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# Workspace Desktop Edition Deployment Guide

Workspace Desktop Edition 8.1.4

12/29/2021

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# Interaction Workspace 8.1 Deployment Guide

## Installation and Deployment

### Introduction

Find information about concepts, features, functionality and environment.

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[Introduction to Interaction Workspace](#)  
[Interaction Workspace Functionality Overview](#)

[System Support for Interaction Workspace](#)

## Deploying Interaction Workspace

Find detailed information about planning your Interaction Workspace deployment.

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[Deploying Interaction Workspace](#)  
[Effects of Configuration Options and Privileges on Performance](#)

## Deployment Procedures

Find all of the procedures that you need to install and deploy Interaction Workspace.

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[Deployment Procedures for Interaction Workspace](#)

## Provisioning Interaction Workspace

Find all of the procedures that you need to enable the features of Interaction Workspace.

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[Provisioning Interaction Workspace](#)

## Configuration Options and Privileges

Find detailed descriptions for all of the configuration options and role privileges that are available in Interaction Workspace.

## Document Change History

A list of topics that are new or that have changed since the previous release.

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[New In Deployment Guide 8.1.4](#)

Interaction Workspace Configuration  
Options Reference



# Introduction

These pages introduce you to Interaction Workspace, the next-generation Genesys agent desktop interface. Privilege- and role-driven capabilities, as well as features that focus on the needs of the user, make Interaction Workspace a total agent solution. The Interaction Workspace agent interface enables users to invoke interactions that are related to existing interactions -- thus ensuring a consistent customer experience. Interaction Workspace is a modular application that permits expansion and customization. See the following resources for information about how to customize and extend Interaction Workspace:

- [Interaction Workspace Developer's Guide and .NET API Reference](#)
- [Interaction Workspace 8.1 Extension Examples](#)




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# Concepts And Features

Interaction Workspace features a unified user interface (UI) that empowers contact-center employees to make their contact center truly dynamic by enabling them to respond in real time to real-time information from a wide variety of touch points and channels.

## Benefits

Interaction Workspace enhances internal communications, user performance, and quality. Interaction Workspace features a privilege-driven flow of information based on roles that you assign to your agents.

 **Note:** The functionality that is assigned to agents through their defined role determines the footprint of the Interaction Workspace application that is downloaded to their workstation. Agents who have simple roles assigned to them do not require as much space for the application as agents whose roles contain many privileges.

## Main Features

The following is a list of some of the main features of Interaction Workspace:

- Role-based application
- Open Framework for integration and extendability
- Support of **plug-ins** from many Genesys solutions.
- Advanced Multi-Channel Interaction interface
- Accessibility
- Active Call Recording
- Active Screen Recording
- Multiple Channels
  - Inbound Voice for both SIP and TDM
  - Outbound Campaigns
  - Web Callback
  - E-Mail
    - Print preview
    - QA review
  - eServices
    - Chat (including support for Chat High Availability (HA) and nicknames)

- SMS
- Web Callback
- Facebook (by an [eServices](#) plug-in)
- Twitter (by an [eServices](#) plug-in)
- RSS (by an [eServices](#) plug-in)
- Workbin
- Workitem
- Team Communicator
- Favorites and Corporate Favorites
- Internal Instant Messaging
- Standard Responses Library and suggested responses (including filtering by language or other category)
- Agent and Contact-Center performance tracking
- Contact History Management
- Last-agent routing
- Broadcast Message viewing
- Disposition codes
- Customer context notifications
- Silent monitoring, coaching, and barge-in (SIP and Chat only; for Team Lead agents or from a 3rd party Supervisor, including monitoring the current interaction)
  - Multi-site support
- Main Window view or Gadget based interface.
- Spelling check (including corporate dictionary support)
- Business Continuity (Disaster Recovery)
- Implementation of [Language Packs](#) to facilitate the customization of the User Interface in any non-right-reading language.
- Business Data Management and Case Data Management

## High-Level Architecture

Interaction Workspace incorporates Genesys interactions into a multi-modal paradigm that enables agents to invoke interactions within interactions to ensure a consistent customer experience. Interaction Workspace is integrated with Genesys 8 components and applications, including Enterprise SDK, Platform SDK, Management Framework, T-Servers, Universal Contact Server, Interaction Server, Configuration Server Data Base, Statistics Server for Reporting, SIP Server, and various specialized [plug-in](#) IPs. Interaction Workspace is dependent upon Genesys Administrator. See [Architecture](#) for a more detailed description of the Interaction Workspace architecture.

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## Time Zones

Interaction Workspace displays all dates based on the time zone and the locale of the workstation where the user is logged in.

# Interaction Workspace Plug-ins

The following Interaction Workspace compatible plug-ins are available from Genesys:

- [Interaction Workspace Plugins for Social Media](#)
- GAS Plug-in -- Coming soon!
- LYNC Plug-in -- Coming soon!
- [Genesys Web Engagement Plug-in for Interaction Workspace](#)
- [Genesys Co-browse Plug-in for Interaction Workspace](#)

Refer to [Installing plug-ins for Interaction Workspace](#) for information about installing Interaction Workspace compatible plug-ins.

# Interaction Workspace And Genesys 8

Interaction Workspace is the key agent interface for Genesys 8. Interaction Workspace is built on top of the primary Genesys 8 SDKs. See the Table - **Components of Interaction Workspace** for a list and description of the components of Interaction Workspace and the Table - **Miscellaneous Deliverables of Interaction Workspace** for a list of miscellaneous deliverables that ship with Interaction Workspace.

## Components of Interaction Workspace

Component	Description
Interaction Workspace	Core application
Interaction WorkspaceSIP Endpoint	Optional SIP Endpoint application
Interaction Workspace Compatible Plug-ins	Optional plug-ins available as separate IPs that are shipped with other Genesys Products
Platform SDK	Low-level SDK that is used to access Genesys back-end servers
Enterprise SDK	High-level SDK that is built on top of Platform SDK to render models, services, and so on

## Miscellaneous Deliverables of Interaction Workspace

Component	Description
Interaction Workspace Deployment Manager	Wizard that is used during deployment to prepare the ClickOnce packages
Interaction Workspace Extension Samples	Set of examples that illustrate how to implement extensions for Interaction Workspace

## Topology

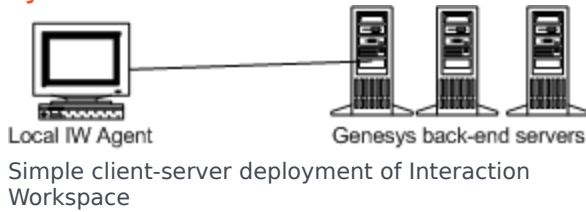
You can deploy Interaction Workspace in two different deployment configurations, depending upon the arrangement of your network; they are:

- Oversimplified deployment with a Client-server in a local setup.
- Client-server with centralized deployment based on Click-Once

