEngine]
label=Bing
url=http://www.bing.com

[MyCompanyWebApp]
label=Genesys
url=http://www.genesys.com

[SearchLocation]
attached-data-update-handle-mode=1
label=Search Location
url=http://myhost/service-client-api/
GoogleMaps.html?InteractionId=$Interaction.Id$&att=$AttachedData.GSW_CAMPAIGN_NAME$
mode=BACKGROUND

[interaction-workspace]
interaction.web-content=SearchLocation
workspace.web-content=MyCompanyWebApp,SearchEngine
```

## Enabling and Disabling Agents

**Purpose:** To enable or disable an agent to be available for use by Web Services. Disabled Agents will not be imported into Web Services.

**Prerequisites**

- A working knowledge of Configuration Manager or Genesys Administrator Extension.
- An `Person` object exists in the Configuration Database.

**Start**

1. In the configuration layer, use Configuration Manager or Genesys Administrator Extension to select `State Enabled` to enable an agent for use. Deselect `State Enabled` to disable an agent.

**End**

## Enabling Disposition Codes

**Purpose:** To enable disposition codes to be presented.

**Prerequisites**

- A working knowledge of Genesys Administrator Extension or Configuration Manager.
- A `Business Attribute` object containing the dispositions exists in the Configuration Database.

**Start**

1. In the configuration layer, using Genesys Administrator Extension or Configuration Manager.
2. In the annex of the Business Attribute object, in the `htcc` section, specify the value `dispositions` for the `contains` option.
3. To enable hierarchical dispositions, use folders to organize the `Business Attribute` values.

**End**

> **Important**
> If using Configuration Manager and you do not see an Annex tab, go to `View > Options` and select `Show Annex tab in Object properties`

.

## Enabling Security

**Purpose:** To configure Workspace to log out an agent from the application if the agent has not used the keyboard or mouse for a period that you specify. When this happens, Workspace saves the agent's work, ends the session, logs out the agent on all media channels, and goes back to the login page.

**Prerequisites**

- A working knowledge of Genesys Administrator Extension or Configuration Manager.
- A `WS_Cluster` object exists in the Configuration Database.

**Start**

1. In Genesys Administrator Extension, open the `WS_Cluster` application.

2. Select the Options tab.
3. You must configure the following options in the **[interaction-workspace]** section:
    - security.inactivity-timeout — Specifies the period of inactivity that triggers Workspace to log out the agent.
    - security.inactivity-alert-dialog-before-timeout — Specifies when to display an alert to the agent about an upcoming inactivity timeout.

**End**

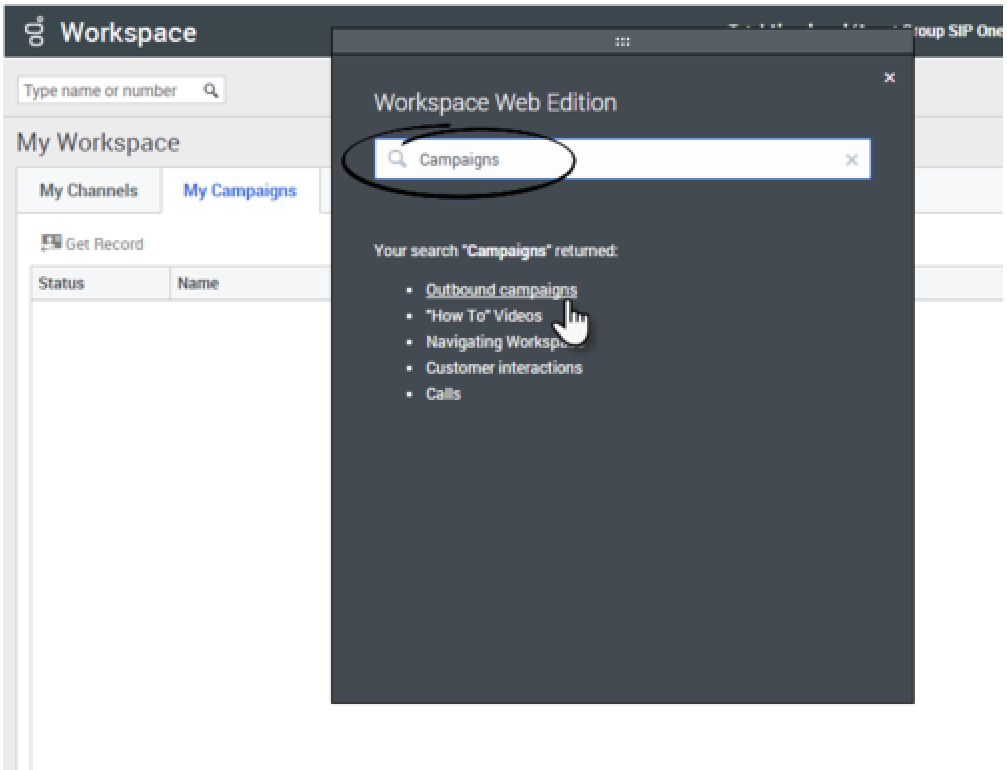
## Optional Help Widget

Agent help is available automatically for all agents and supervisors. To access the *Workspace Web Edition Help*, users can press **F1** or click the **?** icon.

The Help opens in a new browser window or tab.

Some contact centers prefer to limit agent access to the world wide web.

For this purpose, Genesys is trialing an *optional* Help Widget that you can enable through configuration to open Workspace Web Edition Help in an in-application widget. The widget is under development and does not yet display context-sensitive help (this is planned for a later release). When the widget is displayed, an agent can enter the term they are interested in learning about in the **Search** field; for example: "Campaigns".




To access a topic, agents should click the topic name in the Help Widget.

The Help Widget can be moved or closed so that it does not cover up important parts of the Workspace window.

To configure Workspace to enable agents to use the *optional* Help Widget, in the Configuration Layer use Configuration Manager or Genesys Administrator Extension to create the following privilege in the `interaction-workspace` section of the Workspace Web Edition application object and specify the value `true`: `privilege.help-widget.can-use`. Changes take effect when the session is started or refreshed.

# Setting Up Supervisors On The System

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 Extension application to configure agent objects.

## Defining a User as a Supervisor

**Purpose:** To set up an agent as a supervisor. You can also define a user as an agent group supervisor.

**Prerequisites**

- A working knowledge of Genesys Administrator Extension.
- A `WS_Cluster` object exists in the Configuration Database.

**Start**

1. In the configuration layer, by using Configuration Manager or Genesys Administrator Extension, 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.

**End**

## Defining a User as an Agent Group Supervisor

**Purpose:** To set up an agent as a supervisor for one or more agent groups.

**Prerequisites**

- A working knowledge of Genesys Administrator Extension.
- A `WS_Cluster` object exists in the Configuration Database.

**Start**

Complete the steps below for each agent group you want the user to supervise:

1. In the configuration layer, use Configuration Manager or Genesys Administrator Extension to select an agent group to be used to specify the list of agents that a supervisor can monitor.
2. If necessary, add the agents to be monitored to the agent group.
3. In the **Configuration** tab for the agent group, open the **Advanced** view.
4. In the **Supervisor** field, add the name of the user that will be acting as supervisor for that agent group.

5. Save the changes to the Agent Group object.

**End**

## Enabling a Supervisor to Monitor Agents and Routing Points

You can 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 and chat interactions. If a supervisor is configured to monitor routing points in SIP Cluster environments, interactions routed to IVRs can also be monitored.

The following transitions are supported:

- Monitoring to barge-in.
- Coaching to barge-in (chat only).
- Coaching to monitoring (chat only).
- Barge-in to monitoring.
- End Monitoring.

**Purpose:** To enable a supervisor to use the monitoring features to Monitor, Coach, and Barge-in to agent voice and chat interactions.

> **Important**
>
> - Voice call monitoring is supported only for SIP Server environments
> - Route point monitoring for which calls are routed to IVR is supported only for SIP Cluster environments
> - In SIP Server environments without SIP Cluster, the supervisor is engaged only when the call is routed to an agent and the agent has answered the call

**Prerequisites**

- A working knowledge of Genesys Administrator Extension.
- A `WS_Cluster` object exists in the Configuration Database.

**Start**

1. In the configuration layer, use Configuration Manager or Genesys Administrator Extension to navigate to the annex of the person (or tenant, application, and so on) object you want to be a supervisor. In the `interaction-workspace` section, specify the value `true` for the privilege.teamlead.can-use.
2. In the same `interaction-workspace` section, you should also specify the scope of monitoring (call or agent) by using the teamlead.monitoring-scope option.

**Important**

Set the value of the teamlead.monitoring-cross-site-based-on-activity-enabled option to `true` in environments where supervisors monitor agents across multiple sites.

3. (optional) To enable a supervisor to monitor a routing point instead of a specific agent make the following configuration:
   a. Set the value of the privilege.teamlead.can-monitor-routing-point option to `true`
   b. Set the value of the teamlead.monitorable-routing-points option to a comma-separated list of names of routing points that you want the supervisor to be able to select from Team Communicator for monitoring.
   c. If you want the supervisor to be able to Barge-in on a call, set the value of the teamlead.monitoring-scope option to `call`.
4. Review the Team Lead options for more information about the privileges available for supervisors.

**End**

## Routing Point monitoring and coaching scenarios

Routing Point monitoring and coaching is a little different than individual agent monitoring and coaching. When you monitor or coach an individual agent, you are focusing on his or her performance. This is useful for helping the individual improve their performance. Monitoring a Routing Point gives you a holistic view of how various agents are handling calls that are driven by business strategy. This will help you to better communicate the business strategy or develop training initiatives for the agents associated with the Routing Point.

**Tip**

In SIP Cluster environments, you can monitor the call when the routing point directs the call to an IVR.

The privilege.teamlead.can-monitor-routing-point option enables the possibility to monitor and/or coach calls on a Routing Point; however, you must use the monitoring and coaching privileges to specify whether monitoring, coaching, or both are permitted:

- Monitoring: privilege.teamlead.can-monitor-voice
- Coaching: privilege.teamlead.can-coach-voice (**Note:** Coaching a Routing Point or IVR is not possible.)

Here are some example configurations that enable different monitoring and coaching scenarios:

### Monitor or coach a Routing Point or an agent

To enable this scenario set these configuration options as follows:

- privilege.teamlead.can-monitor-routing-point = `true`
- privilege.teamlead.can-monitor-voice = `true`
- privilege.teamlead.can-coach-voice = `true`

### Monitor a Routing Point or an agent

To enable this scenario set these configuration options as follows:

- privilege.teamlead.can-monitor-routing-point = `true`
- privilege.teamlead.can-monitor-voice = `true`
- privilege.teamlead.can-coach-voice = `false`

### Coach a Routing Point or an agent

To enable this scenario set these configuration options as follows:

- privilege.teamlead.can-monitor-routing-point = `true`
- privilege.teamlead.can-monitor-voice = `false`
- privilege.teamlead.can-coach-voice = `true`

### Monitor or coach an agent but not a Routing Point

- privilege.teamlead.can-monitor-routing-point = `false`
- privilege.teamlead.can-monitor-voice = `true`
- privilege.teamlead.can-coach-voice = `true`

# Agent Login And Authentication

When an agent launches Workspace Web Edition, the agent must provide a user name and password to be authenticated. After authentication, the Configuration Layer is accessed by Workspace Web Edition to obtain the list of functions that are granted to the agent as well as the configuration of the Workspace application for that agent.

The first time that an agent logs in they must follow a two-step process. After providing the user name and password and clicking **Log In**, the Change Password dialog box is displayed and the agent must provide a new password.

Refer to the Genesys Security Deployment Guide for a complete description of password policies and how to configure the Reset Password functionality for agents.

Use the following application options in the `interaction-workspace` section to control agent login:

- `login.prompt-place` -- When this option is set to `true`, a new page is displayed during the login phase to specify a place. Enabling this option disables login.voice.prompt-dn-less-phone-number. Do not enable this option if the privilege.sipendpoint.can-use privilege is granted.

- `login.voice.auto-not-ready-reason` -- Specifies the `NotReady` reason code if the Voice channel is automatically set to `NotReady` when the agent logs in.

- `login.voice.prompt-queue` -- When this option is set to `true`, a new page is displayed during the login phase to select or specify a queue.

- `login.voice.is-auto-ready` -- Specifies whether the voice channel is in the Ready state at login. See also `agent-status.ready-workmode`.

## DN-less Login

If you want agents to be able to login to the system and take calls on a number that is different than the DN configured for their user account, you can set up a DN-less login to allow agents, agent groups, or all users to specify a new phone number during login. This feature is specific to SIP Server environments. Use the following configuration option to enable this feature:

- `login.voice.prompt-dn-less-phone-number.enable-dynamic-dn` — Specifies that the agent should be prompted for a DN-less phone number, and the agent's phone number is updated. A dynamic DN is used for the agent. This is only supported with SIP Server TServer. This feature does not require write privileges on Configuration Server.
- `login.voice.nb-dn-less-phone-number-stored` — Specifies the number of phone numbers to be stored for an agent in a DN-less environment.

Use this option to enable this feature for versions lower than 8.5.202.04:

- `login.voice.prompt-dn-less-phone-number` — When this option is set to `true`, a new page is displayed during the login phase to show the current phone number assigned to the agent and permits the agent to update it.

## Agent login using a URL

Agents can log in to Workspace Web Edition by using a URL that contains their credentials. When they use a URL, the agent can bypass the Log In window and can directly access the Agent Deskop. The following arguments can be included in the URL:

- username
- password
- place: Required when login.prompt-place is set to `true`.

> **Important**
> The username and password arguments are not applicable for Security Assertion Markup Language (SAML) authentication.

If Workspace Web Edition is hosted on https://mydomain/ui/ad/v1/index.html, use the following syntax to automatically log in the agent:

```
https://mydomain/ui/ad/v1/index.html?username=<username>&password=<password>&place=<place>
```

Consider the following examples:

- https://mydomain/ui/ad/v1/index.html?username=JohnDoe&password=genesys
- https://mydomain/ui/ad/v1/index.html?username=JohnDoe&password=genesys&place=Place_29820
- https://mydomain/ui/ad/v1/index.html?authType=saml&place=Place_29820

## Login security

Browser features such as auto-fill, auto-complete, password manager, and "remember me" can enable security breaches. Genesys recommends that you disable these features in the browsers used by your agents. Auto-complete type features might suggest the usernames of agents who have logged in on a particular workstation when someone launches Workspace. If an agent has used password management on the same browser, then anyone can log in using the agent credentials remembered by the browser.

Genesys recommends that you make the following browser modifications:

### Chrome

1. In Chrome **Settings**, select **Autofill**, then click **Passwords**.
2. In the **Passwords** view, disable **Offer to save passwords**.

### Firefox

1. In Firefox **Options**, select **Privacy & Security**.
2. In the **Privacy & Security** view, deselect **Ask to save logins and passwords for websites**.

### Edge Chromium

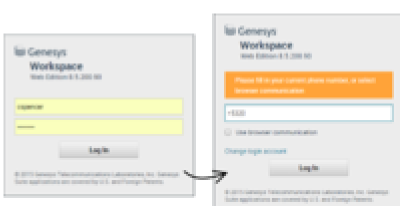
1. In Microsoft Edge Chromium **Settings**, select **Profile**, then click **Passwords**.
2. In the **Profiles/Passwords** view, disable **Offer to save passwords**.

### Internet Explorer 11

1. In the Internet Explorer **Internet options** dialog box, select the **Content** tab.
2. In the **AutoComplete** section, click **Settings**.
3. In the **AutoComplete Settings** view, deselect **User names and passwords on forms** then click **OK**.
4. In the **Internet Options** dialog box, click **OK**.

## Log in, log out, log on, log off, and exit, what's the difference?

Your agents log in and log out of the Workspace Agent Desktop application. Logging in means the agent launches the application in a browser and identifies themself to the system so that they become authorized to receive interactions and use the various features that are enabled for them.




Typically, agents log in to Workspace Agent Desktop at the beginning of their shift and log out (Exit) at the end of their shift. To log out of Workspace, they must use the **Exit** option from the menu in the upper right-hand corner. They won't be able to log out if they have any active calls or interactions.

Agents log on to and log off of channels in Workspace Agent Desktop. Channels include voice, email, chat, and so on. Channels are the media that agents use to interact with contacts. When agents log in to Workspace Agent Desktop, they are usually logged on to all the channels assigned to them, and when they log out (exit) of Workspace Agent Desktop, they are logged off from all the assigned channels. In some environments, agents might be logged off from one or more channels when they log in because the channel is out of service or you have set up their account to be logged on to specific channels only.

Agents use the **My Channels** tab to log on or log off one or more channels. Logging off of all their channels does not log them out of Workspace Agent Desktop. Agents must still exit the application to log out.

Agents can log on or log off all their assigned channels by using the Global Status menu.

To configure agent log on and log off capabilities, refer to Declaring and using new Not-Ready Reason codes.

# Managing Agent Status

Workspace provides options that enable agents to control their status. Use these options to populate the Workspace status menu with one or more of the following privileges:

- Global Ready
- Global Not Ready (with reason code)
- Global DND (Do Not Disturb)
- Global After Call Work
- Global Log Off
- Global Login

The options enable the following agent states:

- Logged off
- DND (Do Not Disturb)
- After Call Work
- Not Ready - Full (Multiple Reasons)
- Not Ready - Full (Single Reason)
- Ready - Partial (for example, ready on one channel)
- Ready - Full

Workspace also enables detailed agent and place status management through options. Agents can set individual channels to the following states:

- Ready
- Not Ready
- Do Not Disturb
- After Call Work
- Logged off
- Call Forwarded (for voice)

You can use the following options in the `interaction-workspace` section to control the contents of the command menu in the Workspace Main Window.

- `agent-status.enabled-actions-by-channel` — 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` — 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.
- `privilege.mychannels.pending-state.can-use` — Allows the pending state to be displayed in the **My**

**Channels** view while the agent engaged in a call, chat, or email interaction. When the value of this option is set to `true`, if an agent sets his or her status to Not Ready, Not Ready Reason, or any other state while he or she is still handling an interaction, the timer for that state will not start until the call is released, the chat is marked as Done, or the email is sent or put into a workbin.

For the Voice channel, you can configure Workspace to automatically set the agent status to the former status when **Done** is clicked. This enables an agent to return to their former status as soon as he or she has completed after call work, instead of having to manually change status.

- `voice.cancel-after-call-work-on-done` — Specifies that the After Call Work state is changed to the former status when an agent clicks **Done**.

## Important

If an agent manually changes state while still engaged in a voice interaction, their state will display the change, but the time in state will be suspended until the call is ended.

# Enabling Internal And External Communications

The following procedures enable internal and external communication features in Workspace Web Edition.

## Configuring Team Communicator

Team Communicator is a universal lookup tool. Agents use the Team Communicator to start phone calls and emails. The following procedures enable features in Team Communicator.

### Enabling Team Communicator

You can enable agents to use Team Communicator to call a contact that is stored in the Universal Contact Server (UCS).

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- A `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to Universal Contact Server.
- Enabling Agents To Manage Contacts.
- Provisioning Workspace Web Edition for the Voice channel.

To enable agents to use Team Communicator to call a contact:

1. Grant the privilege.teamcommunicator.can-use privilege.
2. Configure the Team Communicator options in the `interaction-workspace` section of the `WS_Cluster` application object.
3. To restrict which agents can be seen in Team Communicator search results, you can specify which groups an agent can or cannot see by specifying them in these configuration options:
    - teamcommunicator.permissions.agent.restrict-to-agent-groups — Agents who belong to at least one of these agent groups or virtual agent groups will be included in the list.
    - teamcommunicator.permissions.agent.exclude-from-agent-groups — Agents who belong to at least one of these agent groups or virtual agent groups will be excluded from the list.
4. Ensure that the UCS application to which `WS_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*.

## Enabling call routing and voice call, conference, or transfer

You can enable agents to use Team Communicator to call, conference, or transfer to an agent, agent group, skill, or a routing point using a strategy. This procedure is mandatory for agent groups and skill targets.

> **Tip**
> No extra configuration is required to transfer an interaction to an agent.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- A working knowledge of Genesys Designer.
- A `WS_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.

To enable agents to use Team Communicator to call, conference, or transfer to an agent, agent group, skill, or a routing point:

1. Set up your system infrastructure:
   a. In the `Configuration` tab of the `WS_Cluster` application, add connections to the following servers:
      - Stat Server
      - Universal Contact Server (Optional)
   b. In the connections, add a reference to the T-Server associated with the switch to which the agent logs in.
   c. Configure the Team Communicator options in the `interaction-workspace` section of the `WS_Cluster` application object.
2. Set up your agents to be able to use the Team Communicator to call or transfer to other agents or other internal targets:
   a. To let your agents make voice calls, set the value of the privilege.voice.can-use option, to `true`.
   b. To ensure that the status of your agents is displayed in the Team Communicator of other agents who might be trying to call them, set the value of the presence.evaluate-presence option to `true`.
   c. To enable your agents to view the number of targets who are in Ready status in an agent group, perform the following steps:
      i. Add the following definition for the VIRTUAL_AGENT_GROUP and AGENT_GROUP object types to

the **statistics.yaml** file: TransferAvailability_CurrentReadyAgents.

ii. Allow the privilege.teamcommunicator.display-agent-groups-availability privilege.

d. 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 search results when an agent initiates a transfer or conference by searching in the Team Communicator.
To enable this functionality, set the value of the teamcommunicator.show-all-internal-targets option to `true`.
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.

3. You can choose to set up call routing to direct calls to specific agents based on strategies. To transfer to Skills and Groups, you must also create a routing point by using the intercommunication.voice.routing-points option.

a. First determine which call flow scenarios you want handled by a routing-based mechanism based on targets, such as langauge or product skills, level of training, or availability, and types of calls, such as high priority customers, inquiries, sales, and so on.

b. Use Genesys Designer, to 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 RoutingPointl)
- `IW_RoutingBasedRequestType` — Informs the strategy of the type of action is to be done (`MakeCall`,`OneStepConference`,`InitConference`,`OneStepTransfer`,`InitTransfer`)

c. Depending on the type of target for which you want to use routing-based transfer, use Genesys Administrator Extension to set the value of the intercommunication.voice.routing-based-targets options as follows:

- To use T-Server to handle transfers 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.

d. To specify whether a specific call type is to be handled by the routing-based mechanism, set the value of the intercommunication.voice.routing-based-actions option.

    - `MakeCall`: Use the routing-based mechanism for external calls.
    - `OneStepTransfer`: Use the routing-based mechanism for single-step transfers.
    - `InitTransfer`: Use the routing-based mechanism for two-step transfers.
    - `InitConference`: Use the routing-based mechanism for two-step conferences.
    - `OneStepConference`: Use the routing-based mechanism for single-step conferences.

   e. Load the routing strategy on the Routing Point that is defined by the intercommunication.voice.routing-points option.

4. Fine-tune the settings for contacting specific targets (`Agent`, `AgentGroup`, `RoutingPoint`, `Contact`, and/or `TypeDestination`) that are using a routing-based mechanism by configuring action-specific options:
   - intercommunication.voice.consultation-enabled
   - intercommunication.voice.make-call-enabled
   - intercommunication.voice.single-step-conference-enabled
   - intercommunication.voice.single-step-transfer-enabled
5. To control whether agents can make one-step transfers and conferences while there is an active consultation on a voice call, configure the following options. Setting the options to `true` means that the one-step transfer or one-step conference buttons are available during voice calls with active consultations.
   - teamcommunicator.one-step-conference-with-consultation.enabled
   - teamcommunicator.one-step-transfer-with-consultation.enabled

## Enabling multimedia interaction transfer

You can enable agents to use Team Communicator to transfer a multimedia interaction (Email and Chat) to an agent, agent group, or skill by using a strategy. This procedure is mandatory to transfer to agent groups and skills.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- A working knowledge of Genesys Designer.
- A `WS_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.

To enable agents to use Team Communicator to transfer a multimedia interactions:

1. By using Genesys Designer, 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 Genesys Administrator Extension, 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 Genesys Administrator Extension 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.

## Creating Corporate Favorites

You can enable the use of corporate favorites in the Team Communicator. Administrators must create, edit, and remove favorites by using Genesys Administrator Extension. 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.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- An understanding of Configuration options
- A `WS_Cluster` application object exists in the Configuration Database.

To enable the use of corporate favorites:

1. By using Genesys Administrator Extension, create a new section in the appropriate object (the `WS_Cluster` application, `Tenant`, `Agent Group`, or `Agent`), and name it with the name of the Corporate Favorite that you want to create.
2. Configure the type option in the new Corporate Favorite section to be one of the following types:
   - `Agent`
   - `Agent Group`

- `Skill`
- `Routing Point`
- `Custom Contact`
- `Interaction Queue`

### Attached Data

You can have multiple instances of the same object type, such as a routing point, in corporate favorites with different attached data for each. For example:

| [Fav-English] | [Fav-Spanish] |
|---|---|
| type: RoutingPoint | type: RoutingPoint |
| id: 6666@MySwitch<br>**Note:** the following characters are not supported for the id: ?\|{}[]()"\, | id: 6666@MySwitch<br>**Note:** the following characters are not supported for the id: ?\|{}[]()"\, |
| display-name: English | display-name: Spanish |
| attached-data.lang: en | attached-data.lang: es |

### Corporate Favorite Options by Type

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

> **Important**
>
> A corporate favorite that has **Custom Contact** specified as the type only appears in a Favorites search and the Recent list if the contact was previously called. **Search All** only searches within targets that specify the following types: **Agent**, **Contact**, **Routing Point**, **Skill**, **Queue**, **Interaction Queue**, and **Agent Group**. For information about using the **capabilities** option, refer to Creating different Corporate Favorites for Transfer, Conference, and Consult targets.

**Corporate Favorite Options by Type**

<table>
<tr><th>Type</th><th>Options</th><th>Mandatory</th><th>Valid values</th><th>Example</th></tr>
<tr><td rowspan="5">Agent</td><td>type</td><td>Yes</td><td>Agent</td><td>Agent</td></tr>
<tr><td>id</td><td>Yes</td><td><user name of the agent></td><td>User123<br>**Note:** the following characters are not supported for the id: ?|{}[]()"\,</td></tr>
<tr><td>capabilities</td><td>No</td><td>empty, Engage, OneStepTransfer, OneStepConference, TwoStepTransfer, TwoStepConference, Consultation</td><td>Refer to Creating different Corporate Favorites for Transfer, and Conference targets.</td></tr>
<tr><td>category</td><td>No</td><td><a semicolon-separated list of category names></td><td>CorporateCategory1;FavoriteAgents</td></tr>
<tr><td>display-name</td><td>No</td><td><display name of the agent></td><td>Jim Brown</td></tr>
<tr><td rowspan="5">Agent Group</td><td>type</td><td>Yes</td><td>AgentGroup</td><td>AgentGroup</td></tr>
<tr><td>id</td><td>Yes</td><td><name of the agent group></td><td>Agent Group Meridian<br>**Note:** the following characters are not supported for the id: ?|{}[]()"\,</td></tr>
<tr><td>capabilities</td><td>No</td><td>empty, Engage, OneStepTransfer, OneStepConference, TwoStepTransfer, TwoStepConference, Consultation</td><td>Refer to Creating different Corporate Favorites for Transfer, and Conference targets.</td></tr>
<tr><td>category</td><td>No</td><td><a semicolon-separated list of category names></td><td>CorporateCategory1;FavoriteAgents</td></tr>
<tr><td>display-name</td><td>No</td><td><display name of the agent group></td><td>Meridian</td></tr>
</table>

<table>
<tr><th>Type</th><th>Options</th><th>Mandatory</th><th>Valid values</th><th>Example</th></tr>
<tr><td rowspan="5">Skill</td><td>type</td><td>Yes</td><td>Skill</td><td>Skill</td></tr>
<tr><td>id</td><td>Yes</td><td><name of the skill></td><td>French<br>Note: the following characters are not supported for the id: ?|{}[]()"\,</td></tr>
<tr><td>capabilities</td><td>No</td><td>empty, Engage, OneStepTransfer, OneStepConference, TwoStepTransfer, TwoStepConference, Consultation</td><td>Refer to Creating different Corporate Favorites for Transfer, and Conference targets.</td></tr>
<tr><td>category</td><td>No</td><td><a semicolon-separated list of category names></td><td>French Speaking Agents;Mandarin Speaking Agents</td></tr>
<tr><td>display-name</td><td>No</td><td><display name of the skill></td><td>French</td></tr>
<tr><td rowspan="6">Routing Point</td><td>type</td><td>Yes</td><td>RoutingPoint</td><td>RoutingPoint</td></tr>
<tr><td>id</td><td>Yes</td><td>The DN number in the following format: <DN number>@<switch></td><td>123@MySwitch<br>Note: the following characters are not supported for the id: ?|{}[]()"\,</td></tr>
<tr><td>capabilities</td><td>No</td><td>empty, Engage, OneStepTransfer, OneStepConference, TwoStepTransfer, TwoStepConference, Consultation</td><td>Refer to Creating different Corporate Favorites for Transfer, and Conference targets.</td></tr>
<tr><td>category</td><td>No</td><td><a semicolon-separated list of category names></td><td>CorpRoutingPoint</td></tr>
<tr><td>display-name</td><td>No</td><td><display name of the routing point></td><td>Support</td></tr>
<tr><td>attached-data.<AttachedDataKey></td><td>No</td><td><an attached data key></td><td>attached-data.lang: en</td></tr>
</table>

<table>
<tr><th>Type</th><th>Options</th><th>Mandatory</th><th>Valid values</th><th>Example</th></tr>
<tr><td rowspan="8">Directly Dialed</td><td>type</td><td>Yes</td><td>CustomContact</td><td>CustomContact</td></tr>
<tr><td>capabilities</td><td>No</td><td>empty, Engage, OneStepTransfer, OneStepConference, TwoStepTransfer, TwoStepConference, Consultation</td><td>Refer to Creating different Corporate Favorites for Transfer, and Conference targets.</td></tr>
<tr><td>category</td><td>No</td><td><a semicolon-separated list of category names></td><td>External Resources</td></tr>
<tr><td>firstname</td><td>No</td><td><any string></td><td>First</td></tr>
<tr><td>lastname</td><td>No</td><td><any string></td><td>External</td></tr>
<tr><td>phonenumber</td><td rowspan="2">Yes (one or both)</td><td><a semicolon-separated list of phone numbers></td><td>+1555234567890;+555123454321</td></tr>
<tr><td>emailaddress</td><td><a semicolon-separated list of email addresses></td><td>external1@mail.dom;external2@mail.dom</td></tr>
<tr><td>display-name</td><td>No</td><td><display name of the custom contact></td><td>Angie Davis</td></tr>
<tr><td rowspan="4">Interaction Queue</td><td>type</td><td>Yes</td><td>InteractionQueue</td><td>InteractionQueue</td></tr>
<tr><td>id</td><td>Yes</td><td><script name of the interaction queue></td><td>123<br>**Note:** the following characters are not supported for the id: ?|{}[]()"\,</td></tr>
<tr><td>category</td><td>No</td><td><a semicolon-separated list of category names></td><td>CorporateCategory1;FavoriteAgents</td></tr>
<tr><td>display-name</td><td>No</td><td><display name of the interaction queue></td><td>Quality Assurance</td></tr>
</table>

3. 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.

## 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"`

## Creating different Corporate Favorites for Transfer, and Conference targets

You can specify different Corporate Favorites to be displayed in Team Communicator for the following call actions by using the **capabilities** option in the section for a given Corporate Favorite: Main Window Team Communicator, Transfer, and Conference, and Consult.

The teamcommunicator.corporate-favorites option specifies which Corporate Favorites are displayed in Team Communicator. This option can be configured at the **Agent**, **Agent Group**, and **Application** level and can be overridden by a Routing Strategy. The value of this option is a list of sections that contain options that describe the Corporate Favorite.

The following values are supported for the **capabilities** option:

- If the **capabilities** option is set to a specific list of values, then the use of corporate favorites is possible only for these capabilities.
    - **Engage**: The corporate favorite is enabled in the Main Window Team Communicator to create a new outbound interaction (voice or email).
    - **OneStepTransfer**: The Corporate Favorite can be used for one-step call transfers.
    - **OneStepConference**: The Corporate Favorite can be used for one-step call conferences.
    - **TwoStepTransfer**: The Corporate Favorite can be used for a consultation call which can be completed as a call transfer.
    - **TwoStepConference**: The Corporate Favorite can be used for a consultation call which can be

completed as a call conference.

- **Consultation**: The Corporate Favorite can be used for consultation calls that cannot be completed as a call transfer or call conference.

- If the **capabilities** option is not set, then the Corporate Favorite can be used for any call operation.
- If the **capabilities** option is set with no value specified (empty), then the Corporate Favorite cannot be used for any call operation.

Here are some example Corporate Favorites with different values set for the **capabilities** option.

| Corporate Favorite | Value of capabilities | Functionality |
|---|---|---|
| CorpFav1 | Engage,OneStepConference,Consultation | This Corporate Favorite is available for new outbound interaction creation. It is displayed in the **Instant Conference** and **Consultation** button Team Communicators. |
| CorpFav2 | Engage,OneStepTransfer,TwoStepTransfer | This Corporate Favorite is available for new outbound interaction creation. It is displayed in the **Instant Transfer** and **Consultation with Transfer option** button Team Communicators. |
| CorpFav3 | Engage,TwoStepTransfer,TwoStepConference | This Corporate Favorite is available for new outbound interaction creation. It is displayed in the **Consultation with Transfer option** and **Consultation with Conference option** button Main Window Team Communicator. |

For an **Agent** object assigned the three Corporate Favorites, the Corporate Favorites are available in the following buttons:

- **Main Team Communicator**: CorpFav1, CorpFav2, and CorpFav3 are all displayed.
- **One-Step Transfer**: CorpFav2 is displayed.
- **One-Step Conference**: CorpFav1 is displayed.
- **Consultation**: CorpFav1, CorpFav2, and CorpFav3 are all displayed.
  Once the consultation is established:
    - **Complete Transfer**: CorpFav2 and CorpFav3 are displayed.
    - **Complete Conference**: CorpFav3 is displayed.

## Enabling the Email channel

You can enable agents to use Email to correspond with a contact that is stored in Universal Contact

Server (UCS).

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The `WS_Cluster` application object exists in the Configuration Database.
- The `WS_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 email interactions.

To enable agents to email contacts:

1. Configure the Email options in the `interaction-workspace` section of the `WS_Cluster` application object.
2. Configure the email queue options in the `email` section that are mandatory for basic email processing: email.default-queue and email.outbound-queue.
3. Configure the Workbin options in the `interaction-workspace` section of the `WS_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 email interaction, configure the email.max-attachment-size option in the `interaction-workspace` section of the `WS_Cluster` application object.
5. To control the total size of attachments that agents are allowed to attach to an external email interaction, configure the email.max-attachments-size option in the `interaction-workspace` section of the `WS_Cluster` application object.

## Enabling the Chat channel

You can enable agents to use the Chat channel to handle inbound chat interactions from a contact that is stored in Universal Contact Server (UCS).

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to Universal Contact Server and Interaction Server.
- Enabling Agents To Manage Contacts.
- A capacity rule that allows Agents to receive chat interactions.

To enable the Chat channel:

1. Configure the Chat options in the `interaction-workspace` section of the `WS_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.

## Enabling agents to join an Outbound Campaign functionality to a contact

You can enable agents to join an Outbound Campaign call to a contact that is stored in Outbound Contact Server (OCS).

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The `Application` object exists in the Configuration Database.

To enable agents to join an Outbound Campaign call to a contact:

1. Allow the Outbound privileges (see [Outbound|Outbound Campaign configuration options]) for the role to which the agent is assigned.
    - Can Use
    - Can Reject Record
    - Can Cancel Record
    - Can Dial Alternative Chained Record
    - Can Get Next Preview Record
    - Can Mark Do Not Call
    - Can Set Call Result
    - Can Reschedule
    - Can Reschedule On New Number
2. Configure the Outbound options in the `interaction-workspace` section of the Workspace `Application` object (refer to the Outbound configuration option reference for a list of Outbound options and a description of how to configure them).

## Enabling the Facebook channel

You can enable agents to use the Facebook channel to handle inbound Facebook interactions from a contact that is stored in Universal Contact Server (UCS).

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to Universal Contact Server and Interaction Server.
- Enabling Agents To Manage Contacts.
- A capacity rule that allows Agents to receive Facebook interactions.

To enable the Facebook channel:

1. Configure the Facebook options in the `interaction-workspace` section of the `WS_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 `WS_Cluster` application object, them), in particular: workbin.facebook.in-progress and workbin.facebook.draft.

## Enabling the Twitter channel

You can enable agents to use the Twitter channel to handle inbound Twitter interactions from a contact that is stored in Universal Contact Server (UCS).

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to Universal Contact Server and Interaction Server.
- Enabling Agents To Manage Contacts.
- A capacity rule that allows Agents to receive Twitter interactions.

To enable the Twitter channel:

1. Configure the Twitter options in the `interaction-workspace` section of the `WS_Cluster` application object. To enable the Twitter channel, configure the privilege.twitter.can-use configuration option.

## Enabling Agent Workbins

You can enable agents to use Agent Workbins to receive and/or store contact interactions for future processing.

- A working knowledge of Genesys Administrator Extension.
- The `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to Universal Contact Server and Interaction Server.
- Enabling Agents To Manage Contacts.

To enable Agent Workbins:

1. Use Genesys Composer to create a Workbin.
2. In Genesys Administrator Extension, declare the Workbin in the `interaction-workspace` section of the `Options` tab of the `WS_Cluster` application object, following the generic rule:

`workbin.<media_type>.<workbin-nick-name>=<workbin-script-name>`.

3. Configure the following Workbin configuration options
    - intercommunication.<media-type>.queue
    - intercommunication.<media-type>.routing-based-actions
    - intercommunication.<media-type>.routing-based-targets

## Enabling contact history management

You can enable an agent to view and update the email and chat interaction history of a contact.

Before you begin, ensure that the following prerequisites are met:

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

To enable contact history management

1. Configure the Contact options in the `interaction-workspace` section of the `WS_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*.

## Enabling disposition codes

You can enable agents to specify the outcome (disposition) of an interaction.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- A `WS_Cluster` application object exists in the Configuration Database.
- The agent object is configured to use one or more of the following media channels:
    - Voice
    - Email
    - Chat
    - Facebook
    - Twitter

To enable disposition codes:

1. In Genesys Administrator Extension, 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 `WS_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`

## Enabling case information editing

You can enable an agent to edit the contents of case information.

Before you begin, ensure that the following prerequisites are met:

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

To enable case information editing:

1. In Genesys Administrator Extension, 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.

## Enabling caller ID selection

You can enable agents to select a caller ID from pre-defined list of caller IDs.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- A `WS_Cluster` object exists in the Configuration Database.

To enable caller ID selection:

1. In Genesys Administrator Extension, create a Business Attribute that contains the possible caller ID values you want agents to be able to select. In its Business Attribute Values, the name is used to specify the actual phone number Workspace dials. If the Display Name is specified, this is the information Workspace presents to the agent (in alphabetical order).

> **Important**
> If the Business Attribute doesn't contain any Business Attribute Values, then the feature isn't enabled. Also, if the attribute contains only one value, then the adapter automatically uses that caller ID so the agent doesn't see a popup when making a call.

2. Set the intercommunication.voice.make-call-caller-id-business-attribute option to the name of your Business Attribute. For example, if you create a Business Attribute named **CallerID**, then you would set **intercommunication.voice.make-call-caller-id-business-attribute** to `CallerID`.

## Enabling the Instant Messaging (IM) channel

You can enable agents to use the Instant Messaging channel for internal communication and interaction consultation.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to SIP Server.

To enable the Instant Messaging channel:

1. Configure the IM options in the `interaction-workspace` section of the `WS_Cluster` application object.
2. Ensure that the SIP DN of the Place used for Instant Messaging has the following options defined in the TServer section:
    - multimedia = `true`

- voice = `true`
- sip-signaling-chat = none

## Important

Workspace does not support a Place that uses one DN for voice and one DN for IM.

# Configuring for Genesys Softphone integration

For agents that use the Genesys Softphone, you can configure some softphone options in the Workspace Web Application, including Single Sign On (SSO) access, and the mute and volume functions on the Genesys Softphone. For all other configuration, see Genesys Softphone documentation.

> **Tip**
>
> Genesys Softphone supports SRV-based name resolution. You do not need additional configuration to enable this feature, but, as described in RFC 3263, you should not include the port number in the server URI (sipendpoint.sip-server-address).

## Enabling agents to use mute and volume on Genesys Softphone

Configure the following options:

- privilege.sipendpoint.can-change-microphone-volume
- privilege.sipendpoint.can-change-speaker-volume
- privilege.sipendpoint.can-mute-microphone
- privilege.sipendpoint.can-mute-speaker

## Enabling Single Sign On (SSO)

To enabled SSO for the Genesys Softphone, configure the following options:

- privilege.sipendpoint.can-use
- sipendpoint.uri
- sipendpoint.sip-server-address
- sipendpoint.register-interval
- sipendpoint.register-max-attempts
- sipendpoint.ping-interval
- sipendpoint.max-failed-ping

- sipendpoint.transport-protocol

## Enabling Dual Registration with the Softphone

You can enable Workspace to transmit the address of the session border controllers (SBC) to the Softphone, which allows dual registration. Use the following configuration options to enable this feature and specify the two regions:

- sipendpoint.sip-server-address
- sipendpoint.sip-server-address.peer

Disaster Recovery environments are transparent for Workspace in this scenario because the Softphone is registered on both regions. Workspace transmits the following information to the Workspace SIP Endpoint:

