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Workspace Desktop Edition Deployment Guide

Enabling Agents To Manage Contacts

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Refer to *Framework 8.0 Genesys Administrator Help* and *Genesys Security Guide* for detailed information on how to use Genesys Administrator and Management Framework to configure access permissions

Procedure: Enabling agents to manage contacts

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

Prerequisites

- Genesys Administrator 8.0.2 or higher, configured to show Advanced View.
- A working knowledge of Genesys Administrator 8.
- An Interaction Workspace Application object exists in the Configuration Database.
- Interaction Workspace has a connection to Universal Contact Server.
- [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)
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Start

1. Allow the applicable Contact Actions privileges (see [Contact Management Privileges](#)) for the role to which the agent is assigned (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).
2. Configure the Contact options in the interaction-workspace section of the Interaction Workspace Application object (refer to the [Contact](#) configuration option reference for a list of Contact options and a description of how to configure them).

End

Procedure: Configuring the Interaction Workspace application and Universal Contact Server to enable custom contact attributes

Purpose: To enable an agent to search for and manage contacts based on custom Business Attributes. Business Attributes must be configured to be searchable and sortable.

In the Universal Contact Server (UCS), each contact is defined by a set of attributes that are known as Business Attributes. Business Attributes are metadata for the contact fields in the contact database. Each Business Attribute value contains a description of one of the contact fields in the contact database.

Prerequisites

- Genesys Administrator 8.0.2 or higher, configured to show Advanced View.
- A working knowledge of Genesys Administrator 8.
- An Interaction Workspace Application object exists in the Configuration Database.
- Interaction Workspace has a connection to UCS.

- **Procedure: Enabling agents to manage contacts**

Start

1. In Genesys Administrator, create a new Business Attribute by using the name and display name of the Custom Contact Attribute.
2. Configure the new Business Attribute as follows:
 - Set the `is-searchable` to `true` option to make the Business Attribute available to contact searches.
 - Set the `is-sortable` to `true` option to make the Business Attribute available in the directory view.
3. Add the Business Attribute to the list of searchable attributes in the Interaction Workspace `contact.directory-search-attributes` option.
4. Configure the Interaction Workspace `contact.directory-displayed-columns` option by using the display name of the Business Attribute to enable the Business Attribute to appear as a column heading in search results (refer to the **Contact** configuration option reference for a list of Contact options and a description of how to configure them).
5. To enable the Business Attribute to display in the record details for the contact, configure the Interaction Workspace `contact.displayed-attributes` option that is displayed (refer to the **Contact** configuration option reference for a list of Contact options and a description of how to configure them).

End