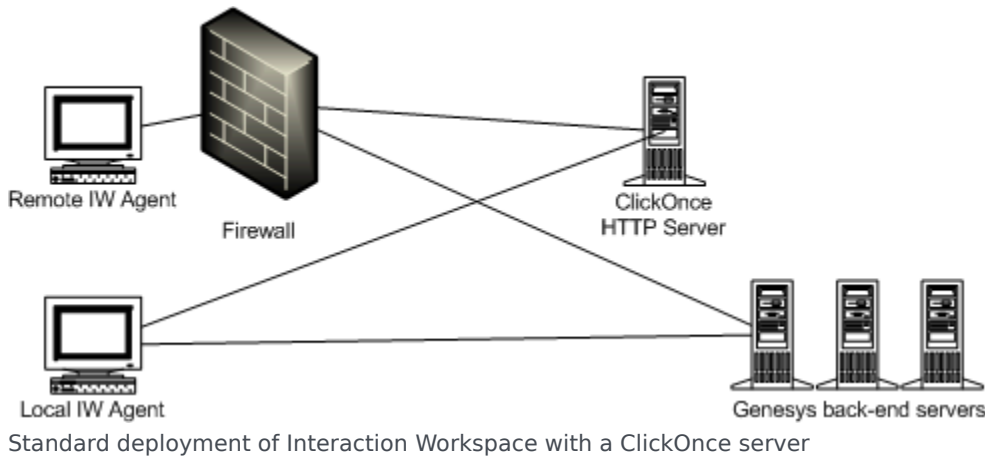
This section shows the key components of the Interaction Workspace network topology and indicates how Interaction Workspace is related to other Genesys components.

The Figure - **Simple client-server deployment of Interaction Workspace** shows a minimal deployment that consists of agent workstations that are

connected directly to the Genesys back-end servers. For the procedure on deploying Interaction Workspace in this configuration, see the [Procedure: Installing Interaction Workspace Deployment Package on the Windows operating system](#).



The Figure - **Standard deployment of Interaction Workspace with a ClickOnce server** shows the standard deployment of Interaction Workspace in an environment in which the deployment is controlled from a centralized place and in which remote agents can be connected to Genesys back-end through a Virtual Private Network.

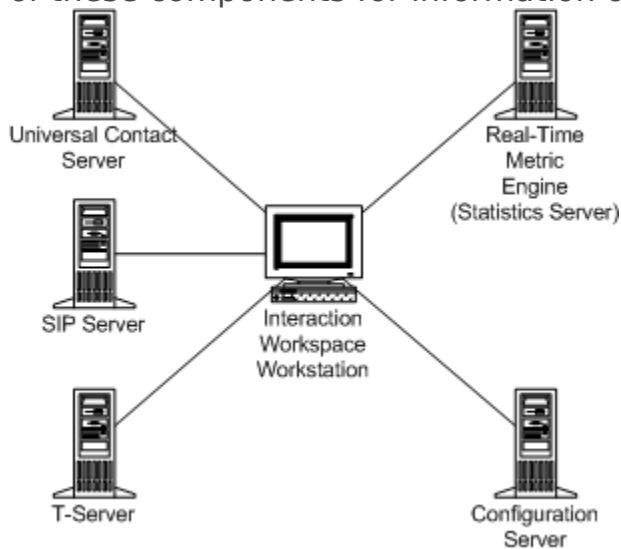


## Connections to Genesys Components

The Figure - **Interaction Workspace connections to the Genesys 8 Suite** shows the connections to various Genesys components. Interaction Workspace requires connections to the following Genesys Components:

- Configuration Server -- Through Genesys Administrator, provides authentication, the list of connections, Role- Based Access Control, agent and place management, the object hierarchy for team communication, and application hierarchical configuration
- T-Server -- Enables voice handling
- SIP Server -- Enables voice and IM handling
- Real Time Metric Engine -- Maintains statistics and target agent/group presence
- Universal Contact Server -- Maintains the contact history
- Interaction Server -- Manages interactions

Refer to the documentation that accompanies Genesys Administrator and each of these components for information on setting up connections.



Interaction Workspace connections to the Genesys 8 Suite

## Architecture

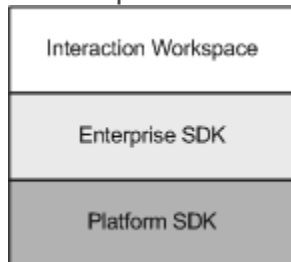
Interaction Workspace is integrated with the following Genesys 8 applications:

- Embedded components:
  - Enterprise SDK
  - Platform SDK
- Direct connections:
  - T-Server
  - Universal Contact Server
  - Interaction Server
  - Configuration Server
  - Statistics Server for Reporting
  - SIP Server
- Dependencies:
  - Genesys Administrator
- Optional installation:
  - Interaction Workspace SIP Endpoint

- Interaction Workspace Compatible Plug-ins

Interaction Workspace features a modular design that divides the application into several components that are served out to agents based on their roles. All agents receive common modules such as the Login and Go Ready module and the Main Window module, while other modules, such as the Contact Management module and the Team Communicator module are distributed only to agents whose roles include those modules.

Interaction Workspace relies on both Enterprise SDK and Platform SDK (refer to the Figure - **Interaction Workspace architecture**). This architecture enables developers to build customization for Interaction Workspace at any level.



Interaction Workspace architecture

## Customization Support

This architecture supports the following customization:

- Interaction Workspace -- User-interface customization
- Enterprise SDK -- Business logic customization using a high-level API
- Platform SDK -- Business logic customization using a low-level API

Refer to the [Interaction Workspace Developer's Guide and .NET API Reference](#) and the [Interaction Workspace 8.1 Extension Examples](#) for information on how to customize Interaction Workspace. Refer to the [Enterprise SDK Developer's Guide](#) and the [Platform SDK 8.0 .NET API Reference and Developer's Guide](#) for information on lower-level customization capabilities.

## Common System Aspects

The goal of Genesys 8 and Interaction Workspace is to provide a consistent, simplified, and comprehensive application that enables each user at every level to be efficient and productive. Genesys 8 and Interaction Workspace focus on a set of criteria that deliver a higher level of productivity. Interaction Workspace is designed "from the ground up" to have a high degree of usability, with the goal of enhancing agent productivity.