```
   POST <sipendpoint.uri>/RegisterDn
   Content-Type:application/json; charset=UTF-8
   data: {
       "addresses":["<sipendpoint.sip-server-address>","<sipendpoint.sip-server-
address.peer>"],
       "users":["<userName>","<userName>"]
   }
```

## Related Genesys Softphone configuration options

Workspace Web Edition transmits all configured SIP Endpoint options to the Genesys Softphone. Note that there is no dependency on which version of Genesys Softphone is in use. For more information about Genesy Softphone options, see Genesys Container in the *Genesys Softphone Deployment Guide*.

To translate the Genesys Softphone options to the format of Workspace Web Edition options, use the following pattern: `sipendpoint.<Domain>.<Section>.<Setting>`

### Important

To use Workspace Web Edition with Genesys Softphone, you must have a SIP named and concurrent license only.

### Warning

Agents that are provisioned to use Genesys Softphone must have a default Place configured. These agents can work from any location that supports Genesys Softphone, but their Place cannot be used for a hard phone. For Genesys Softphone agents you must set the value of the login.prompt-place option to `false`.

# Handling Interactions

Workspace supports the following media types:

- Voice
- Voicemail
- Email
- Chat
- Facebook
- Twitter

Workspace also supports the following functionality for various interaction types:

- Customer Case
- Workbins
- Workitems
- Standard Responses Library
- Hierarchical Dispositions

# Voice Interactions

Workspace uses the following privileges to enable voice-related functionality:

| | |
|---|---|
| • privilege.voice.can-extend-after-call-work<br>• privilege.voice.can-forward<br>• privilege.voice.can-make-call<br>• privilege.voice.can-one-step-conference<br>• privilege.voice.can-one-step-transfer<br>• privilege.voice.can-reject-call<br>• privilege.voice.can-release-call<br>• privilege.voice.can-send-dtmf | • privilege.voice.can-two-step-conference<br>• privilege.voice.can-two-step-transfer<br>• privilege.voice.can-use<br>• privilege.voice.consultation.can-use-caller-id<br>• privilege.voice.make-call.can-use-caller-id<br>• privilege.voice.show-monitoring.can-use<br>• privilege.voice.single-step-conference.can-use-caller-id<br>• privilege.voice.single-step-transfer.can-use-caller-id |

You can use the following options in the **[interaction-workspace]** section to configure voice interactions:

- voice.auto-answer — Specifies whether a voice interaction is automatically answered when a TServer Ringing event is received. This option can be overridden by a routing strategy.
- voice.auto-answer.is-enabled-on-already-in-call — When `voice.auto-answer` is set to `true`, this option specifies whether a voice interaction is automatically answered if there is no other active call. This option can be overridden by a routing strategy.
- voice.mark-done-on-release — Specifies whether the Mark Done function is required to complete the release of the call.
- voice.prompt-for-end — 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 Configuration Guide.
- privilege.voice.can-one-step-conference — Enables instant conferencing of a voice call. Depends on privilege.voice.can-use.
- privilege.voice.can-one-step-transfer — Enables instant conferencing of a voice call. Depends on privilege.voice.can-use.
- privilege.voice.can-send-dtmf — Enables agents to send DTMF during a voice call. Depends on privilege.voice.can-use.
- privilege.voice.can-use — Mandatory to use the voice channel. When the value of this option is set to `true`, the agent is permitted to use the Voice channel.
- privilege.voice.show-monitoring.can-use — Enables agents to be notified that the current call is monitored by a supervisor.
- interaction.disposition.is-mandatory — 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.

- interaction.disposition.is-read-only-on-idle — Prevents changes to the disposition code after the interaction has been released. This option can be overridden by a routing strategy.
- interaction.disposition.key-name — 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.
- interaction.disposition.use-attached-data — Enables the adding of attached data from the interaction in UserEvent. This option can be overridden by a routing strategy.
- interaction.disposition.value-business-attribute — 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.
- intercommunication.voice.make-call-caller-id-business-attribute — A character string that specifies the name of the Business Attribute that contains the Attribute Values used as an enumerated value to select the caller id during a make call.

## Important

Voice call monitoring is supported only for SIP Server environments

# Voicemail

Workspace Web Edition enables SIP agents to access their voicemail boxes through the agent interface. When this feature is enabled, Workspace displays a Message Waiting Indicator, a red circle that show the total number of unread messages, including system messages, in all voicemail boxes that are configured to be connected to Workspace.

Refer to the following Genesys documentation for information about setting up voicemail boxes in your Genesys system:

- Genesys SIP Voicemail (voicemail deployment, administration, and use)
- Feature Server Deployment Guide (mailbox configuration)

Workspace uses the following privileges to enable voicemail functionality:

- privilege.voicemail.can-use

You can use the following options in the **[interaction-workspace]** section to configure voicemail:

- voicemail.access-number — number the agent can call to access the voicemail system
- voicemail.notification-types — types of voicemail boxes included in the count of unread voicemail messages
- voicemail.request-timeout — time to wait for voicemail messages from Feature Server

# Outbound campaign interactions

Workspace Web Edition supports the following Outbound campaign types:

- **Preview**: Contacts are retrieved manually by the agent and dialed manually by the agent. These are low volume/high value campaigns, in which campaign calls are made by using a preset calling list for a specific campaign.
- **Push-Preview**: Contacts are retrieved automatically by the campaign, but the agent dials the call manually. These are low volume/high value campaigns, in which campaign calls are made by using a preset calling list. Agents are provided with a preview of the call, and then can either have the opportunity to accept it, or to reject it and return it to the top of the queue or discard the record.
- **Progressive**: Contacts are retrieved and dialed automatically by the campaign. These are low volume/ high value campaigns, in which outbound calls are directed to the agent desktop.
- **Predictive**: Contacts are retrieved and dialed automatically by the campaign. These are high volume/ low value campaigns, in which outbound calls are directed to the agent desktop.

## Outbound privileges

Workspace Web Edition employs the following Outbound privileges for all outbound campaign voice interactions:

- privilege.outbound.can-use: Enables access to the Outbound Campaign functions. All other outbound privileges and configuration options have a dependency on this privilege.
- privilege.outbound.can-cancel-record: Enables agents to decline a preview record so that it is not processed during the current campaign.
- privilege.outbound.can-dial-alternative-chained-record: Enables agents to dial a number from the preview record chain that is different from the number selected by the system.
- privilege.outbound.can-get-next-preview-record: Enables agents to request a new preview record while terminating the processing of the previous record.
- privilege.outbound.can-mark-do-not-call: Enables agents to mark a contact as `Do Not Call`.
- privilege.outbound.can-reject-record: Enables agents to decline a preview record and redirect it back to the queue to be processed by another agent in the campaign.
- privilege.outbound.can-reschedule: Enables agents to reschedule an outbound record of an active call for callback at a different date and/or time.
- privilege.outbound.can-reschedule-before-call: Enables agents to reschedule an outbound record of an Outbound Preview for callback at a different date and/or time. The Can Reschedule privilege must be enabled for this privilege to be active.
- privilege.outbound.can-reschedule-on-new-number: Enables agents to reschedule an outbound record using a new number. This action results in a new record being added to the chain.
- privilege.outbound.can-set-call-result: Enables agents to set a call result for the outbound record.
- privilege.outbound.push-preview.can-use: Enables agents to participate in an Outbound push-preview

campaign.

## Outbound options configuration

After you grant privilege.outbound.can-use, use the following options in the `interaction-workspace` section to configure outbound interactions:

- outbound.call-result-values: Specifies the list of call results that are available for the agent to use for an outbound interaction. The call results are displayed in the order in which they appear in the list. For example: `Answered,NoAnswer,AnsweringMachine,Busy,WrongNumber`
- outbound.call-result-automatically-selected: Specifies the call result to be selected by default for outbound records. The specified call result must be defined by the values that are specified for the outbound.call-result-values option. If set to an empty value, the current call result of the outbound record is selected, or unknown is selected if there is no current value.
- outbound-callback.ringing-bell: Specifies the outbound callback ringing sound configuration string of a scheduled callback pushed to the agent as a preview.
- outbound.preview.max-simultaneous-preview-record: Specifies the maximum number of simultaneous Outbound Preview records an agent can view in the interaction window. A 0 or a negative value indicates no limit.

> **Important**
> You can edit case information to include custom fields in the case information for an Outbound interaction.

# Email Interactions

Workspace enables agents to handle email interactions, including the following functionality:

- Reply to inbound emails (with or without the original text)
- Create new outbound emails
- Check the spelling of an outbound email
- Apply a signature to an outbound email
- Store emails in a workbin
- Transfer an email to an internal target
- Set a disposition code
- Mark the interaction as Done
- View and copy links to non-embedded images in inbound and outbound email interactions
- View and insert Standard Responses
- Paste content from browsers and other applications that display HTML
- Paste images from browsers and other applications that display HTML

Workspace enables the following Email interaction capabilities:

- Decline an interaction
- Release an interaction
- Move an interaction to a Workbin
- Reply to an interaction
- Reply All to an interaction
- Add Attachments to an interaction
- Send an interaction
- Save an interaction
- Delete an interaction

The following are mandatory options for correct email interaction handling:

- privilege.email.can-use — Mandatory to use the email channel. When the value of this option is set to `true`, the agent is permitted to use the Email channel.
- email.default-queue — Specifies the default queue for email interactions.
- email.outbound-queue — Specifies the default queue for email interactions.
- workbin.email.draft — Specifies the name of the Workbin to be used to store draft emails
- workbin.email.in-progress — Specifies the workbin to be used to store emails which are in the `In`

`Progress` state.

You can also use the following options for email interaction handling:

- email.from-addresses — Specifies a character string that specifies the name of the Business Attribute which contains the Attribute Values that are used as available addresses. You can set a default value by using the flag from the Business Attribute value. These come from the addresses of email interactions. This option can be overridden by a routing strategy.
- interaction.disposition.is-mandatory — 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.
- interaction.disposition.is-read-only-on-idle — Prevents changes to the disposition code after the interaction has been released. This option can be overridden by a routing strategy.
- interaction.disposition.key-name — 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.
- interaction.disposition.use-attached-data — Enables the adding of attached data from the interaction in UserEvent. This option can be overridden by a routing strategy.
- interaction.disposition.value-business-attribute — 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.

You can use the following options to control the default and available fonts for outgoing email interactions:

- editor.fonts — the list of available fonts in the font menu.
- editor.font-sizes — the list of available font sizes in the font size menu.
- editor.default-font — the default font for all new or reply outgoing email interactions.
- editor.default-font-size — the default font size for all new or reply outgoing email interactions.

## Signatures

Workspace Agent Desktop enables you to assign default signature templates to outbound email interactions. Email signatures allow the insertion of tagged-data fields with data that is related to the agent, such as name, job title, department, phone number, email address, and so on. Refer to "Using UCS Data in Standard Responses: System Variables" in the "Genesys Knowledge Management: Basics" chapter of the eServices User's Guide for more information about the tagged data field. Signatures also support linked image(s) and hyperlinks.

Use the email.signature configuration option in the **[interaction-workspace]** section to specify the type and location of the signature template that Workspace should add to outbound emails.

Use the email.signature.line-<n> configuration option in the **[interaction-workspace]** section to specify the path and name of the signature file or the location of the Response in the Standard Response Library that is to be used as the default signature.

> **Tip**
> This option can be overridden by a routing strategy based on the attached data of the interaction.

## Forwarding Inbound Email

Workspace enables agents to forward active and closed inbound email interactions to an external resource by selecting a valid email address in Team Communicator, either by manually entering the address or by selecting it from a searched Contact or a Corporate or Personal Favorite. Email Forward supports both **To** and **CC** (carbon copy) addressing and multiple recipient targets. Agents can also add additional information about the forwarded interaction in a dedicated text box.

Two types of forwarding are supported:

1. Inline forwarding (quoted)
2. Forwarding as an attachment (if supported by the email server)

Depending on the Business Process that you are using, the agent who has forwarded an email interaction to an external resource can still retain the ownership of the interaction and be responsible for closing the interaction.

### Business Processes

A set of key-value pairs that include the destination email address and other information is added to the inbound email before it is placed in the Forward queue so that they can be used in a Business Process:

#### Inline Forwarding

- `IW_OriginalAgentEmployeeId` — The Empoyee Id of the agent.
- `OriginalAgentUserName` — The UserName of the agent.

Refer to eServices email workflow samples for more information about forwarding email interactions to external resources.

#### Forward as an Attachment

- `IW_OriginalAgentEmployeeId` — The Empoyee Id of the agent.
- `IW_TransferrerUserName` — The UserName of the agent.
- `IW_EmailNotepad` — The current notepad text of the email view.
- `IW_ExternalAgentAddress` — The **To** email address destination. If the value of the email.forward.enable-multiple-to-addresses option is set to `true`, the value of `IW_ExternalAgentAddress` is a comma separated list of **To** addresses. This list has to be parsed in the

Business Process. For each extracted address, the Business Process has to do the following:

1. Assign the extracted address to a variable.
2. Use this variable in the Forward Email block.

- `IW_ExternalAgentCcAddress` — The **CC** email address destination. This is added only if the value of the email.forward.enable-cc-addresses option is set to `true` (Enable the CC address field where agents can specify one or several CC addresses). The value is a comma separated list of **CC** addresses. With this list, the Business Process has to do the following:

1. Assign the list to a variable.
2. Use this variable in the Forward Email block.

- `IW_ExternalAgentInstructions` — The text provided by the agent who is forwarding the email interaction. This is added only if the value of the email.forward.enable-instructions option is set to `true` (Enable the forward instructions field). This value can be used as a Field Code in the Standard Response that is contained in the Forward Email block to give forward instructions to an external resource.

Refer to eServices email workflow samples for more information about forwarding email interactions to external resources.

## Privileges

The following privilege controls the use of the forwarding feature:

- privilege.email.can-forward — Allows forwarding of an email as an attachment.
- privilege.email.can-inline-forward — Allows forwarding of an email as an inline (quoted) email.
  If both privileges are granted, the **Forward** button becomes a split button, and the following menu options are availalbe:
  - Forward (Inline forwarding)
  - Forward as an Attachment
- privilege.contact.can-inline-forward.email.from-history — Allows forwarding of a closed email interaction as an inline email from the History.

## Configuration Options

Use the following configuration options in the **[interaction-workspace]** section to configure the forwarding features:

### Forwarding as an Attachment Specific Configuration Options

- email.forward.enable-instructions — Enable the forward information field. Information entered into this field is included in the email containing the attachment.
- email.forward-queue — Specifies the Interaction Queue in which the inbound email is placed when an agent forwards it to an external resource.
- email.forward.enable-cc-addresses — Enable agents to specify more than one target in the **CC** address field.
- email.forward.enable-multiple-to-addresses — Enable agents to specify more than one target in the **To** address field.

## Inline Forwarding Specific Configuration Options

- email.inline-forward-queue — Specifies the Interaction Queue in which the inbound email is placed when an agent forwards it as an inline email.
- email.inline-forward-prefix — Specifies the in-line forward prefix that is added to subject of the inbound email.
- email.inline-forward-header — Specifies the header information that is added inline to the forwarded email interaction.

# Chat Interactions

Workspace supports the following functionality for Chat interactions:

- Accept an interaction
- Reject an interaction
- Ignore an interaction
- End an interaction
- One-Step Transfer an interaction
- Consult with another agent about an interaction
- Set Interaction Disposition
- Mark Done

You use the following options in the **[interaction-workspace]** section to configure Chat interactions (there are also options that you can use to control the appearance of chat interactions in the agent interface):

- privilege.chat.can-use — Mandatory to use the chat channel. When the value is set to `true`, the agent is permitted to use the Chat channel.
- chat.auto-answer — 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 Configuration Guide.
- chat.nickname —Specifies that a nickname (pseudonym) is used in chat sessions instead of the agent's user name, and defines the nickname.
- chat.pending-response-to-customer — Specifies two alarm thresholds, in seconds, that warn agents that they have a pending response to a chat from a customer. Three levels are displayed: before the warning time, between the warning time and the maximum time, and after the maximum time.
- chat.typing-timeout — Specifies the duration, in seconds, that the typing notification is displayed after the last keystroke and before the agent or contact sends their message.
- interaction.disposition.is-mandatory — 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.
- interaction.disposition.is-read-only-on-idle — Prevents changes to the disposition code after the interaction has been released. This option can be overridden by a routing strategy.
- interaction.disposition.key-name — 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.
- interaction.disposition.use-attached-data — Enables the adding of attached data from the interaction in UserEvent. This option can be overridden by a routing strategy.
- interaction.disposition.value-business-attribute — 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.

# Facebook Interactions

Workspace supports the following functionality for Facebook interactions:

- Accept an interaction
- Reject an interaction
- Ignore an interaction
- Mark Done an interaction
- One-Step Transfer an interaction
- Set Interaction Disposition

You use the following options in the **[interaction-workspace]** section to configure Facebook interactions:

- privilege.facebook.can-use — Enables agent to use the Facebook channel.
- facebook.auto-answer — Specifies whether a Facebook interaction is automatically accepted when an Interaction Server Invite event is received. This option can be overridden by a routing strategy as described in Configuration Guide.
- facebook.comments-pagination-size — Specifies the number of comments are initially displayed and then added when Show More is clicked.
- facebook.default-queue — Specifies the name of the queue in which outbound interactions are first created. This name must be identical to the the name of the default queue in the configuration layer.
- facebook.outbound-queue — Specifies the name of the queue in which an outbound interaction is to be placed when an agent has completed editing it.
- interaction.disposition.is-mandatory — 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.
- interaction.disposition.is-read-only-on-idle — Prevents changes to the disposition code after the interaction has been released. This option can be overridden by a routing strategy.
- interaction.disposition.key-name — 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.
- interaction.disposition.use-attached-data — Enables the adding of attached data from the interaction in UserEvent. This option can be overridden by a routing strategy.
- interaction.disposition.value-business-attribute — 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.

# Twitter Interactions

Workspace supports the following functionality for Twitter interactions:

- Accept an interaction
- Reject an interaction
- Ignore an interaction
- Mark Done an interaction
- One-Step Transfer an interaction
- Set Interaction Disposition

You use the following options in the **[interaction-workspace]** section to configure Twitter interactions:

- privilege.twitter.can-use — Enables agent to use the Twitter channel.
- twitter.default-queue — Specifies the name of the queue in which outbound interactions are first created. This name must be identical to the the name of the default queue in the configuration layer.
- twitter.outbound-queue — Specifies the name of the queue in which an outbound interaction is to be placed when an agent has completed editing it.
- interaction.disposition.is-mandatory — 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.
- interaction.disposition.is-read-only-on-idle — Prevents changes to the disposition code after the interaction has been released. This option can be overridden by a routing strategy.
- interaction.disposition.key-name — 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.
- interaction.disposition.use-attached-data — Enables the adding of attached data from the interaction in UserEvent. This option can be overridden by a routing strategy.
- interaction.disposition.value-business-attribute — 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.

# 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.

Use the following configuration option when the decimal symbol in the regional settings of the agent's workstation or browser is different from the one provided by the database: case-data.float-separator. Typical float separators are: '.' ',' '\'

## 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 Extension, 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 |
| | mandatory | true, false | false | Specifies whether this key name is mandatory |
| | 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) | |
| | read-only | true, false | true | Specifies whether this key name can be modified |
| | mandatory | true, false | false | Specifies whether this key name is mandatory |
| | 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 |
| | mandatory | true, false | false | Specifies whether this key name is mandatory |
| | string.default-value | | | |
| | int.min-value | integer | 0 | Minimum value accepted |
| | int.max-value | integer | 9007199254740992 | Maximum value accepted |

| Attribute type | Option | Valid Values | Default Value | Description |
|---|---|---|---|---|
| enum | display-type | enum | enum (for this type) | |
| | read-only | true, false | true | Specifies whether this key name can be modified |
| | mandatory | true, false | false | Specifies whether this key name is mandatory |
| | 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 |
| | mandatory | true, false | false | Specifies whether this key name is mandatory |
| | 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) | The date is stored in the UTC format: YYYY-MM-DDThh:mm:ssTZD (refer to http://www.w3.org/TR/NOTE-datetime).<br>The display is based on the local from the browser. |
| | read-only | true, false | true | Specifies whether this key name can be modified |
| | mandatory | true, false | false | Specifies whether this key |

| Attribute type | Option | Valid Values | Default Value | Description |
|---|---|---|---|---|
| | | | | name is mandatory |

## 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 options 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: This option is configured by default to display most valid URLs as clickable hyperlinks.
- interaction.case-data.enable-hyperlink: This option controls whether Workspace displays 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 as follows, the `TITLE` is displayed as a clickable hyperlink, and the target is the URL:
    - <a href="URL" title="TITLE" />
    - <a href="URL">TITLE<a/>
- If the attached data is formatted as follows, the `WEB_SITE_NAME` is displayed as a clickable hyperlink, the `TITLE` is used for the tooltip on mouse over, and the target is the URL:
    - <a href="URL" title="TITLE">WEB_SITE_NAME<a/>
- In the hyperlink tag, you can use the `target` attribute to determine the name of the tab or the window used to display the related page. If a tab or a window is already based on this name, the browser reuses it. For example:
    - <a href="URL" title="TITLE" target="WINDOW_NAME"/>
    - <a href="URL" target="WINDOW_NAME">TITLE</a>
    - <a href="URL" target="WINDOW_NAME" title="TITLE">WEB_SITE_NAME</a>

If Protected mode is enabled in the Microsoft Internet Explorer 10 and 11 web browser, when the agent clicks the hyperlink for attached data configured with a named target, the browser always opens the target of the link in a new window or tab. To prevent this, add the hyperlinked website and the Web Services and Application URL to the list of trusted sites. Protected mode is disabled by default for trusted sites. Adding the websites to the list of trusted sites ensures that both sites have the same integrity level. For more information, see https://msdn.microsoft.com/library/ms534659(v=vs.85).aspx.

**Important**

Setting the `target` attribute to `*_self*`, `*_parent*` and `*_top*` doesn't change the default behavior of the hyperlink.

## 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).

# Workbins

A workbin is like a shared queue for Agents, Places, Agents Groups, and Places Groups, in which an agent, supervisor, or manager can store email and other multimedia interactions that are to be handled later. However, unlike with a queue, interactions that are stored in a workbin can be accessed in any order; interactions can be assigned to agents, places, agent groups, or place groups. Items that are stored in a workbin are owned by the owner of the workbin. Open interactions can be added to a Workbin to be saved for future processing or collaborative processing by the agent, place, agent group, or place group.

You use the following options in the **[interaction-workspace]** section to configure Workbins:

- workbin.email.draft: The name of the workbin to be used to store draft email interactions.
- workbin.email.in-progress: The name of the workbin that is to be used to store inbound email interactions for later processing, after an agent explicitly saved the email interaction or submitted an outbound reply.
- workbin.facebook.draft: The name of the workbin to be used to store a draft Facebook post.
- workbin.facebook.in-progress: The name of the workbin that is to be used to store inbound Facebook posts for later processing, after an agent explicitly saves the Facebook post or submits an outbound reply.
- workbin.<media-type>.in-progress: The name of the workbin to be used to store interactions of the specified workitem media type.
- workbin.twitter.draft: The name of the workbin to be used to store a draft Twitter post.
- workbin.twitter.in-progress: The name of the workbin that is to be used to store an inbound Twitter post for later processing, after an agent explicitly saves the Twitter post or submits an outbound reply.

# Workitem interactions

Workitems are documents that might be directed to agents, supervisors, or managers for handling. They include many media types, such as faxes or PDFs, that a user might have to view while they are handling interactions of another type, such as email.

You use the following options in the **[interaction-workitem]** section to configure Workitems:

## Privilege options

For a list of privilege options that you can set for workitems, see Enabling Privileges and Features.

## Workitem behaviour options

- <media-type>.auto-answer specifies whether a workitem is automatically accepted when a Interaction Server Invite event is received
- <media-type>.prompt-for-done specifies if the application prompts a confirmation message when a user clicks the **Done** button.
- <media-type>.ringing-bell specifies the path to the sound file that is played when the workitem interaction is ringing.
- intercommunication.<media-type>.queue specifies the name of the Interaction Queue that is used by the routing-based feature for workitems.
- intercommunication.<media-type>.routing-based-actions specifies the list of routing based actions that an agent is allowed to perform.
- intercommunication.<media-type>.routing-based-targets defines the list of targets that are contacted through the routing based mechanism for the requests that are defined in the intercommunication.<media-type>.routing-based-actions option.
- workbin.<media-type>.in-progress specifies the name of the workbin to be used to store interactions of a particular workitem media type.
- workbin.<media-type>.in-progress.displayed-columns specifies the list of interaction fields displayed as columns in the specified workbin.

## Contact options

- contact.lookup.<media-type>.enable enables Workspace features that rely on Universal Contact Server (UCS) for contact lookup when a workitem interaction of the given media type is presented to the agent.
- contact.lookup.<media-type>.enable-create-contact, when this option is `true` and the

**contact.lookup.<media-type>.enable** option is set to `true`, the UCS creates a contact if the initial search does not find a matching existing contact.

- contact.ucs-interaction.<media-type>.enable-create, when this option is `true`, the UCS generates the interaction history for Open Media Workitem interactions.

# Standard Responses Library

The Standard Responses Library (SRL) enables you to access a database of prewritten standard responses for interactions. Agents can insert these responses as replies into any email or chat message.

Agents can modify the contents of a standard response after inserting it into an email interaction or chat message.

To use the Standard Responses Library, you must set up the multimedia feature in Web Services, by using the `features-definition.json` file.

Agents can insert these responses as replies into any email, instant messaging, or chat message, or they can read them to the contact during a voice interaction.

Before you begin, ensure the following prerequisites are met:

- Genesys Administrator Extension 8.0.2 or higher, configured to show Advanced View.
- A working knowledge of Genesys Administrator Extension 8.
- A Workspace `Application` object exists in the Configuration Database.
- Workspace has a connection to Universal Contact Server.
- The Procedure: Creating a Role and allowing an Workspace privilege and assigning a Role to an agent or agent group.
- The privilege.SRL.can-use option must be enabled.
- Optional. To allow agents to use the Quick Search feature of the Responses database, enable the privilege.SRL.can-quick-search option.
- Optional. Ensure that privileges related to channels are enabled. For more details, see:
  - Setting Up Agents
  - Voice Interactions
  - Email Interactions
  - Chat Interactions
  - Twitter Interactions
  - Facebook Interactions

To enable an agent to access the Universal Contact Server database of prewritten standard responses for interactions:

1. For information about creating and managing Standard Responses and standard response field codes, refer to Knowledge Manager.
2. Enable an index search on SRL in the Universal Contact Server configuration.
   - Set the `index\enabled` option to `true`.

- Set the `index.srl\enabled` option to `true`.

For more details about these settings, refer to the *eServices (Multimedia) 8.0 User's Guide*.

3. Configure the other Standard Response options to meet the requirements of your environment.
4. (Optional) Create custom field codes for agents, agent groups, tenants, or at the application level that can be used by Standard Response objects. Use the standard-response.field.<[Agent.]CustomFieldCode> option to specify a custom field code and value, such as an agent nickname, role, department, or other qualification, and then insert the field code into a Standard Response object.

   For example, you could create a set of field codes for a Standard Response for an agent signature such as the following:

```
Name: "Signature"
Text: "<$ Agent.Title $> <$ Agent.FullName $> (< $Agent.NickName$ >) - <$ Agent.Position
$>
<$ Department $>"
```

In the Agent annex configure `standard-response.field.<[Agent.]CustomFieldCode>`:

- `'interaction-workspace'/'standard-response.field.Agent.Title' = "Ms"`
- `'interaction-workspace'/'standard-response.field.Agent.NickName' = "Beth"`
- `'interaction-workspace'/'standard-response.field.Agent.Position' = "Technical Support Analyst"`

In the Agent Group annex (in Configuration Server):

- `'interaction-workspace'/'standard-response.field.Department' = "Customer Care"`

# Hierarchical Dispositions

Workspace Web Edition supports the display of disposition codes in a hierarchy tree, with expanding and collapsing controls.

Disposition Codes are set up as Business Attributes in Configuration Server and set to `State Enabled`.

The hierarchy is configured by adding folders under the Disposition Code Business Attribute in Configuration Server.

The dispositions hierarchy is enabled by setting up the annex for the disposition Business Attribute.

# Enabling Agents to View KPIs and Contact Center Statistics

The Workspace agent desktop includes two optional tabs and the Statistics Gadget that you can configure to display real-time agent Key Performance Indicators (KPIs) (**My Statistics**) and contact center statistics (**Contact Center Statistics**). KPIs enable agents to focus on their efficiency and to compare their performance against that of their colleagues. Contact center statistics enable agents to focus on their efficiency and to compare their performance against that of their colleagues.

> **Important**
> KPIs and Statistics are reported only for the voice channel.

To enable KPIs and statistics:

1. You must first set up the **statistics.yaml**, which contains a list of statistics that can be requested from Stat Server.
2. You then create sections in the Workspace Application object that correspond to the statistic names in the **statistic.yaml** file that you want to use.
3. Finally, you configure the KPI and Contact Center Statistics options to display the statistics to your agents.

For details about the statistics used in Workspace, see the following topics in the Stat Server 8.5.1 User's Guide:

- Statistic Configuration Options
- Statistical Type Sections
- Stat Type Definitions in the Stat Server Application Template
- Creating Stat Type Definitions

The following statistics are supported by default in Workspace. To display them, follow the example for how to display a statistic in the **My Statistics** or **Contact Center Statistics** tabs:

| | | | |
|---|---|---|---|
| • AverageHandlingTime | • CurrentTargetState | • MissedEmails | • TalkDuration |
| • AverageHandlingTime_Chat | • Current_In_Queue | • OutboundCalls | • TimeInCurrentEmail |
| • AverageHandlingTime_Email | • EmailDuration | • OutboundEmails | • TimeInCurrentFacebook |
| • AverageWaitingTime | • HoldDuration | • Productivity | • TimeInCurrentState |
| • ChatDuration | • InboundCalls | • Productivity_Chat | • TimeInCurrentTwitter |

- ConsultCalls
- CurrAvgCallWaitingTime
- CurrMaxCallWaitingTime
- CurrNumberInCall
- CurrentAgentState
- CurrentNotReadyAgents
- CurrentNumberLoggedInAgents
- CurrentReadyAgents
- InboundChats
- InboundEmails
- InternalCalls
- LongestIdleTime
- MissedCalls
- MissedCallsForSkill
- MissedChats
- Productivity_Email
- ReadyDuration
- ReadyDuration_Chat
- ReadyDuration_Email
- RejectedChats
- RejectedEmails
- ServiceLevel
- ServiceLevel
- TimeInCurrentWorkitem
- Total_Abandoned
- Total_Answered
- TransferredChats
- TransferredChatsToQueue
- TransferredEmails
- TransferredEmailsToQueue
- WrapDuration

# statistics.yaml Setup

Workspace reports statistics based on the statistic names in the **statistics.yaml** file which is included with Web Applications and Services. The file contains all of the statistics that Workspace needs internally as well as those that are required by the agent and supervisor applications.

The **statistics.yaml** file 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).

The following is an example entry in the **statistics.yaml** file. The name of the statistic is `OutboundCalls`. To use this statistic, create a section in the `WS_Cluster` application object by using Genesys Administrator Extension (or Configuration Manager) such as `KPI-OutboundCalls`, then create an option in the section called `statistic-name` and assign `OutboundCalls` as the value. You can also create an option in the section called `description` and specify the value as `Total number outbound calls`.

```
name: OutboundCalls
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
    category: TotalNumber
    dynamicTimeProfile: "0:00"
    intervalType: GrowingWindow
    mainMask: CallOutbound
    subject: DNAction
```

## List of Available Statistics

Click the link below to see an example of a **statistics.yaml** file and all the statistics available in Workspace by default:

### [+] statistics.yaml

```
---
name: CurrentTargetState
notificationFrequency: 0
```

```
notificationMode: IMMEDIATE
objectType: AGENT
statisticDefinitionEx:
  category: CurrentTargetState
  mainMask: '*'
  subject: DNStatus
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
---
name: CurrentAgentState
notificationFrequency: 0
notificationMode: IMMEDIATE
objectType: AGENT
statisticDefinitionEx:
  category: CurrentState
  mainMask: '*'
  subject: DNAction
---
insensitivity: 0
name: Total_Answered
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: QUEUE
saveHistory: true
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: CallAnswered
  subject: DNAction
---
insensitivity: 0
name: Total_Abandoned
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: QUEUE
saveHistory: true
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: CallAbandoned
  subject: DNAction
---
insensitivity: 0
name: Current_In_Queue
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: QUEUE
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: CurrentNumber
  mainMask: CallWait
  subject: DNAction
---
insensitivity: 0
name: CurrMaxCallWaitingTime
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: QUEUE
statisticDefinitionEx:
```

```
  dynamicFilter: MediaType=voice
  category: CurrentMaxTime
  mainMask: CallWait
  relativeMask: CallWait
  subject: DNAction
---
insensitivity: 0
name: CurrAvgCallWaitingTime
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: QUEUE
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: CurrentAverageTime
  mainMask: CallWait
  relativeMask: CallWait
  subject: DNAction
---
insensitivity: 0
name: AverageWaitingTime
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: QUEUE
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: AverageTime
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: CallWait
  relativeMask: CallWait
  subject: DNAction
---
insensitivity: 0
name: CurrentNotReadyAgents
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: SKILL_AG
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: CurrentNumber
  mainMask: AfterCallWork, NotReadyForNextCall
  subject: DNStatus
---
insensitivity: 0
name: CurrentReadyAgents
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: SKILL_AG
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: CurrentNumber
  mainMask: WaitForNextCall
  subject: DNStatus
---
insensitivity: 0
name: CurrNumberInCall
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: SKILL_AG
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: CurrentNumber
  mainMask: CallUnknown, CallConsult, CallInternal, CallOutbound, CallInbound, CallRinging,
```

```
CallDialing
  subject: DNStatus
---
insensitivity: 0
name: CurrentNumberLoggedInAgents
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: SKILL_AG
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: CurrentNumber
  mainMask: '*,~LoggedOut,~NotMonitored'
  subject: DNStatus
---
insensitivity: 0
name: LongestIdleTime
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: SKILL_AG
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: CurrentMaxTime
  mainMask: WaitForNextCall
  subject: DNStatus
---
insensitivity: 0
name: AverageHandlingTime
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: SKILL_AG
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: AverageTime
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: CallUnknown, CallConsult, CallInternal, CallOutbound, CallInbound, AfterCallWork
  relativeMask: CallUnknown, CallConsult, CallInternal, CallOutbound, CallInbound
  distinguishByConnId: true
  subject: DNStatus
---
insensitivity: 0
name: MissedCallsForSkill
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: SKILL_AG
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: TotalNumber
  mainMask: CallForwarded
  subject: DNAction
  intervalType: SlidingWindow
  intervalLength: 9999999
  dynamicTimeProfile: 3600:10
  distinguishByConnId: false
---
insensitivity: 0
name: AverageHandlingTime
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: AverageTime
```

```
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: CallUnknown, CallConsult, CallInternal, CallOutbound, CallInbound, AfterCallWork
  relativeMask: CallUnknown, CallConsult, CallInternal, CallOutbound, CallInbound
  distinguishByConnId: true
  subject: DNStatus
---
insensitivity: 0
name: Productivity
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: AverageNumberPerRelativeHour
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: CallInbound,CallOutbound,CallInternal,CallConsult,CallUnknown
  relativeMask: '*,~LoggedOut,~NotMonitored'
  subject: DNStatus
  distinguishByConnId: true
---
insensitivity: 0
name: InboundCalls
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: CallInbound
  subject: DNAction
---
insensitivity: 0
name: InternalCalls
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: CallInternal
  subject: DNAction
---
insensitivity: 0
name: OutboundCalls
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: CallOutbound
  subject: DNAction
---
insensitivity: 0
name: ConsultCalls
```

```
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: CallConsult
  subject: DNAction
---
insensitivity: 0
name: MissedCalls
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: TotalNumber
  mainMask: CallForwarded
  subject: DNAction
  intervalType: SlidingWindow
  intervalLength: 9999999
  dynamicTimeProfile: 3600:10
  distinguishByConnId: false
---
insensitivity: 0
name: ReadyDuration
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: TotalAdjustedTime
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: WaitForNextCall
  subject: DNStatus
---
insensitivity: 0
name: WrapDuration
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: TotalAdjustedTime
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: AfterCallWork
  relativeMask: AfterCallWork
  subject: DNStatus
---
insensitivity: 0
name: TalkDuration
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: TotalAdjustedTime
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
```

```
  mainMask: CallUnknown, CallConsult, CallInternal, CallOutbound, CallInbound
  subject: DNAction
---
insensitivity: 0
name: HoldDuration
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: TotalAdjustedTime
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask:
CallOnHoldInbound,CallOnHoldOutbound,CallOnHoldInternal,CallOnHoldConsult,CallOnHoldUnknown
  subject: DNAction
---
insensitivity: 0
name: TimeInCurrentState
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: CurrentTime
  mainMask: '*'
  subject: DNStatus
---
features: api-multimedia-chat
insensitivity: 0
name: AverageHandlingTime_Chat
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: ' MediaType=chat &
~PairExist("InteractionSubtype","InternalConferenceInvite")'
  category: AverageTime
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask:
InteractionHandlingUnknown,Coaching,InteractionHandlingInternal,InteractionHandlingOutbound,InteractionHandling
  relativeMask:
InteractionHandlingUnknown,Coaching,InteractionHandlingInternal,InteractionHandlingOutbound,InteractionHandling
  subject: DNStatus
  maskType: MEDIA
---
features: api-multimedia-email
insensitivity: 0
name: AverageHandlingTime_Email
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=email
  category: AverageTime
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask:
InteractionHandlingUnknown,Coaching,InteractionHandlingInternal,InteractionHandlingOutbound,InteractionHandling
  relativeMask:
InteractionHandlingUnknown,Coaching,InteractionHandlingInternal,InteractionHandlingOutbound,InteractionHandling
  subject: DNStatus
```

```
  maskType: MEDIA
---
features: api-multimedia-chat
insensitivity: 0
name: Productivity_Chat
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: ' MediaType=chat &
~PairExist("InteractionSubtype","InternalConferenceInvite")'
  category: AverageNumberPerRelativeHour
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask:
InteractionHandlingInbound,InteractionHandlingOutbound,InteractionHandlingInternal,Coaching,InteractionHandling
  relativeMask: '*,~Available,~NotAvailable'
  subject: DNStatus
  maskType: MEDIA
---
features: api-multimedia-email
insensitivity: 0
name: Productivity_Email
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=email
  category: AverageNumberPerRelativeHour
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask:
InteractionHandlingInbound,InteractionHandlingOutbound,InteractionHandlingInternal,Coaching,InteractionHandling
  relativeMask: '*,~Available,~NotAvailable'
  subject: DNStatus
  maskType: MEDIA
---
features: api-multimedia-chat
insensitivity: 0
name: InboundChats
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: ' MediaType=chat &
~PairExist("InteractionSubtype","InternalConferenceInvite")'
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: InteractionAccepted
  subject: DNAction
  maskType: MEDIA
---
features: api-multimedia-email
insensitivity: 0
name: InboundEmails
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=email
  category: TotalNumber
  dynamicTimeProfile: 0:00
```