## Internationalization

Interaction Workspace uses the existing internationalization capabilities of Genesys back-end components, such as Universal Contact Server, that employ Unicode to support multiple languages. Interaction Workspace uses the Genesys Platform SDK **ESP** protocol to communicate with Genesys back-end servers that also support the same Unicode protocol. Any set of Unicode characters is supported; therefore, any language that is supported by Unicode is supported by Interaction Workspace; however, to support more than one Unicode language in your environment, you must configure the specific Unicode support for each connection (this is configured in the same way as TLS requires custom encoding). Interaction Workspace is aligned with the existing internationalization capabilities of Genesys back-end components:

- Universal Contact Server uses Unicode to support multiple languages. Therefore, for this connection any combination of locale that is specified in the client configuration, server configuration, and interaction content is supported. This applies to the content of the Notepad, the body of an e-mail and so on.
- Other Genesys back-end servers do not implement Unicode. Therefore, internationalization requires you to configure consistently the locale of the system servers, the client "locale for non Unicode application", and the content of interactions. Each of these items must rely on the same Code Page (several languages can be supported by a single code page). This configuration applies to the user data, configuration data, and so on of each interaction.
- You can configure Interaction Workspace to enforce which encoding is used when it communicates with non-Unicode back-end servers. To do this, configure the following options:

`general.non-unicode-connection-encoding`--The value corresponds to the .Net Name of Code Page Identifier. Refer to the following article: [http://msdn.microsoft.com/en-us/library/windows/desktop/dd317756\(v=vs.85\).aspx](http://msdn.microsoft.com/en-us/library/windows/desktop/dd317756(v=vs.85).aspx)

For the Configuration Server connection, the code page identifier must be set in the `general.non-unicode-connection-encoding` key in the `InteractionWorkspace.exe.config` file.

## Accessibility and Navigation

### Section 508 Accessibility

You can use a screen-reader application or the keyboard to navigate the agent desktop interface.

### Screen Readers

Interaction Workspace is designed to maximize content readability for screen-reader applications. Interaction Workspace can be configured to be compatible with screen readers that support Microsoft UI Automation API, such as the Freedom Scientific application: Job Access With Speech (JAWS) version 11. Screen readers enable visually impaired (blind and low-vision) agents to use the desktop interface through text-to-speech or text-to-Braille systems. Interaction Workspace must be configured in the Configuration Layer to enable this compatibility (see [Accessibility](#)). These options can be set in the Configuration Layer as default values that can be overridden in the Agent Annex following the standard hierarchy configuration.

## Keyboard Navigation of Interface

You can navigate the Interaction Workspace interface by using a keyboard or other accessibility device that is enabled by keyboard navigation. This feature improves the accessibility of the interface by not forcing the user to navigate by using the mouse. Navigation works panel to panel and, within a panel, component to component. In general, you can use the TAB key to set the focus on the next component; use the SHIFT-TAB key combination to set the focus on the previous component. You can use this method to navigate the Menu bar, the interaction interface, the tabs, and so on.

## Access Keys and Keyboard Shortcuts

Interaction Workspace follows the Microsoft Windows convention of enabling interface navigation by using access keys. Access keys are alphanumeric keys that are employed in combination with the ALT key to replicate a menu command or button click on the interface. Interaction Workspace also provides shortcut keys. Shortcut keys, which are intended mostly for advanced users, enable quick access to frequently performed actions. Shortcut keys can be reconfigured by Tenant, Group, and/or User by using Genesys Administrator. These key combinations are documented in the *Genesys Interaction Workspace 8.0 User's Guide*.

## Security

### RADIUS

Interaction Workspace implements the Remote Authentication Dial-In User Service (RADIUS) security protocol to prevent illegal system access, track system use, and limit the access of authenticated users. To access the system, users must provide their credentials and connection parameters for authentication before they can be granted limited system access. The user must provide both a user name and a password to gain access to the Configuration Layer, which is used to obtain a list of existing places, privileges that are specified for the user, and configuration of the agent application. A place is mandatory for all Interaction Workspace agent scenarios. A role or roles are assigned to agents upon login. Agents do not have access to system aspects outside of those that are defined by their assigned roles.

### Transport Layer Security (TLS)

Interaction Workspace supports Transport Layer Security (TLS), which is a cryptographic protocol that provides security and data integrity for communications over networks such as the Internet. TLS encrypts the segments of network connections at the transport layer from end to end. For more information about TLS, refer to the Genesys TLS Configuration chapter of the *Genesys 8.1 Security Deployment Guide*.

### FIPS

As of release 8.1.401, Interaction Workspace supports Federal Information Processing Standard (FIPS). For information about configuring and using FIPS, refer to *Genesys 8.1 Security Deployment Guide*.

## Interaction Workspace

Prior to Interaction Workspace 8.1.4, encrypted communication was used to secure the communication protocol between Interaction Workspace and the other Genesys Servers. This method meant that control on certificate expiration and authority was not enforced. Interaction Workspace 8.1.4 (and higher) implements full TLS control. If you have migrated from Interaction Workspace 8.1.3 (or lower) to 8.1.4, you might receive warning messages from the system informing you that the security certificate on a particular channel has expired. This renders the channel Out of Service until the certificate is updated. Interaction Workspace supports a TLS connection to Universal Contact Server (UCS) starting from version 8.1.3 of UCS. For support details for other Genesys servers please refer to the respective product documentation.

## Interaction Workspace SIP Endpoint

Pre-requisites: Interaction Workspace 8.1.401 and higher, and Interaction Workspace SIP Endpoint 8.0.204 and higher.

The `sipendpoint.transport-protocol` option enables configuration of the SIP Transport Protocol. For encrypted transport, set the value of this option to TLS.

The `sipendpoint.proxies.proxy0.media-encrypted` option enables you to configure the RTP Protocol. For encrypted transport, set the value of this option to 1. If Interaction Workspace is deployed in a SIP Business Continuity environment, set also the value of the `sipendpoint.proxies.proxy1.media-encrypted` option to 1 to encrypt the peer SIP connection. For more information about SRTP, refer to *Genesys 8.1 Security Deployment Guide* and *SIP Server 8.1 Deployment Guide*.

If Interaction Workspace SIP Endpoint must connect to an SBC or a SIP Proxy instead of an actual SIP Server, then you must configure the `sipendpoint.sbc-register-port` configuration option (and `sipendpoint.sbc-register-port.peer` if you are running Interaction Workspace in SIP Business Continuity scenarios) by specifying the UDP/TCP or TLS ports.

## Inactivity Time-out


Interaction Workspace can be configured to become locked after a specific period of time during which neither the agent's mouse nor keyboard are used. This feature protects your system from unwanted system access, should the agent walk away from a workstation without locking it. When the specified time period of inactivity is reached, all of the open Interaction Workspace windows on the agent's desktop are minimized, and the Reauthenticate view is displayed. Interaction notifications such as notification of inbound interaction delivery are still displayed, but business information about them is not, and the **Accept** and **Reject** buttons are disabled. To unlock Interaction Workspace, the agent must enter in the Reauthenticate view the password that was used to log in the locked application, then click Authenticate. Refer to the *Interaction Workspace 8.1.x Help* for details about using the reauthentication feature.

## Business Continuity

The *Framework 8.1 SIP Server Deployment Guide* provides detailed information about Business Continuity architecture and configuration. A disaster is defined as the loss of all Genesys components that are running on one or more physical sites. Business Continuity is a set of automated procedures

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that enable agents that are connected to the site that is experiencing a disaster to connect to an alternate site to continue working normally with minimal data lost. This is known as Geo-redundancy. In the event of a disaster, Interaction Workspace can be configured to maintain a dual connection to a pair of SIP Servers, a pair of Stat Servers, and a pair of Configuration Servers at two different sites. Two or more switches must be configured in Genesys Administrator to have identical agent extensions and logins. Agents must be able to log in to any synchronized switch at any time. In a typical Business Continuity set up, two pairs of High Availability (HA) SIP Servers are implemented. Each pair of SIP Servers, the Preferred server and the Peer server, use synchronized (not replicated) configuration layer objects. Agents are logged in to the Current Primary server in their Preferred site HA Pair. Each agent has two SIP Channels and two SIP Endpoints registered on each server. Interaction Workspace always tries to connect to the Preferred server. If it is not available it connects to the alternate (Peer) server until the Preferred server becomes available again. The agent state is set to Not Ready until a connect with one or the other server is established.

 **Note:** The current interaction might be lost.

Refer to the [Procedure: Configuring Interaction Workspace for Business Continuity](#) to enable Business Continuity for your agents.

## Licensing

There are no technical licensing requirements for Interaction Workspace.

## Framework and Solutions Compatibility

Interaction Workspace is part of the Genesys 8 suite of products. See Table - **Key Genesys 8 Framework and Solution Compatibility Requirements for Interaction Workspace** for a list of key compatibilities. Also see the following system guides for details on compatibility and system requirements:

- *Genesys Hardware Sizing Guide*
- *Genesys Interoperability Guide*
- *Genesys Licensing Guide*
- *Genesys Supported Media Interfaces Reference Manual*
- *Genesys Supported Operating Environment Reference Manual*


### Key Genesys 8 Framework and Solution Compatibility Requirements for Interaction Workspace

Component	Version	Scope
Configuration Server	8.0.2 and higher	All deployments
Genesys Administrator	8.0.2 and higher	All deployments
Management Framework	8.0.2 and higher	All deployments

Component	Version	Scope
Statistics Server	7.6, 8.0 and higher	InteractionWorkspace.KPI InteractionWorkspace.ObjectStatistics InteractionWorkspace.GadgetStatistics InteractionWorkspace.TeamCommunicator (only if presence information is required)
Universal Contact Server	8.0 and higher	InteractionWorkspace.Contacts InteractionWorkspace.SRL
T-Server	7.6, 8.0 and higher	InteractionWorkspace.Voice InteractionWorkspace.BroadcastMessage
SIP Server	7.6, 8.0 and higher	InteractionWorkspace.SIP.Monitoring InteractionWorkspace.SIP.Recording InteractionWorkspace.IM InteractionWorkspace.Voice InteractionWorkspace.BroadcastMessage
eServices	8.0.1 and higher	InteractionWorkspace.Email InteractionWorkspace.Chat InteractionWorkspace.SMS InteractionWorkspace.WebCallback> InteractionWorkspace.WorkItem InteractionWorkspace.Workbins
	8.1.1 and higher	Social Media (Facebook, Twitter)
	8.1.2 and higher	Social Media (RSS)
Interaction Workspace SIP Endpoint	8.0.2 and higher	Optional for SIP Server support
Genesys Quality Management (QM) Solution	8.1.0 and higher	Active Recording

# Role-Based Approach Of Genesys 8

Genesys Administrator is used to create roles that contain a list of privileges. Roles are defined as the set of privileges that are either Allowed or Not Assigned. Each agent receives only what is needed to complete the privileges that relate to the role of that agent; everything else is inaccessible. Genesys Administrator enables the assignment of a Role to an Access Group or a Person.

 **Note:** Users have no default assigned Role. Roles have no default granted privileges.


Depending on the privileges that are granted to an agent, Interaction Workspace enables the following:

- Module activation -- Triggering of module download from the ClickOnce server; this modifies the footprint of the agent desktop application.
- User Interface rendering -- Includes the display of menu items, toolbar buttons, and views.

Refer to the [Procedure: Creating a Role, allowing an Interaction Workspace privilege, and assigning a Role to an agent or agent group](#) to create or modify a role and assign privileges to an agent or Agent Group.

## Role- and Privilege-Based Models

Interaction Workspace implements Role-Based Access Control (RBAC). RBAC enables administrators to limit agents to specific channels, interactions, and so on, based on their permissions.

 **Note:** RBAC requires Configuration Server 8.0.2 or higher and Genesys Administrator 8.0.2 or higher.

The system administrator defines a role for each agent. The role has a series of privileges that are associated with it; in this way, agents do not have access to privileges or functionality that are outside their assigned roles. RBAC enhances system security by limiting agent access to the system. This is critical for protecting the system against accidental or intentional damage. Accidental damage can occur if an agent is accessing a part of the system that is outside of the area of responsibility of that agent. RBAC enables you to update your system easily. If agents change responsibilities or new agents are added, you do not have to assign permissions to those agents based on their username. When you create or modify an agent, all that you have to do is set the role of that agent; system access is determined automatically. As soon as the agent logs into the system, the identity of that agent determines access. Individual permissions do not have to be set for new or modified users. To facilitate RBAC, Interaction Workspace is constructed as a collection of modules that encompass privileges or related privileges. RBAC selects only those modules that pertain to the role of the agent and are necessary for the context of the functions that are accessible to the agent. The `security.disable-rbac` configuration option in the `interaction-workspace` section determines whether agents have all privileges granted or whether the Role Based Access Control (RBAC) control

system is used. You can set this option to true when you deploy the application in your testing lab to evaluate and test the application. Refer to [Role Privileges](#) for a list of all the privileges.

## Views (Modules and Groups of Privileges)

Modules are assembled into views. Each module, set of modules, or view is related to a privilege or set of privileges. Privileges are implemented by modules. In a ClickOnce environment; when an agent logs in to Interaction Workspace, modules are transferred to the client desktop. The modules that are transferred are dependent upon the role that is assigned to the user with that login.

## Privileges Implemented by Interaction Workspace

This section introduces the privileges that are implemented by Interaction Workspace. The privileges are grouped logically by action and access type:

- Voice actions
- Instant Messaging actions
- Statistics access
- Contact actions
- Team Communicator actions
- eServices actions
- Standard Response Favorites actions

### Voice Actions

Voice action privileges enable a variety of capabilities, including the use of the Voice media, transfer, conference, disposition, answering, rejecting, and making calls.

### Instant Messaging Actions

Instant Messaging (IM) actions enable agents to use the IM media for internal communication, and to make and release IM sessions.

### Statistics Access

Statistics access privileges enable the viewing of Key Performance Indicators (KPIs) and contact center statistics by agents.

### Contact Actions

Contact action privileges can be used to enable a wide variety of contact related privileges including marking done interactions, merging contacts and interactions, creating contacts, deleting contacts, and saving changes to contacts. Contact action privileges also enable access to Interaction Workspace features such as Contact history, information, directory, details, notepad, and case data.