```
  intervalType: GrowingWindow
  mainMask: InteractionAccepted
  subject: DNAction
  maskType: MEDIA
---
features: api-multimedia-chat
insensitivity: 0
name: ChatDuration
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: ' MediaType=chat &
~PairExist("InteractionSubtype","InternalConferenceInvite")'
  category: TotalAdjustedTime
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: InteractionHandlingUnknown, Coaching, InteractionHandlingInbound
  subject: DNAction
  maskType: MEDIA
---
features: api-multimedia-email
insensitivity: 0
name: EmailDuration
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=email
  category: TotalAdjustedTime
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: InteractionHandlingUnknown, Coaching, InteractionHandlingInbound
  subject: DNAction
  maskType: MEDIA
---
features: api-multimedia-email
insensitivity: 0
name: TimeInCurrentEmail
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=email
  category: CurrentTime
  mainMask: '*'
  subject: DNStatus
  maskType: MEDIA
---
features: api-multimedia-twitter
insensitivity: 0
name: TimeInCurrentTwitter
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=twitter
  category: CurrentTime
  mainMask: '*'
  subject: DNStatus
  maskType: MEDIA
---
features: api-multimedia-facebook
```

```
insensitivity: 0
name: TimeInCurrentFacebook
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=facebook
  category: CurrentTime
  mainMask: '*'
  subject: DNStatus
  maskType: MEDIA
---
features: api-multimedia-workitem
insensitivity: 0
name: TimeInCurrentWorkitem
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=workitem
  category: CurrentTime
  mainMask: '*'
  subject: DNStatus
  maskType: MEDIA
---
features: api-multimedia-email
insensitivity: 0
name: OutboundEmails
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=email
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: InteractionStartedOutbound
  subject: DNAction
  maskType: MEDIA
---
features: api-multimedia-chat
insensitivity: 0
name: TransferredChats
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: ' MediaType=chat  &
~PairExist("InteractionSubtype","InternalConferenceInvite")'
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: TransferMade
  subject: DNAction
  maskType: MEDIA
---
features: api-multimedia-chat
insensitivity: 0
name: MissedChats
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
```

```
  dynamicFilter: ' MediaType=chat &
~PairExist("InteractionSubtype","InternalConferenceInvite")'
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: InteractionRevoked
  subject: DNAction
  maskType: MEDIA
---
features: api-multimedia-chat
insensitivity: 0
name: RejectedChats
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: ' MediaType=chat &
~PairExist("InteractionSubtype","InternalConferenceInvite")'
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: InteractionRejected
  subject: DNAction
  maskType: MEDIA
---
features: api-multimedia-email
insensitivity: 0
name: TransferredEmails
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=email
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: TransferMade
  subject: DNAction
  maskType: MEDIA
---
features: api-multimedia-email
insensitivity: 0
name: MissedEmails
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=email
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: InteractionRevoked
  subject: DNAction
  maskType: MEDIA
---
features: api-multimedia-email
insensitivity: 0
name: RejectedEmails
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=email
```

```
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: InteractionRejected
  subject: DNAction
  maskType: MEDIA
---
features: api-multimedia
insensitivity: 0
name: ReadyDuration_Email
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=email
  category: TotalAdjustedTime
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: Available
  subject: DNStatus
  maskType: MEDIA
---
features: api-multimedia-chat
insensitivity: 0
name: ReadyDuration_Chat
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: MediaType=chat
  category: TotalAdjustedTime
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: Available
  subject: DNStatus
  maskType: MEDIA
---
insensitivity: 0
name: ServiceLevel
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: QUEUE
saveHistory: false
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: ServiceFactor1
  subject: DNAction
  intervalType: SlidingWindow
  intervalLength: 9999999
  dynamicTimeProfile: 3600:10
  timeRangeLeft: 0
  timeRangeRight: 120
  timeRangeLeft2: 0
  timeRangeRight2: 10
---
insensitivity: 0
name: ServiceLevel
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: SKILL_Q
saveHistory: false
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
```

```
  category: ServiceFactor1
  subject: DNAction
  intervalType: SlidingWindow
  intervalLength: 9999999
  dynamicTimeProfile: 3600:10
  timeRangeLeft: 0
  timeRangeRight: 120
  timeRangeLeft2: 0
  timeRangeRight2: 10
---
insensitivity: 0
name: Current_In_Queue
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: SKILL_Q
statisticDefinitionEx:
  dynamicFilter: MediaType=voice
  category: CurrentNumber
  subject: DNAction
  mainMask: CallWait
---
features: api-multimedia-chat
insensitivity: 0
name: TransferredChatsToQueue
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: ' PairExists("IW_RoutingBasedRequestType", "InitTransfer") & MediaType=chat'
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: InteractionHandlingInbound, InteractionHandlingInternal,
InteractionHandlingOutbound
  subject: DNAction
  maskType: MEDIA
---
features: api-multimedia-email
insensitivity: 0
name: TransferredEmailsToQueue
notificationFrequency: 10
notificationMode: PERIODICAL
objectType: AGENT
statisticDefinitionEx:
  dynamicFilter: ' PairExists("IW_RoutingBasedRequestType", "InitTransfer") & MediaType=email'
  category: TotalNumber
  dynamicTimeProfile: 0:00
  intervalType: GrowingWindow
  mainMask: InteractionHandlingInbound, InteractionHandlingInternal,
InteractionHandlingOutbound
  subject: DNAction
  maskType: MEDIA
```

### Web Services 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 statistics 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 `statisticsTTL` property. If this optional parameter is not defined, the default value of `86400` (24 hours) is used. This property defines the interval of time for which the value of the statistics are stored.

## KPIs

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

> **Important**
> The statistics and KPIs that are in the **statistics.yaml** file are the only statistics and KPIs that are currently supported by Workspace. Contact your Genesys Sales Representative or Genesys Customer Service to add statistics to the **statistics.yaml** file.

### Example

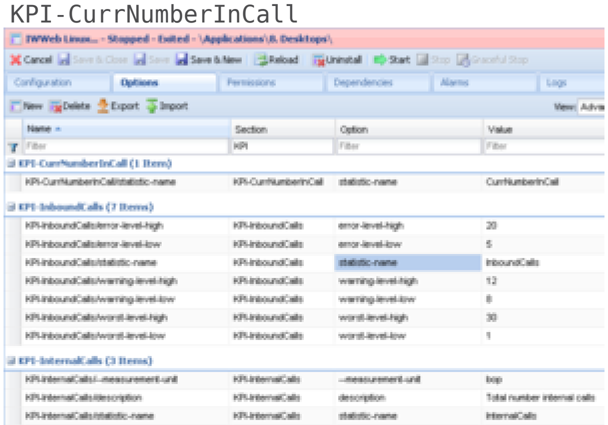
The following is an example of how to specify the `InboundCalls` statistic for display:

1. Choose a statistic from the **statistics.yaml** file that you want to display, such as `InboundCalls`.
2. Create a section in the `WS_Cluster` application object by using Genesys Administrator Extension (or Configuration Manager) such as `KPI-InboundCalls`
3. Create an option in the section called `statistic-name`.
4. Assign `InboundCalls` as the value.
5. (Optional) You can create other options in the section to specify a display name, such as `description` with the value as `Total number inbound calls`.
   The attributes that you can specify include:
   - statistic-name(mandatory)
   - target-value
   - warning-level-low
   - warning-level-high
   - error-level-low
   - error-level-high
   - worst-value-low
   - worst-value-high

- statistic-type — possible values are: duration, number. If statistic-type isn't specified, the default type is number excepted if the statistics name includes the duration keyword.
- measurement-unit — an optional display value.

Refer to Setting the Warning, Error, and Worst Levels for more information about how to use the target, warning, error, and worst attributes.

6. Repeat steps 1 through 5 for each statistic that you want to use.
7. In the `interaction-workspace` section in the `WS_Cluster` application, specify the name of the section that you created in Step 2 as one of the values of the `kpi.displayed-kpis` option. The value of this option is a coma-separated list of section names defined in the `WS_Cluster` application. Specify the statistics in the order in which you want the statistics to be displayed in the Workspace interface. For example: `KPI-InternalCalls,KPI-OutboundCalls,KPI-InboundCalls,KPI-CurrentTargetState,KPI-CurrNumberInCall`



Example of the KPI-InboundCalls section

## Contact Center Statistics

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.

> **Important**
>
> The statistics and KPIs that are in the **statistics.yaml** file are the only statistics and KPIs that are currently supported by Workspace. Contact your Genesys Sales Representative or Genesys Customer Service to add statistics to the **statistics.yaml** file.

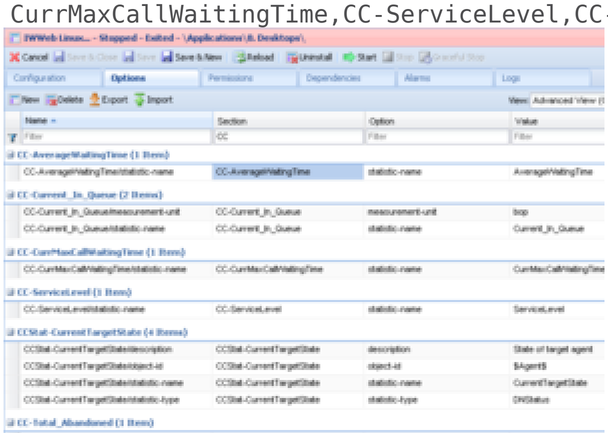
### Example

The following is an example of how to specify the `AverageWaitingTime` statistic for display:

1. Choose a statistic from the **statistics.yaml** file that you want to display, such as `InboundCalls`.

2. Create a section in the `WS_Cluster` application object by using Genesys Administrator Extension (or Configuration Manager) such as `CC-AverageWaitingTime`
3. Create an option in the section called `statistic-name`.
4. Assign `AverageWaitingTime` as the value.
5. (Optional) You can create other options in the section to specify a display name, such as `description` with the value as `Average Customer Wait Time`.
   The attributes that you can specify include:
   - statistic-name(mandatory)
   - target-value
   - warning-level-low
   - warning-level-high
   - error-level-low
   - error-level-high
   - worst-value-low
   - worst-value-high
   - statistic-type — possible values are: duration, number. If statistic-type isn't specified, the default type is number excepted if the statistics name includes the duration keyword.
   - measurement-unit — an optional display value.

   Refer to Setting the Warning, Error, and Worst Levels for more information about how to use the target, warning, error, and worst attributes.
6. Repeat steps 1 through 5 for each statistic that you want to use.
7. In the `interaction-workspace` section in the `WS_Cluster` application, specify the name of the section that you created in Step 2 as one of the values of the `statistics.displayed-statistics` option. The value of this option is a coma-separated list of section names defined in the `WS_Cluster` application. Specify the statistics in the order in which you want the statistics to be displayed in the Workspace interface. For example: `CC-AverageWaitingTime,CC-Current_In_Queue,CC-CurrMaxCallWaitingTime,CC-ServiceLevel,CC-Total_Abandoned,CC-Total_Answered`

   Example of the CC-AverageWaitingTime section
8. Specify the queue group, agent group, routing point, and/or virtual queue for which you want statistics reported by using the following options:
   - `statistics.queue-groups`

- `statistics.agent-groups`
- `statistics.routing-points`
- `statistics.virtual-queues`

9. Use the `permissions.agent-group.exclude` option to specify the list of agent groups or virtual agent groups to be excluded from Statistics, or use the `permissions.agent-group.restrict` option to specify the list of agent groups or virtual agent groups to which Statistics are restricted.
10. Specify the refresh time, in seconds, for the statistics in the **Contact Center Statistics** tab by using the `statistics.refresh-time` option.

## Setting the Warning, Error, and Worst Levels

Workspace provides eight non-mandatory options that you can use to define low and/or high levels of warning and error and low and/or high levels of worst values.

Some statistics are in an error state when they are below a certain value, while others are in an error state when they are above a certain value; for some statistics both a lower error threshold and a higher error threshold are required. The following non-mandatory options enable you to set a low and high threshold for a statistic:

- `error-level-low`—Values below this value are in an error state for the statistic.
- `error-level-high`—Values above this value are in an error state for the statistic.

Some statistics are in a warning state when they are below a certain value, while others are in a warning state when they are above a certain value; for some statistics both a lower warning threshold and a higher warning threshold are required. The following non-mandatory options enable you to set a low and high threshold for a statistic:

- `warning-level-low`—Values below this value are in a warning state for the statistic.
- `warning-level-high`—Values above this value are in a warning state for the statistic.

Use the error and warning options to specify ranges that are most suitable for the statistic.

Some statistics are performance based. The agent's result is compared to a target value to determine the agent's level of performance. Some statistics require a lower worst value and some require a higher worst value. For some statistics, both a lower and a higher worst value are required.

- `worst-value-low`—Values below this value result in a negative evaluation for the KPI.
- `worst-value-high`—Values above this value result in a negative evaluation for the KPI.
- `target-value`—The target value to be reached by the agent.
- `evaluation-display`—Specifies which value is displayed to the agent, a performance indicator or the raw statistic in the format of the statistic (for example, number, date, or percentage). If the option is set to `Result`, the actual statistic value is displayed. If the option is set to `Evaluation`, the performance of the agent is calculated by using the following formulae:

If the statistic value is lower than the target value, the following evaluation is applied: Agent

Performance = (Agent Result - `worst-value-low`) / (Target Value -`worst-value-low`) x 100 or: If the statistic value is higher than the target value, the following evaluation is applied: Agent Performance = (`worst-value-high` - Agent Result) / (`worst-value-high` - Target Value) x 100

## Example of a Statistics Configuration file for Workspace

The following is an example of a configuration (`.cfg`) file that is related to a statistics configuration for the options in a `WS_Cluster` object that was exported from Configuration Manager:

### [+] statistics-kpi.cfg

```
[CC-AverageWaitingTime]
statistic-name=AverageWaitingTime

[CC-Current_In_Queue]
statistic-name=Current_In_Queue

[CC-CurrMaxCallWaitingTime]
statistic-name=CurrMaxCallWaitingTime

[CC-ServiceLevel]
statistic-name=ServiceLevel

[CC-Total_Abandoned]
statistic-name=Total_Abandoned

[CC-Total_Answered]
error-level-high=15
error-level-low=2
statistic-name=Total_Answered
warning-level-high=10
warning-level-low=4

[CCStat-CurrentTargetState]
statistic-name=CurrentTargetState
statistic-type=DNStatus

[interaction-workspace]
kpi.displayed-kpis=KPI-InternalCalls,KPI-OutboundCalls,KPI-InboundCalls,KPI-
CurrentTargetState,KPI-CurrNumberInCall
statistics.displayed-statistics=CC-AverageWaitingTime,CC-Current_In_Queue,CC-
CurrMaxCallWaitingTime,CC-ServiceLevel,CC-Total_Abandoned,CC-Total_Answered,CCStat-
CurrentTargetState

[KPI-CurrentTargetState]
statistic-name=CurrentTargetState

[KPI-CurrNumberInCall]
statistic-name=CurrNumberInCall

[KPI-InboundCalls]
error-level-high=15
error-level-low=2
statistic-name=InboundCalls
warning-level-high=10
warning-level-low=4

[KPI-InternalCalls]
```

```
statistic-name=InternalCalls

[KPI-OutboundCalls]
statistic-name=OutboundCalls
```

### 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.

- Only Agent Statistics should be specified for KPIs.
- Only Queue Statistics should be specified for Contact Center Statistics.

## Statistics Gadget

The Workspace Statistics Gadget enables your agents to constantly monitor key statistics that you specify. You can specify one or more statistics to be displayed to the agent at all times in the Main Menu bar of the Workspace window.

The Contact Center Statistics and My Statistics tabs enable agents to view all the statistics and KPIs that you define; however, to view these, the agent must open those tabs, which temporarily hides the rest of the Workspace window.

Refer to the Workspace Help for information about using the Statistic Gadget.

Use the statistics.gadget-statistics option to specify a section or sections that contain a statistic or statistics to be displayed in the Statistics Gadget. If more than one statistic is specified, the first one is displayed by default. The others can be displayed by hovering the mouse pointer over the gadget or by clicking the gadget to open a menu that enables selection of a different statistic.

Use the statistics.gadget-statistics.max-size option to specify the maximum number of statistics that can be displayed in the Statistics Gadget. If you specify a number of statistics in the **statistics.gadget-statistics** option that exceeds this number, only the first *n* statistics are displayed.

### Configuring the statistics.gadget-statistics option

The statistics.gadget-statistics option enables you to specify statistic sections to be displayed. The section should contain the name of the statistics definition, specified by the `statistic-definitions` option and the list of objects for which the statistic should be displayed (in the `object-ids` option) and the type of the object (in the `object-type` option). The list of objects in `object-ids` should all be from the same type (for example, Agent Groups), and this type of object should be specified in the `object-type` option.

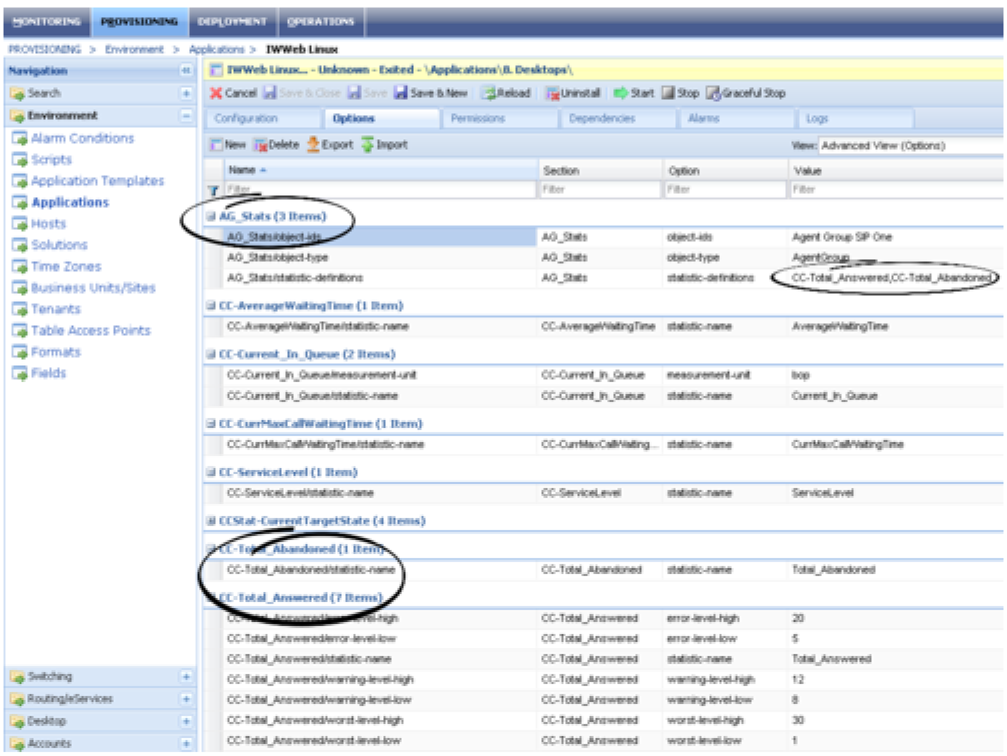
You can also specify the following options in the statistic section to add the name and the type of the statistic:

- `object-ids`: The ids of Agent Groups, Virtual Queues, DN Groups, and Routing Points

- `object-type`: Statistics can be displayed for five different types of objects:
    - Agent Group — Statistics for an agent group or virtual agent group
    - Routing Point — Statistics for a Routing Point
    - Virtual Queue — Statistics for a Virtual Queue
    - Queue Group — Statistics for a Group of DNs

Valid values for this option are the names of sections that you have defined that contain the definitions of statistics, such as the name of the statistic, the name of the object for which the statistic is calculated, object type, object id, and so on.

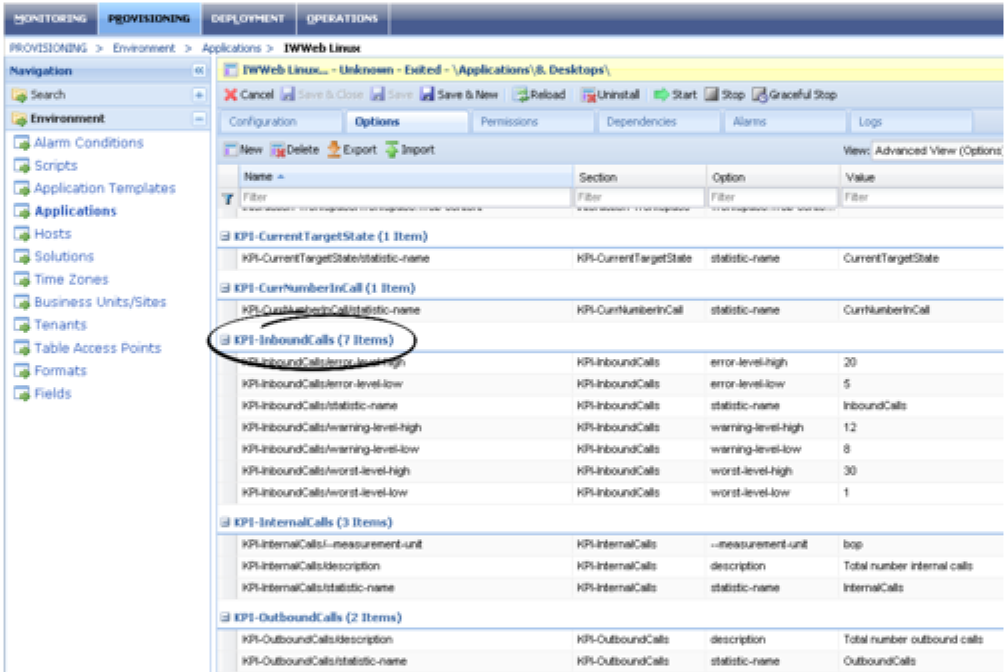
- Agent Statistic — If the statistic section is defined only with a `statistic-name` option, the statistic is considered as a statistic for the currently logged-in agent.
- Routing Point Statistic — The statistic section is defined with the `object-type` option as `RoutingPoint`.
- Virtual Queue Statistic — The statistic section is defined with the `object-type` option as `VirtualQueue`.
- Queue Group Statistic — The statistic section is defined with the `object-type` option as `QueueGroup`.
- Agent Group Statistic — The statistic section is defined with the `object-type` option as `AgentGroup`.




Workspace tests if the configured objects exist in the configuration layer. If a statistic is defined for an object that does not exist, the configured statistic is not displayed.

You can also create sections that collect a group of related statistics to make it easier to specify which statistics can be displayed. For example, you might want to display two statistics (`CC-Total_Answered and CC-Total_Abandoned statistics`) for an agent group object and one (KPI-

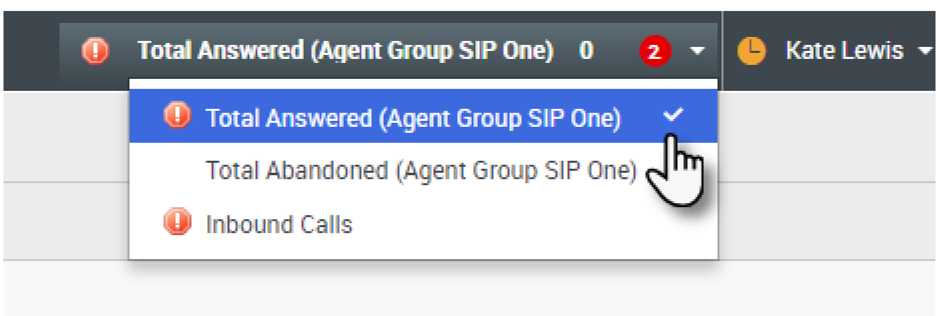
InboundCalls) for the current agent. The following two figures show how this is configured in Genesys Administrator Extension.



To display CC-Total_Answered and CC-Total_Abandoned statistics for the agent group to which the agent belongs create a new section and add these two statistics as values:

```
[AG_Stats]
object-ids=AG1, AG2
object-type=AgentGroup
statistic-definitions=CC-Total_Answered,CC-Total_Abandoned
```

Next, assign the value AG_Stats,KPI-InboundCalls to the **statistics.gadget-statistics** option. The three statistics are then available in the Workspace Main Menu bar.




You can use the permissions.agent-group.exclude or permissions.agent-group.restrict options to further refine which statistics are displayed in the Statistics Gadget and the Contact Center Statistics tab.

# Configuring Not Ready Reason Codes

Workspace Web Edition provides "reasons" with which agents can specify details about their `NotReady` status, for instance: *Lunch*, *15 minute break*, *Appointment*, *Meeting*, and so on. These reasons are configured by creating `Action Code` objects of type `Not Ready`.

Each `Not Ready Reason` can be customized by creating a section named **[interaction-workspace]** in the annexes of `Action Code` objects that are used to define `Not Ready Reason` codes. Next, define and configure the options in that section to customize the way that not-ready reasons are sent to your T-Server.

**Example:** Use *either* Configuration Manager or Genesys Administrator Extension for this procedure:

## Configuration Manager

**Purpose:** Create an ActionCode of type NotReady in Configuration Manager. **Start**

1. Open Configuration Manager
2. Go to the appropriate Tenant
3. Navigate to `Action Codes` Folder
4. Right-click > `New` > `Action Code` **OR** `File` > `New` > `Action Code`
5. For **Name**, change it to an appropriate name (example: *Lunch Break*)
6. **Tenant** should already be populated with the tenant name
7. For **Type**, select `Not Ready`
8. For **Code**, choose a relevant code for reporting purposes.

   *Note that codes must be unique within each **Type***
9. Click **Apply** or **OK**

**End**

## Genesys Administrator Extension

**Purpose:** Create an ActionCode of type NotReady in Genesys Administrator Extension. **Start**

a. Open Genesys Administrator Extension
b. Navigate to Provisioning > Desktop
c. Click `Action Codes`

d. Click `New`
e. For **Name**, change it to an appropriate name (example: *Lunch Break*)
f. **Tenant** should already be populated with the tenant name
g. For **Type**, select `Not Ready`
h. For **State**, ensure it is clicked as `Enabled`
i. For **Code**, choose a relevant code for reporting purposes.

   *Note that codes must be unique within each **Type***

j. Click **Save & Close**

**End**

# Email Quality Assurance

Workspace supports Quality Assurance (QA) review of outbound email interactions. Team Leads or other individuals can approve or reject email interactions. You can design your routing strategy to send all email interactions from an agent or agent group to a reviewer; you can design your routing strategy to enable an agent to request a review; you can direct email interactions for review to a reviewer or a group. You can design your routing strategy to send rejected email interactions back to the originating agent.

## Designing a Routing Strategy for an Email Quality Assurance Review

The email QA Review process is managed by a Routing Strategy and Business Process design. You must configure specific keys that are set in the interaction by Workspace; these keys are used by the Routing Strategy to route the interaction based on its review state, as defined by the keys. In the following example, the keys prefixed by "BP_" are exclusively under the responsibility of the Routing Strategy or Business Process. The keys that do not have this prefix are keys that are defined by Workspace. The values of the keys are interpreted and/or updated by the core product implementation and can also be interpreted/edited by the Routing Strategy or Business Process.

Prerequisites to enable the "QA Review Disposition" feature:

- Create a Business Attribute in Genesys Administrator Extension that defines all possible QA review dispositions. The following example uses the `Rejected` and `Accepted` dispositions as samples. You should use values that suit your business purposes.
- Assign the name of this Business Attribute as the value of the email.qa-review-dispositions-business-attribute option.
- The QA Review disposition that is selected by a supervisor is assigned to the attached data `Ixn.UserData.QAReviewDisposition`, described in the following section. Your Business Process must apply rules that are based on this disposition— for example, redistributing to the writer.

The following is an example of a Strategy workflow:

1. An inbound email is received by the Business Process
2. The inbound email is distributed to an agent
3. The agent writes a reply email and clicks Send
4. Workspace makes the following updates to the attached data of the reply email
    - `UCS.OwnerID` is set to `EMailAgent.DBID`
    - `IxnSvr.UserData.OriginalAgentEmployeeID` is set to `EMailAgent.EmployeeID`
    - `IxnSvr.UserData.OriginalAgentUserName` is set to `EMailAgent.UserName`
5. The email is then directed to the Business Process, and the Business Process should make the following updates to the reply email and distribute it to the reviewer target:

- `Ixn.UserData.QAReviewFlag` is set to `1`
- `Ixn.UserData.QAReviewDisposition` is set to `Unknown`
- `Ixn.UserData.BP_QAReview_Status` is set to `Review`
- `Ixn.UserData.BP_QAReview_Cycle#` is set to `1`

6. The reviewer reviews the email and edits it or provides feedback. If the reviewer sets the disposition to `Rejected`, it is sent back to the originating agent.
7. Workspace makes the following updates to the attached data of the rejected reply email:
   - `UCS.ReviewerID` is set to `Reviewer.DBID`
   - `Ixn.UserData.QAReviewerEmployeerID` is set to `Reviewer.EmployeeID`
   - `Ixn.UserData.QAReviewerUserName` is set to `Reviewer.UserName`
   - `Ixn.UserData.QAReviewDisposition` is set to `Rejected`
8. The email is then directed to the Business Process, and the Business Process should make the following updates to the reply email and distribute it to the original agent:
   - `Ixn.UserData.QAReviewFlag` is set to `0`
9. The agent makes the required changes and then clicks Send.
10. Workspace makes the following updates to the attached data of the reply email and directs it the the Business Process:
    - `UCS.OwnerID` is set to `EMailAgent.DBID`
    - `IxnSvr.UserData.OriginalAgentEmployeeID` is set to `EMailAgent.EmployeeID`
    - `IxnSvr.UserData.OriginalAgentUserName` is set to `EMailAgent.UserName`
11. The Business Process should make the following updates to the reply email and distribute it to the Reviewer Target:
    - `Ixn.UserData.QAReviewFlag` is set to `1`
    - `Ixn.UserData.QAReviewDisposition` is set to `Unknown`
    - `Ixn.UserData.BP_QAReview_Status` is set to `Review`
    - `Ixn.UserData.BP_QAReview_Cycle#` is set to `2`
12. The reviewer reviews the email reply again and sets the disposition to `Accepted` and clicks Send
13. Workspace makes the following updates to the attached data of the accepted reply email and directs it to the Business Process:
    - `UCS.ReviewerID` is set to `Reviewer.DBID`
    - `Ixn.UserData.QAReviewerEmployeerID` is set to `Reviewer.EmployeeID`
    - `Ixn.UserData.QAReviewerUserName` is set to `Reviewer.UserName`
    - `Ixn.UserData.QAReviewDisposition` is set to `Accepted`
14. The Business Process should make the following updates to the reply email and distribute it to the Final Send E-Mail Business Process:
    - `Ixn.UserData.QAReviewFlag` is set to `1`

- `Ixn.UserData.BP_QAReview_Status` is set to `Completed`

15. The email reply is sent to the contact.

## Outbound Email Quality Assurance Review

The Workspace outbound email review feature enables you to redirect outbound email interactions to an internal target for review. The Quality Assurance Review function has the following features:

- Outbound email interactions can be redirected to a reviewer
- Reviewers can accept and send the outbound email to the recipient
- Reviewers can reject the outbound email interaction and send it back to the author to be reworked

The following is a sample of the outbound email review process workflow:

1. Email interaction is received from a contact and is routed to an agent who, by a business process is identified as an agent whose outbound email interactions are to be sent for review before the email is sent to the contact.
2. The agent creates a reply to the inbound email interaction, or the agent creates a new outbound email interaction, and clicks **Send**.
3. Workspace tags the email interaction with the `EmployeeID` and `UserName` of the agent, and stores the `OwnerID` of the author in the email interaction history in Universal Contact Server.
4. The outbound business process for the agent is activated and the email interaction is flagged for review. The review flag is a count of the number of review iterations which the interaction has undergone. The business process might also be configured to attach other key/value pairs to the interaction.
5. The email interaction is redirected to the agent, agent group, or role defined by the business process as the reviewer.
6. The email interaction reviewer can modify the interaction, add information to the Notepad, and then accept or reject the email interaction.
   - If the reviewer accepts the interaction, the email interaction is sent to the contact.
   - If the reviewer rejects the interaction, the email interaction is sent back to the agent who created the email.
7. If the email interaction is returned to the agent, the agent can change the email according to the comments that are provided by the reviewer or view the changes that were made by the reviewer.
8. The agent finishes updating the email interaction and then clicks **Send**.
9. The outbound business process for the agent is activated and the email interaction is flagged for second review.
10. The email interaction is redirected to the agent or agent group or roles who is defined by the business process as the reviewer.
11. The email interaction reviewer can modify the interaction, add information to the Notepad, and then accept or reject the email interaction, or apply some other disposition that is specific to the design of your business process or routing strategy. Workspace tags the email interaction with the `EmployeeID` and `UserName` of the reviewer, and stores the `ReviewerID` of the author in the email interaction history in Universal Contact Server.

- If the reviewer accepts the interaction, the email interaction is sent to the contact.
- If the reviewer rejects the interaction, the email interaction is sent back to the agent who created the email and the process begins again. The review count is incremented by one.

## Displaying Review Information in the Case Information Area

You can create Business Attributes to populate the interaction Case Information area with information about the review process that informs the reviewer and the author of the email about the status of the review. For example, you could create keys for Review Status and Review Cycle Count.

You can create an editable Case Information attribute that is displayed as a drop-down list of disposition types. Refer to the interaction.case-data.format-business-attribute option for information about creating new attributes for case data.

# 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 Extension.
- The `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to Universal Contact Server.
- The `WS_Cluster` application has a connection to Interaction Server.
- The agent object is configured to use one or more of the following media channels:
  - E-Mail
  - Chat
  - Facebook
  - Twitter

**Start**

1. In the `feature-definition.json` file you can enable the following apis depending on your environment:
   - For environments that include eServices: `api-multimedia`
   - For voice-only environments: `api-ucs-voice`
2. Configure the Contact options in the `interaction-workspace` section of the `WS_Cluster` application object.

**End**

## Procedure: Enabling agents to handle voice interactions without an assigned contact

**Purpose:** To create voice interactions in the Universal Contact Server (UCS) database without an associated **contactId**. This feature also enables the **Note** view for interactions without an assigned contact.

By default, Workspace does not create a voice interaction in the USC database if a **contactId** is not assigned to a voice call. An interaction might not have an assigned **ContactId** if the contact lookup request returns no matching contact and the agent does not assign a contact to the interaction. In some environments, agent configuration might prevent the association of a **contactId** with an interaction. For example:

- The value of contact.lookup.<media-type>.enable is **false**. In this scenario, contact lookup is not performed and no **contactId** is assigned.
- The value of contact.lookup.<media-type>.enable is **true**, but the value of contact.ucs-interaction.voice.enable-create is set to **false**. In this scenario, contact lookup is performed, but when no matching contact is found, the interaction history is not created in the UCS database.
- The value of privilege.contact.can-use-assign-contact is set to **false**. In this scenario, when a **contactId** cannot be assigned automatically to a voice interaction, it is not possible for the agent to manually create a contact or assign an interaction to a known contact.

**Prerequisites**

- A working knowledge of Genesys Administrator Extension.
- Procedure: Enabling agents to manage contacts

**Start**

Configure the value of the contact.ucs-interaction.voice.enable-create-without-contact option to **true**.

**End**

## Procedure: Enabling the Contact Directory and Contact History

**Purpose:** To enable an agent to use the Contact Directory and Contact History views.

This functionality enables agents to search the contact data base, create new contacts, and delete existing contacts.

The Contact Directory supports two views, a grid and a list.

**Prerequisites**

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

**Start**

1. In Genesys Administrator Extension, 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.
        - annex—Used in the Agent interface. Include a settings section with these options:
            - is-sortable = true
            - is-searchable = true
2. Configure the following Interaction options in the `interaction-workspace` section of the `WS_Cluster`

object:

- contact.myhistory-displayed-columns
- contact.history-displayed-columns

- Configure the Contact options in the `interaction-workspace` section.

**End**

### Procedure: Enabling Last Routed Agent

**Purpose:** To enable the last routed agent feature, which saves information about the last agent who handled interactions from that contact in the Contact Profile. That information can then be used during the routing of subsequent interactions from this contact. When an agent actively handles an interaction of a given media type from a contact, the following keys are set in the Contact Profile:

- `LastCalledAgent_EmployeeID`
- `LastCalledAgent_TimeStamp`
- `LCA_EmplID_<MediaType>`
- `LCA_TimeStamp_<MediaType>`

Where <MediaType> corresponds to the media of the interaction.

Refer to the eServices and Routing documentation for more information about this feature.

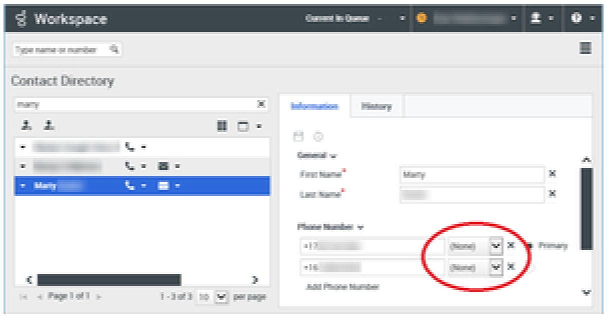
**Start**

1. You can activate this feature by setting the following options in the `interaction-workspace` section:
    - To globally enable last routed agent, set the contact.last-called-agent.enable option to `true`
    - To activate it by media type, set contact.lookup.<media-type>.enable to `true`.

**End**

## Add predefined descriptions for a custom contact attributes with multiple values

You can add a custom attribute to the Contact Information that can be populated with multiple values. It is possible to assign a description to those values, either by allowing the user to add plain text (the default mode) or through a selection of a pre-defined descriptions through a drop-down list (the mechanism described here). For example, you might want to create a new contact attribute called "Company" and, for each value assigned to this contact attribute, associate a **Company Type** from a predefined list.




Use the following steps to create the attribute and add it to the Contact Information view:

1. Create a new Business Attribute where the Business Attribute Values represent the list of valid descriptions that are displayed in the drop-down control; for example, **CompanyTypes**.
2. Create a new Business Attribute Value in the Business Attribute **ContactAttributes**; for example, **Company**.
3. In the annex of the new Business Attribute Value of the Business Attribute **ContactAttributes**, create a section called **settings**.
4. In the **settings** section, create a Key-Value Pair (KVP) where the key is **MultipleValues-Descriptions** and the value is the name of the Business Attribute created in step 1 to store valid descriptions; for example, **MultipleValues-Descriptions** = **CompanyTypes**.
5. Make the new Contact Attribute part of the contact profile by adding the value, **Company** in this example, to the contact.displayed-attributes application option.
6. Make the new Contact Attribute of type **multiple** by adding its name to the contact.multiple-value-attributes application option. For example, `contact.multiple-value-attributes=` 'FirstName,LastName,Company'
7. Restart Workspace.

## Change the displayed columns in the Contac Directory

To change the displayed columns in the contact directory, use the contact.directory-displayed-columns option to specify valid objects from Universal Contact Server (UCS) and Business Attribute values.

Custom contact attributes can be created using the Web Services API or by using UCS.

To populate the Contact Information view and the Contact Directory, you must use Business Attributes:

1. In Genesys Administrator Extension, create a new Business Attribute by using the name and display name of the Custom Contact Attribute.
2. In UCS 8.5 environments, configure the new Business Attribute as follows (Business Attributes are automatically searchable and sortable in UCS 9.1 environments):
    1. Set the **is-searchable** option to `true` to make the Business Attribute available for contact searches.
    2. Set the **is-sortable** option to `true` to make the Business Attribute available in the directory view.

# Outbound Contact - Provisioning Case Data

It is possible to display specific outbound campaign information in the Case Information area.

This information can be displayed in the Toast or Case Information area, and/or in the interaction Case Information area.

To display this information, you will need to add some business attribute values to the business attribute configured for Toast or Case Information. The toast business attributes is configured in the Workspace Web Edition option toast.case-data.format-business-attribute.

To specify a title for the Toast window, configure field values for the title in the toast.window-title configuration option.

The interaction business attribute is configured in the Workspace Web Edition option interaction.case-data.format-business-attribute.

Within these business attributes, you can add business attribute values for OCS Outbound Reserved Fields and OCS Custom fields.

## OCS Outbound Reserved Fields

Create a business attribute value by following this pattern:

- Display Name: <Whatever you want>
- Name: The OCS Reserved key for this outbound field (for example, `GSW_CAMPAIGN_NAME` for the name of the campaign).
- Limitation: For From and Until campaign fields (`GSW_FROM`, `GSW_UNTIL`), the presented value will be the number of seconds since midnight, while in Workspace Desktop Edition, this value is translated as a time (For example: with Workspace Web Edition, the `GSW_FROM` is presented as `36000`, while with Workspace Desktop Edition, it is presented as `10:00`)

There are 3 specific OCS reserved fields for which it's needed to add a dedicated section in the annex to display the field correctly:

- `GSW_PHONE_TYPE`
- `GSW_RECORD_STATUS`
- `GSW_RECORD_TYPE`

Here is the configuration to be created to be able to display the fields.

### PhoneType

- Display Name=Phone Type (or something else)

- Name=GSW_PHONE_TYPE