### Team Communicator Actions

Team Communicator privileges enable contacts to use the Team Communicator feature to contact internal targets, create and use favorites, and view recent contacts.

### eServices Actions

eServices privileges for E-Mail, Chat, Web Callback, Workitems, and Workbins. For more information on the privileges implemented by Interaction Workspace, refer to [Interaction Workspace Functionality Overview](#).

### Standard Response Favorites Actions

Standard Response Favorites privileges enable the agents to save a list of favorite responses from the SRL.



# Configuration And Administration By Using Options And Annexes

Interaction Workspace privileges are assigned to users based on the role that is configured for them in the Configuration Layer. Interaction Workspace privileges are associated with modules. Under the terms of RBAC, agents must be configured to have access to Interaction Workspace modules. Later, agents may be granted the ability to set preferences that personalize the modules. As with the other Genesys 8 applications, Interaction Workspace is first set up and configured through the Genesys Administrator interface. After the initial configuration, the settings of each Interaction Workspace module can be assigned hierarchically to:

1. An Application.
2. A Tenant.
3. An Agent Group.
4. A Person.

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

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

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

## Other Applicable Object Hierarchies

Some specific Interaction Workspace options can be defined in other objects and object hierarchies, such as: Action Codes -- For example: Not Ready reason codes.

## Overriding Options by Using a Routing Strategy

A Routing Strategy can be used to override configuration options that you have defined by using the hierarchies that are described in [Configuration And Administration By Using Options And Annexes](#). Interaction Workspace uses Transaction Objects of type `object list`. You can attach a transaction

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name or list of transaction names to your strategy. The transaction names in the list should be separated by commas. Interaction Workspace reads the transaction objects at rendering time to override the static options. Overriding options enables you to change the appearance of interactions based on a key-value pair that is defined in the annex of each listed transaction object. The attached data contains the name of the transaction object to be used for the interaction. Transaction objects are configured in Genesys Administrator or Composer, by using the standard approach that is used for other object types in the hierarchy. Use the `interaction.override-options` option to define the key in which the Transaction object(s) are to be listed in attached data. If you set an override value, Interaction Workspace will look for the transaction object that corresponds to the key-value pair. Not all the options in the `interaction-workspace` section can be overridden by transaction objects. Refer to [Section: interaction-workspace](#) to determine which options support overriding by transaction objects. To apply this approach, you must replicate in the annex of the transaction object the structure that is used in the `interaction-workspace` section of the Interaction Workspace Application object. The option name must be the same key as in the Interaction Workspace Application object template.

## Conflict Resolution for Configuration Options

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

### Single Value Option Types

The arbitrary conflict resolution for single-value options proceeds as follows:

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

### Transaction Object Conflicts

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

## Using Options in Genesys 8 and Interaction Workspace

Each object in Genesys Framework, including agents and the Interaction Workspace application, can be configured using Genesys Administrator. Refer to *Framework 8.1 Genesys Administrator Help* and *Genesys Administrator Deployment Guide* for detailed information on how to use Genesys Administrator and Management Framework to set up your contact center and configure objects such as agents, groups, privileges, and applications. All configuration options in Genesys 8 are divided first into sections. Sections are groups of related configuration options. Within a section, each option is

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named by its functional area, and then by its name or specific function. The Figure - **Examples of Interaction Workspace sections and configuration options, derived from metadata, displayed in the Genesys Administrator interface** shows examples of Interaction Workspace options in the KPIs and interaction-workspace sections, such as agent-status.not-ready-reasons. The functional area is agent-status, and the option name is not-ready-reasons.

Name	Section	Option
Filter	Filter	Filter
<b>interaction-workspace (107 Items)</b>		
Accessibility - Agent-state change bell	interaction-workspace	accessibility.agent-state-change-bell
Accessibility - Interaction-state change bell	interaction-workspace	accessibility.interaction-state-change-bell
Accessibility - Warning message bell	interaction-workspace	accessibility.warning-message-bell
Agent status - Enabled actions by channel	interaction-workspace	agent-status.enabled-actions-by-channel
Defines the available agent state actions in "My Channels" contextual menu. The actions are displayed in the order in which they appear in the Valid: Comma-separated list of action names from the following list: Ready, NotReady, NotReadyReason, AfterCallWork, Dnd, LogOn, LogOff. Default: Ready,NotReady,NotReadyReason,AfterCallWork,Dnd,Logon,LogOff Effective: Immediately.		
Agent status - Enabled actions global	interaction-workspace	agent-status.enabled-actions-global
Agent status - Not ready reasons	interaction-workspace	agent-status.not-ready-reasons
Channel information window title	interaction-workspace	channel-information.window-title
Contact - Available directory page sizes	interaction-workspace	contact.available-directory-page-sizes
DateSearchTypes	interaction-workspace	contact.date-search-types
Contact - Default directory page size	interaction-workspace	contact.default-directory-page-size

Examples of Interaction Workspace sections and configuration options, derived from metadata, displayed in the Genesys Administrator interface

## Option-Value Types

Option values are of the following types:

- String -- Open content or a comma-separated list of valid string or numeric values; some lists may have an open number of members to be determined by the user.
- Numeric -- Specific values or ranges of values.
- Boolean -- Either true or false.

[Interaction Workspace Configuration Options Reference](#) contains a list of all the Interaction Workspace options. It includes descriptions of their type and use. Refer also to [Deploying Interaction Workspace](#), when you are planning your implementation of Interaction Workspace.

## Effect of Privileges and Hierarchical Options on the Behavior of Interaction Workspace

This content had been moved [here](#).

# Configuring The Appearance And Content Of The User Interface

Many of the Interaction Workspace views can be configured to display certain elements depending on the context"for example:

- Case data key-value pairs
- The values that are displayed for a Case History
- The title of the Main Toolbar
- The party identifier in Voice Media view
- The information that is displayed in the Preview window

There are three ways to specify the appearance and functionality of Interaction Workspace: Administration, Personalization, and Customization.

## Administration

Administration is configuration that is performed by system administrators. It managed through Genesys Administrator by setting configuration options on the Interaction Workspace Application object. Administration settings are stored in the Genesys Configuration Layer.

## Views

The **View** options enable you 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 `ViewName` string in the option; this is the string that is passed as the `ViewName` in the view activator. For the details about how to do this, refer to the [Interaction Workspace Developer's Guide](#).

## Personalization

Interaction Workspace is personalized at the user level by the setting of Personal Preferences. Personalization data are stored in the agent annex or in the personal-data directory on the local workstation, as specified by the `options.record-option-locally-only` option. For more

information on setting preferences, see *Interaction Workspace User's Guide* and *Interaction Workspace Context-Sensitive Help* (which is available by clicking the Help icon in the Interaction Workspace Main Window, or, with the Interaction Workspace Main Window open, by pressing F1 on your keyboard). Agents have control over the display location of various Interaction Workspace Windows, as well as the arrangement and appearance of text and fields within the display.

## Customization

Customization is accomplished through development. Interaction Workspace features an open framework that enables developers to add value and extend the capabilities of the application. Interaction Workspace employs a modular design that enables you to expand and integrate your application by using multiple data sources and systems. Interaction Workspace enables you to customize views and create or customize extensions. For more information on extending Interaction Workspace, see the [Interaction Workspace Developer's Guide](#) and [.NET API Reference](#) and the [Interaction Workspace 8.1 Extension Examples](#).

# Customization

Interaction Workspace can be customized through development. Refer to the [Interaction Workspace Developer's Guide and .NET API Reference](#) and the [Interaction Workspace 8.1 Extension Examples](#) for more information.

To customize the Interaction Workspace, you must install the Interaction Workspace Developer's Kit. For more, information see: [Procedure: Installing Interaction Workspace Customization on the Windows operating system](#).

**Limitation:** Usage of Enterprise SDK that is provided with this release of Interaction Workspace is supported only for the purpose of Interaction Workspace customization.

# Deploying

This topic provides an overview of the deployment procedures for Interaction Workspace and discusses the prerequisites and other items that should be considered prior to deployment.

This topic contains the following sections:

- [Planning Your Deployment](#)
- [Deployment Overview](#)
- [ClickOnce Deployment](#)
- [Non-ClickOnce Deployment](#)
- [Configuring System-Access Permissions](#)



# Planning Your Deployment

Before you deploy Interaction Workspace, you should take time to define your needs in terms of load, bandwidth, scale, the type of network that you have or want to develop, the number of resources you plan to manage, and the type of deployment (ClickOnce or non-ClickOnce) that you want.

## Defining Your Needs

This section provides items that you should consider when you are planning your deployment.

### Load, IIS vs. Apache

Interaction Workspace is designed to be equally compatible with Microsoft Internet Information Services (IIS) or Apache web servers. Your choice depends on the server-side operating system and HTTP server that you are running. Refer to the following system guides for details on compatibility and system requirements:

- *Genesys Hardware Sizing Guide*
- *Genesys Interoperability Guide*
- *Genesys Supported Operating Environment Reference Manual*

### Type of Network

Refer to the following system guides for details on compatibility and system requirements:

- *Genesys Hardware Sizing Guide*
- *Genesys Interoperability Guide*
- *Genesys Supported Operating Environment Reference Manual*

### Choosing Between a ClickOnce Deployment and a Non-ClickOnce Deployment

**ClickOnce** A ClickOnce deployment of Interaction Workspace automatically handles software updates as you make them available in your environment. If you do not have the ability to push applications, updates, and configurations to your agents, you might want to take advantage of a managed services deployment approach in your environment by using ClickOnce. **Non-ClickOnce** In a Standard Deployment, you must install the Interaction Workspace application on each client workstation. In this scenario, you must push software updates to each workstation in your environment. Refer to the following sections for information about different deployment scenarios:

- [Deployment Overview](#)
- [ClickOnce Deployment](#)
- [Non-ClickOnce Deployment](#)

## Memory Usage

This Table represents the Memory Usage range of Interaction Workspace. Minimum value is the out of the box version using voice only interactions Maximum value is the out of the box version using multimedia interactions

OS Type	Memory used
x86 (32-bits)	185 - 320 MB
x64 (64-bits)	200 - 350 MB

Interaction Workspace can use more memory if deployed with click-once on compatibility mode with 8.1.2. This mode runs Interaction Workspace in 64-bits native mode and can use up to 450 MB.

## Monitor Resolution

The minimum supported resolution is 1024x768.

## Effects of Configuration Options and Privileges on System Performance

The behavior of Interaction Workspace is controlled by a compilation of settings in various systems and components of the Genesys 8 suite. The behavior is controlled by the following components:

- Privileges are assigned to logged-in agents through the Genesys RBAC security system (refer to [Role- and Privilege-Based Models](#)).
- Option and Annex settings that are defined in the applicable objects of the configuration layer.

Privileges are part of the security of the Genesys 8 suite; therefore, they have a higher priority than application and user settings. It is important to note that the options that are defined in the configuration layer and the routing strategy will never override any privilege management. Under this hierarchy of control, options act only on the feature set that is permitted by the privilege that is specified for a given role. For example, a graphical module is configured to be visible by the application settings; however, none of the privileges that are implemented by this module are granted to the agent; therefore the module is not visible for this agent.

These tables list the effects that some configuration options and privileges might have on network bandwidth and the local desktop, and also the performance of Configuration Server, Configuration Server proxies, and the Data Center.

### Summary of the effects of Workspace options and privileges on network bandwidth

Option/Privilege	Default Value	Values that might affect system network bandwidth	Functional impact of using different values
<a href="#">Workbins - Can Use My Team Workbins</a>	Unassigned	Assigned During supervisor/Team Lead	No Team Workbin Supervision

Option/Privilege	Default Value	Values that might affect system network bandwidth	Functional impact of using different values
		<p>login, the Workbin module loads the current state of each of the workbins of the agents on the supervisor's team to provide the supervisor with an overview of the content of each workbin.</p> <p>This action generates a set of requests to Interaction Server. The bandwidth that is consumed by those requests is proportional to the following variables:</p> <ul style="list-style-type: none"> <li>• the number of monitored agents</li> <li>• the number of workbins assigned the supervisor</li> <li>• the number of interactions in each workbin</li> <li>• the size of the interaction properties in each interaction (depends on the Business Process design)</li> </ul>	
<p><b>teamcommunicator.list-filter-showing</b></p>	<p>Agent</p>	<p>Agent</p> <p>Affected instance: Configuration Server (Proxy)</p>	<p>Target types are not displayed to agents</p>
<p><b>login.enable-place-completion</b></p>	<p>true</p>	<p>true: Workspace loads all the Places that are visible to the logged-in agent immediately to enable the process of Place. This might be a large number of Places in a large scale environment.</p> <p>Affected instance: Configuration Server (Proxy)</p>	<p>false: agents must enter their Place name manually and the verification is performed after the Place is submitted. If a default place is assigned to agents, this issue is mitigated.</p>
<p><b>teamcommunicator.load-at-startup</b></p>	<p>true</p>	<p>true: all configured object lists for team communicator are loaded during agent login and added to the index.</p>	<p>false: all configured object lists for team communicator are loaded at the first time that the Team Communicator is used.</p>

Option/Privilege	Default Value	Values that might affect system network bandwidth	Functional impact of using different values
		Affected instance: Configuration Server (Proxy)	