```
Annex=
  Section=interaction-workspace
      display-type=enum
      enum.business-attribute=PhoneTypes (or something else)
```

Then create the PhoneTypes business attribute, with the following business attribute values:

```
Name=0, Display Name=No Contact Type
Name=1, Display Name=Home Phone
Name=2, DisplayName=Direct Business Phone
Name=3, DisplayName=Business With Ext
Name=4, Display Name=Mobile
Name=5, Display Name=Vacation Phone
Name=6, Display Name=Pager
Name=7, Display Name=Modem
Name=8, Display Name=Voice Mail
Name=9, Display Name=Pin Pager
Name=10, Display Name=Email Address
Name=11, Display Name=Instant Messaging
```

## RecordStatus

- Display Name: Record Status (or something else)
- Name: GSW_RECORD_STATUS

```
Annex=
  Section=interaction-workspace
      display-type=enum
      enum.business-attribute=RecordStatus (or something else)
```

Then create the `RecordStatus` business attribute, with the following business attribute values:

```
Name=0, Display Name=No Record Status
Name=1, Display Name=Ready
Name=2, DisplayName=Retrieved
Name=3, DisplayName=Updated
Name=4, Display Name=Stale
Name=5, Display Name=Cancelled
Name=6, Display Name=Agent Error
Name=7, Display Name=Chain Updated
Name=8, Display Name=Missed Callback
```

## RecordType

- Display Name: Record Type (or something else)
- Name: GSW_RECORD_TYPE

```
Annex=
  Section=interaction-workspace
      display-type=enum
      enum.business-attribute=RecordTypes (or something else)
```

Then create the `RecordTypes` business attribute, with the following business attribute values:

```
Name=0, Display Name=No Record Type
Name=1, Display Name=Unknown
Name=2, DisplayName=General
Name=3, DisplayName=Campaign Rescheduled
Name=4, Display Name=Personal Rescheduled
Name=5, Display Name=Personal Callback
Name=6, Display Name=Campaign Callback
Name=7, Display Name=No Call
```

## OCS Custom fields

- Display Name: Whatever you want
- Name: the send_attribute for the outbound custom field.

Depending on the custom field type, some information should be added within the annex of the business attribute value. If the custom field type is:

- char, varchar: no annex is needed
- int: add, in annex, a section titled "interaction-workspace" with a `display-type=int` option
- float: add, in annex, a section titled "interaction-workspace" with a `display-type=float` option
- datetime: add, in annex,a section titled "interaction-workspace" with a `display-type=date` option

## Unsupported Use Cases

The following are unsupported outbound use cases.

### Outbound Operations

- Not possible to update the Outbound Campaign Record (Custom Fields).
- Not possible to reschedule the Outbound Campaign Record

# Enabling Supervisors to Manage Workbins and Queues

If an agent is set up as a supervisor for an Agent Group, you can configure that supervisor to read and manage the contents of workbins that belong to other agents in the group. You can also configure the supervisor to manage the contents of queues.

Supervisors can select a single interaction in a workbin or a queue and:

- reassign it by moving it to another workbin or another queue
- mark the interaction as Done, if it's an inbound email
- delete the interaction if it's an outbound email

You can use the following options in the `interaction-workspace` section to grant the supervisor the right privileges to manage workbins and queues:

- privilege.my-team-workbins.can-use — Enables the Team Lead to see the Workbins of agents who are members of the Agent Group for which the Team Lead is specified as a Supervisor.
- privilege.interaction-management.can-use — Enables the Team Lead to see interactions that are filtered by pre-defined criteria.
- privilege.interaction-management.can-move-to-queue — Enables the Team Lead who can use Interaction Management to move items from displayed workbins or from an Interaction Filter to an available Queue.
- privilege.interaction-management.can-move-to-workbin — Enables the Team Lead who can use Interaction Management to move items from displayed workbins or from an Interaction Filter to another workbin.

## Creating Interaction Filters for Team Leads

Agents who are granted privilege.interaction-management.can-use can view "snapshots" of interactions from the Interaction Server database. To do this, system administrators should use Genesys Administrator Extension or Configuration Manager to build interaction filters (database requests that Workspace Web Edition sends to the Interaction Server database) and then set the interaction-management.filters to assign the filters to Team Lead agents.

Here are a few examples of criteria you could use to create a filter:

- **mediaType:** The media type, such as **email**, of the interactions you want to request from the database.
- **age:** The age of the interactions you want to extract. You could use this criteria to find interactions that have been received in the last four hours, or interactions that are older than one day, and so on.
- **Priority:** The priority of the interactions you want to extract.
- **Queue:** The name of the queue, or a comma-separated list of queues, where the interactions you want

to extract are stored.

- **Time in Queue**: The time that the interactions you wan to extract have been in the queue.
- **Received At:** The date and time at which the interaction was received. The query can specify that the filter returns either all the interactions created on, before, or after this date, or within a range of two dates.

To create and use a filter in Workspace Web Edition, complete the following steps:

1. Create a new section on the **WEWS Cluster** application object that is same as the name of the filter (for example: **[FilterEmailAge]**).
2. Configure options for the filter by using the names of fields in the Interaction Server database. The options correspond to the criteria for the interactions you want to extract from the database. The filter section must contain the following options:
   - **category**: The name of the category that contains the filter — for example: `Email`
   - **condition**: The complete filter — for example: `(priority >= 2) AND (MediaType='email') AND (_age() > 172800)`. See Specifying Filter Conditions for information about how to define the conditions of a filter.
   - **display-name**: The display name of the filter — for example: `Older Than Two Days`
   - **displayed-columns**: (Optional) The list of columns that are displayed for interactions in this filter — for example: `From,To,Subject,Received`. If this option is not set, the displayed columns are taken from the interaction-management.interactions-filter.displayed-columns option.
   - **queues**: The list of queues to which this filter applies — for example: `email-routing-queue-inbound,email-default-queue`.
   - **case-data.business-attribute**: (Optional) Specifies the name of the Business Attribute that contains the Business Attribute Values that are used to filter and render attached data for an interaction displayed in this filter. Use this option to enable agents who are configured to be supervisors to view different interaction content than the agents whom they supervise. This option is not mandatory. If it is not specified, Workspace displays the case data that is specified by the interaction.case-data.format-business-attribute option.
3. For the Application object, Agent Group, or Agent, configure the value of the interaction-management.filters option to specify a comma-separated list of filters by the section name that you configured. For example:

```
[interaction-workspace]
interaction-management.filters=FilterEmailAge
```

## Specifying Filter Conditions

A filter in Workspace is defined by specifying different property filters and linking them together by using *AND* and *OR* logical operators.

A property filter is composed of a property name (for example: `MediaType`, `Queue`, or `SubmittedBy`) and a property value — for example, `MediaType='email'`.

Refer to the eServices Interaction Properties Reference Manual for details about keywords, operators, and properties that can be used to query the Interaction Server database. Be sure to read about the different System properties and how to configure Custom properties — you can use both kinds of properties to define interaction filters.

You can use the following property types for System and Custom properties:

- Integer
- String — Strings are bracketed by single quote characters — for example: `'email'`.
- Timestamp — Use the _timestamp keyword from Interaction Server for the value — for example: `_timestamp('2013-11-21 14:12:00')`

Filter conditions use comparators and logical operators to test the value of a property against the value that is stored in the database field. The following operators are supported:

- > (greater than)
- < (less than)
- >= (greater than or equal)
- <= (less than or equal)
- = (equal)
- != OR <> (different from/not equal)
- LIKE (contains the string) — for example, `MediaType LIKE '%a%'` finds all of the media types that contain the letter a. The `%` character acts as a wildcard. If `MediaType LIKE 'ema%'` is used, then media types that begin with `ema` are found. If `MediaType LIKE '%at'` is used, then media types that end with `at` are found.
- NOT LIKE (does not contain the string)

For interaction properties that have the String type, you can avoid issues with database formatting differences for empty strings by using the `_empty` and `_not_empty` keywords. For example, to filter all the interactions that have an ExternalId property that is non-null, use `_not_empty(ExternalId)`.

For interaction properties that have the Timestamp type, use the keywords that are described in the Translations section of the *eServices Interaction Properties Reference Manual*. For example, to find all interactions that were received between November 24 and November 29 in 2013, you would use the following conditions: `ReceivedAt >=_timestamp('2013-11-23 00:00:00') AND ReceivedAt <= _timestamp('2012-11-29 00:00:00')`.

### Important

To make the columns in the Interactions table sortable, in the Interaction Custom Properties Business Attribute, you must explicitly declare the attribute as a column of the 'interactions' table of Interaction Server database.

# Enabling Co-browse Sessions

A Genesys Co-browse session lets an agent and a customer navigate the same web page at the same time. Unlike conventional screen sharing applications where one party sees an image of the other party's browser, in a Genesys Co-browse session the agent and the customer share the same instance of the web page. Upon joining a co-browse session, the agent will be in *Pointer Mode* and the agent can use their cursor to guide the customer through a webpage. An agent may also send a request to the customer to enable *Write Mode*. In Write Mode, the agent may help the customer enter information and navigate their browser.

Workspace supports the following functionality for Co-browse sessions:

- Join a co-browse session
- End a co-browse session
- Send the customer a request to enable *Write Mode* in the co-browse session

You can use the following options in the `cobrowse` section to configure Co-browse sessions:

- cobrowse.url — URL of the Co-browse cluster, for example, http://[host]:[port]/cobrowse. Typically, this will be the load balancer's URL.
- cobrowse.use-replica-logging — Enables browser logging in the iframe containing the Co-browse replica application.
- privilege.cobrowse.can-use — If true, the agent is permitted to use Co-browse.

## Important

Genesys is committed to diversity, equality, and inclusivity, including for terms used in our software and documentation. As such, Genesys is removing non-inclusive terms. The cobrowse.use-slave-logging is replaced by cobrowse.use-replica-logging beginning with version 8.5.2xx.xx

# Configuring Views

You can set the Workspace Views options to configure the sorting order and the default tab selection of tabbed views within each window.

The sort order can be customized by using the `views.<RegionName>.order` options.

The default tab selection can be configured by using the `views.<RegionName>.activate-order` options. The first in the list, if present, is selected by default. If the first in the list is absent, the second in the list is presented by default, and so on. Both options support out-of-the-box view names and names of custom views added to tab areas.

For custom views, use the section names specified in the interaction.web-content option.

## Using the Allow attribute

For security purposes, many workstation resources cannot be requested or used by an application running in a cross-origin iframe. To enable Workspace to authorize the use of workstation resources, implement the `allow` option. The `allow` enables you to specify the following option values:

- `GEOLOCATION`: Enables the use of a Geolocation API to obtain the geographical position of a user.
- `MICROPHONE`: Enables the use of the workstation microphone.
- `CAMERA`: Enables the use of the workstation web camera.
- `MIDI`: Enables the use of the Web-MIDI (Audio) API to play sounds on the user workstation.
- `ENCRYPTED-MEDIA`: Enables access to a media key system used to create keys for decrypting a media stream.
- `CLIPBOARD-READ`: Enables the use of the clipboard API to read the content of the clipboard in the page displayed in the iframe.
- `CLIPBOARD-WRITE`: Enables the use of the clipboard API to write content to the clipboard in the page displayed in the iframe.

For example, to enable the microphone and web camera, the `allow` option would be specified as follows:

```
[MyWebSite]
url = "http://my-website.com/"
label = "My Website"
allow = "MICROPHONE,CAMERA"
```

# Enabling advanced search for Contact Interaction History

You can enable advanced searching in the Contact History window for agents in your contact and configure which advanced search options are displayed in the Agent Desktop. With advanced searching enabled, agents can search contact history by date range, interaction type, and specific default and custom attributes. The search returns a maximum of 100 results.

**Start**

1. Activate the basic search privilege. See privilege.contact.can-search-contact-history.
2. Enable advanced searching. See privilege.contact.can-advanced-search-contact-history.
3. Enable the filtering of interactions in the **Contact History** view. See privilege.contact.can-filter-contact-history.
4. Define the list of attributes displayed on the **Advanced Search** window. See contact.history-search-attributes.
5. Define the list of date search options on the **Advanced Search** window. See contact.date-search-types.
6. Specify which interaction types (channels) are included in the **Contact History** view list of interactions. See contact.history.media-filters.

**End**

# Enabling the Interactions Search view

In Workspace Web Edition, you can enable the **Interactions Search** view. When enabled, the agent can select **Interactions Search** from the main menu and then use a variety of advanced search controls to locate the interactions that they want to view. The search returns a maximum of 100 results.

**Start**

1. Activate the **Interaction Search** view. See privilege.contact.can-search-all-interactions.
2. Enable advanced searching. See privilege.contact.can-advanced-search-all-interactions.
3. Enable the filtering of interactions. See privilege.contact.can-filter-all-interactions.
4. Define the list of attributes that the agent can select in the **Quick Search** view. See contact.all-interactions-quick-search-attributes.
5. Define the list of attributes that the agent can select in the **Advanced Search** view. See contact.history-search-attributes.
6. Define the list of search types that the agent can use to define a date range for the search. See contact.date-search-types.
7. Define the columns displayed in the returned search results. See contact.all-interactions-displayed-columns.
8. Specify which interaction types (channels) are included in the **Interaction Search** view list of interactions. See contact.history.media-filters.

**End**

## Advanced Search

The standard search enables you to search for interactions by status, subject, start date, end date, contact first name, and contact last name. You can expand the capabilities of the advanced search by enabling agents to search for interactions based on the attributes listed in the **Searchable Attributes** table. You specify these criteria by using the contact.history-search-attributes option.

**Searchable attributes**

| Attribute Name | Attribute Display Name | Comments |
|---|---|---|
| BccAddresses | Bcc Address | All types of email addresses |
| CcAddresses | Cc Address | All types of email addresses |
| ContactId | Contact | Name of a contact (Team Communicator is presented to select the contact) |
| EndDate | End Date | Date |
| EstablishedDate | Established Date | Date |

| Attribute Name | Attribute Display Name | Comments |
|---|---|---|
| FromAddress | From Address | |
| FromPersonal | From Personal Part | |
| Id | Interaction ID | |
| Mailbox | Source mailbox | |
| OwnerId | Processed By | Name of the agent. Team communicator is presented to select the agent |
| PhoneNumber | Phone Number | |
| ReleasedDate | Released Date | |
| ReplyToAddress | Reply-To Address | |
| SentDate | Sent Date | |
| StartDate | Start Date | |
| Status | Status | To be selected among: All, InProgress, Done |
| Subject | Subject | |
| SubtypeId | Interaction Sub-Type | |
| Text | Interaction Text | Search in the body of the interaction (email (PlainText or HTML), chat (transcript)). |
| TheComment | Notes | Contains the note associated with the interaction |
| ToAddresses | To Address | |
| TypeId | Interaction Type | |

## Case Sensitivity

Search is case insensitive. TEST, tESt, test, and teST are all considered identical.

## Phrase Search

Searches are *Starts With* searches unless quotation marks are used. When quotation marks are used, Workspace employs an *Exact* search.

If an agent encloses a phrase in quotation marks, search results return only matches for the exact phrase.

Without quotation marks around a phrase, each word is searched for independently, and results are returned for all interactions that contain *all the strings* that start with the specified words. If not all of the phrase strings are found in an interaction, it will not be included in the search results.

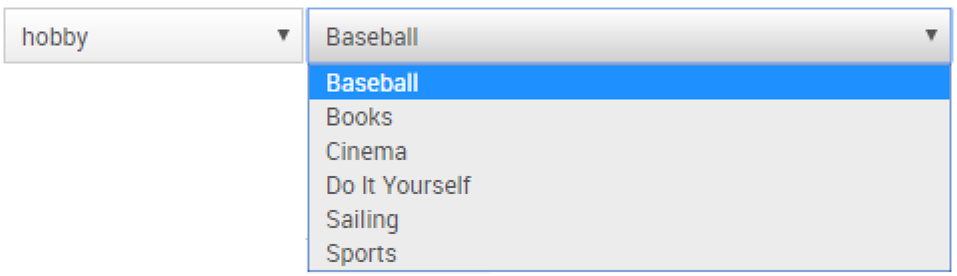
## Custom Attributes

You can define a search based on custom attributes. Custom attribute search employs an *Exact Match* strategy. Workspace can search on either the Display name or the Attribute name.

To use a custom attribute, in the Interaction Attributes business attribute, define a new business attribute value where:

- `Name` = <Name of the custom attribute>
- `Display Name` = The name displayed in Workspace

Custom Attribute searches can either be presented as a text field where the agent must enter the exact search string to find a match, or you can configure Workspace to display a drop-down menu of search options so that agents do not have to type in the display name.




To do this:

1. Define a business attribute with a name = <Name of the custom attribute> (for example, "hobby") that corresponds to an Interaction Attribute value
2. Assign as the business attribute values the list of options and display names that will be displayed in the combo box for that attribute. For example:
    - Name = Baseball
      Display Name = Baseball
    - Name = Books
      Display Name = Books
    - Name = Cinema
      Display Name = Cinema
    - Name = DIY
      Display Name = Do It Yourself
    - Name = Sailing
      Display Name = Sailing
    - Name = Sports
      Display Name = Sports

# Enabling advanced search for My History

You can enable advanced searching in the **My History** window for agents in your contact and configure which advanced search options are displayed in the Agent Desktop. With advanced searching enabled, agents can search my history by date range, interaction type, and specific default and custom attributes. The search returns a maximum of 100 results.

**Start**

1. Activate the basic search privilege. See privilege.contact.can-search-my-history.
2. Enable advanced searching. See privilege.contact.can-advanced-search-my-history.
3. Enable the filtering of interactions in the Contact History view. See privilege.contact.can-filter-my-history.
4. Define the list of attributes displayed on the Advanced Search window. See contact.history-search-attributes.
5. Define the list of date search options on the Advanced Search window. See contact.date-search-types.
6. Specify which interaction types (channels) are included in the **My History** view list of interactions. See contact.history.media-filters.

**End**

# Active Recording Setup

You can enable your agents to record calls. You can enable call recording for single agents, agent groups, skills, or for all users.

Workspace supports only call recording from SIP Server using Media Server Markup Language (MSML)-based call recording, provided by Genesys Voice Platform (GVP) Genesys Media Server. Refer to the Genesys Quality Management documentation for more information.

To enable the Active Recording feature, set the value of the `privilege.active-recording.can-use` option to `true`.

> **Important**
> Do not set up this same recording option under both the `crm-adapter` section and the `interaction-workspace` section. In the case where both options are available, Genesys recommends recording be set up in the `interaction-workspace` section only.

Once you have enabled an agent, agent group, and so on, to use Active Recording, you can disable certain recording features by setting the value of one or more of the following configuration options to `false`:

- `privilege.active-recording.can-start` — Agents can start Active Recording at any time during the call. When set to `false`, call recording starts automatically and there is no Start Recording button in the agent interface.
- `privilege.active-recording.can-stop` — Agents can stop an Active Recording at any time during the call. When set to `false`, call recording stops automatically and there is no Stop Recording button in the agent interface.
- `privilege.active-recording.can-pause` — Agents can pause an Active Recording at any time during the call. When set to `false`, there is no Pause Recording button in the agent interface. Enabling an agent to pause a recording is useful for ensuring that private customer information is not included in the recording.
- `privilege.active-recording.can-resume` — Agents can resume a paused Active Recording at any time during the call. When set to `false`, there is no Rresume Recording button in the agent interface; agents will not be able to resume a paused call.

You can disable the call monitoring indicator during recorded calls by setting the value of the `privilege.active-recording.can-monitor-recording` option to `false`. This is useful if you are automatically recording a call and do not want the agent to know that he or she is being monitored.

# Workspace Web Edition Configuration Options

The Workspace Web Edition configuration options are described in the following topics in functionality-related sections, like Email, Voice, and so on. These options should all be set in the **[interaction-workspace]** section of your WS_Cluster application by using either Genesys Administrator Extension or Configuration Manager.

## Important

When an option is defined for multiple agent groups and virtual agent groups, Workspace Web Edition applies precedence using an alphabetical listing of groups. Precedence is applied to the the last virtual agent group on the list. If the list does not contain any virtual agent group, precedence is given to the last agent group on the list.

- Accessibility
- Active Recording
- Agent Status
- Application
- Case Data
- Chat
- Co-browse
- Contact
- Contact Center Statistics
- Editor
- Email
- Expression
- Facebook
- Feedback
- IM
- Interaction
- Interaction Preview (Toast)
- Intercommunication
- Knowledge Center
- KPI
- Login
- Main Window
- Outbound
- Permissions
- Rebranding
- Screen Recording Client
- Security
- Service Client API
- SIP Endpoint
- Standard Response
- Team Communicator
- Team Lead
- Twitter
- Update on Startup
- Views
- Voice
- Voicemail
- Web Engagement
- Workbin
- Workitem
- Overriding Interaction Workspace Options

# Accessibility

Workspace Web Edition provides the following options for managing accessibility features:

## accessibility.agent-state-change-bell

- Default Value:
- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the agent state change sound-configuration string. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
    - `-1` — play and repeat the sound until an explicit message, such as event established, causes it to stop.
    - `0` — play the whole sound once
    - an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

## accessibility.dialog-bell

- Default value:
- Valid value: All special characters that are valid URL file path, '|' separator and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the dialog sound-configuration string. For example: 'BELL|7|0'. The value has three components that are separated by the character '|'. The first is the sound file name (BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
    - `0` — play the whole sound once
    - an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

## accessibility.dialog-error-bell

- Default value:
- Valid value: All special characters that are valid URL file path, '|' separator and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the error alert sound-configuration string. For example: 'BELL|7|0'. The value has three components that are separated by the character '|'. The first is the sound file name (BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:

- `0` — play the whole sound once
- an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

### accessibility.focus-on-interaction-toast

- Default Value: `false`
- Valid Values: `true, false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether the **Interaction Notification** views receive the focus when they are displayed. This option does not rely on the **accessibility.visual-impairment-profile** option; therefore, it applies to all configured agents, not just visually impaired agents.

### accessibility.interaction-state-change-bell

- Default Value:
- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the interaction state change sound-configuration string. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
  - `-1` — play and repeat the sound until an explicit message, such as event established, causes it to stop.
  - `0` — play the whole sound once
  - an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

### accessibility.<media-type>.focus-on-interaction-toast

- Default Value: `false`
- Valid Values: `true, false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether the **Interaction Notification** views associated with the specified media type receive the focus when they are displayed. This option does not rely on the accessibility.visual-impairment-profile option; therefore, it applies to all configured agents, not just visually impaired agents.

### accessibility.outbound-campaign-state-change-bell

- Default Value:
- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.

- Changes take effect: When the session is started or restarted.
- Description: Specifies the outbound campaign state change sound-configuration string. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to an MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
  - `0` — play the whole sound once
  - an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

## accessibility.visual-impairment-profile

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether the profile for visually impaired users is active. This option enables users to navigate interface elements from keyboard navigation and tooltips by using a Screen Reader application. Some components might change their behavior in this mode. For example, Team Communicator is collapsed in this configuration.

## accessibility.voicemail-message-change-bell

- Default Value:
- Valid Values: All special characters that are in valid URL file path, '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the Voice Mail counter change sound-configuration string for new or old messages. For example: `'BELL|7|0'`. The value has three components that are separated by the pipe character '|'.
  - Sound file name (BELL, RING, CHORD or WARNING, predefined aliases, or an absolute URL to a mp3 file).
  - Priority level. The higher the integer, the higher the priority.
  - Duration. 0 means to play the whole sound one time. An integer greater than 0 means a time in milliseconds to play and repeat the sound.

## accessibility.voicemail-new-message-change-bell

- Default Value:
- Valid Values: All special characters that are valid URL file path, '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the Voice Mail counter change sound-configuration string for new messages. For example: `'BELL|7|0'`. The value has three components that are separated by the pipe character '|'.
  - Sound file name (BELL, RING, CHORD or WARNING, predefined aliases, or an absolute URL to a mp3 file).
  - Priority level. The higher the integer, the higher the priority.

- Duration. 0 means to play the whole sound one time. An integer greater than 0 means a time in milliseconds to play and repeat the sound.

## accessibility.warning-message-bell

- Default Value:
- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the warning message sound-configuration string. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
  - `-1` — play and repeat the sound until an explicit message, such as event established, causes it to stop.
  - `0` — play the whole sound once
  - an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

## keyboard.shortcut.interaction.next

- Default Value: `Alt+N`
- Valid Values: The name of a key or a key combination. A key combination begins with one of the following modifier key names: `Ctrl`, `Shift`, and `Alt`, and ends with a character key. Separate the modifier key name from the character key with the **+** character.
- Changes take effect: When the session is started or restarted.
- Description: The combination of keys that a user can use as a keyboard shortcut to jump to the next case interaction.

## keyboard.shortcut.interaction.previous

- Default Value: `Alt+B`
- Valid Values: The name of a key or a key combination the begins with one of the following modifier key names: `Ctrl`, `Shift`, and `Alt`, and ends with a character key. Separate the modifier key name from the character key with the **+** character.
- Changes take effect: When the session is started or restarted.
- Description: The combination of keys that a user can use as a keyboard shortcut to jump to the previous case interaction.

## keyboard.shortcut.jump-to-last-error

- Default Value: `Alt+L`
- Valid Values: The name of a key or a key combination the begins with one of the following modifier key names: `Ctrl`, `Shift`, and `Alt`, and ends with a character key. Separate the modifier key name from the

character key with the **+** character.

- Changes take effect: When the session is started or restarted.
- Description: The combination of keys that a user can use as a keyboard shortcut to jump the focus to the last error.

# Active Recording

Workspace Web Edition provides options that enable agents to control their recordings:

### privilege.active-recording.can-monitor-recording

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether the call monitoring indicator is displayed to agents when their calls are being recorded. The Call Recording functionality (for VoIP/SIP enabled agents only) enables you to record the current voice interaction with a contact or an internal target. Depends on privilege.active-recording.can-use.

### privilege.active-recording.can-pause

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to pause the Active Recording. Depends on privilege.active-recording.can-use.

### privilege.active-recording.can-resume

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to resume the Active Recording. Depends on privilege.active-recording.can-use.

### privilege.active-recording.can-start

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to start the Active Recording. Depends on privilege.active-recording.can-use.

### privilege.active-recording.can-stop

- Default Value: `true`

- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to stop the Active Recording. Depends on privilege.active-recording.can-use.

## privilege.active-recording.can-use

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agents to use the Active Recording functionality. **Note:** Do not set up this same recording option under both the crm-adapter section and the interaction-workspace]section. In the case where both options are available, Genesys recommends recording be set up in the interaction-workspace section only.

# Agent Status

Workspace Web Edition provides options that enable agents to control their status:

### agent-status.after-call-work-reasons

- Default Value: " "
- Valid Values: Comma-separated list of Action Code names of type After Call Work; empty means all not ready action codes are considered
- Changes take effect: When the session is started or restarted.
- Description: Defines the available reasons in the Agent Status menus (global and My Channels). Workspace displays the reason commands in the order in which they appear in the list.

### 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.

### agent-status.not-ready-reasons

- Default Value: " "
- Valid Values: Comma-separated list of Action Code names of type Not Ready; empty means that all Not Ready Action Codes are considered.
- Changes take effect: When the session is started or restarted.
- Description: Defines the available reasons in the global Status menu. The reason commands are displayed in the order in which they appear in the list.

## agent-status.ready-workmode

- Default Value: `unknown`
- Valid Values: `unknown`, `auto-in`, `manual-in`
- Changes take effect: When the session is started or restarted.
- Description: Specifies which workmode is applied when the agent manually specifies the Ready state for the voice DN from the Global State menu or from My Channels. This option also applies to the value specified for the `login.voice.is-auto-ready` option. To determine whether your switch supports the workmode, refer to the Deployment Guide of the relevant T-Server.

## privilege.mychannels.pending-state.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows the pending state to be displayed in the **My Channels** view while the agent engaged in a call, chat, or email interaction. When the value of this option is set to `true`, if an agent sets his or her status to Not Ready or Not Ready Reason while he or she is still handling an interaction, the timer for that state will not start until the call is released, the chat is ended, or the email is sent or put into a workbin.

# Application

Workspace Web Edition provides the following Application-level options:

## 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.

## application.wiki-help-locale

- Default Value:
- Valid Values: A valid locale name in the *LanguageCode-CountryCode* format — for example, `en-US`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the locale of the Workspace Web Edition online help. When this option is left empty, Workspace tries to find the online help that corresponds with the current language selected by the agent. If set to a valid locale, Workspace accesses the online help of the specified language.

## application.wiki-help-site

- Default Value: `https://docs.genesys.com/`
- Valid Values: A valid URL.
- Changes take effect: When the session is started or restarted.
- Description: Path to the Workspace Web Edition Help. By default the help documentation is located on the Genesys Documentation website. You might have to create an exception for this URL in your firewall to enable agents to access the help. If you do not want to allow your agents to access the help stored on the Genesys Documentation website, you can request a PDF of the help document, which you can load locally.

## application.wiki-help-welcome-page

- Default Value:
- Valid Values: A valid URL.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the Workspace Web Edition online help home page URL. When this option is specified, all attempts to access the online help are redirected to this page and the application.wiki-help-site option is ignored. This approach can be used in an environment when an Administrator wants the agent to have a look at a custom help page, like a 'Quick Start User Guide'.

### privilege.mychannels.can-use

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to access My Channels.

### privilege.mymessages.can-use

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to access My Messages.

### 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.

### system.log-level

- Default Value: `Trace`
- Valid Values: Select a value from the following list: `Trace`, `Debug`, `Info`, `Warning`, `Error`, `Off`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the global log level.

### workspace.web-content

- Default Value: `""`
- Valid Values: A comma-separated value list of option section names that correspond to the extension views, for example: Extension1,Extension2,Extention3
- Changes take effect: When the session is started or restarted.
- Description: The list of Web Applications that are configured to be displayed at the Workspace level. Refer to the Procedure: Enabling integration of web applications in the agent interface for information about creating web application objects in the configuration layer.

# Case Data

Workspace Web Edition provides the following options for managing 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

Workspace Web Edition provides the following options for managing 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 Configuration 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 agent's nickname that is used during chat sessions (displayed to the customer) by a string that can contain regular characters and field codes.

### chat.new-message-bell

- Default Value:
- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the path of the sound file Workspace plays when a new chat message arrives. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
    - `-1` — play and repeat the sound until an explicit message, such as event established, causes it to stop.
    - `0` — play the whole sound once
    - an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

### chat.pending-response-to-customer

- Default Value: `30,50`
- Valid Values: <A comma-separated list value: warning time, maximum time>
- Changes take effect: When the session is started or restarted.

- Description: Specifies two alarm thresholds, in seconds, that warn agents that they have a pending response to a chat from a customer. Three levels are displayed: before the warning time, between the warning time and the maximum time, and after the maximum time.

## 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 clicks Done. This option is only available for interaction open media. This option can be overridden by a routing strategy as described in this Configuration 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 Configuration Guide.

## chat.push-url.max-records

- Default Value: `20`
- Valid Values: Any integer
- Changes take effect: When the session is started or restarted.
- Description: Specifies the maximum size of the pushed URL list.

## chat.ringing-bell

- Default Value:
- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the path of the sound file Workspace plays when a chat interaction is ringing. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
    - `-1` — play and repeat the sound until an explicit message, such as event established, causes it to stop.
    - `0` — play the whole sound once
    - an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

## 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 sent to the contact during a chat interaction. 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.

## expression.email-address

- Default Value: (\w+([-+.]\w+)*@\w+([-.]\w+)*\.\w+([-.]\w+)*)
- Valid Values: A regular expression
- Changes take effect: When the session is started or restarted.
- Description: Specifies the regular expression that identifies a email address in the chat.

## expression.phone-number

- Valid Description: A regular expression.
- Default Value: `(?:(?:[\+]?([\d]{1,3}(?:[ ]*|[\-.])))?[(]?([\d]{1,3})[\-/)]?(?:[ ]+|[\-`

`.])?)?([\d]{3,})`

- Changes take effect: When the session is started or restarted.
- Description: Specifies the regular expression that identifies a phone number in the chat transcript. This option can be overridden by a routing strategy as described in Configuration Guide.

## privilege.chat.can-click-to-dial

- Default Value: `false`
- 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 Click to Dial feature identified by expression.phone-number. Depends on privilege.chat.can-use and expression.phone-number.

## privilege.chat.can-click-to-email

- Default Value: `false`
- 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 Click to Email feature identified by expression.email-address. Depends on privilege.chat.can-use and expression.email-address

## privilege.chat.can-consult

- 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 can use the chat consultation.

## privilege.chat.can-decline

- 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 can decline incoming chat interactions. Depends on privilege.chat.can-use.

## privilege.chat.can-one-step-conference

- 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 can use instant chat conference.

## privilege.chat.can-one-step-transfer

- 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 can use instant chat transfer. Depends on privilege.chat.can-use.

## privilege.chat.can-push-url

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: The agent is permitted push URLs to customers during chat sessions. Depends on privilege.chat.can-use.

## privilege.chat.can-release

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to manually end chat conversations. Depends on privilege.chat.can-use.

## privilege.chat.can-release-consultation

- 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 can manually end a chat consultation. Depends on privilege.chat.can-use.

## privilege.chat.can-set-interaction-disposition

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to set the disposition code on chat interactions. Depends on privilege.chat.can-use.

## privilege.chat.can-two-step-conference

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables chat conference in two steps, started by a chat consultation. Depends on privilege.chat.can-use.

## privilege.chat.can-two-step-transfer

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables chat transfer in two steps, started by a chat consultation. Depends on privilege.chat.can-use.

## 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.

## privilege.chat.show-monitoring.can-use

- Default Value: `false`
- Valid Values: `true`, `false`.
- Changes take effect: When the session is started or restarted.
- Description: Allows the agent to be informed that the current chat interaction is monitored by a supervisor.

# Co-browse

Workspace Web Edition provides the following options for managing Co-browse:

## cobrowse.url

- Default Value:
- Valid Values: Valid HTTP URL
- Changes take effect: When the session is started or restarted.
- Description: URL of the Co-browse cluster, for example, http://[host]:[port]/cobrowse. Typically, this will be the load balancer's URL.

## cobrowse.use-replica-logging

[**Added:** 8.5.202.81]

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables browser logging in the iframe containing the Co-browse replica application. This option replaces cobrowse.use-slave-logging.

## cobrowse.use-slave-logging

[**Doscontinued:** 8.5.202.81]

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables browser logging in the iframe containing the Co-browse slave application. Discontinued as of 8.5.2xx.xx. Genesys is committed to diversity, equality, and inclusivity, including for terms used in our software and documentation. As such, Genesys is removing non-inclusive terms. This option is replaced by cobrowse.use-replica-logging.

## privilege.cobrowse.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: If `true`, the agent is permitted to use Co-browse.

# Contact

[**Modified:** 8.5.202.94]

Workspace Web Edition provides the following options for managing Contacts:

## contact.all-interactions-displayed-columns

[**Modified:** 8.5.202.94]

- Default Value: `Status,Subject,StartDate,EndDate`
- Valid Values: A comma-separated value list of Contact History items to display in the interaction view, such as Status, Subject, StartDate, EndDate, MediaType.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of interaction attributes that are displayed in the result list of the **Interaction Search** view.

## contact.all-interactions-quick-search-attributes

- Default Value: `Subject`
- Valid Values: A comma-separated list of valid interaction attribute names, such as `Subject`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the interaction attributes that are used to search interactions in the **Quick Search** mode of the **Interaction Search** view.

## 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.date-search-types

- Default Value: `On,OnOrAfter,Before,Between`
- Valid Values: A comma-separated list of the following options:
  - On
  - OnOrAfter
  - OnOrBefore
  - Before
  - Between
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of search types that are available for the agent to use to search the contact database by date.

### 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.directory-displayed-columns

- Default Value: `LastName,FirstName,PhoneNumber,EmailAddress`
- 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: The list of contact fields that are displayed when the results of a contact search are

displayed.

## contact.directory-enabled-modes

- Default Value: `ListView,GridView`
- Valid Values: A comma-separated value list of views from the following list: `ListView, GridView`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies which view of the Contact Directory can be selected.
  - `ListView`: Quicker search performance and tokenized search items, but no sort on the result. This view can be enabled only if the 'Contact' index is activated in Universal Contact Server.
  - `GridView`: Results are sortable, but the search is less powerful, and the search items are non-tokenized.

## contact.directory-search-attributes

- Default Value: `LastName,FirstName,PhoneNumber,EmailAddress`
- Valid Values: A comma-separated value list of Attribute Value names that correspond to contact field names that can be used as search parameters.
- Changes take effect: When the session is started or restarted.
- Description: The list of Contact fields that can be used as search parameters.

## contact.displayed-attributes

- Default Value: `Title,FirstName,LastName,PhoneNumber,EmailAddress`
- Valid Values: A comma-separated value list of Attribute Value names that correspond to contact field names.
- Changes take effect: When the session is started or restarted.
- Description: The list of contact fields that are displayed when a Contact record is displayed.

## contact.history-default-time-filter-main

- Default Value: `1M`
- Valid Values: A value from the following list: `All`, `1M`, `1W`, `1D`
- Changes take effect: When the session is started or restarted.
- Description: Specifies which Time Filter option is selected by default in the **Contact History** view when an agent accesses the main history data source:
  - `All`: All interactions from the main Universal Contact Server (UCS) database.
  - `1M`: Interactions from main UCS database that were created less than 1 month ago.
  - `1W`: Interactions from main UCS database that were created less than 1 week ago.
  - `1D`: Interactions from main UCS database that were created less than 1 day ago.

### contact.history-displayed-columns

[**Modified:** 8.5.202.94]

- Default Value: `Status,Subject,StartDate,EndDate,OwnerId`
- Valid Values: A comma-separated value list of Contact History items to display in the interaction view, for example: `Status,Subject,StartDate,EndDate,OwnerId,MediaType`.
- Changes take effect: When the session is started or restarted.
- Description: Defines the list of Contact History items that are displayed in the interaction view.

### contact.history-quick-search-attributes

- Default Value: `Subject`
- Valid Description: A comma-separated value list of valid interaction attribute names, for example: `Subject`. Possible searchable attributes are: `BccAddresses`, `CcAddresses`, `FromAddress`, `FromPersonal`, `Id`, `Mailbox`, `ReplyToAddress`, `StructuredText`, `Subject`, `Text`, `TheComment`, `ToAddresses`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the interaction attributes that are used to search interactions in the quick search mode of the **Contact History** view. These attributes should be text attributes. You can use custom interaction attibutes. For more information, see Making an Attribute Searchable from the Desktop.

### contact.history-search-attributes

- Default Value: `Status,StartDate,EndDate,Subject`
- Valid Description: A comma-separated value list of Interaction attributes.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of interaction attributes that an agent can use in **Advanced Search** mode of the **Contact History**, **My History** and **Interaction Search** views. You can also use custom interaction attributes.

### contact.history.media-filters

- Default Value: `$AllMedia$,voice,email,chat,twitter,facebook,$OtherMedia$`
- Valid Values: A comma-separated value of valid media type names (`voice`, `email`, `chat`, `twitter`, `facebook`), `$AllMedia$`, or `$OtherMedia$`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of media types (channels) that can be used to filter the Contact History, My History, and the result list of Interaction Search. The value `$AllMedia$` allows the filter to return any media. The value `$OtherMedia$` allows the filter to return any media not specified by this option.

### contact.last-called-agent.enable

- Default Value: `false`

- Possible Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Defines if the last called agent properties are set in the contact when an interaction is presented to the agent. This option is taken into account only when the option contact.last-called-agent.<media-type>.enable is not defined for the applicable media type.

### contact.last-called-agent.<media-type>.enable

- Default Value: `false`
- Possible Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Defines if the last called agent properties are set in the contact when an interaction of the corresponding media type is presented to the agent. This option overrides the contact.last-called-agent.enable option. Use the `voice-campaign` media-type to define the look-up behavior for outbound campaign interactions.

### contact.lookup.enable

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Activates *Universal Contact Server* (UCS) lookup for contacts when an interaction is presented to an Agent. This option can be overridden by a routing strategy, as described in Overriding Options by Using a Routing Strategy.

> **Important**
> This option is overridden by the attached data `IdentifyCreateContact` and the option contact.lookup.<media-type>.enable

### contact.lookup.enable-create-contact

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: When this option is `true` and contact.lookup.enable is set to `true`, the *Universal Contact Server* (UCS) will create a contact if the initial search does not find a matching existing contact. This option can be overridden by a routing strategy, as described in Overriding Options by Using a Routing Strategy.

## Important

This option is overridden by the attached data `IdentifyCreateContact` and the contact.lookup.<media-type>.enable-create-contact option.

### contact.lookup.<media-type>.enable

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Activates the Workspace features that rely on Universal Contact Server (UCS) for contact lookup when an interaction of the given media type is presented to the agent. This option can be overridden by a routing strategy, as described in Overriding Options by Using a Routing Strategy.

## Important

This option overwrites the contact.lookup.enable option. It is not taken into account when the attached data `IdentifyCreateContact` is set in the interaction. Use the voice-campaign media-type to define the lookup behavior in the context of outbound campaign interactions.

### contact.lookup.<media-type>.enable-create-contact

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: When contact lookup is enabled in the context of the current interaction, this option specifies that the *Universal Contact Server* (UCS) will create a contact if the initial search cannot find any existing contact. This option can be overridden by a routing strategy, as described in Overriding Options by Using a Routing Strategy.

## Important

This option overwrites the contact.lookup.enable-create-contact option. It is not taken into account when the attached data `IdentifyCreateContact` is set in the interaction. Use the voice-campaign media-type to define the lookup and create behavior in the context of outbound campaign interactions.

### 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.multiple-value-attributes

- Default Value: `PhoneNumber,EmailAddress`
- Valid Values: A comma separated value list of Attribute Value names that correspond to contact field names.
- Changes take effect: When the session is started or restarted.
- Description: A list of contact attributes that can support multiple values.

### contact.myhistory-default-time-filter-main

- Default Value: `1M`
- Valid Values: A value from the following list: `All`, `1M`, `1W`, `1D`
- Changes take effect: When the session is started or restarted.
- Description: Specifies which Time Filter option is selected by default in the **My History** view when an agent accesses the main history data source:
    - `All`: All interactions from the main Universal Contact Server (UCS) database.
    - `1M`: Interactions from main UCS database that were created less than 1 month ago.
    - `1W`: Interactions from main UCS database that were created less than 1 week ago.
    - `1D`: Interactions from main UCS database that were created less than 1 day ago.

### contact.myhistory-displayed-columns

[**Modified:** 8.5.202.94]

- Default Value: `Status,Subject,StartDate,EndDate`
- Valid Values: A comma-separated value list of Contact History items to display in the interaction view **MyHistory**. For example: `Status, Subject, StartDate, EndDate, MediaType`
- Changes take effect: When the session is started or restarted.
- Description: Defines the list of Contact History items that are displayed in the **MyHistory** view.

### contact.myhistory-quick-search-attributes

- Default Value: `Subject`

- Valid Values: A comma-separated value list of valid interaction attribute names, for example: `Subject`. Possible searchable attributes: `BccAddresses`, `CcAddresses`, `FromAddress`, `FromPersonal`, `Id`, `Mailbox`, `ReplyToAddress`, `StructuredText`, `Subject`, `Text`, `TheComment`, `ToAddresses`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the interaction attributes that are used to search interactions in the quick search mode of the **My History** view. These attributes must be text attributes. You can use custom interaction attibutes. For more information, see Making an Attribute Searchable from the Desktop.

### contact.ucs-interaction.<media-type>.enable-create

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Activates the Workspace Web Edition feature that generates the interaction history in Universal Contact Server (UCS) for Open Media Workitem interactions. This option can be overridden by a routing strategy as described in Overriding Options by Using a Routing Strategy.

### contact.ucs-interaction.voice-campaign.enable-create

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Activates the Workspace Web Edition feature that generates interaction history in the Universal Contact Server (UCS) for Voice Outbound Campaign interactions. This option can be overridden by a routing strategy, as described in Overriding Options by Using a Routing Strategy.

### contact.ucs-interaction.voice.enable-create

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Activates the Workspace Web Edition feature that generates the interaction history in the *Universal Contact Server* (UCS) for Voice interactions. This option can be overridden by a routing strategy, as described in Overriding Options by Using a Routing Strategy.

### contact.ucs-interaction.voice.enable-create-without-contact

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether a voice interaction is created in Universal Contact Server (UCS) when there is no associated contact. This option can be overridden by a routing strategy as described in Overriding Options by Using a Routing Strategy.

### privilege.contact.can-advanced-search-all-interactions

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to do advanced searches of all interactions.

### privilege.contact.can-advanced-search-contact-history

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to do advanced searches within the **Contact History** view.

### privilege.contact.can-advanced-search-my-history

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to do advanced search within **My History**.

### privilege.contact.can-create-contact

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to create contacts. Depends on privilege.contact.can-use.

### privilege.contact.can-create-contact

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to create contacts. Depends on privilege.contact.can-use.

### privilege.contact.can-delete-contact

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.

- Description: Allows agent to delete contacts. Depends on privilege.contact.can-use.

### privilege.contact.can-filter-all-interactions

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to filter all interactions. Depends on privilege.contact.can-use.

### privilege.contact.can-filter-contact-history

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agents to filter interactions within the **Contact History** view. Depends on privilege.contact.can-use.

### privilege.contact.can-filter-my-history

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agents to filter interactions within the **My history** view. Depends on privilege.contact.can-use.

### privilege.contact.can-inline-forward.email.from-history

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agents to forward email interactions from the Interaction History that are marked as Done.

### privilege.contact.can-open.email.from-history

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agents to open in-progress email from interaction history. Depends on privilege.contact.can-use.

### privilege.contact.can-open.<media-type>.from-history

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to open in-progress workitems of the corresponding media-type from interaction history. Depends on privilege.contact.can-use.

### privilege.contact.can-search-contact-history

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to search contact history. Depends on privilege.contact.can-use.

### privilege.contact.can-search-all-interactions

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to search among all interactions.

### privilege.contact.can-search-my-history

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to search within My History. Depends on privilege.contact.can-use.

### privilege.contact.can-use

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows access to the Contact features.

### privilege.contact.can-use-assign-contact

- Default Value: `false`
- Valid Values: `true`, `false`

- Changes take effect: When the session is started or restarted.
- Description: Allows agent to assign a contact to an interaction. Depends on privilege.contact.can-use.

### privilege.contact.can-use-contact-directory

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to view and search into contact directory. Depends on privilege.contact.can-use.

### privilege.contact.can-use-contact-history

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to access contact history. Depends on privilege.contact.can-use.

### privilege.contact.can-use-contact-history-case-data

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to see the case information of interactions in contact history. Depends on privilege.contact.can-use.

### privilege.contact.can-use-contact-history-detail

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to see the detail of interactions in contact history. Depends on privilege.contact.can-use.

### privilege.contact.can-use-contact-history-notepad

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to see notes about interactions in the contact history. Depends on privilege.contact.can-use.

### privilege.contact.can-use-contact-information

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to access contact history. Depends on privilege.contact.can-use.

### privilege.contact.can-use-contact-myhistory

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to access the agent's own history with contacts.

### privilege.contact.can-use-interaction-notepad

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to display and edit the interaction notepad while handling an interaction.

### privilege.contact.can-use-save-contact

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to commit contact modifications. Depends on privilege.contact.can-use.

# Contact Center Statistics

Workspace Web Edition provides the following options for managing Contact Center Statistics:

### statistics.agent-groups

- Default Value: *An empty string*
- Valid Values: A comma-separated list of Agent Group or Virtual Agent Group identifiers.
- Changes take effect: When the session is started or restarted.
- Description: Defines the list of agent groups and virtual agent groups that are displayed in the Contact Center Statistics tab. If empty, no agent groups or virtual agent groups are displayed. If set to a list and none of the groups in the list match an existing group, no agent groups or virtual agent groups are displayed.

### 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 Statistics Gadget. Each statistics specified in this option is the name of a section containing the statistic definition or the statistic object.

### statistics.gadget-statistics

- Default Value: *An empty string*
- Valid Values: A comma-separated list of section names containing statistics.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the statistics that are displayed in the Statistics Gadget. Each statistic specified by this option is the name of a section containing the statistic definition or the statistic object. You can also create sections that define groups of statistics.

### statistics.gadget-statistics.max-size

- Default Value: `10`
- Valid Values: Any integer from 0 to 50.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the maximum number of statistics that are displayed in the Statistics Gadget. If more statistics are specified by the statistics.gadget-statistics option, only the first *n* statistics are displayed.

### statistics.queue-groups

- Default Value: *An empty string*
- Valid Values: A comma-separated list of Queue Group identifiers.
- Changes take effect: When the session is started or restarted.
- Description: Defines the list of queue groups that are displayed in the Contact Center Statistics tab. If empty, no queue groups are displayed. If set to a list and none of the queue groups in the list match an existing queue group, no queue groups are displayed.

### statistics.refresh-time

- Default Value: `20`
- Valid Values: A positive integer
- Changes take effect: When the session is started or restarted.
- Description: Defines, in seconds, how often statistics are refreshed in the **Contact Center Statistics** tab. When set to 0, no automatic refresh occurs. The user should manually refresh statistics.

### statistics.routing-points

- Default Value: *An empty string*
- Valid Values: A comma-separated list of routing point identifiers.
- Changes take effect: When the session is started or restarted.
- Description: Defines the list of routing points that are displayed in the Contact Center Statistics tab. If empty, no routing points are displayed. If set to a list and none of the routing points match an existing routing point, no routing points are displayed.

### statistics.virtual-queues

- Default Value: *An empty string*
- Valid Values: A comma-separated list of Virtual Queue identifiers.
- Changes take effect: When the session is started or restarted.
- Description: Defines the list of virtual queues that are displayed in the Contact Center Statistics tab. If empty, no virtual queues are displayed. If set to a list and none of the virtual queues in the list match an existing virtual queue, no virtual queues are displayed.

### statistics-values.columns.enable-sorting

- Default Value: `false`
- Valid Values: `true, false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether columns in Contact Center Statistics tab can be sorted.

# Editor

Workspace Web Edition provides the following options for managing feature of the text editor:

### editor.default-font

- Default Value: `Roboto`
- Valid Values: One font from list following list: `Serif`, `Sans-serif`, `Monospace`, `Cursive`, `Fantasy`, `Tahoma`, `Roboto`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the font that is selected in the font menu of new and reply HTML formatted email interactions. If empty, the last selected font is used for the next email.

### editor.default-font-size

- Default Value: `9`
- Valid Values: A value from the following list: `8`, `9`, `10`, `11`, `12`, `14`, `16`, `18`, `20`, `22`, `24`, `26`, `28`, `36`, `48`, `72`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the font size that is selected in the font size menu of new and reply HTML formatted email interactions. If empty, the last selected font size is used for the next email.

### editor.fonts

- Default Value: `Serif,Sans-serif,Monospace,Cursive,Fantasy,Tahoma,Roboto`
- Valid Values: A comma-separated list of fonts from the following list: `Serif`, `Sans-serif`, `Monospace`, `Cursive`, `Fantasy`, `Tahoma`, `Roboto`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the available fonts in the font menu of new and reply HTML formatted email interactions. The fonts are displayed in the order in which they appear in the list.

### editor.font-sizes

- Default Value: `8,9,10,11,12,14,16,18,20,22,24,26,28,36,48,72`
- Valid Values: A comma-separated list of font sizes from the following list: `8`, `9`, `10`, `11`, `12`, `14`, `16`, `18`, `20`, `22`, `24`, `26`, `28`, `36`, `48`, `72`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the available font sizes in the font size menu of new and reply HTML formatted email interactions. The font sizes are displayed in the order in which they appear in the list.

# Email

Workspace Web Edition provides the following options for managing 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 email 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 Configuration 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 emails are submitted.

## email.forward-queue

- Default Value:""
- 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 where Workspace submits forwarded outbound emails.

## email.forward.enable-cc-addresses

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether it is possible to add cc addresses when forwarding an inbound email to an external resource.

## email.forward.enable-instructions

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.

- Description: Specifies whether it is possible for agents to add instructions when forwarding an inbound email to an external resource.

## email.forward.enable-multiple-to-addresses

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether it is possible to forward an inbound email to multiple external resources.

## 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 email interactions. You can set a default value by using the flag from the Business Attribute value. This option can be overridden by a routing strategy as described in this Configuration Guide.

## 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 email. When set to 'true', new email 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 email is included in the outbound reply email. This option can be overridden by a routing strategy, as described in this Configuration Guide.

## email.inline-forward-header

- Default Value: `$FullHeader$`
- 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 inbound email content in the body of the inline forward email. The value `$FullHeader$` inserts the entire header of the inbound

email into the inline forwarded email. You can also choose to include any other text. The following tags are supported: <contact>, <date>. This enables you to create a custom header, such as: `"On <date>, <contact> wrote:"`

## email.inline-forward-prefix

- Default Value: Fwd:
- Valid Values: Any valid character string.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the inline forward prefix that is added to subject of the forwarded inbound email.

## email.inline-forward-queue

- Default Value:
- 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 in-line forwarded inbound emails are submitted.

## email.max-attachment-size

- Default Value: `0`
- Valid Values: A positive integer.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the maximum number of megabytes of one file that agents can attach to an external email interaction. The attachment is refused by the system and an error message is displayed to the agent if the size in megabytes of the attached file exceeds this value. The value 0 means that there is no restriction.

## email.max-attachments-size

- Default Value: `0`
- Valid Values: A positive integer.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the maximum number of total megabytes of files that agents can attach to an external email interaction. An error message is displayed to the agent if the total number of megabytes for all attached files exceeds this value. The value 0 means that there is no restriction.

## 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 emails 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 Emails 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 Configuration Guide.

## email.qa-review-dispositions-business-attribute

- Default Value:""
- Valid Values: Any valid character string.
- Changes take effect: When the session is started or restarted.
- Description: A character string that specifies the name of the Business Attribute that contains the Attribute Values that are used as an enumerated value for `qa-review-dispositions` code. This option can be overridden by a routing strategy, as described in this Configuration 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 email that is formatted as plain text, specifies the characters that are used to quote the contents of the inbound email interaction in the outbound email interaction body.

## email.quote-header

- Default Value: `$FullHeader$`
- 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 email content in the body of the outbound email. The value `$FullHeader$` inserts the entire header of the inbound email into the outbound email. You can also choose to include any other text. The following tags are supported: `<contact>, <date>`. This enables you to create a custom header, such as: "On `<date>`, `<contact>` wrote:"

## 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 email reply:
  - auto: outbound email reply format is the same as corresponding inbound email.
  - html: outbound email reply format is forced to html.
  - plain-text: outbound email 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 email.

## email.ringing-bell

- Default Value:
- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the path of the sound file Workspace plays when an email interaction is ringing. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
  - `-1` — play and repeat the sound until an explicit message, such as event established, causes it to stop.
  - `0` — play the whole sound once
  - an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

## email.signature

- Default Value: An empty string
- Valid Value: The type and location of the signature template in the following format: "`response:<path to the standard response>`".
- Changes take effect: When the session is started or restarted.
- Description: Specifies the type and location of the signature template that Workspace should add to outbound emails. The value has two components that are separated by a colon:
  1. "response"
  2. The standard response name and the full path of the parent category in the Standard Response Library.

     For example, "`response:Signatures\Classic`".

This option can be overridden by a routing strategy, as described in this Configuration Guide.

## 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 Configuration Guide.

## privilege.email.can-add-attachment

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to add attached files to outbound emails. Depends on privilege.email.can-use.

## privilege.email.can-decline

- 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 can decline incoming email interactions. Depends on privilege.email.can-use.

## privilege.email.can-delete

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to delete emails. Depends on privilege.email.can-use.

## privilege.email.can-forward

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to forward emails. Depends on privilege.email.can-use.

### privilege.email.can-inline-forward

- Default Value: `false`
- 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 forward an email inline instead of as an attachment.

### privilege.email.can-mark-done

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to mark an inbound email as done without further processing. Depends on privilege.email.can-use.

### privilege.email.can-move-to-workbin

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to move emails to workbins. Depends on privilege.email.can-use.

### privilege.email.can-one-step-transfer

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to one-step transfer emails. Depends on privilege.email.can-use.

### privilege.email.can-reply

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to reply to emails. Depends on privilege.email.can-use.

### privilege.email.can-reply-all

- Default Value: `true`

- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to reply all to emails. Depends on privilege.email.can-use.

## privilege.email.can-save

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to save emails. Depends on privilege.email.can-use.

## privilege.email.can-send

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to send emails. Depends on privilege.email.can-use.

## 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 Email channel.

# Expression

Workspace Web Edition provides the following options for managing Expressions:

## expression.email-address

- Default Value: (\w+([-+.]\w+)*@\w+([-.]\w+)*\.\w+([-.]\w+)*)
- Valid Values: A regular expression
- Changes take effect: When the session is started or restarted.
- Description: Specifies the regular expression that identifies a email address in the chat.

## 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 Configuration 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 Configuration Guide.

## expression.team-communicator-email-address

- Default Value: `^([A-Za-z0-9._-]+)@([A-Za-z0-9.-]+)\.([A-Za-z]{2,6})$`
- Valid Values: A valid regular expression.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the regular expression used to recognize an email address of a target entered in the Team Communicator.

## expression.team-communicator-phone-number

- Default Value: `^[\(\)\-\.\+\d\s\*#]*[\d]+[\(\)\-\.\+\d\s\*#/]*$`

- Valid Values: A valid regular expression.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the regular expression used to recognize a phone number of a target entered in the Team Communicator when it is used to start a call, transfer, or conference. If the number entered by the agent in the Team Communicator edit box matches this expression, the 'Call' or 'Start Voice Consultation' or 'Instant Transfer' or 'Instant Conference' action is enabled for this number. When the agent executes the action, the entered phone number is modified by the logic specified by the expression.phone-number.supported-characters option before the telephony operation is executed.

## expression.url

- Default Value: `(http://(www.)?|https://(www.)?|ftp://(www.)|www.){1}([0-9A-Za-z+&@#/%?=~_|!:,.;-]+.+[0-9A-Za-z]{2,6})([0-9A-Za-z+&@#/%?=~_|!:,.;-]*)?`
- Valid Value: A regular expression
- Change Take Effect: When the session is started or restarted
- Description: Specifies the regular expression that identifies a URL in the Case Information area. This option can be overridden by a routing strategy as described in this Configuration Guide.

# Facebook

Workspace Web Edition provides the following options for managing Facebook:

### facebook.auto-answer

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

### facebook.comments-pagination-size

- Default Value: 2
- Valid Values: Any positive integer.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the number of comments are initially displayed and then added when Show More is clicked.

### facebook.default-queue

- Default Value: `Facebook Outbound Queue`
- 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 name of the queue in which outbound interactions are first created. This name must be identical to the the name of the default queue in the configuration layer.

### facebook.outbound-queue

- Default Value: `Facebook Outbound Queue`
- 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 name of the queue in which an outbound interaction is to be placed when an agent has completed editing it.

### facebook.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 can be overridden by a routing strategy, as described in the Configuration Guide.

## facebook.ringing-bell

- Default Value:
- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the path of the sound file Workspace plays when a Facebook interaction is ringing. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
    - `-1` — play and repeat the sound until an explicit message, such as event established, causes it to stop.
    - `0` — play the whole sound once.
    - an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound.

## privilege.facebook.can-use

- Default Value: `false`
- 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.

## privilege.facebook-session.can-use

- Default Value: `false`
- 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 Facebook Private Messaging on the Facebook channel.

# Feedback

Workspace Web Edition provides the following options for managing Feedback:

## system.feedback

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: When this option is set to true, the **Feedback** menu item appears in the **Help** menu

## system.feedback.submit-after-disconnect

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: When this option is set to `true`, a feedback dialog box is displayed when a user log ins again after a session disconnects due to the Cometd defense managed by the system.cometd.timeout option.

# IM

Use the options below to enable instant messaging capabilities for internal communication and interaction consultation.

## im.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 messages the agent enters in the IM view.

## im.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 text color of messages the agent enters in the IM view.

## im.auto-answer

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

## im.other-agent.prompt-color

- Default Value: `#D88000`
- 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 messages the other agent enters in the IM view

## im.other-agent.text-color

- Default Value: `#D88000`
- Valid Values: Valid Hexadecimal (HTML) color code
- Changes take effect: When the session is started or restarted.

- Description: Specifies the text color of messages the other agent enters in the IM view. For example: `#FF0000` for a red color.

## im.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 text color of system messages in the IM view.

## im.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 IM transcript area.

## im.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 Configuration Guide.

## im.toast-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 IM interaction notification is displayed in the Information area of the Main Window before the IM is rejected. The value `0` means the interaction notification is displayed until the agent accepts the interaction.

## im.new-message-bell

- Default Value:
- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the configuration string for the new IM message sound. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The

second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:

- `0` — play the whole sound once
- an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

## im.ringing-bell

- Default Value:
- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the path of the sound file that is played when Instant Messaging interaction is ringing. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
    - `-1` — play and repeat the sound until an explicit message, such as event established, causes it to stop.
    - `0` — play the whole sound once
    - an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

## privilege.im.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enable an agent to use IM.

## privilege.im.can-release

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to manually end an IM session. Depends on privilege.im.can-use.

## privilege.im.can-make

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to create a new instant messaging session from any area that has this functionality. Depends on privilege.im.can-use.

# Interaction

Workspace Web Edition provides the following options for managing Interactions:

## interaction-bar.quick-access-modes

- Default Value: `Pinned`, `Floating`
- Valid Values: `Pinned`, `Floating`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of modes that are available to present interactions. The available modes are:
    - `Pinned`: the interaction view occupies the full available size, shared with Supporting Views like **Contact** and **Responses**.
    - `Floating`: the interaction view is presented in a floating window that is painted above any other kind of content and that fits the visual material to display. This view cannot display content displayed on the right part, such as **Contact Profile** or **Responses**.

      When more than one mode is specified, by default the first mode in the configured list is used. The end user can switch from one mode to the other using a dedicated control. For a given media type, this option can be overridden by option interaction-bar.quick-access-modes.<media-type>.

## interaction-bar.quick-access-modes.<media-type>

- Default Value: `Pinned`, `Floating`
- Valid Values: `Pinned`, `Floating`
- Changes take effect: When the session is started or restarted.
- Description: Use this option as a template to specify the list of modes available to present interactions of the given media type. The available modes are:
    - `Pinned`: the interaction view occupies the full available size, shared with Supporting Views like **Contact** and **Responses**.
    - `Floating`: the interaction view is presented in a floating window that is painted above any other kind of content and that fits the visual material to display. This view cannot display content displayed on the right part, such as **Contact Profile** or **Responses**.

      When more than one mode is specified, by default the first mode in the configured list is used. The end user can switch from one mode to the other using a dedicated control. When it is defined for a media type this option overwrites the definition of generic option interaction-bar.quick-access-modes.

## 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 like the Origin field. The order in which the values are specified defines the order of the Case Data and History information in the Case Information area. This option can be overridden by a routing strategy, as described in Overriding Workspace Options.

### interaction.case-data.enable-hyperlink

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables Workspace to display hyperlinks that are part of the case information. See also the [expression.url option.

This option can be overridden by a routing strategy, as described in Overriding Workspace Options.

### 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 Overriding Workspace Options. 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: `#17849D`
- 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 Overriding Workspace Options.

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

- Default Value: `#FFFFFF`
- 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 Overriding Workspace Options.

## interaction.case-data.is-read-only-on-idle

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: If the value of this option is true, changes to the case data after a voice interaction has been released are prevented. When some values are modified or added after the voice call is released, the update is pushed to back-end as a User Event when agent clicks 'Mark Done'. This option can be overridden by a routing strategy as described in Overriding Workspace Options.

## interaction.disposition.cache-timeout-delay

- Default Value: `-1`
- Valid Values: `-1` to MAXINT
- Changes take effect: When the session is started or restarted.
- Description: Specifies the delay, in seconds, before the cache of a disposition request result is cleared. If set to -1, the dispositions are kept in cache until the browser page is refreshed, or until the agent logs out and logs back in.

## interaction.disposition.folder-name-depth-<n>

- Default Value: `""`
- Valid Values: The name of a key to be displayed as a folder in the Disposition view.
- Changes take effect: When the session is started or restarted.
- Description: 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 Overriding Workspace Options.

## interaction.disposition.is-expanded-on-display

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Set to `true` to expand the whole Dispositions tree by default; `false` to collapse the tree.

## 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 Overriding Workspace Options.

### 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: If this option is `true`, Workspace prevents changes to Disposition after a voice interaction is released. This option can be overridden by a routing strategy as described in Overriding Workspace Options.

### 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 Overriding Workspace Options.

### 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 Overriding Workspace Options.

### 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 Overriding Workspace Options.

### interaction-management.available-interaction-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 Interaction Management content view. Values grater than `100` are not recommended due to performance impact. The maximum value depends on the content of interactions and the robustness of your network. If you specify a value that is too high, the request to get a snapshot fails and an error message is displayed.

## interaction-management.default-interaction-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 Interaction Management content view.

## interaction-management.filters

- Default Value: *An empty string*
- Valid Values: A comma-separated list of Filter names.
- Changes take effect: When the session is started or restarted.
- Description: Defines the filters that are displayed to the supervisor for interaction management. The filter names refer to the names of the Application Option sections that define the Filters. See Creating Interaction Filters for Team Leads for more information.

## interaction-management.interactions-filter.displayed-columns

- Default Value: `From,To,Subject,Received`
- Valid Values: A comma-separated list of attached data — for example: `From,Subject,Received`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of interaction fields that are displayed as columns in the Interaction Queue view.

## 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.

## interaction.reject-route

- Default Value: An empty string
- Valid Values: A string that represents an attached data key
- Changes take effect: When the session is started or restarted.
- Description: Workspace enables the **Reject** voice call operation in SIP Server environments that use multi-site routing. The reject route mechanism has been extended to accommodate different types of 'reject' implementations, depending on the context. Use this option to enable the reject route mechanism by specifying a string as a key to be used at run-time to retrieve the behavior description from the interaction user data. It is the responsibility of the administrator to define the multi-site reject criteria.

The reject route is specified in the interaction user data in the following format: <reject-method>:<dn>@<switch>.

When reject-method is specified, ensure that the following characters are also specified: :, @, and the switch field. The following are possible values for the reject-method attribute:

- sst - Reject applies the following action: SingleStepTransfer(OtherDN=<dn>,Location=<switch>).
- release Reject applies the following action: releaseCall. This value must be applied when the value of the **TServer/divert-on-ringing** SIP Server configuration option is set to false.

> **Warning**
> If the value of dn@switch corresponds to the same routing point as the one that is handling the call that is being delivered to the agent, the action will succeed only if the value of the **TServer/divert-on-ringing** SIP Server configuration option is set to true.

## interaction.web-content

- Default Value: ""
- Valid Values: A comma-separated list of option section names that correspond to web extension views. For example: Extension1, Extension2
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of Web Applications that are configured to be displayed at the Interaction level. Refer to the Enabling integration of web applications in the agent interface for information about creating web application objects in the configuration layer. This option can be overridden by a routing strategy as described in Overriding Workspace Options.

## privilege.interaction-management.can-move-to-queue

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.

- Description: Enables supervisors to move interactions to a queue.

## privilege.interaction-management.can-move-to-workbin

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables supervisors to move interactions to a workbin.

## privilege.interaction-management.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows supervisors access to Interaction Management.

## privilege.interaction-management.case-data.can-edit

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables supervisors to edit case data for interactions directly from Workbins and Interaction Queues without pulling the interactions first.

# Interaction Preview (Toast)

Workspace Web Edition provides the following options for managing the Interaction Preview notification ('Toast') window:

> **Tip**
> For information about auto-answering interactions, see the configuration options for the specific channel or channels for which you want to enable auto-answer.

## 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. The order in which the values are specified defines the order of the Case Data and History information in the Case Information area. This option can be overridden by a routing strategy, as described in the Configuration 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 Configuration 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.

## toast.window-title

- Default Value: `($Contact.FirstName$ $Contact.LastName$|$Interaction.MainParty$)`
- Valid Values: `$Window.Title$`, `$Agent.UserName$`, `$Agent.LastName$`, `$Agent.FirstName$`, `$Agent.EmployeeId$`, `$Interaction.CaseId$`, `$Interaction.Id$`, `$Contact.X$`, `$AttachedData.Y$`, `$Interaction.MainParty$`

- Changes take effect: When the session is started or restarted.
- Description: Defines the title of the Interactive Notification window by specifying a string that contains the following field codes, as identified in the list of valid values. X is the name of the contact attribute and Y is the name of the attached-data key. If all field codes are empty, the following field code is used: `$Interaction.MainParty$`. This option can be overridden by a routing strategy as described in this Configuration Guide.

# Intercommunication

Workspace Web Edition provides the following options for managing 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: `InitTransfer,OneStepTransfer`
- Valid Values: A comma-separated list of valid operation names from the following list: `InitTransfer`, `OneStepTransfer`, `OneStepConference`.
- 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.im.routing-based-actions

- Default Value: `MakeIM`
- Valid Values: A comma-separated list of valid operation names from the following list: `MakeIM`.
- 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.im.routing-based-targets

- Default Value:
- Valid Values: A comma-separated list of valid object types from the following list: `Agent`, `RoutingPoint`
- 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.im.routing-based-actions`. **Note:** The targets 'AgentGroup' and 'Skill' are always addressed through routing; therefore, they are not affected by this option.

## intercommunication.im.routing-points

- Default Value:
- 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

## intercommunication.voice.consultation-enabled

- Default Value: `Agent, AgentGroup, RoutingPoint, Contact, TypeDestination, Skill`
- Valid Values: A comma-separated list of valid object types from the following list: `Agent`, `AgentGroup`, `RoutingPoint`, `Contact`, `TypeDestination`, `Skill`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of targets enabled in Team Communication for a consultation.

## intercommunication.voice.make-call-caller-id-business-attribute

- Default Value: *An empty string*.
- Valid Values: Letters `A` to `Z` and `a` to `z`, numbers `0` through `9`, underscore and space characters.
- Changes take effect: When a session is started or restarted.
- Description: A character string that specifies the name of the Business Attribute that contains the Attribute Values that are used as outbound caller IDs. This option is only applicable for external calls.

## intercommunication.voice.make-call-caller-id-enable-anonymous

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When a session is started or restarted.
- Description: Specifies whether anonymous is enabled on make call with caller id. This option is only applicable for external calls. Depends on privilege.voice.can-use. This functionality can currently only be used in conjunction with the SIP Server **TServer/enforce-p-asserted-identity** option configured on the outbound PSTN Trunk DN. This must be configured in the environment where the PSTN Provider (Carrier) implements Calling Line Identification Restriction (CLIR) and allows masking the displayed number (Caller ID) only if privacy SIP headers are correctly constructed and "anonymous@anonymous.invalid" is specified in the From field.

## intercommunication.voice.make-call-enabled

- Default Value: `Agent, AgentGroup, RoutingPoint, Contact, TypeDestination, Skill`
- Valid Values: A comma-separated list of valid object types from the following list: `Agent`, `AgentGroup`, `RoutingPoint`, `Contact`, `TypeDestination`, `Skill`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of targets enabled in Team Communication for making a call.

## 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: Specifies whether a specific call type is to be handled by the routing-based mechanism. This option does not affect calls to Skills or Agent Groups.

### 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`, `OutboundRecord`, `Contact`.
- 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 `intercommunication.voice.routing-based-actions` option.
  - `Agent`: an Agent.
  - `RoutingPoint`: a routing point configured in the environment.
  - `TypeDestination`: a phone number specified in Team Communicator; an agent can select just the phone number and not the DN, even though there is one matching. The phone number can be a DN or an external phone number.
  - `OutboundRecord`: a phone number provided by Outbound Contact Server for a campaign in Preview mode.
  - `Contact`: a phone number stored as a contact by Universal Contact Server. It is normally not associated with a DN. It is typically an external phone number.

**Note:** The targets 'AgentGroup' and 'Skill' are addressed through routing only when the routing-based mechanism is enabled. They are not affected by this option.

### intercommunication.voice.routing-points

- Default Value: *An empty string*.
- Valid Values: The call number names of the routing point in the following format: `$dn_name@switch$`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the call number that is used by the Routing Base feature for outbound calls. The following attached data are added by Workspace: IW_RoutingBasedOriginalEmployeeId,IW_RoutingBasedTargetId,IW_RoutingBasedTargetType,IW_RoutingBasedRequest

### intercommunication.voice.single-step-conference-enabled

- Default Value: `Agent,AgentGroup,RoutingPoint,Contact,TypeDestination,Skill`
- Valid Values: A comma-separated list of valid object types from the following list: `Agent, AgentGroup, RoutingPoint, Contact, TypeDestination, Skill`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of targets that are enabled in Team Communication for a single-step conference.

## intercommunication.voice.single-step-transfer-enabled

- Default Value: `Agent, AgentGroup, RoutingPoint, Contact, TypeDestination, Skill`
- Valid Values: A comma-separated list of valid object types from the following list: `Agent`, `AgentGroup`, `RoutingPoint`, `Contact`, `TypeDestination`, `Skill`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of targets enabled in Team Communication for a single-step transfer.

## intercommunication.<media-type>.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 Workitem. The following attached data are added by Worskpace: IW_RoutingBasedOriginalEmployeeId,IW_RoutingBasedTargetId,IW_RoutingBasedTargetType,IW_RoutingBasedRequest

## intercommunication.<media-type>.routing-based-actions

- Default Value: `InitTransfer,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.<media-type>.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`, `InteractionQueue`
- 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.

# Knowledge Center

Workspace Web Edition provides the following options for managing Knowledge Center:

## knowledge-center.auth-active

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether a basic HTTP authentication scheme is used to provide secure browser history requests to the Knowledge Center Server.

## knowledge-center.auth-user

- Default Value: none
- Valid Values: Valid user ID
- Changes take effect: When the session is started or restarted.
- Description: Specifies the user ID used to authenticate browser history requests to the Knowledge Center Server.

## knowledge-center.auth-password

- Default Value: none
- Valid Values: Valid password
- Changes take effect: When the session is started or restarted.
- Description: Specifies the password used to authenticate browser history requests to the Knowledge Center Server.

## knowledge-center.customerId

- Default Value: none
- 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 contact attribute that is used to match with a customerId.

## knowledge-center.kbId

- Default Value: none
- 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 key that stores the knowledge base Id in the attached interaction data that this interaction is related to.

## knowledge-center.question

- Default Value: none
- 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 key that stores the last question a customer asked the knowledge system. The attached interaction data includes this key.

## knowledge-center.sessionId

- Default Value: none
- 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 name that stores the knowledge session Id in the attached data of the interaction.

## knowledge-center.url

- Default Value: none
- Valid Values: Valid HTTP URL
- Changes take effect: When the session is started or restarted.
- Description: URL of the Knowledge Center cluster. For example, http://*host*:*port*/gks-server/v1. Typically, this is the load balancer's URL.

## privilege.knowledge-center.can-author

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables an agent to suggest new content to knowledge bases.

## privilege.knowledge-center.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Permission to use the Knowledge center. The plugin only loads if the value of this option is set to `true`.

### knowledge-center.can-upvote-on-copycontent

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables or disables to vote automatic positive feedback after clicking the copy content button.

# KPI

Workspace Web Edition provides the following options for managing KPIs:

## 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: Specifies the KPIs that are displayed to the agent. The KPI names refer to the names of the Application Option sections that define the KPIs.

# Login

Workspace Web Edition provides the following options for managing Login Voice:

### login.list-available-locales

- Default Value:
- Valid Values: Comma-separated list of valid locale names, based on the format LanguageCode-CountryCode, from the following list: `$All$, en-US, pt-BR, fr-FR, fr-CA, de-DE, ja, es, ko`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the language that the agent can select at login time. If empty, `en-US` is used as default value. Either set this option to empty to prevent the agent from selecting the language, set this option to `$All$` to get all the languages available, or set this option to a list of languages (possible values are English United States (`en-US`) Portuguese Brazilian (`pt-BR`), French (`fr-FR`), French Canadian (`fr-CA`), German (`de-DE`), Korean (`ko`), Japanese (`ja`), Spanish (`es`)).

### login.prompt-place

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether the agent must enter his place in the login window. When this option is set to `true`, a new page is displayed during the login phase to specify a place. Enabling this option disables login.voice.prompt-dn-less-phone-number. Do not enable this option if the privilege.sipendpoint.can-use privilege is granted.

### login.store-recent-place

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies to store the most recently used place. This option is available if the login.prompt-place option is set to true.

### 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.dn-less-phone-number.valid-format

- Default Value: *An empty string*.
- Valid Values: A string.
- Description: Specifies the correct format information to be displayed to the agent when the DN-less phone number format is not correct.

### login.voice.expression.dn-less-phone-number

- Default Value: *An empty string*.
- Changes take effect: When the session is started or restarted.
- Valid Values: A regular expression.
- Description: Specifies the valid format for a new phone number. A regular expression can be used to check the DN-less phone number format in the login window.

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

- Default Value: `false`
- Valid Description: `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.

### login.voice.list-available-queues

- Default Value: *An empty string*
- Valid Values: Comma-separated list of ACD Queues.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the ACD Queues that are displayed in the login window. If the option value is left blank, no queue is displayed to the agent; the agent can enter any valid login queue name. If a single queue is specified and the value of the login.voice.prompt-queue no queue information is displayed during login.

### login.voice.nb-dn-less-phone-number-stored

- Default Value:
- Valid Description: `0` to `10`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the number of phone numbers which are stored for the agent. For this option to apply, the value of login.voice.prompt-dn-less-phone-number.enable-dynamic-dn must be `true`.
    - `0` — no phone number is pre-filled in the second login screen.
    - `1` — the last entered phone number is displayed in the second login screen.

- A number greater than 1 specifies the maximum number of phone numbers that can be displayed in the second login screen.

## login.voice.prompt-dn-less-phone-number

- Default Value: `false`
- Valid Description: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: When this option is set, a new page is displayed during the login phase to show the current phone number assigned to the agent and permits agent to update it. This option is specific to SIP Server environment with no Config Server proxy connected to GWS.

## login.voice.prompt-dn-less-phone-number.enable-dynamic-dn

- Default Value: `false`
- Valid Description: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether the agent should be prompted for a DN-less phone number, and the agent's phone number is updated. A dynamic DN is used for the agent. This is only supported with SIP Server TServer 8.1.102.89 or higher. This feature does not require write privileges on Configuration Server.

## login.voice.prompt-queue

- Default Value: `false`
- Valid Description: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether the agent must enter the ACD Queue for the voice channel in the login window. This is applicable only if more than one ACD Queue is specified by the login.voice.list-available-queues option. If only one queue is specified, then the prompt is not displayed.

## login.workmode

- Default Value: `unknown`
- Valid Description: A value from the following list: `unknown`, `auto-in`, `manual-in`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the workmode that is applied when the voice DN logs in. To determine whether your switch supports the workmode, refer to the Configuration Guide of the relevant T-Server.

# Main Window

## main-window.window-title

- Default Value: `$Window.Title$`
- Valid Values: One or more of the following field codes and/or any text string: `$Window.Title$`, `$Application.Title$`, `$Agent.UserName$`, `$Agent.LastName$`, `$Agent.FirstName$`, `$Agent.EmployeeId$`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the title of the browser window or tab. You can specify any string and/or combination of valid field codes up to the maximum width of the browser window title bar or tab. If all field codes are empty, the following field codes are used: $Window.Title$.

# Outbound

This page displays the options and privileges associated with Outbound campaigns for Workspace Web Edition.

> **Important**
> In initial releases, some values depicted below were hard coded; modifying these options might not have any effect.

## outbound.call-result-automatically-selected

- Default Value: ""
- Valid Values: Any available call result value: outbound.call-result-values.
- Changes take effect: At the next interaction.
- Description: Specifies the call result to be selected by default for outbound records. The specified call result must be defined by the values that are specified for the `outbound.call-result-values` option. If set to an empty value, the current call result of the outbound record is selected, or unknown is selected if there is no current value. Has a dependency on privilege.outbound.can-use.

## outbound.call-result-values

- Default Value: `Answered,NoAnswer,AnsweringMachine,Busy,WrongNumber`
- Valid Values: One or more items from the following list: `Abandoned` (Abandoned), `AgentCallbackError` (Agent Callback Error), `AllTrunksBusy` (All Trunks Busy), `Answered` (Answered), `AnsweringMachine` (Answering Machine), `Busy` (Busy), `CallDropError` (Call Drop Error), `DialError` (Dial Error), `DoNotCall` (Do Not Call), `Dropped` (Dropped), `DroppedNoAnswer` (Dropped No Answer), `FaxDetected` (Fax Detected), `GeneralError` (General Error), `GroupCallbackError` (Group Callback Error), `NoAnswer` (No Answer), `NoDialTone` (No Dial Tone), `NoEstablished` (No Established), `NoFreePortError` (No Free Port Error), `NoProgress` (No Progress), `NoRingback` (No Ringback), `NuTone` (Nu Tone), `Ok` (Ok), `PagerDetected` (Pager Detected), `Silence` (Silence), `SitDetected` (Sit Detected), `SitInvalidNum` (Sit Invalid Num), `SitNoCircuit` (Sit No Circuit), `SitOperintercept` (Sit Operintercept), `SitReorder` (Sit Reorder), `SitUnknown` (Sit Unknown), `SitVacant` (Sit Vacant), `Stale` (Stale), `SwitchError` (Switch Error), `SystemError` (System Error), `TransferError` (Transfer Error), `Unknown` (Unknown), `WrongNumber` (Wrong Number), `WrongParty` (Wrong Party)
- Changes take effect: At the next interaction.
- Description: Specifies the list of call results that are available for the agent to use for an outbound interaction. The call results are displayed in the order in which they appear in the list. Has a dependency on privilege.outbound.can-use.

## outbound-callback.ringing-bell

- Default Value:

- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the outbound callback ringing sound configuration string of a scheduled callback pushed to the agent as a preview. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
  - `-1` — play and repeat the sound until an explicit message, such as event established, causes it to stop.
  - `0` — play the whole sound once
  - an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

  Has a dependency on privilege.outbound.can-use.

### outbound.delay-voice-state-change.timeout

- Default Value: `0`
- Valid Values: An integer value.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the duration in milliseconds for which Agent Desktop will delay changing the state of the Voice channel to **Ready**, to allow completion of any Outbound interaction that is being marked done.

### outbound.preview.max-simultaneous-preview-record

- Default Values: `-1`
- Valid Values: An integer.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the maximum number of simultaneous Outbound Preview records an agent can view in the interaction window. A `0` or a negative value indicates no limit. Has a dependency on privilege.outbound.can-use.

### outbound.treatment-mode

- Default Value: An empty string
- Valid Values: `personal`, `campaign`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the type of treatment to be applied for the outbound record after it is marked as processed. If not set or set to an invalid value, no treatment is applied for the outbound record. This option can be overridden by a routing strategy as described in this Configuration Guide.

## privilege.outbound.can.cancel-record

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to cancel a preview record. If an agent cancels a preview record, it is not processed again during the current campaign. Has a dependency on privilege.outbound.can-use.

## privilege.outbound.can-dial-alternative-chained-record

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to dial a number from the preview record chain that is different than the number selected by the system. Has a dependency on privilege.outbound.can-use.

## privilege.outbound.can-get-next-preview-record

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to request a new preview record while processing of the previous preview record terminates. Has a dependency on privilege.outbound.can-use.

## privilege.outbound.can-mark-do-not-call

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to mark a contact as `Do Not Call`. Has a dependency on privilege.outbound.can-use.

## privilege.outbound.can-reject-record

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to decline a preview record. If an agent declines a preview record, it can be processed by another agent in the campaign. Has a dependency on privilege.outbound.can-use.

## privilege.outbound.can-reschedule

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to reschedule an outbound record for an active call. Use the privilege.outbound.can-reschedule-before-call privilege to allow rescheduling before the call is dialed. Has a dependency on privilege.outbound.can-use.

## privilege.outbound.can-reschedule-before-call

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to reschedule an outbound record before calling the contact. Requires privilege privilege.outbound.can-reschedule. Has a dependency on privilege.outbound.can-use.

## privilege.outbound.can-reschedule-on-new-number

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to reschedule an outbound record on a new number (which adds a new record to the chain). Requires privilege privilege.outbound.can-reschedule. Has a dependency on privilege.outbound.can-use.

## privilege.outbound.can-set-call-result

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to set a call result to the outbound record. Has a dependency on privilege.outbound.can-use.

## privilege.outbound.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows access to the Outbound Campaign functions

## privilege.outbound.push-preview.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows access to the Outbound push preview Campaign functions. Has a dependency on privilege.outbound.can-use.

# Permissions

Workspace Web Edition provides the following options for managing Team Communicator and Statistics Permissions:

### permissions.agent-group.exclude

- Default Value:
- Valid Values: A comma-separated list of Agent Groups or Virtual Agent Groups; empty means Workspace doesn't exclude any agent groups or virtual agent groups.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of agent groups or virtual agent groups to be excluded from searches and statistics.

### permissions.agent-group.restrict

- Default Value:
- Valid Values: A comma-separated list of Agent Groups or Virtual Agent Groups; empty means no filtering.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of agent groups or virtual agent groups that are returned for searches and statistics. Overrides the permissions.agent-group.exclude option.

# Rebranding

Workspace Web Edition provides the following options for rebranding:

## rebranding.company-logo

- Default Value:
- Valid Values: A valid URL
- Changes take effect: When the session is started or restarted.
- Description: Specifies the URL of the company logo to be displayed at the right top corner of the application. The maximum size for the logo is 100 x 24 pixels.

## rebranding.login.company-logo

- Default Value:
- Valid Values: A valid URL
- Changes take effect: When the session is started or restarted.
- Description: Specifies the URL of the company logo used on the **Login** page. The maximum size for the logo is 320 x 32 pixels.

## rebranding.about.company-logo

- Default Value:
- Valid Values: A valid URL
- Changes take effect: When the session is started or restarted.
- Description: Specifies the URL of the company logo used in the **About** page. The maximum size for the logo is 320 x 32 pixels.

## rebranding.product-major-name

- Default Value:
- Valid Values: A valid string
- Changes take effect: When the session is started or restarted.
- Description: Specifies the major name of the product.

## rebranding.product-minor-name

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

- Description: Specifies the minor name of the product.

## rebranding.product-version

- Default Value:
- Valid Values: A valid string
- Changes take effect: When the session is started or restarted.
- Description: Specifies the product version.

## rebranding.company-favicon

- Default Value:
- Valid Values: A valid URL
- Changes take effect: When the session is started or restarted.
- Description: Specifies the favicon used for the address bar or in tab related to Workspace Web Edition. The maximum size for the favicon is 100 x 24 pixels.

# Screen Recording Client

Workspace Web Edition provides the following options for the Screen Recording Client:

## privilege.screen-recording.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables the usage of Screen Recording Client.

# Security

## security.inactivity-timeout

- Default value: `0`
- Valid value: An integer value greater than or equal to `0`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the amount of time, in minutes, of agent inactivity (no mouse or keyboard usage) that triggers the application to log out. If the agent has been inactive longer than the number of minutes that are specified by the inactivity timeout, the agent session is ended. A value of `0` disables the inactivity timeout.

> **Warning**
> After the timeout occurs, the Worksapce login dialog should be blank; however, if the agent has allowed the browser to remember his or her password, then the login dialog will still be populated with the agent's credentials. For security, agents should not allow web browsers to remember their login credentials.

## security.inactivity-alert-dialog-before-timeout

- Default value: `30`
- Valid value: An integer value greater than or equal to `0`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies when Workspace displays an alert dialog to warn the agent of the upcoming inactivity timeout. The value of this option, in seconds, tells Workspace how soon to display the alert before the timeout occurs. You must set this option to a value less than the value of security.inactivity-timeout.

# Service Client API

## service-client-api.accepted-web-content-origins

- Default Value: *An empty string*
- Valid Values: A comma-separated list of URLs or '*' — for example: 'http://my-web-server-1,http://my-web-server-2' or '*'.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of granted origins and allowed APIs that are used in the web extension views. You can filter requested API with the following self-explanatory keywords:
  - agent.get
  - agent.getStateList
  - agent.setState
  - agent.getState
  - interaction.getInteractions
  - interaction.getByInteractionId
  - interaction.getByBundleId
  - interaction.getByCaseId
  - interaction.setUserData
  - interaction.deleteUserData
  - system.closeToast
  - system.popupToast
  - system.updateToast
  - voice.dial
  - voice.startCallRecording
  - voice.stopCallRecording
  - voice.pauseCallRecording
  - voice.resumeCallRecording
  - email.create

    For example, the value for the **service-client-api.accepted-web-content-origins** option could now be: http://my-web-server0, http://my-web-server1 , http://my-web-server2 (agent.*, voice.dial), http://my-web-server3 (agent.*, interaction.*)

    In this example, all requests are allowed for the http://my-web-server0 and http://my-web-server1 domains. For the http://my-web-server2 domain, only the following requests are allowed: 'agent.get', 'agent.getStateList', 'agent.setState', 'agent.getState', 'voice.dial'. For the http://my-web-server3 domain, only the following requests are allowed: 'agent.get', 'agent.getStateList', 'agent.setState', 'agent.getState', 'interaction.getInteractions', 'interaction.getByInteractionId', 'interaction.getByBundleId', 'interaction.getByCaseId', 'interaction.setUserData', 'interaction.deleteUserData'.

In addition to filtering by origin, you can filter by API with a wildcard in parentheses after the allowed origin.

This option cannot be overridden and must be set in the **WS_Cluster** application.

## service-client-api.block-markdone-timeout

- Default Value: `1000`
- Valid Values: An integer value greater than `0`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the duration, in milliseconds, of the timeout started by the 'interaction.blockMarkdone()' service. If this option is set, when an agent marks an interaction as Done, the Mark Done operation is delayed until the specified timeout has elapsed. During this interval, Mark Done can be blocked by using the serviceClientAPI 'blockMarkdone' operation. If Mark Done is blocked by 'serviceClientAPI', the Mark Done operation is cancelled. If the Mark Done is not blocked, the Mark Done operation occurs after the specified duration has elapsed. If Mark Done has been blocked by the 'blockMarkDone' operation from the 'serviceClientAPI', it can be unblocked by using the 'unblockMarkDone' operation from the 'serviceClientAPI'.

## service-client-api.rate-limit

- Default Value: `0`
- Valid Values: An integer value greater than or equal to `0`. Specify `0` for an unlimited rate.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the limit for the maximum number of requests per minute on the Service Client API. This option cannot be overridden and must be set in the `WS_Cluster` application.

## service-client-api.rate-limit.<service-name>

- Default Value: `0`
- Valid Values: An integer value greater than or equal to `0`. Specify `0` for an unlimited rate.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the limit for the maximum number of requests per minute on a specific API request on the Service Client API. The <service-name> can be one of the following:
  - agent.get
  - agent.getStateList
  - agent.setState
  - agent.getState
  - interaction.getInteractions
  - interaction.getByInteractionId

- interaction.deleteUserData
- interaction.setUserData
- media.getMediaList
- media.setState
- system.closeToast
- system.popupToast
- system.updateToast
- voice.dial
- voice.startCallRecording
- voice.stopCallRecording
- voice.pauseCallRecording
- voice.resumeCallRecording
- email.create

This option cannot be overridden, it must be set in the WSA Cluster Application.

### service-client-api.rate-limit-quarantine-delay

- Default Value: `30`
- Valid Values: An integer value greater than or equal to `0`. Specify `0` for infinite quarantine delay.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the quarantine delay, in seconds, during which requests are ignored once the rate limit is reached. This option cannot be overridden and must be set in the `WS_Cluster` application.

### service-client-api.user-data.read-allowed

- Default Value: *
- Valid Values: A comma-separated value list of user data keys to allow, or '*' to allow all keys. For example: `Key1,Key2,Key3`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of keys that can be read in the user data. This applies to the userData property of the Interaction object returned by a function or an event.

### service-client-api.user-data.write-allowed

- Default Value: *
- Valid Values: A comma-separated value list of user data keys to allow, or '*' to allow all keys. For example: `Key1,Key2,Key3`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of keys that the interaction.setUserData() and interaction.deleteUserData() functions can write to in the user data.

# SIP Endpoint

Workspace Web Edition provides the following options for managing SIP Endpoints, such as the Genesys Softphone:

## sipendpoint.headset-unplugged.not-ready-reason

- Default Value: `""`
- Valid Values: A valid Not Ready reason.
- Change takes effect: When the session is started or restarted.
- Description: Specifies the Not Ready reason that is to be set for the SIP DN when the headset that is used by the agent is unplugged if the value of the `sipendpoint.headset-unplugged-set-not-ready` option is set to `true`.

## sipendpoint.headset-unplugged-set-not-ready

- Default value: `true`
- Valid values: `true`, `false`
- Change takes effect: When the session is started or restarted.
- Description: Specifies whether the agent SIP DN is set automatically to Not Ready when the headset that is configured for the agent is unplugged.

## sipendpoint.max-failed-ping

- Default value: 5
- Valid values: A correct integer
- Change take effect: When the session is started or restarted.
- Description: Number of failed pings allowed on Genesys Softphone.

## sipendpoint.ping-interval

- Default value: `2000`
- Valid values: A correct integer
- Change take effect: When the session is started or restarted.
- Description : Interval in milliseconds between each ping of the Genesys Softphone.

## sipendpoint.register-interval

- Default value: `1500`
- Valid values: A correct integer

- Change take effect: When the session is started or restarted.
- Description: Interval in milliseconds between each register on the Genesys Softphone.

### sipendpoint.register-max-attempts

- Default value: `10`
- Valid values: A correct integer
- Change take effect: When the session is started or restarted.
- Description: Number of failed attempts allowed on check if register is done.

### sipendpoint.sip-server-address

- Default value:
- Valid values: Any valid IP address or host name
- Change take effect: When the session is started or restarted.
- Description: Address of the sip server and, optionally, the port using the `<address>:<port>` format. If the port is not specified, the Genesys Softphone uses DNS SRV resolution for the specified address.

  In Business continuity environments, this option specifies the host name or IP address of the session border controller where the SIP REGISTER request will be sent by Workspace SIP Endpoint.

  To set the Domain/Realm of your contact center instead of an IP address when Workspace SIP Endpoint tries to register through a session border controller (SBC) device, set the value of the this option to the FQDN of your domain instead of just the IP address.

### sipendpoint.sip-server-address.peer

- Default value:
- Valid values: Any valid IP address or host name
- Change take effect: When the session is started or restarted.
- Description: Address of the peer sip server and, optionally, the port using the `<address>:<port>` format. If the port is not specified, the Genesys Softphone uses DNS SRV resolution for the specified address. Requires Genesys Softphone 8.5.400.08 or higher.

  In Business Continuity environments, this option specifies the host name or IP address of the session border controller where the peer SIP REGISTER request will be sent by Workspace SIP Endpoint.

  To set the Domain/Realm of your contact center instead of an IP when Workspace SIP Endpoint tries to register through a session border controller (SBC) device, set the value of the this option to the FQDN of your domain instead of just the IP address.

## sipendpoint.transport-protocol

- Default Value: `UDP`
- Valid Values: `UDP, TCP, TLS`
- Change take effect : When the session is started or restarted.
- Description: Specify whether UDP, TCP, or TLS is used for the SIP transport protocol.

## sipendpoint.uri

- Default value:
- Valid values: A valid URI
- Change take effect: When the session is started or restarted.
- Description : URI of the SIP endpoint used in connector mode. For example: https://localhost:8000

## sipendpoint.wait-user-max-attempts

- Default value: `20`
- Valid values: An integer value greater than `0`.
- Change take effect: When the session is started or restarted.
- Description : The number of failed waiting user actions that are allowed before timeout.

## privilege.sipendpoint.can-change-microphone-volume

- Default value : `false`
- Valid values : `true`, `false`
- Changes take effect : When the session is started or restarted.
- Description : Allows agents to change the volume of the microphone. Depends on privilege.voice.can-use and privilege.sipendpoint.can-use.

## privilege.sipendpoint.can-change-speaker-volume

- Default value : `false`
- Valid values : `true`, `false`
- Changes take effect : When the session is started or restarted.
- Description : Allows agents to change the volume of the speaker. Depends on privilege.voice.can-use and privilege.sipendpoint.can-use.

## privilege.sipendpoint.can-mute-microphone

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agents to mute and unmute the microphone. Depends on privilege.voice.can-use and privilege.sipendpoint.can-use.

## privilege.sipendpoint.can-mute-speaker

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agents to mute and unmute the speaker. Depends on privilege.voice.can-use and privilege.sipendpoint.can-use.

## privilege.sipendpoint.can-use

- Default value : `false`
- Valid values : `true`, `false`
- Change take effect : When the session is started or restarted.
- Description : Enables use of Genesys Softphone. Depends on privilege.voice.can-use. The login.prompt-place option must not be enabled if this privilege is granted.

# Standard Response

## standard-response.categories

- Default Value: `$All$`
- Valid Values: A comma-separated list of category names or the full path of the category, starting at the root category. Set the value to `$All$` to display Standard Responses from all categories.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of categories Workspace Web Edition uses to filter Standard Responses. Agents see only those Standard Responses that are part of the sub-tree of categories set in the value for this option.

## standard-response.field.<[Agent.]CustomFieldCode>

- Default Value: `""`
- Valid Values: Any valid text string.
- Changes take effect: At the next interaction.
- Description: In the name of the option, `CustomFieldCode` represents a field code that is called in a Standard Response object created in Knowledge Manager and stored in Universal Contact Server. Use this option to specify a custom field code such as an agent nickname, role, department, or other qualification. The value of the option is specific to the agent, agent group, tenant, or application. Refer to Standard Responses Library for more information.

  The value of this option represents the data that is used to populate the corresponding field codes when a Standard Response is inserted into an interaction. You can format `CustomFieldCode` to represent a custom agent attribute using the following pattern: `Agent.<CustomAgentAttr>`, or any custom attribute by dropping the agent modifier: `<CustomFieldCode>`.

  **Examples**:

  - `standard-response.field.Agent.Nickname = Lee`
  - `standard-response.field.Department = Sales`

## privilege.SRL.can-quick-search

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to perform a Quick Search of the Standard Response Library.

## privilege.SRL.can-use

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows access to the Standard Response Library functions.

# Team Communicator

Workspace Web Edition provides the following options for managing Team Communicator:

### presence.evaluate-presence

- 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`, the presence (availability) of an agent or agent group (when configured) is shown in Team Communicator in the search results.

### teamcommunicator.add-recent-filters.voice

- Default Value: " "
- Valid Values: A comma-separated list of interaction types taken from the following values: internal, external, consultation.
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether to store incoming interactions into the Recent buffer. By default, the Recent buffer stores only the actions of the agent, such as recent outbound voice calls. If one or more of the valid values is specified, then recent inbound interactions of that type are also stored in the Recent buffer. This enables agents to see a record of missed calls of the specified type(s).

### 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.corporate-favorites

- Default Value: `""`
- Valid Values: A comma-separated list of favorite names (section names) that are defined in the Workspace application.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of corporate favorites (quick dial favorites) that are configured in the Configuration Server for an Agent, Agent Group, Skill, Routing Point, or Custom Contact. See the Procedure: Creating Corporate Favorites for information about creating Corporate Favorite objects in the

configuration layer. This option can be overridden by a routing strategy as described in Overriding Workspace Options.

## teamcommunicator.list-filter-showing

- Default Value: `Agent,AgentGroup,Skill,RoutingPoint,InteractionQueue,Contact,CustomContact`
- Valid Values: A comma-separated value list of filter items to be displayed in the team communicator. For example:

`Agent,AgentGroup,Skill,RoutingPoint,InteractionQueue,Contact,CustomContact`

- 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.load-at-startup

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: This option is used to help with performance at login if many agents login at the same time. This option specifies if all the configuration elements (Agents, Agent Groups, Queues, Routing Points, Skills) needed by Teamcommunicator are loaded at login. When this option is set to `false`, the elements are not loaded at login, they are loaded the first time the focus is placed in the Team Communicator.

## teamcommunicator.max-favorites-size

- Default Value: `50`
- Valid Values: An integer value from `0` through `100`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the maximum size of the favorites list that Workspace displays when an agent views favorites.

## teamcommunicator.max-size

- Default Value: `50`
- Valid Values: An integer value from `0` through `100`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the maximum size of the default list when the value of teamcommunicator.show-all-internal-targets} is set to `true`.

## 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.one-step-conference-with-consultation.enabled

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether agents can make a one-step conference of a call when there is an active consultation on the call. When the value of this option is set to `false`, the one-step conference button is not displayed and agents cannot perform a one-step conference operation when there is an active consultation.

### teamcommunicator.one-step-transfer-with-consultation.enabled

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether agents can make a one-step transfer of a call when there is an active consultation on the call. When the value of this option is set to `false`, the one-step transfer button is not displayed and agents cannot perform a one-step transfer operation when there is an active consultation.

### teamcommunicator.permissions.agent.exclude-from-agent-groups

- Default Value:
- Valid Values: A comma-separated list of Agent Groups; empty means Workspace doesn't exclude any agent groups.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of agent groups (virtual agent groups aren't supported) used to exclude agents returned in a Team Communicator search. Agents who belong to at least one of these agent groups are excluded from the list. **Note:** This overrides the teamcommunicator.permissions.agent.restrict-to-agent-groups filter where there is overlap. For example, if an agent belongs to groups A and B, and the exclude filter specifies B while the include filter specifies A, the agent is excluded from the returned list.

### teamcommunicator.permissions.agent.restrict-to-agent-groups

- Default Value:
- Valid Values: A comma-separated list of Agent Groups; empty means no restriction are applied.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of agent groups (virtual agent groups aren't supported) used to restrict

agents returned in a Team Communicator search. Agents who belong to at least one of these agent groups are included in the list.

### 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.

### teamcommunicator.show-all-internal-targets

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specify whether all internal targets are displayed by default in the Team Communicator when an agent is searching for a transfer or conference target, including all Agents, Agent Groups, Skills, and Routing Points.

### teamcommunicator.voice.consultation.exclude-numbers

- Default Value:
- Valid Values: A regular expression.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the format for a phone number to exclude on consultation. The check is done after Workspace applies a clean-up on the phone number the agent entered in Team Communicator based on the expression.phone-number.supported-characters option. For example, to exclude extensions that are 7 digits and start with the numbers 7 or 8, set this option to `^(7|8)\d{6}$`.

### teamcommunicator.voice.list-status-reachable

- Default Value: `NotReady`
- Valid Values: A case-sensitive comma-separated list of agent statuses from the following list: `NotReady`, `Busy`, `LoggedOff`.
- Changes take effect: When the session is started or restarted.

- Description: Specifies the list of unavailable statuses for which a target agent can be contacted for consultation, transfer, and conference requests. If the unavailable status of the target agent is not in the list of allowed statuses, the target agent will not be listed as available for consultation, transfer, and conference requests. Depends on privilege.voice.can-use and presence.evaluate-presence.

### teamcommunicator.voice.make-call.exclude-numbers

- Default Value:
- Valid Values: A regular expression.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the format for a phone number to exclude on making a call. The check is done after Workspace applies a clean-up on the phone number the agent entered in Team Communicator based on the expression.phone-number.supported-characters option. For example, to exclude extensions that are 7 digits and start with the numbers 7 or 8, set this option to `^(7|8)\d{6}$`.

### teamcommunicator.voice.single-step-conference.exclude-numbers

- Default Value:
- Valid Values: A regular expression.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the format for a phone number to exclude on single-step conference. The check is done after Workspace applies a clean-up on the phone number the agent entered in Team Communicator based on the expression.phone-number.supported-characters option. For example, to exclude extensions that are 7 digits and start with the numbers 7 or 8, set this option to `^(7|8)\d{6}$`.

### teamcommunicator.voice.single-step-transfer.exclude-numbers

- Default Value:
- Valid Values: A regular expression.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the format for a phone number to exclude on single-step transfer. The check is done after Workspace applies a clean-up on the phone number the agent entered in Team Communicator based on the expression.phone-number.supported-characters option. For example, to exclude extensions that are 7 digits and start with the numbers 7 or 8, set this option to `^(7|8)\d{6}$`.

### privilege.teamcommunicator.can-manage-favorites

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to add, edit, and remove personal favorites in Team Communicator. Depends on privilege.teamcommunicator.can-use and privilege.teamcommunicator.can-view-favorites.

### privilege.teamcommunicator.can-use

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows access to the Team Communicator.

### privilege.teamcommunicator.can-view-all

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to search within all internal targets and contacts in Team Communicator. Depends on privilege.teamcommunicator.can-use.

### privilege.teamcommunicator-can-view-favorites

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to view favorites in Team Communicator. Depends on privilege.teamcommunicator.can-use.

### privilege.teamcommunicator.can-view-recent-calls

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to view recently contacted resources in Team Communicator. Depends on privilege.teamcommunicator.can-use.

### privilege.teamcommunicator.display-agent-groups-availability

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to view the number of agents who are ready for voice in agent groups in Team Communicator. Depends on privilege.teamcommunicator.can-use.

# Team Lead

> **Important**
> Voice call monitoring is supported only for SIP Server environments

For Workspace Web Edition deployments, you can enable supervisor tasks such as monitoring, coaching, and barge-in by setting the following options:

### teamlead.monitorable-routing-points

- Default Value: `""`
- Valid Values: A comma-separated list of routing points (<DN Number>@<switch>).
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of routing points that a supervisor can monitor. Depends on privilege.teamlead.can-monitor-routing-point

### teamlead.monitoring-cross-site-based-on-activity-enabled

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies if cross-site monitoring is enabled and if agent presence is evaluated to select the device to be monitored for a remote agent. If this option is set to `true`, the monitoring request is started on the device where the remote agent is currently logged in.

### teamlead.monitoring-scope

- Default Value: `call`
- Valid Values: Select a value from the following list: `agent`, `call`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the scope of monitoring that is to be used for voice interactions. If the value call is specified, the supervisor remains on the call until it is finished. This mode enables barge-in. If the value agent is specified, the system disconnects the supervisor automatically from the call when the monitored agent leaves the call. In this mode, the barge-in operation is not possible.

### teamlead.myagents.enabled-channels

- Default Value: `voice,chat,email`

- Valid Values: A comma-separated list of channel names from the following list: `voice, chat, email`.
- Changes take effect: When the session is started or restarted.
- Description: Defines the available media in the My Agents view. Workspace displays the channels in the order in which they appear in the list.

### teamlead.myagents.refresh-rate

- Default Value: `30`
- Valid Values: An integer value between 5 and 5000 or equal to 0.
- Changes take effect: When the session is started or restarted.
- Description: Defines the frequency in seconds to refresh the list of users. When set to 0, no automatic refresh is applied and the refresh must be done manually.

### privilege.myagents.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables supervisors to access the My Agents view, where they can view and update the state for agents in the groups they supervise. Supervisors can also remotely log off agents from media channels in this view.

### privilege.teamlead.can-coach-chat

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables a supervisor to coach chat interactions. Depends on privilege.chat.can-use.

### privilege.teamlead.can-coach-current-voice

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables a supervisor to coach the current voice interaction. Depends on privilege.teamlead.can-coach-voice.

### privilege.teamlead.can-coach-voice

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.

- Description: Enables a supervisor to coach voice interactions. Depends on privilege.voice.can-use.

## privilege.teamlead.can-monitor-chat

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables a supervisor to monitor chat interactions.

## privilege.teamlead.can-monitor-current-voice

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the session is started or restarted.
- Description: Enables a supervisor to monitor the current voice interaction. Depends on {{Optionslink|link=Options:Web_Services_and_Applications:interaction-workspace:privilege-teamlead-can-monitor-voice}.

## privilege.teamlead.can-monitor-routing-point

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables a supervisor to monitor routing points. Depends on privilege.teamlead.can-monitor-voice.

## privilege.teamlead.can-monitor-voice

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables a supervisor to monitor voice interactions.

## privilege.teamlead.can-stop-monitoring-chat

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables a supervisor to stop monitoring chat interactions. Depends on privilege.chat.can-use.

## privilege.teamlead.can-stop-monitoring-voice

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables a supervisor to stop monitoring voice interactions. Depends on privilege.voice.can-use.

## privilege.teamlead.can-switch-to-barge-in-chat

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables a supervisor to switch to barge-in mode for monitored chat interactions. Depends on privilege.chat.can-use.

## privilege.teamlead.can-switch-to-barge-in-voice

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables a supervisor to switch to barge-in mode for monitored voice interactions. Depends on privilege.voice.can-use.

## privilege.teamlead.can-use

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables a supervisor to use the agent call and chat monitoring functionality.

# Twitter

Workspace Web Edition provides the following options for managing Twitter:

### twitter.auto-answer

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

### twitter.default-queue

- Default Value: `Twitter Outbound Init Queue`
- 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 name of the queue in which outbound interactions are first created. This name must be identical to the name of the default queue in the configuration layer.

### twitter.outbound-queue

- Default Value: `Twitter Outbound Queue`
- 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 name of the queue in which an outbound interaction is to be placed when an agent has completed editing it.

### twitter.ringing-bell

- Default Value:
- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the path of the sound file Workspace plays when a Twitter interaction is ringing. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
    - -1 — play and repeat the sound until an explicit message, such as event established, causes it to

stop.

- `0` — play the whole sound once
- an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

## privilege.twitter.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: The agent is permitted to use the Twitter channel.

# Update on Startup

Workspace Web Edition provides the following options for customizing the update that occurs when the GWS server restarts:

> **Important**
>
> In previous releases, a GWS server restart automatically updated global information. Now the updates are set to false by default. If you want to configure the GWS to update all global information, use the following configuration sample:
>
> ```
> updateOnStartup:
>         statistics: true
>         opsCredentials: true
>         features: true
> ```

### opsCredentials

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the GWS server is started or restarted.
- Description: Specifies whether to update the global ops credentials to the values specified in configuration file.

### statistics

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the GWS server is started or restarted.
- Description: Specifies whether to update statistic definitions to the values specified in corresponding configuration file. This option is taken into consideration only on StatNodes.

### features

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the GWS server is started or restarted.
- Description: Specifies whether to update feature definitions to the values specified in corresponding configuration file.

# Views

Workspace Web Edition provides the following options to configure the default tab and tab display order in regions where there are multiple tabs:

## views.CaseSideRegion.activate-order

- Default Value: `ContactView,SRLView,KnowledgeView,CoBrowseView,WebActivityView`
- Valid Values: A comma-separated list of valid view names from the following list (plus the custom views specified with the section names in the interaction.web-content option): `ContactView,SRLView,KnowledgeView,CoBrowseView,WebActivityView,...`
- Changes take effect: When the session is started or restarted.
- Description: Specifies, in order of precedence, the view selected by default in the Case Side Region. (The default view is the first configured view, if visible; otherwise, it's the second configured view, if visible, and so on). If this option is not configured, then the default setting is used. If you do not specify all the options, then the default order is used, except where an item order is specified.

## views.CaseSideRegion.order

- Default Value: `KnowledgeView,CoBrowseView,WebActivityView,ContactView,SRLView`
- Valid Values: A comma-separated list of valid view names from the following list (plus the custom views specified with the section names in the interaction.web-content option): `KnowledgeView,CoBrowseView,WebActivityView,ContactView,SRLView,...`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the order (left to right, top to bottom) in which the views are displayed in the Case Side Region. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default setting is used for any item not specified.

## views.ContactRegion.activate-order

- Default Value: `ContactInformationView,ContactHistoryView`
- Valid Values: A comma-separated list of valid view names from the following list: `ContactInformationView,ContactHistoryView`
- Changes take effect: When the session is started or restarted.
- Description: Specifies, in order of precedence, the view selected by default view in the Contact region. (The default view is the first configured view, if visible; otherwise, it's the second configured view, if visible, and so on). If this option is not configured, then the default setting is used. If you do not specify all the options, then the default order is used, except where an item order is specified.

## views.ContactRegion.order

- Default Value: `ContactInformationView,ContactHistoryView`
- Valid Values: A comma-separated list of valid view names from the following list:

`ContactInformationView,ContactHistoryView`

- Changes take effect: When the session is started or restarted.
- Description: Specifies the order (left to right, top to bottom) in which the views are displayed in the Contact Region. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default setting is used for any item not specified.

### views.HistoryInteractionDetailsRegion.activate-order

- Default Value: `ContactInteractionDetailView,ContactInteractionNotePadView,StaticCaseDataView`
- Valid Values: A comma-separated list of valid view names from the following list: `ContactInteractionDetailView,ContactInteractionNotePadView,StaticCaseDataView`
- Changes take effect: When the session is started or restarted.
- Description: Specifies, in order of precedence, the view selected by default view in the History Interaction Details Region. (The default view is the first configured view, if visible; otherwise, it's the second configured view, if visible, and so on). If this option is not configured, then the default setting is used. If you do not specify all the options, then the default order is used, except where an item order is specified.

### views.HistoryInteractionDetailsRegion.order

- Default Value: `ContactInteractionDetailView,ContactInteractionNotePadView,StaticCaseDataView`
- Valid Values: A comma-separated list of valid view names from the following list (plus the custom views specified with the section names in the: `ContactInteractionDetailView,ContactInteractionNotePadView,StaticCaseDataView`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the order (left to right, top to bottom) in which the views are displayed in the History Interaction Details Region. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default setting is used for any item not specified.

### views.InteractionDetailsRegion.activate-order

- Default Value: `ContactInteractionNotePadView,DispositionView`
- Valid Values: A comma-separated list of valid view names from the following list: `ContactInteractionNotePadView,DispositionView`
- Changes take effect: When the session is started or restarted.
- Description: Specifies, in order of precedence, the view selected by default view in the Interaction Details Region. (The default view is the first configured view, if visible; otherwise, it's the second configured view, if visible, and so on). If this option is not configured, then the default setting is used. If you do not specify all the options, then the default order is used, except where an item order is specified.

### views.InteractionDetailsRegion.order

- Default Value: `DispositionView,ContactInteractionNotePadView`

- Valid Values: A comma-separated list of valid view names from the following list: `DispositionView`, `ContactInteractionNotePadView`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the order (left to right, top to bottom) in which the views are displayed in the Interaction Details Region. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default setting is used for any item not specified.

## views.MyWorkspaceRegion.activate-order

- Default Value: `MyChannelsView,MyCampaignsView,MyHistoryView,CustomMyStatReportView,CustomCcReportView`
- Valid Values: A comma-separated list of valid view names from the following list (plus the custom views specified with the section names in the interaction.web-content option): `MyChannelsView,MyCampaignsView,MyHistoryView,CustomMyStatReportView,CustomCcReportView,...`
- Changes take effect: When the session is started or restarted.
- Description: Specifies, in order of precedence, the view selected by default view in the My Workspace Region. (The default view is the first configured view, if visible; otherwise, it's the second configured view, if visible, and so on). If this option is not configured, then the default setting is used. If you do not specify all the options, then the default order is used, except where an item order is specified.

## views.MyWorkspaceRegion.order

- Default Value: `MyChannelsView,MyCampaignsView,MyHistoryView,CustomMyStatReportView,CustomCcReportView`
- Valid Values: A comma-separated list of valid view names from the following list (plus the custom views specified with the section names in the interaction.web-content option): `MyChannelsView,MyCampaignsView,MyHistoryView,CustomMyStatReportView,CustomCcReportView,...`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the order (left to right, top to bottom) in which the views are displayed in the My Workspace Region. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default setting is used for any item not specified.

## views.WorkbinInteractionDetailsRegion.activate-order

- Default Value: `ContactInteractionDetailView,ContactInteractionNotePadView,StaticCaseDataView`
- Valid Values: A comma-separated list of valid view names from the following list: `ContactInteractionDetailView,ContactInteractionNotePadView,StaticCaseDataView`
- Changes take effect: When the session is started or restarted.
- Description: Specifies, in order of precedence, the view selected by default view in the Workbin Interaction Details Region. (The default view is the first configured view, if visible; otherwise, it's the second configured view, if visible, and so on). If this option is not configured, then the default setting is used. If you do not specify all the options, then the default order is used, except where an item order is specified.

## views.WorkbinInteractionDetailsRegion.order

- Default Value: `ContactInteractionDetailView,ContactInteractionNotePadView,StaticCaseDataView`
- Valid Values: A comma-separated list of valid view names from the following list: `ContactInteractionDetailView,ContactInteractionNotePadView,StaticCaseDataView`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the order (left to right, top to bottom) in which the views are displayed in the Workbin Interaction Details Region. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default setting is used for any item not specified.

# Voice

Workspace Web Edition provides the following options for managing Voice:

## 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 Configuration Guide.

## voice.auto-answer.is-enabled-on-already-in-call

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: For environments that use SIP Server, this option specifies whether a voice interaction is automatically answered if there is other active call(s) (used only when the value of voice.auto-answer set to `true`). This option can be overridden by a routing strategy as described in this Configuration Guide.

## voice.caller-id.key-name

- Default Value: `IW_SelectedCallerId`
- Valid Values: An attached data key name (string)
- Changes take effect: When the session is started or restarted.
- Description: Specifies the key name of the attached data that contains the selected caller id information.

## voice.cancel-after-call-work-on-business-call

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies if the After Call Work status of the voice channel should be canceled when the agents switches from After Call Work to Ready or Not Ready during a business call. This option is specific to SIP Server environments.

### voice.cancel-after-call-work-on-done

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies if the voice channel should be forced to its former status when the agent marks the voice interaction as 'done' while the voice channel is in After Call Work status.

### voice.clear-conference-on-release

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: When this option is set to `true`, all the parties in the conference are released when the last agent leaves the conference.

### voice.enable-dtmf-tone

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: When this option is set to `true`, a tone is played when the agent selects a DTMF key.

### voice.floating-interaction-mode.auto-collapse

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: When this option is set to `true`, new floating voice interactions will automatically be collapsed. When this option is set to `false`, new floating voice interactions will not be collapsed.

### voice.hold-active-call-on-make-call

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether the active call is placed on hold when an agent makes an independent call. When disabled, the make call operation isn't available if there is a call on hold.

### voice.hold-indicator-timer

- Default Value: `30,60`

- Valid Values: An integer for the number of seconds before Workspace displays the warning indicator and an integer for the number of seconds before Worksapce displays the alarm indicator.
- Changes take effect: When the session is started or restarted.
- Description: Defines two alarm thresholds, in seconds, that warn agents when a voice call is on hold for a long time. Three levels are displayed: before the warning time, between the warning time and the maximum time, and after the maximum time.

### 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 Configuration 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 Configuration Guide.

### voice.reject.counter-key-name

- Default Value:
- 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: The key that is used to populate a counter in attached data when a call is rejected. This option can be overridden by a routing strategy described in this Configuration Guide.

### voice.ringing-bell

- Default Value:
- Valid Values: All special characters that are valid in a URL file path, the '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the path of the sound file Workspace plays when a voice interaction is ringing. For example: 'BELL|7|0'. Specifies the warning message sound-configuration string. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:
    - -1 — play and repeat the sound until an explicit message, such as event established, causes it to

stop.

- `0` — play the whole sound once
- an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

### voice.use-caller-id-display-name

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables the Caller Id Display Name and allows it to be used when caller id is used. This feature requires that the value of the SIP Server T`Server/use-display-name` option be set to `true`. The Caller Id Display Name should be the display name of the caller ID in business attribute value specified by the intercommunication.voice.make-call-caller-id-business-attribute option.

### privilege.voice.can-answer-call

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to answer manually an incoming voice call. Setting this option to `false` hides the **Accept** button in the Interaction notification pop-up.

### privilege.voice.can-extend-after-call-work

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to extend the After Call Work state. Depends on privilege.voice.can-use.

### privilege.voice.can-forward

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables forward of voice call. This option requires privilege.voice.can-use to be `true`.

### privilege.voice.can-hold-retrieve-call

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.

- Description: Enables and agent to hold or retrieve a voice call.

## privilege.voice.can-make-call

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to make a new call from any area enabling this function. Depends on privilege.voice.can-use.

## privilege.voice.can-one-step-conference

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables instant conferencing of a voice call. Depends on [privilege.voice.can-use.

## privilege.voice.can-one-step-transfer

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables instant conferencing of a voice call. Depends on privilege.voice.can-use.

## privilege.voice.can-reject-call

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to reject an incoming voice call. Depends on privilege.voice.can-use.

## privilege.voice.can-release-call

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables manual ending of voice call. Depends on privilege.voice.can-use.

## privilege.voice.can-send-dtmf

- Default Value: `false`

- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Enables agents to send DTMF during a voice call. Depends on privilege.voice.can-use.

### privilege.voice.can-show-hold-duration

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Enables agents to see the hold duration for a voice call. Depends on privilege.voice.can-use.

### privilege.voice.can-show-post-call-duration

- Default Value: `false`
- Possible Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Enables agents to see the post call duration for a voice call, in the tooltip and in the interaction bar. Depends on privilege.voice.can-use.

### privilege.voice.can-two-step-conference

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables two step conference for voice calls. This option requires privilege.voice.can-use to be `true`.

### privilege.voice.can-two-step-transfer

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables two step transfer of of a voice call. Depends on privilege.voice.can-use.

### 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.

### privilege.voice.consultation.can-use-caller-id

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables agents to use caller ID for consultations. Depends on privilege.voice.can-use.

### privilege.voice.make-call.can-use-caller-id

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables agents to use caller ID for making calls. Depends on privilege.voice.can-use.

### privilege.voice.show-monitoring.can-use

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables agents to be notified that the current call is monitored by a supervisor.

### privilege.voice.single-step-conference.can-use-caller-id

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables agents to use caller ID for single-step conferences. Depends on privilege.voice.can-use.

### privilege.voice.single-step-transfer.can-use-caller-id

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables agents to use caller ID for single-step transfers. Depends on privilege.voice.can-use.

# Voicemail

## voicemail.access-number

- Default Value: " "
- Valid Values: Any Valid DN
- Changes take effect: When the session is started or restarted.
- Description: Specifies the number the agent can call to access the voicemail system.

## voicemail.notification-types

- Default Value: `personal, public`
- Valid Values: A comma-separated list of action names from the following list: personal, public
- Changes take effect: When the session is started or restarted.
- Description: Specifies the types of voicemail boxes included in the count of unread voicemail messages in the Main Window. `personal` refers to the voicemail box that is identified as the personal voicemail box of the agent; `public` refers to the group voicemail boxes to which the agent has access.

## voicemail.request-timeout

- Default Value: 1
- Valid Values: An integer
- Changes take effect: When the session is started or restarted.
- Description: Specifies the time, in seconds, to wait for voicemail messages from Feature Server. If no voicemail messages are received during this timeout, a request is sent to Feature Server to get them.

## privilege.voicemail.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agents to use the voicemail functionality. This privilege is required to control and monitor voicemail boxes. Depends on privilege.voice.can-use.

# Web Engagement

Workspace Web Edition provides options that allow agents to view their current customer's browser history using the capabilities of Genesys Web Engagement.

> **Important**
> All of the following options appear in the `interaction-workspace` section.

### webme.allowed-domains

- Default value: *
- Valid Values: A comma-separated list of domains which can be displayed to the agent in the page frame.
- Changes take effect: When the session is started or restarted.
- Description: Limits agent access to only those domains which are included in the list. Provided in order to protect agents from opening non-secure websites.

### webme.auth-scheme

- Default value: `none`
- Valid Values: `none` or `basic`
- Changes take effect: When the session is started or restarted.
- Description: Specifies the HTTP authentication scheme used to provide for secure browser history requests to the Web Engagement Server.

### webme.password

- Default value: ""
- Valid Values: A valid password.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the password used to authenticate browser history requests to the Web Engagement Server.

### webme.url

- Default Value: ""
- Valid Values: A valid url.
- Changes take effect: When the session is started or restarted.

- Description: Path to the Web Engagement Server URL.

## webme.user-id

- Default value: ""
- Valid Values: A valid user ID.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the user ID used to authenticate browser history requests to the Web Engagement Server.

## webme.useSecuredHistoryAPI

- Default value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies to use secure history REST API service.

## privilege.webme.can-use

- Default value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Indicates that the agent is allowed to use the web engagement features.

# WebRTC

**Important**
login.voice.prompt-dn-less-phone-number is mandatory for WebRTC.

Workspace Web Edition provides the following options for integrating WebRTC:

### web-rtc.enable-dtmf-tone

- Default Value: `true`
- Valid Values: `true, false`
- Changes take effect: When the session is started or restarted.
- Description: When this option is true, a tone is played when the agent selects a DTMF key.

### web-rtc.gateway-uri

- Default Value:
- Valid Values: A valid URI
- Changes take effect: When the session is started or restarted.
- Description: Defines the host for the WebRTC gateway.

### web-rtc.identifier.x-last-digit-displayed

- Default Value: `10`
- Valid Values: A positive integer
- Changes take effect: When the session is started or restarted.
- Description: Specifies the number of digits of the WebRTC identifier to display in Workspace. The WebRTC identifier is generated based on the user ID — for example, a user ID of a78b5fc6bc7742fb9802958c985098e3 is converted to 977898510299698997742102989802958999850981013. You can use this option to make the number a more user-friendly size when it's displayed in the interaction for the toolbar, parties in Case Information, and in Team Communicator. For example, if you leave the option at the default value, the WebRTC identifier above would be displayed as 9850981013 in Workspace.

### web-rtc.phone-number-prefix

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

- Description: Specifies the prefix that is used for the phone number that is dynamically created for WebRTC.

### web-rtc.quality-alert-timeout

- Default Value: `30`
- Valid Values: A positive integer
- Changes take effect: When the session is started or restarted.
- Description: Time in seconds that passes before an alert is displayed to notify that timeout occurred during a test call.

### web-rtc.quality.score.key-name

- Default Value: `callQualityScore`
- Valid Values: Any string
- Changes take effect: When the session is started or restarted.
- Description: Specifies the key in the UserEvent that Workspace should use for the call quality score set by the agent. The agent only provides this score if the WebRTC API detects low quality of audio for the call.

### web-rtc.quality.statistics.key-name

- Default Value: `callQualityStatistics`
- Valid Values: Any string
- Changes take effect: When the session is started or restarted.
- Description: Specifies the key in the UserEvent that Workspace should use for the call quality statistics it receives from the WebRTC API.

### web-rtc.request-quality-interval

- Default Value: 2
- Valid Values: A positive integer
- Changes take effect: When the session is started or restarted.
- Description: Specifies the interval, in seconds, to request audio call quality from the Genesys WebRTC JavaScript API.

### web-rtc.ringing-bell

- Default Value:
- Valid Values: All special characters that are valid URL file path, '|' separator and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the voice channel ringing sound-configuration string. For example: 'BELL|7|0'. The value has three components that are separated by the pipe ('|') character. The first is the sound file

name (the BELL, RING, CHORD or WARNING predefined aliases or an absolute URL to a MP3 file). The second is a priority — the higher the integer, the higher the priority. The last is the duration, which can have the following values:

- `-1` — play and repeat the sound until an explicit message, such as event established, causes it to stop.
- `0` — play the whole sound once
- an integer greater than `0` — the length of time, in milliseconds, to play and repeat the sound

### web-rtc.stun-uri

- Default Value:
- Valid Values: A valid URI
- Changes take effect: When the session is started or restarted.
- Description: The URI to the STUN server.

### web-rtc.troubleshooting.enable-feedback

- Default Value: `true`
- Valid Values: `true, false`
- Changes take effect: When the session is started or restarted.
- Description: Enables WebRTC to send a user event that contains diagnostic information.

### web-rtc.turn-password

- Default Value:
- Valid Values: A valid password
- Changes take effect: When the session is started or restarted.
- Description: The password for the TURN server.

### web-rtc.turn-username

- Default Value:
- Valid Values: A valid username
- Changes take effect: When the session is started or restarted.
- Description: The username for TURN server.

### web-rtc.turn-uri

- Default Value:
- Valid Values: A valid URI
- Changes take effect: When the session is started or restarted.

- Description: The URI to the TURN server.

## privilege.web-rtc.can-mute-microphone

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to mute and unmute the microphone. Depends on privilege.voice.can-use and privilege.web-rtc.can-use.

## privilege.web-rtc.can-mute-speaker

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows an agent to mute and unmute the speaker. Depends on privilege.voice.can-use and privilege.web-rtc.can-use.

## privilege.web-rtc.can-send-dtmf

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies if DTMF is available for WebRTC calls. Depends on privilege.voice.can-use and privilege.web-rtc.can-use.

## privilege.web-rtc.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Enables WebRTC in Workspace. Depends on privilege.voice.can-use.

# Workbin

Workspace Web Edition provides the following options for managing Workbins:

### 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 email.

### workbin.email.draft.displayed-columns

- Default Value: `To,Subject,Submitted`
- Valid Values: A comma separated list of Interaction Server interaction properties, for example: `To, Subject,Submitted`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of interaction fields displayed as columns in the workbin that stores draft email.

### 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 email for later processing, after an agent explicitly saved the email or submitted an outbound reply.

### workbin.email.in-progress.displayed-columns

- Default Value: `From,Subject,Received`
- Valid Values: A comma separated list of Interaction Server interaction properties, for example: `From, Subject,Received`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of interaction fields displayed as columns in the workbin that stores inbound email for later processing.

### workbin.facebook.draft

- Default Value: ""

- 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: The name of the workbin that is used to store draft Facebook posts.

### workbin.facebook.draft.displayed-columns

- Default Value: `To,Subject,Submitted`
- Valid Values: A comma separated list of Interaction Server interaction properties, for example: `To, Subject,Submitted`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of interaction fields displayed as columns in the workbin that stores draft Facebook posts.

### workbin.facebook.in-progress

- Default Value: ""
- 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: The name of the workbin that is used to store inbound Facebook posts for later processing, after an agent explicitly saved the Facebook post or submitted an outbound reply.

### workbin.facebook.in-progress.displayed-columns

- Default Value: `From,Subject,Received`
- Valid Values: A comma separated list of Interaction Server interaction properties, for example: `From, Subject,Received`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of interaction fields displayed as columns in the workbin that stores inbound Facebook posts for later processing.

### workbin.twitter.draft

- Default Value: ""
- 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: The name of the workbin that is used to store draft Twitter posts.

### workbin.twitter.draft.displayed-columns

- Default Value: `To,Subject,Submitted`
- Valid Values: A comma separated list of Interaction Server interaction properties, for example: `To, Subject,Submitted`.

- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of interaction fields displayed as columns in the workbin that stores draft Twitter posts.

## workbin.twitter.in-progress

- Default Value: ""
- 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: The name of the workbin that is used to store inbound Twitter posts for later processing, after an agent explicitly saved the Twitter post or submitted an outbound reply.

## workbin.twitter.in-progress.displayed-columns

- Default Value: `From,Subject,Received`
- Valid Values: A comma separated list of Interaction Server interaction properties, for example: `From, Subject,Received`.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of interaction fields displayed as columns in the workbin that stores inbound Twitter posts for later processing.

## workbin.<media-type>.in-progress

- Default Value:
- Valid Values: The name of a valid Script object for the Interaction Workbin type 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 interactions of the specified workitem media type. Agents can open interactions from this workbin but not save interactions to it.

## workbin.<media-type>.<workbin-nickname>

- 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: The name of the workbin used to store interactions of a particular workitem media type. Agents can open interactions from this workbin but not save interactions in it.

## workbin.<media-type>.<workbin-nickname>.displayed-columns

- Default Value: `From,To,Subject,Received`
- Valid Values: Comma-separated list of Interaction Server interaction properties, for example: `From, Subject,Received`

- Changes take effect: When the session is started or restarted.
- Description: The list of interaction fields displayed as columns in the specified workbin.

## privilege.my-team-workbins.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows access to My Team Workbins.

## privilege.workbins.can-use

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows access to Workbins.

# Workitems

Workspace Web Edition provides the following options for managing Workitems:

### intercommunication.<media-type>.queue

- Default Value:
- Valid Values: The name of a valid Script object of the Interaction Queue type
- 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 workitems.

## The following attached data is added by Worskpace:

`IW_RoutingBasedOriginalEmployeeId,IW_RoutingBasedTargetId,IW_RoutingBasedTargetType,IW_RoutingBasedRequestType`

### intercommunication.<media-type>.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.<media-type>.routing-based-targets

- Default Value:
- Valid Values: A comma-separated list of valid object types from the following list: `Agent`, `InteractionQueue`.
- 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 intercommunication.<media-type>.routing-based-actions option.

> **Important**
> The **AgentGroup** and **Skill** targets are always addressed through routing; therefore, they are not affected by this option.

### openmedia.workitem-channels

- Default Value:
- Valid Values: A comma-separated list of valid media types.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of Workitem channels that are used by the agents.

### workbin.<media-type>.in-progress

- Default Value:
- Valid Values: The name of a valid Script object of the Interaction Workbin targets 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 interactions of a particular workitem media type. Agents can open interactions from this workbin, but cannot save interactions to it.

### workbin.<media-type>.in-progress.displayed-columns

- Default Value: `From,To,Subject,Received`
- Valid Values: A comma-separated list of Interaction Server interaction properties.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the list of interaction fields displayed as columns in the specified workbin.

### <media-type>.auto-answer

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Specifies whether a workitem is automatically accepted when a Interaction Server Invite event is received. This option can be overridden by a routing strategy, as described in Overriding Options by Using a Routing Strategy.

### <media-type>.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 clicks the **Done** button. This option is only available for interaction open media. This option can be overridden by a routing strategy, as described in Overriding Options by Using a Routing Strategy.

### <media-type>.ringing-bell

- Default Value:
- Valid Values: All special characters that are valid URL file path, '|' separator, and numeric values.
- Changes take effect: When the session is started or restarted.
- Description: Specifies the path to the sound file that is played when the workitem interaction is ringing. For example: `BELL|7|0`. The value has three components that are separated by the character '|'.
    - The first component is the sound file name, such as the BELL, RING, CHORD or WARNING predefined aliases or an absolute url to a mp3 file).
    - The second component is a priority; the higher the integer the higher the priority.
    - The third component is a duration..A value of `-1` means to play and repeat until an explicit message stops it with an established event for instance. A value of `0` means to play the whole sound one time. A value that is greater than `0` means a time in milliseconds to play and repeat the sound.

### privilege.workitem-channels.can-use

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: The agent is allowed to use all WorkItem channels configured in the openmedia.workitem-channels option.

### privilege.<media-type>.can-decline

- 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 allowed to decline incoming workitems. Depends on privilege.workitem-channels.can-use.

### privilege.<media-type>.can-mark-done

- Default Value: `true`
- Valid Values: `true`, `false`