**Summary of Interaction Workspace options and privileges that can affect Configuration Server (or CS Proxies)**

Option/Privilege	Default Value	Values that can affect Configuration Server (or CS Proxies)	Functional impact of using different values
<code>general.configuration-update-notification</code>	All	All or <empty>: Workspace subscribes for notifications about all object types that are read.  The Agent option might also generate a lot of notifications, depending on Configuration Server operations.  Affected instance: Configuration Server (Proxy)	None: no notification at all. Any config update is taken into account at next login.  ThisApplication, ThisAgent: Workspace is informed about modifications to the configuration of the current agent or current Application. Any other changes are taken into account at the next login.
<code>teamcommunicator.list-filter-showing</code>	Agent	Agent  Affected instance: Configuration Server (Proxy)	Target types are not presented to agent
<code>login.enable-place-completion</code>	true	true: Workspace loads all the Places that are visible to the logged-in agent immediately to enable the process of Place. This might be a large number of Places in a large scale environment.  Affected instance: Configuration Server (Proxy)	false: agents must enter their Place name manually and the verification is performed after the Place is submitted. If a default place is assigned to agents, this issue is mitigated.
<ul style="list-style-type: none"> <li><code>interaction.evaluate-real-party-for-agent</code></li> <li><code>display-format.agent-name</code></li> </ul>	true	true: Workspace accesses Configuration Server and Stat Server before an interactive notification is displayed, to retrieve the display name of internal agents or supervisors who are engaged. The generated load on Config Server Proxy is not large, but it	false: the internal voice interaction parties are displayed as phone numbers instead of a display name.

Option/Privilege	Default Value	Values that can affect Configuration Server (or CS Proxies)	Functional impact of using different values
		is proportional to the flow of interactions. Affected instance: Workspace client	
teamcommunicator.load-at-startup	true	true: all lists of configured objects for Team Communicator are loaded at login time and added to the index, which can affect the system in a scenario where there is massively concurrent agent login operations. Affected instance: Configuration Server (Proxy)	false: all lists of configured objects for Team Communicator are loaded the first time that Team Communicator is used, which might make the first activation of Team Communicator slower.
<ul style="list-style-type: none"> <li>• interaction.override-option-key</li> <li>• interaction.disposition.value-business-attribute</li> <li>• interaction.case-data.format-business-attribute</li> </ul>	empty	Business Attributes and Transactions are always loaded the first time that an interaction that is received by an agent requires them. They are then cached for further usage. The more possible values that exist, the more accesses are required during interaction notification. The generated load is not large, but in case of slow response time, there might be a delay before the interactive notification is displayed.	

# Deployment Overview

Interaction Workspace can be deployed in one of three ways, depending on whether you want a ClickOnce or a non-ClickOnce deployment. Optionally, you can choose to install the developer package to customize and extend the capabilities of Interaction Workspace. Refer to Table - **Interaction Workspace Install Mode Deployment Packages** for the list and description of items that are installed by the Interaction Workspace Deployment Application.

**Interaction Workspace Install Mode Deployment Packages**

Package name	Purpose	Folder contents
Prepare a ClickOnce package	Enables IT and administrators to install the Interaction Workspace ClickOnce package on a WebServer.	The Interaction Workspace folder contains the following folders or files: <ul style="list-style-type: none"> <li>• InteractionWorkspace -- Interaction Workspace application</li> <li>• InteractionWorkspaceDeploymentManager -- Deployment Manager application</li> <li>• WebPublication -- publish.htm (bootstrap for client side) and setup.exe (prerequisites)</li> </ul>
Install Interaction Workspace Developer Toolkit	Intended for developers, testers, or those who are demonstrating the application. It contains all the deliverables, including the API references, Interaction Workspace, Deployment Manager, and Samples. <b>Note:</b> In this prototype release, this mode is not yet available. If you choose this option, not everything that you require will be installed.	The destination folder contains the following folders or files: <ul style="list-style-type: none"> <li>• Bin -- List of assemblies (DLLs) available for customization of Interaction Workspace (API)</li> <li>• Doc -- API Reference documentation</li> <li>• InteractionWorkspace -- Interaction Workspace application</li> <li>• InteractionWorkspaceDeploymentManager -- Deployment Manager application</li> <li>• WebPublication -- publish.htm (bootstrap for client side) and setup.exe (prerequisites)</li> <li>• Samples -- Samples of</li> </ul>

Package name	Purpose	Folder contents
		extensions for developers
Install Interaction Workspace application	Intended for agents, testers, or those who are demonstrating the application. It contains only the agent application.	The destination folder contains the following folder: <ul style="list-style-type: none"> <li>• InteractionWorkspace -- Interaction Workspace application.</li> </ul>

### ClickOnce Deployment

ClickOnce enables a safe and secure workflow that enables agents to be authenticated and then granted access only to specific privileges. Initially, agents are given a URL (through e-mail, a corporate portal, or a desktop shortcut) that links to the ClickOnce server. When they navigate to the server, the Interaction Workspace application is downloaded to their workstation. The application automatically starts, and agents are prompted to authenticate through the login window. When upgrades are made available, they are automatically delivered to agents upon login. The basic steps for a ClickOnce deployment are as follows:

1. Perform [Procedure: Installing Interaction Workspace Deployment Package on the Windows operating system](#), which guides you through the steps for installing Interaction Workspace on your Windows web server from the Interaction Workspace CD/DVD.
2. Deploy the ClickOnce package on your web server by using the following [Procedure: Deploying the Interaction Workspace downloadable package \(ClickOnce\) on your web server](#).
3. Start the application bootstrap to install, upgrade, or start the application.
4. Test the client application by using the following [Procedure: Configuration verification: Testing the client](#).

### Non-ClickOnce Deployment

You can install Interaction Workspace on a workstation without a ClickOnce deployment. This installation includes only the agent application. This installation option is used mainly to test Interaction Workspace on your system, not for enterprise-wide deployment. The basic steps for a Non-ClickOnce deployment are as follows:

1. Modify the Configuration Server host, port, and application name parameters in the InteractionWorkspace.exe.config file to conform with your system. This file is in the Interaction Workspace directory on the Interaction Workspace CD/DVD.
2. Perform [Procedure: Installing the Interaction Workspace application on a client desktop](#), which guides you through the steps for installing Interaction Workspace on an end-user desktop from the Interaction Workspace CD/DVD.
3. Start the application.
4. Test the client application by using the following: [Procedure: Configuration verification: Testing the client](#).

## Customization Package Deployment

You can install the Interaction Workspace application, API references, Deployment Manager, and Samples on a development workstation as follows: Perform [Procedure: Installing Interaction Workspace Customization on the Windows operating system](#), which guides you through the steps for installing Interaction Workspace Customization on a development workstation from the Interaction Workspace CD/DVD.