```
Changes take effect: When the session is started or restarted.
```

- Description: Allows agents to mark a workitem as done without further processing.

## privilege.<media-type>.can-move-to-workbin

- 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 allowed to move a workitem to the workbin. Depends on privilege.workitem-channels.can-use.

## privilege.<media-type>.can-one-step-transfer

- 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 allowed to use instant workitem transfer. Depends on privilege.workitem-channels.can-use.

## privilege.<media-type>.can-set-interaction-disposition

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the session is started or restarted.
- Description: Allows agent to set disposition code of Workitem interactions. Depends on privilege.workitem-channels.can-use.

# Overriding Workspace Options

You can override a Workspace option by using a routing strategy that overrides the configuration option based on attached data and Transaction objects. This 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.

Workspace Web Edition uses Transaction Objects of the `object list` type. 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.

Before you begin, ensure that Web Services is deployed and you have a strategy that routes to your agent workstations.

1. Configure one or more Transaction objects, of `list` type, in Genesys Administrator or Composer, by using the standard approach that is used for other object types in the hierarchy.

   Transaction objects 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. Therefore, you must replicate the `interaction-workspace` section to the annex of the Transaction objects.

2. Configure the interaction.override-option-key option to define the key where the Transaction objects 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.

# Provisioning Gplus Adapter for Salesforce

The Gplus Adapter for Salesforce is an integrated solution that enables Salesforce users to handle contact center interactions seamlessly within Salesforce. The adapter is part of the Genesys Gplus Adapters, which provide out-of-the-box, pre-packaged, and vendor-validated solutions that integrate Genesys' Customer Experience Platform to the leading CRM solutions. It's included as part of the Web Services and Applications installation package.

The adapter provides a single integrated agent desktop experience that offers rich data integration for screen pops and dispositioning. It presents complete customer information at a glance to more effectively serve customers in Salesforce Classic or Salesforce Console. The adapter leverages the Web Services API and the Salesforce Open CTI API.

There are two options available for the adapter:

- Gplus Adapter for Salesforce provides a smaller interface designed for Salesforce Classic, although it also works in Salesforce Console. Click here to provision Gplus Adapter for Salesforce.
- Gplus Adapter for Salesforce - WWE Option provides the full Workspace Web Edition interface and is only available in Salesforce Console. Click here to provision Gplus Adapter for Salesforce - WWE Option.

# Gplus Adapter for Salesforce

Review the sections below for more information about how to configure these features in the Gplus Adapter for Salesforce. See Gplus Adapter for Salesforce Configuration Options for the full list of options that apply to the adapter.

## Activity history

By default, the adapter updates certain Salesforce activity fields when it saves an activity history entry at the end of a call or chat. Take a look at the table below for the full list of Salesforce activity fields and where the data comes from in the adapter.

| Salesforce Activity Field | Genesys |
|---|---|
| Assigned To | Agent accepting Call |
| Created By | " |
| Last Modified By | " |
| Subject | Text (including the type of call, such as inbound, outbound to #Phonenumber). You can also define the subject using Custom templates. |
| Due Date | Current Timestamp |
| Related To | Record currently in context when an agent clicks **Mark Done** |
| Comments | Text with information from the Subject, Case Data (the full set that comes from the adapter), and Note (note data added by the agent) fields. |
| Status | Values are preset in the Salesforce configuration |
| Priority | Values are preset in the Salesforce configuration |
| Call Duration | Duration in seconds |
| Call Object Identifier | Interaction Id |
| Call Type | Type of call, such as inbound, outbound, or internal |

You can also define a mapping between custom activity field names in Salesforce and Genesys UserData keys so that these custom fields are populated when the adapter saves an activity history entry at the end of a call or chat. This is useful when you want to include or use call- or chat-related data in your Salesforce reports.

To enable this functionality, set the salesforce.activity-log.field-mapping option to the name of a configuration section that contains the mapping.

> **Important**
> If you change the value of salesforce.activity-log.field-mapping, make sure to validate the change by confirming that Salesforce tasks are created correctly.

You can control which types of calls and chats are saved to a Salesforce activity history entry by setting the salesforce.activity-log.enabled-call-types and salesforce.activity-log.enabled-chat-types.

## Chat transcript

The adapter can save chat transcript text either as part of the activity description in Salesforce or it can save the text to a custom field name in Salesforce.

By default, the adapter saves the transcript as part of the description, but you can turn off this functionality with the salesforce.chat.include-transcript-in-desc option. You might want to do this if the transcript and case data are too large for the description field, which has a maximum size of 32K. In this case, you can set the salesforce.chat.transcript-custom-field-name option to the name of a custom field you defined in Salesforce — the adapter will save chat transcripts to this field instead.

> **Important**
> If you change the value of salesforce.chat.transcript-custom-field-name, make sure to validate the change by confirming that Salesforce tasks are created correctly.

## Custom templates

You can specify what the adapter saves for the subject field in the Salesforce activity by using custom templates with the templates.salesforce.<interaction type>.<salesforce argument> option, where:

- <interaction type> is either `inbound-voice`, `outbound-voice`, `transfer-voice`, or `chat`.
- <salesforce argument> is `subject` (the adapter currently supports only this argument).

The value is a string that contains any text, along with templating variables wrapped in the reserved "`{`" and "`}`" characters.

You can use as many instances of this option as you need to handle multiple interactions types. For example, your configuration could include options for each of the supported interaction types:

- templates.salesforce.inbound-voice.subject
- templates.salesforce.outbound-voice.subject
- templates.salesforce.transfer-voice.subject
- templates.salesforce.chat.subject

The adapter supports the following templating variables:

| Variable | Description |
|---|---|
| interaction.ani | The number that originated the call. This variable identifies the caller for inbound calls and is best used in inbound templates. |
| interaction.callType | The type of call (inbound/outbound). |
| interaction.caseId | The unique ID of the related case. |
| interaction.contact | The first and last name of contact. |
| interaction.dnis | The last call dialed (useful for call transfer). This variable identifies the outbound location for outbound calls and is best used in outbound templates. |
| interaction.endDate | The date and time when interaction ended. |
| interaction.isConsultation | This is true if the interaction is a consultation. |
| interaction.startDate | The date and time when the interaction started. |
| userData.<key> | This can be any UserData key available for the interaction. You might also find some of the following UserData keys useful (they're included by default by Workspace Web Edition on transfers):<br>• userData.GCS_TransferringAgentName — The name of the transferring agent.<br>• userData.GCS_TransferringDate — The date and time of transfer.<br>• userData.GCS_TransferringEmployeeId — The ID of the transferring employee.<br>• userData.GCS_TransferringReason — The reason for the transfer. This is an empty string if no reason exists. |
| contact.EmailAddresses | A list of email addresses associated with the contact. |
| contact.PhoneNumbers | A list of phone numbers associated with the contact. |

For example, you might want the activity for all inbound voice calls to have details about the customer's name and phone number. In this case, here's how you would configure the option:

```
templates.salesforce.inbound-voice.subject = Customer: {interaction.contact}, Phone Number: {interaction.ani}
```

If a call comes in from Willard Clinton at 123-456-7890, when the call ends the adapter creates the related activity in Salesforce with following subject field: `Customer: Willard Clinton, Phone Number: 123-456-7890`

Another common use case might be to include information from UserData for all inbound calls. This could come from your own UserData keys or from UserData provided by Workspace Web Edition (see the table above). For example, you want the activity history's subject to include information from your own UserData key, PurposeOfCall, and the contact's name. Here's how you should configure the option:

```
templates.salesforce.inbound-voice.subject = Call from {interaction.contact} about {userData.PurposeOfCall}
```

In this scenario, if Willard Clinton calls into the contact center and chooses the Technical Support option in the IVR, that information is saved in the PurposeOfCall UserData key. When the call ends, the adapter creates the related activity in Salesforce with the following subject field: `Call from Willard Clinton about Technical Support`

# Attached data

You can configure the adapter to save the ID, name, and type of the focused Salesforce object to attached data when an agent clicks **Mark Done**. To do this, set salesforce.user-data.object-id-key, salesforce.user-data.object-name-key, and salesforce.user-data.object-type-key to the keys you want the adapter to use when saving the ID, name, and type. Also, make sure the Workspace Web Edition option interaction.case-data.is-read-only-on-idle is set to `false`.

You should consider setting these options if you want to make sure the ID, name, or type is added to attached data when agents create a new object during a call.

## Editing attached data

Agents can add, update, or delete attached data on active calls or chats when you set the interaction.case-data.enable-advanced-view option to `true`. You can control which attached data fields agents can edit by setting up Business Attributes, as detailed in the Editing Case Information topic.

## Displaying clickable links in attached data

The adapter displays clickable links in attached data when you set the interaction.case-data.enable-advanced-view option to `true` and set the interaction.case-data.enable-hyperlink Workspace option to `true`. You should also make sure the expression.url Workspace option is set to a regular expression that identifies URLs. This option is already set by default to match most valid URLs. See Displaying Active URLs in Case Information for details.

## Ordering attached data

You can define the order of attached data fields in the adapter by setting the interaction.case-data.enable-advanced-view option to `true`. You'll also need to define Business Attributes for the attached data fields — see Editing Case Information for details about setting up Business Attributes. Next, create 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 Business Attributes Values that are not listed in this option are put at the bottom of the list.

# Call back

You can call back a disconnected participant from the call by using the Participants menu in the adapter by setting contact.ucs-interaction.voice.enable-create option to `true` and interaction.disposition.is-mandatory option to `false`. Adapter offers this feature by leveraging Genesys Universal Contact Server (UCS) settings for voice option.

## Call recording

You can enable call recording in the adapter by setting the Workspace Web Edition option privilege-active-recording.can-use option. If you set this option to `true`, agents see the call recording split button on the voice toolbar, which they can use to start, stop, pause, and resume recordings.

## Chat

The adapter currently offers two media channels: voice and chat. To enable chat in the adapter, just set the corresponding privilege option in Workspace Web Edition: privilege.chat.can-use.

As with all Workspace Web Edition options, you can set these options on the Application, Agent Group, Person, and so on. For example, you might want all your agents to be able to access the voice channel, but only some to access the chat channel. In this scenario, you could set privilege.voice.can-use on the Application so that all agents can use this media channel. At the same time, you could also set privilege.chat.can-use on a particular Agent Group so that only agents in that group can use the chat channel.

**Important**

You must configure at least one media channel in order for the adapter to work.

### Chat transfers and consultations

To enable chat transfers and consultations, see the "Chat" row in the Workspace Web Edition Options table for the full list of chat privileges the adapter supports.

### Sending a URL

You can configure the adapter so that an agent participating in a chat can push a URL for a customer to click. To enable this feature, just set the privilege-chat.can-push-url option to `true`.

## Direct outbound calls to a route point

You can configure the adapter to direct all outbound calls through a route point. **Note:** You need to load a routing strategy that takes responsibility for delivering the call. To enable this functionality in the adapter, set the following Workspace Web Edition configuration options:

- intercommunication.voice.routing-based-actions

- intercommunication.voice.routing-based-targets
- intercommunication.voice.routing-points

For example:

```
intercommunication.voice.routing-based-actions: MakeCall,OneStepConference,InitConference,OneStepTransfer,InitTransfer
 intercommunication.voice.routing-based-targets: TypeDestination
 intercommunication.voice.routing-points: 9000
```

If you use this configuration, the call is delivered to the route point with the following UserData fields:

- IW_BundleUid
- IW_CaseUid
- IW_RoutingBasedOriginalEmployeeId
- IW_RoutingBasedRequestType
- IW_RoutingBasedTargetId
- IW_RoutingBasedTargetType
- PhoneNumber

## Disposition

You can decide whether to hide or show the Disposition section in the voice detail view by setting the interaction.hide-disposition option. **Note:** If you set the Workspace Web Edition option interaction.disposition.is-mandatory, then the Disposition will be shown regardless of the value of **interaction.hide-disposition**.

If interaction.disposition.is-mandatory is true, when marking a call or a chat done without selecting a disposition, the warning message displayed is now in the format: You must select a <Business Attribute Display Name> before closing, where <Business Attribute Display Name> is the configured business attribute display name.

For details about how to configure Disposition Codes, see Enabling Disposition Codes and Disposition Codes in the Web Services API Reference.

## Feedback

You can hide or show the Feedback item in the main menu by setting the system.feedback option. When an agent submits feedback, the adapter automatically includes supporting information, such as configuration, logs for both the adapter and Workspace, and active interactions.

## Focus following

You can enable focus following in the adapter so that it keeps track of which instance of the adapter is active when there are multiple instances running in multiple browser tabs or windows. Only the active adapter sends screen pop requests to Salesforce, which prevents duplicate requests and multiple screen pops. This can be helpful if you're using Salesforce standard mode and configure screen pops to open in a new tab or window (which opens a new instance of the adapter in the tab or window).

To enable this feature, set the salesforce.enable-focus-following option to `true`. You should also set multiple-instance.enable-mark-done-sync to `true` so that the agent only has to click **Mark Done** once when the call is finished.

## Free seating

The adapter supports free seating, which enables an agent to confirm or change the resources (such as a phone number) he or she will use for a given session. This is important when agents work together in an office where there is no assigned seating or when different agents sit at the same seat on different shifts. Instead of having a specific phone number assigned to the agent by the administrator, the agent instead enters the phone number he or she will use after finding a seat at the beginning of the shift.

If the agents work in different locations at different times, you can also use this feature so they can enter a phone number based on where they're working.

The adapter provides two modes of free seating:

- Mode 1 — The agent can enter a phone number. Enable this mode with the login.voice.prompt-dn-less-phone-number Workspace Web Edition option.
- Mode 2 — The agent can enter a place name. Enable this mode with the login.prompt-place Workspace Web Edition option.

> **Important**
> If you set both options, `login.prompt-place` takes precedence.

## In-focus page transfers

When an agent performs a voice or chat conference or transfer, the adapter can update the UserData with the ID of the object the agent is looking at in Salesforce. This makes sure that the agent who receives the conference or transfer gets a screen pop for the most relevant object.

This can be helpful when:

- There are multiple matches for a screen pop search on the initial call and the agent has to select between them
- There are no matches for the initial screen pop search and the agent creates a new record

To enable in-focus page transfers, set the salesforce.enable-in-focus-page-transfer option to `true`.

When the adapter updates the UserData, any existing UserData keys that begin with "id_" or "cti_" are removed and a new key, called "id_transfer_object", is added with the object ID of the focused page. If the focused page doesn't correspond to a Salesforce object, the adapter does not make an update and the existing UserData is sent with the conference or transfer request.

If you configured your environment to use a key other than "id_" or "cti_" (basically if you need to set the **screenpop.id-key-regex** option as described in Screen pop), then you must also set the screenpop.transfer-object-key to your custom key in order for screen pop to work. The adapter will add the key you specify in this option instead of "id_transfer_object".

## International dialing

You can configure the adapter to apply custom pre-processing rules on click-to-dial requests and before initiating screen pops. You can use this to adjust the format of phone numbers or ANI for international dialing.

To support click-to-dial for international numbers, you can set up pre-processing rules so that the adapter examines the phone number it receives from Salesforce to determine if a prefix should be added before making the dial request. This can be helpful when local numbers are stored in Salesforce records, but dialing prefixes are required in order to dial the call. You can configure pre-processing rules with the click-to-dial.preprocessing-rules option.

You can also define pre-processing rules for the screen pop to replace a portion of the ANI — for example, to remove a leading +1. This can be helpful in cases where local phone numbers are stored in Salesforce, but inbound customer calls might include international prefixes. You can configure these rules with the screenpop.preprocessing-rule option.

## Login

You can configure the adapter to enable an agent to enter or select a queue when logging in for voice. Set the login.voice.prompt-queue Workspace Web Edition option to enable this feature.

You can also enable an agent to select from a pre-defined list of queues, instead of entering one manually, by setting the login.voice.list-available-queues Workspace Web Edition option to a comma-separated list of queue numbers.

You can configure the default view of the adapter by using the login.default-view option. Currently, voice and statistics views are supported as default views. **Note:** If you are configuring statistics view as the default view, you must set the statistics.allow-footer-view option to `true` and then set the login.default-view option to `statistics`.

## Not Ready reason codes

For details about how to configure Not Ready Reason Codes, see Declaring and using new Not-Ready Reason codes in the Web Services API Reference.

## Reports and statistics

The adapter provides reports and statistics through three different options in the main menu:

- **Reports** — In this view, agents can see details about call activity, call handle time, and routing point metrics, including the maximum and average wait times for the selected routing point. You can also control how often the values are refreshed with the statistics.refresh-time option. For the routing points view, make sure you configure the routing points you want agents to be able to see by setting the statistics.routing-points Workspace Web Edition option.
- **My Statistics** — In this view, agents can see Key Performance Indicators (KPIs) that you configure. If you don't configure any KPIs, the adapter hides the **My Statistics** in the main menu.
  **Note:** The Enabling Agents to View KPIs and Contact Center Statistics page lists a number of attributes that apply to each statistic. The adapter currently only supports the **statistic-name** attribute. The adapter also supports the **display-name** attribute, which specifies the display text that appears with the value in the My statistics view.
- **Contact Center Statistics** — In this view, agents can see statistics you configure that summarize the state of various conditions monitored by your call center, such as the number of abandoned calls, the number of total answered calls, and the average waiting time. If you don't configure any contact center statistics, the adapter hides the **Contact Center Statisics** in the main menu. For the routing points view, make sure you configure the routing points you want agents to be able to see by setting the statistics.routing-points Workspace Web Edition option.
  You can also configure the **Statistics** icon on the Adapter's footer bar to display a badge with a number. The number on the badge represents the value of a statistical parameter in a specific resource. Use statistics.badge-resource option to configure the resource and use statistics.badge-statistic option to configure the statistic to be queried within the resource. **Note:** The Enabling Agents to View KPIs and Contact Center Statistics page lists a number of attributes that apply to each statistic. The adapter currently only supports the **statistic-name** attribute. The adapter also supports the **display-name** attribute, which specifies the display text that appears with the value in the Contact Center Statistics view.

## Screen pop

When an agent receives an external call, the adapter initiates a screen pop that causes Salesforce to show an appropriate record for the caller. See Configuring screen pops in Salesforce for details. By default, the adapter initiates the screen pop when the call is established, but you can set the screenpop.on-ringing option to initiate a screen pop when the call is ringing instead.

> **Important**
> You can also enable this feature for internal calls with the screenpop.enable-for-internal-calls option.

Here's the default way the adapter determines what to ask Salesforce to show in the screen pop:

- If the UserData for the call has key(s) with the prefix "id_" (such as "id_SalesforceCaseId"), then the first value the adapter finds is sent in the screen pop request to Salesforce.
- If the UserData does not include any "id_" keys, the adapter builds a search string using a combination

of the ANI, if available, and any UserData values with keys that have the "cti_" prefix (such as "cti_FirstName" or "cti_PhoneNumber"). You can specify whether the search should include the ANI by setting the screenpop.include-ani-in-search option.

- If there are no "id_" keys, no ANI, and no "cti_" keys, then the adapter doesn't send a screen pop request.

Alternatively, you can configure the expressions the adapter uses to match screen pop UserData keys for the ID and search fields using the screenpop.id-key-regex and screenpop.search-key-regex options, respectively. Note that these options only change the criteria by which keys are matched from UserData. The existing logic and order between ID-based screen pop and search are unchanged (see the bullet points above). If you use these regular expression options to match your own ID key, then you should also make sure to set the screenpop.transfer-object-key option so that screen pop works with in-focus page transfers.

## Screen recording

The Adapter supports Genesys Interaction Recording (GIR) Screen Recording Service (SRS). For an overview of Genesys Interaction Recording, see About Genesys Interaction Recording. To configure Genesys Interaction Recording for the Adapter, see Enable Screen Recording in the *Genesys Interaction Recording Solution Guide*. In this procedure, use the *Integrating with Workspace Web Edition* section.

**Note:**

- SRS is only supported for the Voice channel.
- SRS does not support using the Adapter in multiple browser tabs.
- SRS is not supported when the Adapter is popped out of the Salesforce console window.

## Team communicator

Team Communicator can display corporate favorites (quick dial favorites) that you configure using the teamcommunicator.corporate-favorites Workspace Web Edition option. You can also let agents add their own favorites by setting the privilege.teamcommunicator.can-manage-favorites Workspace option to `true`.

You can make it easier for your agents to find people in Team Communicator by enabling filters. Use the teamcommunicator.list-filter-showing Workspace option to specify the list of filters that an agent can choose from in Team Communicator — Agent, AgentGroup, Skill, RoutingPoint, and so on.

You can also enable your agents to view and search a list of recently contacted resources in Team Communicator by setting the following Workspace options:

- privilege.teamcommunicator.can-view-recent-calls — Turns on the list of recent targets. The default value is `true`.
- teamcommunicator.recent-max-records — Sets the maximum number of items to keep in the list.
- teamcommunicator.add-recent-filters.voice — Filters what types of calls (internal, external, consultation)

are placed in the list.

### Availability for agent groups

While the adapter automatically shows agent availability, if you also want to display whether there are available agents for a particular agent group on the voice channel, set the following Workspace options to `true`:

- privilege.teamcommunicator.display-agent-groups-availability
- presence.evaluate-presence

## Toast and case data

For details about how to configure Toast and Case Data, see Outbound Contact - Provisioning Case Data and Toast And Case Data in the Web Services API Reference.

## Transfer notes

You can use the call note field to allow one agent to provide information to another agent who will receive a conference or transfer. To enable this feature, make sure you set the Workspace Web Edition option `voice.note.key-name` to the desired attached data key. If you don't set it, the adapter hides the notes section in the voice view.

When the agent adds information to the call note before initiating a conference or transfer, that information is added to the value for the attached data key you specified in the `voice.note.key-name` option. Then the agent can proceed with the conference or transfer.

When the second agent receives the call, the call note field is populated using the attached data field, which allows the agent to review and pick up where the first agent left off. This is particularly useful in cases where an agent blind transfers a call and isn't able to speak directly with the second agent before hanging up.

## Voice

The adapter currently offers two media channels: voice and chat. To enable voice in the adapter, just set the corresponding privilege option in Workspace Web Edition: privilege.voice.can-use.

As with all Workspace Web Edition options, you can set these options on the Application, Agent Group, Person, and so on. For example, you might want all your agents to be able to access the voice channel, but only some to access the chat channel. In this scenario, you could set privilege.voice.can-use on the Application so that all agents can use this media channel. At the same time, you could also set privilege.chat.can-use on a particular Agent Group so that only agents in that group can use the chat channel.

**Important**
You must configure at least one media channel in order for the adapter to work.

### Voice Transfers and Consultations

To enable voice transfers and consultations, see the "Voice" row in the Workspace Web Edition Options table for the full list of voice privileges the adapter supports.

### Caller ID

For outbound calling scenarios, you can configure the adapter to allow agents to select from a predefined list of caller IDs; the selected caller ID is then displayed to the person receiving the call.

To enable this feature, first create a Business Attribute in Genesys Administrator Extension that contains the possible caller ID values you would like agents to be able to select. In its Business Attribute Values, the name is used to specify the actual phone number the adapter dials. If the Display Name is specified, this is the information the adapter presents to the agent (in alphabetical order).

If the Business Attribute doesn't contain any Business Attribute Values, then the feature isn't enabled. Also, if the attribute contains only one value, then the adapter automatically uses that caller ID so the agent doesn't see a popup when making a call.

Next, set the Workspace Web Edition option intercommunication.voice.make-call-caller-id-business-attribute to the name of your Business Attribute.

For example, if you create a Business Attribute named **CallerID**, then you would set **intercommunication.voice.make-call-caller-id-business-attribute** to `CallerID`.

## Voicemail

The adapter supports voicemail if your environment is set up for Genesys SIP Feature Server (previously called Genesys SIP Voicemail). To enable voicemail, set the following Workspace options: privilege.voicemail.can-use and voicemail.access-number.

# Gplus Adapter for Salesforce - WWE Option

Review the sections below for more information about how to configure these features if you're using the WWE option.

## Activity history

By default, the adapter updates certain Salesforce activity fields when it saves an activity history entry at the end of a call, chat, email, or outbound call for a preview mode campaign. Take a look at the table below for the full list of Salesforce activity fields and where the data comes from in the adapter.

| Salesforce Activity Field | Genesys |
|---|---|
| Assigned To | Agent accepting Call |
| Created By | " |
| Last Modified By | " |
| Subject | Text (including the type of call, such as inbound, outbound to #Phonenumber). |
| Email body | Text from the email content field for inbound and outbound replies. |
| Due Date | Current Timestamp |
| Related To | Salesforce Record that the activity Task is associated with. This field represents an activity Task association. The field is updated with the open Salesforce Record ID when the interaction is completed. |
| Comments | Text with information from the Subject, Case Data (the full set that comes from the adapter), and Note (note data added by the agent) fields. |
| Status | Values are preset in the Salesforce configuration |
| Priority | Values are preset in the Salesforce configuration |
| Call Duration | Duration in seconds |
| Call Object Identifier | Interaction Id |
| Call Type | Type of call, such as inbound, outbound, or internal |

You can also define a mapping between custom activity field names in Salesforce and Genesys UserData keys so that these custom fields are populated when the adapter saves an activity history entry at the end of a call, chat, or email. This is useful when you want to include or use call, chat, or email related data in your Salesforce reports.

To enable this functionality, set the salesforce.activity-log.field-mapping option to the name of a configuration section that contains the mapping.

> **Important**
> If you change the value of salesforce.activity-log.field-mapping, make sure to validate the change by confirming that Salesforce tasks are created correctly.

You can control which types of calls and chats are saved to a Salesforce activity history entry by setting the salesforce.activity-log.enabled-call-types and salesforce.activity-log.enabled-chat-types.

## Chat transcript

The adapter can save chat transcript text either as part of the activity description in Salesforce or it can save the text to a custom field name in Salesforce.

By default, the adapter saves the transcript as part of the description, but you can turn off this functionality with the salesforce.chat.include-transcript-in-desc option. You might want to do this if the transcript and case data are too large for the description field, which has a maximum size of 32K. In this case, you can set the salesforce.chat.transcript-custom-field-name option to the name of a custom field you defined in Salesforce — the adapter will save chat transcripts to this field instead.

> **Important**
> If you change the value of salesforce.chat.transcript-custom-field-name, make sure to validate the change by confirming that Salesforce tasks are created correctly.

## Custom templates

You can specify what the adapter saves for the subject field in the Salesforce activity by using custom templates with the templates.salesforce.<interaction type>.<salesforce argument> option, where:

- <interaction type> is either `inbound-voice`, `outbound-voice`, `transfer-voice`, `chat`, or `email`.
- <salesforce argument> is `subject` (the adapter currently supports only this argument).

The value is a string that contains any text, along with templating variables wrapped in the reserved "`{`" and "`}`" characters.

You can use as many instances of this option as you need to handle multiple interactions types. For example, your configuration could include options for each of the supported interaction types:

- templates.salesforce.inbound-voice.subject
- templates.salesforce.outbound-voice.subject
- templates.salesforce.transfer-voice.subject
- templates.salesforce.chat.subject

The adapter supports the following templating variables:

| Variable | Description |
|---|---|
| interaction.ani | The number that originated the call. This variable identifies the caller for inbound calls and is best used in inbound templates. |
| interaction.callType | The type of call (inbound/outbound). |
| interaction.caseId | The unique ID of the related case. |
| interaction.contact | The first and last name of contact. |
| interaction.dnis | The last call dialed (useful for call transfer). This variable identifies the outbound location for outbound calls and is best used in outbound templates. |
| interaction.endDate | The date and time when interaction ended. |
| interaction.isConsultation | This is true if the interaction is a consultation. |
| interaction.startDate | The date and time when the interaction started. |
| userData.<key> | This can be any UserData key available for the interaction. You might also find some of the following UserData keys useful (they're included by default by Workspace Web Edition on transfers):<br>• userData.GCS_TransferringAgentName — The name of the transferring agent.<br>• userData.GCS_TransferringDate — The date and time of transfer.<br>• userData.GCS_TransferringEmployeeId — The ID of the transferring employee.<br>• userData.GCS_TransferringReason — The reason for the transfer. This is an empty string if no reason exists. |
| contact.EmailAddresses | A list of email addresses associated with the contact. |
| contact.PhoneNumbers | A list of phone numbers associated with the contact. |

For example, you might want the activity for all inbound voice calls to have details about the customer's name and phone number. In this case, here's how you would configure the option:

```
templates.salesforce.inbound-voice.subject = Customer: {interaction.contact}, Phone Number: {interaction.ani}
```

If a call comes in from Willard Clinton at 123-456-7890, when the call ends the adapter creates the related activity in Salesforce with following subject field: `Customer: Willard Clinton, Phone Number: 123-456-7890`

Another common use case might be to include information from UserData for all inbound calls. This could come from your own UserData keys or from UserData provided by Workspace Web Edition (see the table above). For example, you want the activity history's subject to include information from your own UserData key, PurposeOfCall, and the contact's name. Here's how you should configure the option:

```
templates.salesforce.inbound-voice.subject = Call from {interaction.contact} about {userData.PurposeOfCall}
```

In this scenario, if Willard Clinton calls into the contact center and chooses the Technical Support option in the IVR, that information is saved in the PurposeOfCall UserData key. When the call ends, the adapter creates the related activity in Salesforce with the following subject field: `Call from Willard Clinton about Technical Support`

## Attached data

You can configure the adapter to save the ID, name, and type of the focused Salesforce object to attached data when an agent clicks **Mark Done**. To do this, set salesforce.user-data.object-id-key, salesforce.user-data.object-name-key, and salesforce.user-data.object-type-key to the keys you want the adapter to use when saving the ID, name, and type. Also, make sure the Workspace Web Edition option interaction.case-data.is-read-only-on-idle is set to `false`.

You should consider setting these options if you want to make sure the ID, name, or type is added to attached data when agents create a new object during a call.

## International dialing

You can configure the adapter to apply custom pre-processing rules on click-to-dial requests and before initiating screen pops. You can use this to adjust the format of phone numbers or ANI for international dialing.

To support click-to-dial for international numbers, you can set up pre-processing rules so that the adapter examines the phone number it receives from Salesforce to determine if a prefix should be added before making the dial request. This can be helpful when local numbers are stored in Salesforce records, but dialing prefixes are required in order to dial the call. You can configure pre-processing rules with the click-to-dial.preprocessing-rules option.

You can also define pre-processing rules for the screen pop to replace a portion of the ANI — for example, to remove a leading +1. This can be helpful in cases where local phone numbers are stored in Salesforce, but inbound customer calls might include international prefixes. You can configure these rules with the screenpop.preprocessing-rule option.

## In-focus page transfers

When an agent performs a chat conference or transfer, the adapter can update the UserData with the ID of the object the agent is looking at in Salesforce. This makes sure that the agent who receives the conference or transfer gets a screen pop for the most relevant object.

This can be helpful when:

- There are multiple matches for a screen pop search initially and the agent has to select between them.
- There are no matches for the initial screen pop search and the agent creates a new record.

To enable in-focus page transfers, set the salesforce.enable-in-focus-page-transfer option to `true`.

When the adapter updates the UserData, any existing UserData keys that begin with "id_" or "cti_" are removed and a new key, called "id_transfer_object", is added with the object ID of the focused page. If the focused page doesn't correspond to a Salesforce object, the adapter does not make an update and the existing UserData is sent with the conference or transfer request.

If you configured your environment to use a key other than "id_" or "cti_" (basically if you need to set the **screenpop.id-key-regex** option as described in Screen pop), then you must also set the screenpop.transfer-object-key to your custom key in order for screen pop to work. The adapter will add the key you specify in this option instead of "id_transfer_object".

# Screen pop

## Calls

When an agent receives an external call, the adapter initiates a screen pop that causes Salesforce to show an appropriate record for the caller. See Configuring screen pops in Salesforce for details. By default, the adapter initiates the screen pop when the call is established, but you can set the screenpop.on-ringing option to initiate a screen pop when the call is ringing instead.

> **Important**
> You can also enable this feature for internal calls with the screenpop.enable-for-internal-calls option.

Here's the default way the adapter determines what to ask Salesforce to show in the screen pop:

- If the UserData for the call has key(s) with the prefix "id_" (such as "id_SalesforceCaseId"), then the first value the adapter finds is sent in the screen pop request to Salesforce.
- If the UserData does not include any "id_" keys, the adapter builds a search string using a combination of the ANI, if available, and any UserData values with keys that have the "cti_" prefix (such as "cti_FirstName" or "cti_PhoneNumber"). You can specify whether the search should include the ANI by setting the screenpop.include-ani-in-search option.
- If there are no "id_" keys, no ANI, and no "cti_" keys, then the adapter doesn't send a screen pop request.

Alternatively, you can configure the expressions the adapter uses to match screen pop UserData keys for the ID and search fields using the screenpop.id-key-regex and screenpop.search-key-regex options, respectively. Note that these options only change the criteria by which keys are matched from UserData. The existing logic and order between ID-based screen pop and search are unchanged (see the bullet points above). If you use these regular expression options to match your own ID key, then you should also make sure to set the screenpop.transfer-object-key so that screen pop works with in-focus page transfers.

### Chats

When an agent receives a chat invite from a user, the adapter initiates a screen pop that causes Salesforce to show an appropriate record for the user. Based on the value set in the screenpop.chat.on-invite option, the adapter determines when to initiate a screen pop for chats.

### Emails

When an agent receives an email invite from a user, the adapter initiates a screen pop that causes Salesforce to show an appropriate record for the user. Based on the value set in the screenpop.email.on-invite option, the adapter determines when to initiate a screen pop for emails.

## Integrate your web application or website with the adapter

You can use the Service Client API to customize how your web application or website integrates with the Adapter. Genesys provides this API, which is based on window.postMessage, so that your application can access the Workspace Web Edition object model and bypass the cross-domain security limitations. For more information, see Service Client API.

## Support for Genesys Interaction Recording

The Agent Desktop console supports Genesys Interaction Recording (GIR). For an overview of Genesys Interaction Recording, see About Genesys Interaction Recording.

Genesys Interaction Recording is only supported for the Voice channel and is not supported when Agent Desktop is popped out of the Salesforce console window.

To configure Genesys Interaction Recording for the Agent Desktop console, see Enable Screen Recording in the *Genesys Interaction Recording Solution Guide*. In this procedure, use the *Integrating with Workspace Web Edition* section.

# Lightning Experience in Gplus Adapter for Salesforce - WWE Option

**Important**
Currently, the Adapter only supports Lightning Console navigation.

## Configuration Options

The Lightning Experience in Salesforce supports all the same configuration options as Gplus Adapter for Salesforce - WWE Option which are described in detail on this page.

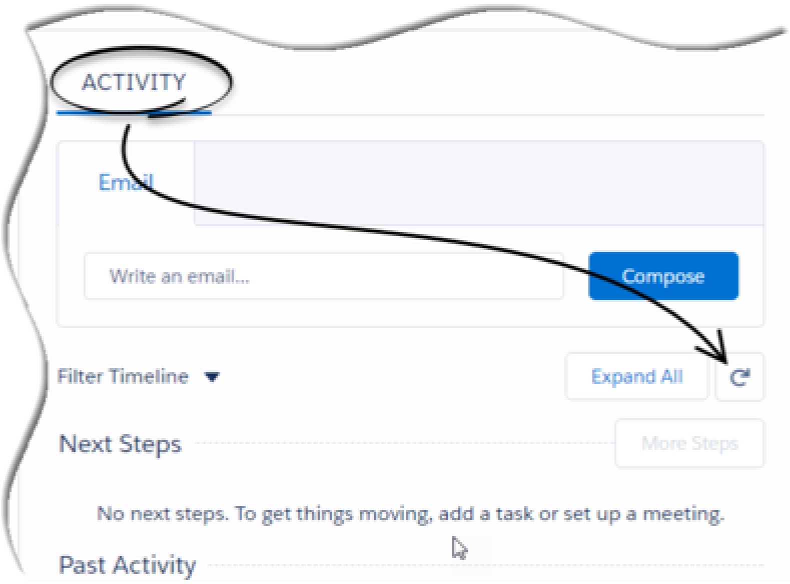
## Activity Logging

Activity Logging for Lightning Experience functions the same as it does in GPlus Adapter for Salesforce. This includes compatibility for all options related to activity logging including those relating to templating, attached data, and field mapping.

### Accessing the Activity Record

Accessing the activity record can be done slightly differently in Lightning Experience. There is a **Refresh Activity History** icon that can be used instead of navigating off the page, or refreshing:

1. Click **Contacts** from the menu bar.
2. Select the contact name.
3. Click the **Refresh Activity History** icon, in the **Activity** tab to review all **Past Activity**.




4. Clicking on an activity will open the **Task** window for that item.

# Configuring Open Media Items

Open media is an interaction type that an agent might be required to handle besides the other non-voice interactions such as email or chat. Open media is supported only in Salesforce Lightning Experience.

You can configure open media interactions for agents by using the options openmedia.workitem-channels, privilege.workitem-channels.can-use, and screenpop.openmedia.on-invite

- Use the openmedia.workitem-channels option to specify the open media channels that are used by the agents.
- Use the privilege.workitem-channels.can-use option to give privilege to the agents to use all the open media channels.
- Use the screenpop.openmedia.on-invite option to specify the screen pop timing.

## Screen Pop

When an agent receives an open media invite from a user, the adapter initiates a screen pop that causes Salesforce to show an appropriate record for the user. When the screenpop.openmedia.on-invite option is set to `true`, the adapter will display the screen pop on open media invite. If this option is set to `false` or the option is not available, the adapter will display the screen pop only when you accept the invitation for an open media interaction.

## Open Media Activity History

You can view the details of Activity fields in the Activity History table. Open media will only have *inbound* as an activity type. This value is reflected in the **Subject** and the **Call Type** fields.

# Gplus Adapter for Salesforce Configuration Options

**Important**

The options on this page are primarily for use with Gplus Adapter for Salesforce. A few of the adapter-specific options also apply if you're using the WWE option — see Gplus Adapter for Salesforce - WWE Option for details.

The Gplus Adapter for Salesforce has its own configuration options that you set in the **[crm-adapter]** section and it also takes advantage of some of the Workspace Web Edition options, set in the **[interaction-workspace]** section. As with Workspace Web Edition, you can apply configuration options to the Web Services Cluster Application, Agent Group, Person, and so on — see Configuration and Administration by Using Options and Annexes for details about the option override order.

## Gplus Adapter for Salesforce options

- click-to-dial.preprocessing-rules
- feedback.submit-after-disconnect
- interaction.case-data.enable-advanced-view
- interaction.hide-disposition
- login.default-view
- multiple-instance.enable-mark-done-sync
- privilege-active-recording.can-use
- privilege-add-contact.can-use
- privilege-chat.can-push-url
- salesforce.activity-log.enabled-call-types
- salesforce.activity-log.enabled-chat-types
- salesforce.activity-log.field-mapping
- salesforce.chat.enable-object-association-tracking
- salesforce.chat.include-transcript-in-desc
- salesforce.chat.transcript-custom-field-name
- salesforce.email.include-body-in-desc
- salesforce.enable-focus-following
- salesforce.enable-in-focus-page-transfer
- salesforce.keep-session-alive
- salesforce.user-data.object-id-key
- salesforce.user-data.object-name-key
- salesforce.user-data.object-type-key
- salesforce.voice.enable-object-association-tracking
- screenpop.enable-for-consult
- screenpop.enable-for-internal-calls
- screenpop.id-key-regex
- screenpop.include-ani-in-search
- screenpop.include-dnis-in-search
- screenpop.on-ringing
- screenpop.chat.on-invite
- screenpop.email.on-invite
- screenpop.openmedia.on-invite
- screenpop.preprocessing-rule
- screenpop.search-key-regex

- screenpop.transfer-object-key
- statistics.allow-footer-view
- statistics.badge-resource
- statistics.badge-statistic
- system.feedback
- system.log
- templates.salesforce.<interaction type>.<salesforce argument>
- voice-note.key-name

## click-to-dial.preprocessing-rules

- **Default Value:** `default`
- **Valid Values:** `default`, `none`, or a comma-separated list of pre-processing rule section names
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies the pre-processing rules to apply to the phone number before making a dial request. If the option is not defined, the default rule is applied. The possible values are:
  - `default` — applies the default rules:
    - If the phone number is 10 digits, add +1.
    - If the phone number is 11 digits, add +.
    - If the phone is greater than 11 digits and doesn't start with 011, add 011.
  - `none` — turns off pre-processing.
  - `<pre-processing-rule-section-name(s)>` — name of the pre-processing rule section(s). Within a rule section, you **must** set the following key/value pairs:
    - `expression` — A regex that defines the condition to be matched.
    - `prefix` — The prefix to be added to the phone number if the expression is matched.
    - `description` — A short description of the rule.

Here's how the default rules would be configured:

```
[crm-adapter]
click-to-dial.preprocessing-rules: preprocessing-rule-10-digit-US-numbers,
preprocessing-rule-11-digit-US-numbers, preprocessing-rule-international-numbers

[preprocessing-rule-10-digit-US-numbers]
expression: ^[0-9]{10}$
prefix: +1
description: "If it is 10 digits add +1"

[preprocessing-rule-11-digit-US-numbers]
expression: ^[0-9]{11}$
prefix: +
description: "If it is 11 digits, add +"

[preprocessing-rule-international-numbers]
```

```
expression: ^(?!011)[0-9]{8,}$
prefix: 011
description: "If it is greater than 11 digits and doesn't start with 011, add 011"
```

> **Important**
> The adapter runs each rule in sequence until it finds a match and adds the prefix. No further rules are executed.

### feedback.submit-after-disconnect

- **Default Value:** `never`
- **Valid Values:** `always`, `prompt`, `never`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: This option controls how the adapter handles the submission of feedback logs after the adapter is disconnected from GWS. When set to `always`, the adapter always submits feedback logs without asking the user. When set to `prompt`, the user is prompted to allow the Adapter to submit feedback logs. When set to `never`, no feedback logs are submitted.

### interaction.case-data.enable-advanced-view

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies whether the adapter should use the advanced case data view that supports editing, links, and ordering.

### interaction.hide-disposition

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: Hides the Disposition section in the voice detail view. If the Workspace Web Edition option interaction.disposition.is-mandatory is set to `true`, the adapter shows the Disposition regardless of the setting for `interaction.hide-disposition`.

### login.default-view

- **Default Value**: `voice`
- **Valid Values**: `voice, statistics`
- **Changes Take Effect**: When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: Specifies which view the agent sees upon logging in to the adapter.

### multiple-instance.enable-mark-done-sync

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: Specifies whether clicking **Mark Done** applies to all instances of the adapter when it's running in multiple tabs or windows. If set to `true`, all instances are marked done when the agent clicks **Mark Done**; if set to `false`, the agent has to click **Mark Done** in each tab or window. You should also set salesforce.enable-focus-following to `true`.

### privilege.active-recording.can-use

- **Default Value:** `true`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description:** Specifies whether the agent can record voice calls. The `true` value switches on recording only if the same `interaction-workspace` option is also enabled. However, the `false` value switches off recording without consideration of the `interaction-workspace` option value. **Note:** Do not set up this same recording option under both the `crm-adapter` section and the `interaction-workspace` section. In the case where both options are available, the Adapter will use the option from the `interaction-workspace` section. Genesys recommends recording only be set up in the `interaction-workspace` section.

### privilege.add-contact.can-use

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.

- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: Specifies whether the agent can add contacts in UCS.

### privilege.chat.can-push-url

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: Specifies whether the agent can add hyperlinks to chat messages.

### privilege.password.can-change

- **Default Value**: false
- **Valid Values**: true, false
- **Changes take effect**: When the session is started or restarted.
- **Salesforce modes (CRM Adapter)**: Classic, Console
- **Salesforce modes (Adapter-WWE)**: Not supported
- **Description**: Specifies whether the agent can change their password. When enabled, the **Change Password** option is shown in the Adapter's main menu. Note that this option overrides the **password-change** option in the Annex of the User object in the configuration.

### salesforce.activity-log.enabled-call-types

- **Default Value:** `Inbound, Outbound, Internal, Consult`
- **Value Values:** A comma-separated list of call types (`Inbound`, `Outbound`, `Internal`, `Consult`) or an empty value to disable all.
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies the call types the adapter should create activity history entries for in Salesforce.

### salesforce.activity-log.enabled-chat-types

- **Default Value:** `Inbound, Consult`
- **Value Values:** A comma-separated list of chat types (`Inbound`, `Consult`) or an empty value to disable all.
- **Changes Take Effect:** When the session is started or restarted.

- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies the chat types the adapter should create activity history entries for in Salesforce.

## salesforce.activity-log.field-mapping

- **Default Value:** None
- **Valid Values:** The name of a configuration section that contains the mapping.
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies the name of the configuration section where the mapping is defined. In that section, each key must correspond to a UserData key the adapter should look for and each value must correspond to the name of the custom activity field in Salesforce. If this option is not defined or has a blank value, no custom values are added when the adapter creates the activity history. Also, if a given key is not present in the UserData or does not have a value, the adapter doesn't include it in the activity creation request.

Here's an example of how to configure the mapping:

```
[crm-adapter]
salesforce.activity-log.field-mapping=my-field-mappings

[my-field-mappings]
firstName=first_name__c
lastName=last_name__c
```

## salesforce.chat.enable-object-association-tracking

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Console
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: Specifies whether to track agent’s navigation through various Salesforce objects such as: Contacts, Accounts, Tasks while agent is processing chat interactions. When this option is set to true, agents may select an object from the navigation list to associate interaction log activity with from Object Association drop down menu on Mark Done call screen. This option requires that the interaction.case-data.is-read-only-on-idle option is set to `false`.

## salesforce.chat.include-transcript-in-desc

- **Default Value:** `true`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.

- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies whether the adapter saves the chat transcript as part of the activity description in Salesforce.

### salesforce.chat.transcript-custom-field-name

- **Default Value:**
- **Valid Values:** Name of a custom field in Salesforce
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies the name of a custom activity field in Salesforce. If set, the adapter saves the chat transcript to this field in Salesforce. **Note:** Salesforce Lightning Experience supports only 255 characters for Text fields. If you configure the Text fields to store the chat transcripts and set the length of characters as 255, only the first 255 characters of the chat transcript will be saved in the Activity History and the remaining transcript will be truncated. However, you can still view the **Details** and **Case Data** of the chat interaction in the **My History** tab in Agent Desktop. Whereas, if you configure the Text field's character length with a value less than 255, then, an activity might not get created in Salesforce if the chat transcript exceeds the configured character length.

### salesforce.email.include-body-in-desc

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Not supported
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: When set to `true`, includes the text version of the email body in the activity description in Salesforce. The email body is saved only for inbound emails and outbound replies.

### salesforce.enable-focus-following

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: If set to `true`, when there are multiple instances of the adapter running at the same time in multiple browser tabs or windows, the adapter tracks which instance is active. Only the active adapter sends screen pop requests to Salesforce, which prevents duplicate requests and multiple screen pops. You should also set multiple-instance.enable-mark-done-sync to `true`.

### salesforce.enable-in-focus-page-transfer

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies whether to update the call data with the ID of the object the agent is looking at in Salesforce when performing a voice or chat conference or transfer. If set to `true`, the agent receiving the voice or chat conference or transfer gets a screen pop for the most relevant object.

### salesforce.keep-session-alive

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: Specifies whether to prevent the Adapter from logging out of Salesforce when there is no activity in Salesforce beyond a configurable time period. If set to `true`, the Adapter refreshes the Salesforce session at short intervals and keeps the Adapter-Salesforce session alive.

### salesforce.user-data.object-id-key

- **Default Value:**
- **Valid Values:** A valid user key name to store the Salesforce object id. For example: `sf_object_key`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies the key the adapter uses when saving the ID of the focused Salesforce object to attached data.

### salesforce.user-data.object-name-key

- **Default Value:**
- **Valid Values:** A valid user key name to store the Salesforce object name. For example: `sf_object_name`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning

- **Description**: Specifies the key the adapter uses when saving the name of the focused Salesforce object to attached data.

## salesforce.user-data.object-type-key

- **Default Value:**
- **Valid Values:** A valid user key name to store the Salesforce object type name. For example: `sf_object_type`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies the key the adapter uses when saving the type of the focused Salesforce object to attached data.

## salesforce.voice.enable-object-association-tracking

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Console
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: Specifies whether to track agent's navigation through various Salesforce objects such as: Contacts, Accounts, Tasks while agent is processing voice interactions. When this option is set to true, agents may select an object from the navigation list to associate interaction log activity with from Object Association drop down menu on Mark Done call screen. This option requires that the interaction.case-data.is-read-only-on-idle option is set to `false`.

## screenpop.enable-for-consult

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description:** Specifies whether the adapter initiates screen pops for consultation calls regardless of screenpop.enable-for-internal-calls option configuration.

## screenpop.enable-for-internal-calls

- **Default Value:** `true`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.

- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies whether the adapter initiates screen pops for internal calls.

## screenpop.id-key-regex

- **Default Value:**
- **Valid Values:** A regular expression that matches a UserData key.
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies a regular expression pattern used to match a UserData key. This key's value should contain the ID of an object to screen pop in Salesforce. As with the existing screen pop behavior using the "id_" prefix, if multiple matching keys are present, the adapter only uses the first one. If this option isn't defined, the adapter uses the existing "id_" prefix logic.

## screenpop.include-ani-in-search

- **Default Value:** `true`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies whether the ANI is used in the screen pop search.

## screenpop.include-dnis-in-search

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Not supported
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies whether the DNIS is used in the screen pop search.

## screenpop.on-ringing

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console

- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies whether the adapter initiates a screen pop in Salesforce when the call is ringing. If not set or `false`, the adapter initiates a screen pop when the call is established.

## screenpop.chat.on-invite

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Not supported
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description:** Specifies whether the adapter initiates a screen pop in Salesforce immediately after displaying the chat invite notification. If the option is not set or `false`, the adapter initiates a screen pop only when the agent accepts the chat invite.

## screenpop.email.on-invite

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Not supported
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description:** Specifies whether the adapter initiates a screen pop in Salesforce immediately after displaying the email invite notification. If the option is not set or `false`, the adapter initiates a screen pop only when the agent accepts the email invite.

## screenpop.openmedia.on-invite

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Not supported
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description:** Specifies whether the adapter initiates a screen pop in Salesforce immediately after displaying the open media invite notification. If the option is not set or `false`, the adapter initiates a screen pop only when the agent accepts the open media invite. This option supports the open media items configured in the openmedia.workitem-channels option.

## screenpop.preprocessing-rule

- **Default Value:** `default`

- **Valid Values:** `default`, none, or a pre-processing rule section name.
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies the pre-processing rule to apply to the ANI before showing the screen pop. If the option is not defined, the default rule is applied. The possible values are:
  - `default` — applies the default rule, which removes +1 from the beginning of the ANI.
  - none — turns off pre-processing.
  - `<pre-processing-rule-section-name>` — name of the pre-processing rule section. Within this rule section, you **must** set the following key/value pairs:
    - `expression` — A regex that defines the condition to be matched.
    - `replacement` — The string to replace the matched substring. If you set this value to empty, this removes the matched section.
    - `description` — A short description of the rule.

Here's how the default rule would be configured:

```
[crm-adapter]
screenpop.preprocessing-rule: preprocessing-rule-remove-prefix

[preprocessing-rule-remove-prefix]
expression: ^\\+1
replacement:
description: "Remove +1 from the beginning of the number"
```

## screenpop.search-key-regex

- **Default Value:**
- **Valid Values:** A regular expression that matches one or more UserData keys.
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies a regular expression pattern used to match one or more UserData keys. The values for these keys are used to build the search and screen pop expression in Salesforce. If this option is not defined, the adapter uses the existing "cti_" prefix logic.

## screenpop.transfer-object-key

- **Default Value:** `id_transfer_object`
- **Valid Values:** A valid key
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning

- **Description**: Specifies the custom UserData key the adapter should use for the object ID of the focused page in Salesforce.

## statistics.allow-footer-view

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: Allows the option for the contact center statistic view to be accessible in the channels footer.

## statistics.badge-resource

- **Default Value:** An empty string.
- **Valid Values:** An identifier contained in `statistics.agent-groups, statistics.queue-groups`, `statistics.routing-points`, or `statistics.virtual-queues` or the string `user` for the statistics of the current user.
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: Specifies the name of the resource(s) within which the statistics service queries to get the desired statistics. The resources queried are `statistics.agent-groups, statistics.queue-groups`, `statistics.routing-points`, or `statistics.virtual-queues` from the **[interaction-workspace]** section or the statistics of the current user.

## statistics.badge-statistic

- **Default Value:** An empty string.
- **Valid Values:** A valid statistical parameter belonging to the resource configured in the **statistics.badge-resource** option.
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: Specifies the statistic-name of the parameter (for example, CurrentNotReadyAgents_VAG) belonging to the resource configured in the statistics.badge-resource option. The statistic configured here is queried within the resource and the resulting value is displayed on the statistic badge in the adapter footer.

Important

> Currently, you can configure only one statistical parameter in this option. Ensure that you configure the corresponding section name of the statistical parameter configured in this option in the statistics.displayed-statistics option.

**Example configuration:** For example, you already have the following section in your GWS application that displays the agents in *Not Ready* status.

```
[CC-CurrentNotReadyAgents_VAG]
display-name=Not Ready Agents
statistic-name=CurrentNotReadyAgents_VAG
```

Then, your configuration to display the number of agents in *Not Ready* status on the statistic badge will be as follows:

- statistics.badge-resource=`GPlus_Group_Of_Queues_QA` (the example value configured here is the virtual agent group, that is, an identifier from `statistics.queue-groups`)
- statistics.badge-statistic=`CurrentNotReadyAgents_VAG` (the example value configured here is the statistic-name that will display the number on the badge)
- statistics.displayed-statistics=`CC-CurrentNotReadyAgents_VAG` (the example value configured here is the section name of the statistic in the GWS application)

### system.feedback

- **Default Value:** `false`
- **Valid Values:** `true`, `false`
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies whether to show the Feedback item in the main menu. When feedback is sent, the adapter automatically includes supporting information, such as configuration, logs, and active interactions.

### system.log

This option is deprecated as of release 8.5.201.09.

## [+] See the option description

- **Default Value:** `off`
- **Valid Values:** on, `off`
- **Changes Take Effect:** When the session is started or restarted.
- **Description**: Specifies whether to show logging in the browser console.

> **Important**
> Even if this option is set to `off`, the log messages are still included in system.feedback.

### templates.salesforce.<interaction type>.<salesforce argument>

- **Default Value:**
- **Valid Values:** A string with custom template variables wrapped in "`{`" and "`}`"
- **Changes Take Effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Console, Lightning
- **Description**: Specifies the custom template the adapter should use when creating the subject field in a Salesforce activity. You can specify two arguments in the option name:
  - <interaction type> is either `inbound-voice`, `outbound-voice`, `transfer-voice`, `chat`, or `email` (WWE option only).
  - <salesforce argument> is `subject` (the adapter currently supports only this argument).

Set the value of this option to a string that contains custom template variables wrapped in "`{`" and "`}`". For details, see Custom templates.

### voice.note.key-name

- **Default Value:** None
- **Valid Values:**Valid attached data key name
- **Changes take effect:** When the session is started or restarted.
- **Salesforce modes (CRM Adapter):** Classic, Console
- **Salesforce modes (Adapter-WWE):** Not supported
- **Description**: **Description:** If this option is defined, the note is stored in attached data using the defined key. If this option is not defined, the note is stored in UCS (if available).

## Workspace Web Edition options

The following Workspace Web Edition options also apply to the Gplus Adapter for Salesforce.

| | |
|---|---|
| Active Recording | • privilege.active-recording.can-use |

| | |
|---|---|
| Agent Status | • agent-status.enabled-actions-by-channel<br>• agent-status.enabled-actions-global<br>• agent-status.not-ready-reasons |
| Application | • system.cometd.timeout<br>• system.log-level |
| Chat | • *No results*<br>• privilege.chat.can-one-step-conference<br>• privilege.chat.can-one-step-transfer<br>• privilege.chat.can-release-consultation<br>• privilege.chat.can-two-step-conference<br>• privilege.chat.can-two-step-transfer<br>• privilege.chat.can-use |
| Contact Center Statistics | • statistics.displayed-statistics<br>• statistics.refresh-time<br>• statistics.routing-points |
| Expression | • expression.url |
| Interaction | • interaction.case-data.enable-hyperlink<br>• interaction.case-data.format-business-attribute<br>• interaction.case-data.is-read-only-on-idle<br>• interaction.disposition.is-mandatory<br>• interaction.disposition.value-business-attribute |
| Interaction Preview (Toast) | • toast.case-data.format-business-attribute |
| Intercommunication | • intercommunication.voice.make-call-caller-id-business-attribute<br>• intercommunication.voice.routing-based-actions<br>• intercommunication.voice.routing-based-targets<br>• intercommunication.voice.routing-points |

| | |
|---|---|
| KPI | • kpi.displayed-kpis |
| Login | • login.prompt-place<br>• login.voice.list-available-queues<br>• login.voice.prompt-dn-less-phone-number<br>• login.voice.prompt-queue |
| Outbound | • privilege.outbound.can-use<br>• privilege.outbound.push-preview.can-use |
| Screen Recording | • privilege.screen-recording.can-use |
| Team Communicator | • presence.evaluate-presence<br>• privilege.teamcommunicator.can-manage-favorites<br>• privilege.teamcommunicator.can-view-recent-calls<br>• teamcommunicator.add-recent-filters.voice<br>• teamcommunicator.corporate-favorites<br>• teamcommunicator.list-filter-showing<br>• teamcommunicator.recent-max-records |
| Voice | • privilege.voice.can-one-step-conference<br>• privilege.voice.can-one-step-transfer<br>• privilege.voice.can-reject-call<br>• privilege.voice.can-release-call<br>• privilege.voice.can-two-step-conference<br>• privilege.voice.can-two-step-transfer<br>• privilege.voice.can-use<br>• voice.mark-done-on-release<br>• privilege.voice.can-show-hold-duration |
| Voicemail | • privilege.voicemail.can-use<br>• voicemail.access-number |

# Disaster Recovery

## Important

- This document has been prepared specifically for Red Hat, Inc., for release with Web Services and Applications 8.5.201.45.
- The information contained herein is proprietary and confidential and cannot be disclosed or duplicated without the prior written consent of Genesys Telecommunications Laboratories, Inc.
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- For technical assistance, contact your Genesys Customer Care representative.

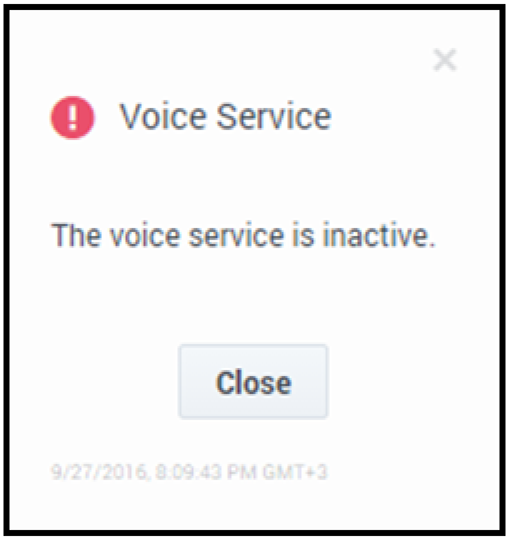
Genesys provides support for disaster recovery in scenarios where the preferred data center goes down. When a disaster scenario occurs while an agent is active on Agent Desktop or Gplus Adapter for Salesforce, the agent is notified in a dialog box and they can click **Reconnect** to reconnect to the secondary data center. When the preferred data center returns to operation, the agent can then log back into the preferred data center.

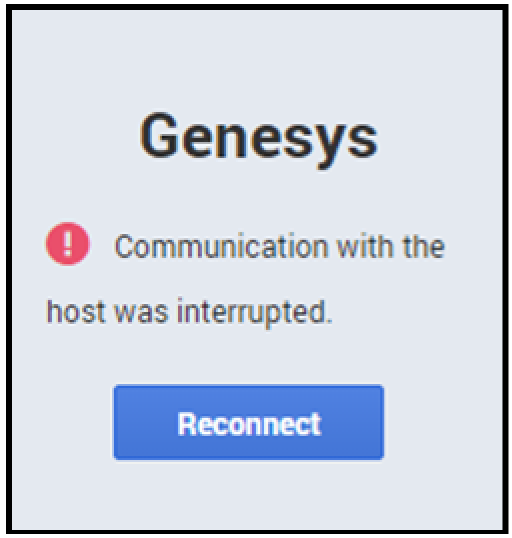
In a disaster recovery scenario, any time an agent logs in to Salesforce, the first attempt is to connect to the primary data center. If the login is unsuccessful after a configurable timeout interval, Salesforce connects to the designated disaster recovery data center.

## How does disaster recovery affect the user experience?

When a disaster situation occurs to Gplus Adapter for Salesforce users, agents are notified and are requested to take action if needed. For example, if the voice service goes down, logged in agents will see an error message to notify them that the voice service is interrupted. Then when the timeout interval is reached and the secondary data center is available, another dialog box is displayed asking the agent to reconnect.

The user experience for Agent Desktop users is not affected.




## How do I configure for disaster recovery?

For Agent Desktops deployments, you don't need to configure anything. Genesys configures disaster recovery for you.

For Gplus Adapter for Salesforce deployments, you need to configure disaster recovery in your Salesforce deployment.

## How do I configure disaster recovery for Gplus Adapter for Salesforce?

To perform the following procedure, you need to set up a new call center using an XML file that Genesys provides to you.

Before you begin, ensure that you have:

- A Salesforce administrator role account
- The callcenter.xml file
- Host and port information required to specify call center settings. Genesys provides this information to you.

**Start**

1. Get the `callcenter.xml` file from Genesys and save to a local folder.
2. Log into Salesforce.com with your administrator credentials to open the **Home** page..

3. Select **Setup**.
4. In the **Quick Find** field, type `Call Center`.
5. Click **Call Centers**.
6. Click **Import**.
7. Click **Choose File** and navigate to the folder where you saved the `callcenter.xml` file.
8. Click **Import**.
9. Click **Edit** and fill in the **CTI Adapter URL** and **CTI Adapter Backup URL** that Genesys provided to you. When you paste the URLs that Genesys gives you, add the following parameters:
    - Add `&site-1=<GWSHOST>:<GWSPORT>&disable-dr-reload=true` to **CTI Adapter URL**.
    - Add `&disable-dr-reload=true` to **CTI Adapter Backup URL**.

**End**

## Next steps

After you add your disaster recovery call center, you must provision the call center with users. If you have a previous Salesforce Call Center, remove users from that Call Center and add the users to the new call center you just added.

### Removing Multiple Users

To remove multiple users from a call center:

1. Log into Salesforce with your administrator credentials to open the **Home** page.
2. Click **Setup**, found under the **User menu** drop-down list, under your user name in the top right corner, to open the **Force.com** page.
3. From the **App Setup** section on the left side of the screen, click **Customize** to open the customization options.
4. Click **Call Center** to open the **Call Center** page.
5. Click **Manage Call Centers** under the **Call Center** section.
6. Click the name of the call center from which you want to remove the Salesforce user.
7. In the **Call Center Users** section, click **Manage Call Center Users**.
8. Select the **Action** check box next to each user you want to remove.
9. Click **Remove Users**.

### Adding Users

You can add new users to your Salesforce call center using the following steps:

1. Log into Salesforce with your administrator credentials to open the **Home** page.
2. Click **Setup**, found under the **User menu** drop-down list, under your user name in the top right corner to open the **Force.com** page.

3. From the **App Setup** section on the left-hand side of the screen, click **Customize** to open the customization options.
4. Click **Call Center** > **Call Centers**.
5. Click the name of your contact center.
6. In the **Call Center Users** section, click **Manage Call Center Users**. You can also access this button from the **Call Center Edit** screen, if you are editing your `callcenter.xml` file.
7. Click **Add More Users**.
8. Specify the search criteria to find the users who you want to assign to your call center. For example, you can search by the **Last name** field.
9. Click **Find** to display the refined list of your search criteria.
10. Select the check boxes for the users that you want to add.
11. Click **Add to Call Center**.