## ClickOnce Deployment Principles

ClickOnce provides a smooth experience for both the user and the network administrator. The user launches the application by using either a URL or a desktop icon. The URL can be provided to agents by e-mail, a corporate portal, a desktop shortcut, or other means. This simple method enables you to install the Interaction Workspace application on every workstation easily. When an agent accesses the URL the Interaction Workspace application is downloaded to the agent's workstation; it automatically starts and the login window is displayed. For subsequent application starts, the agent can reuse the initial URL or execute the application through a desktop icon or through the Start menu. If a hot fix or update is required or made available on the server, Interaction Workspace automatically upgrades the next time that the agent starts the application without you having to push-out a fix or update to every user. ClickOnce enables you to deploy a security-enabled centralized WebService. Microsoft ClickOnce deployment technology that simplifies the privilege of publishing Windows-based applications to a web server or other network file share. ClickOnce eliminates the need to reinstall the entire application whenever updates occur. Updates are provided automatically when an agent logs in. Only those portions of the application that have changed are downloaded to the client. ClickOnce applications are entirely self-contained, they do not rely on shared resources. This means that you can update other resources without any impact on Interaction Workspace, or you can update Interaction Workspace without breaking other applications. Another advantage of ClickOnce is that administrative permissions are not required for the update to be installed. The update is installed automatically from the server when an authorized client logs in.

## Scenarios: ClickOnce Principles

The following three scenarios demonstrate the utility of the ClickOnce approach to application and system security management:

- Initial installation
- Application patch
- Update of agent privilege permissions

The application patch and permission-update scenarios can occur simultaneously.

### Initial Installation

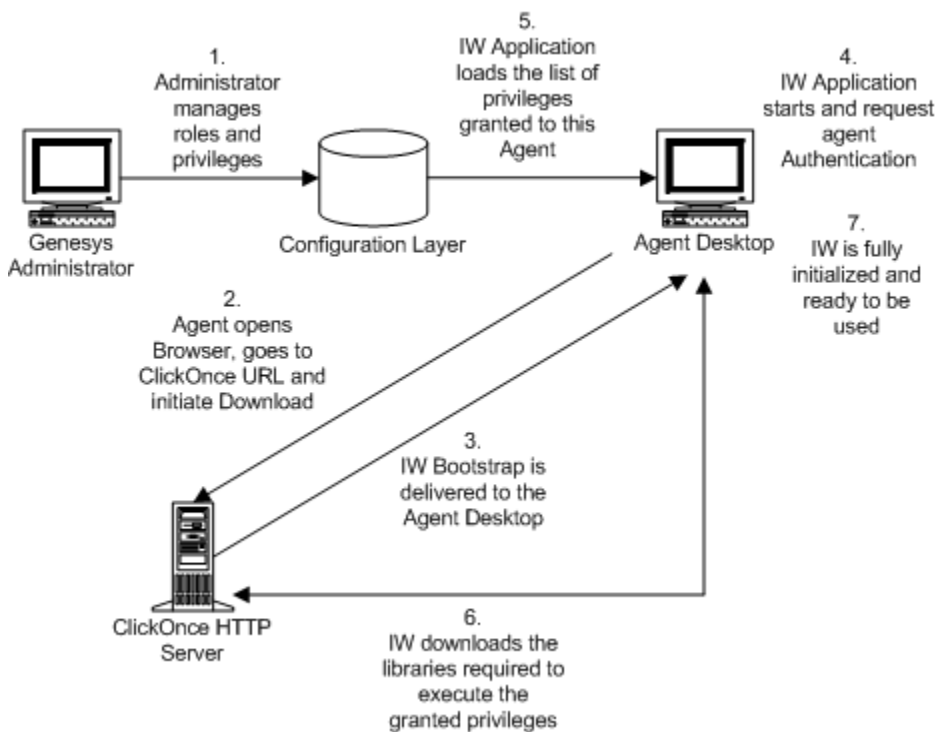
For the initial installation onto the client workstation, the following prerequisites must be met:

- The Interaction Workspace application must be installed as a ClickOnce package on the HTTP Server that enables ClickOnce.
  - Microsoft .NET Framework 3.5 SP 1 must be installed on the client workstation.
-



The Figure - **Initial ClickOnce installation of the Interaction Workspace (IW) application** shows the steps in a typical first installation of Interaction Workspace in a ClickOnce environment:

1. The administrator manages the roles and privileges of the contact-center agent by using Genesys Administrator and stores the configurations in the Configuration Layer. Through e-mail, the corporate portal, or other notification, agents are provided with the application URL.
2. Agents use the URL to go to the ClickOnce HTTP Server and initiate the download.
3. The Interaction Workspace Application Bootstrap is delivered to the agent workstation; then the Interaction Workspace application launches and agents are prompted for authentication information.  
**Note:** Agents provide their credentials and are authenticated on the network.
4. The Interaction Workspace application starts and requests agent authentication.
5. The Interaction Workspace application loads the list of privileges that are granted to each agent, based on agent authentication.
6. The Interaction Workspace application then downloads the libraries that are required to execute the granted privileges.
7. Interaction Workspace is fully initialized and ready to be used.



Initial ClickOnce installation of the Interaction Workspace (IW) application

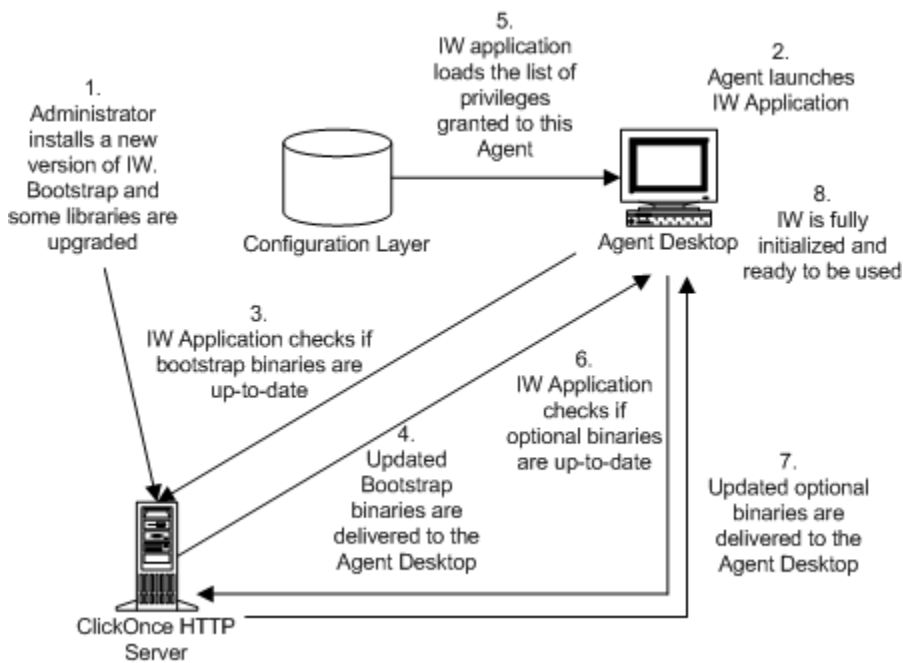
### Applying a Patch

To apply a patch to the installation on the client workstation, the following prerequisites must be met:

- The agent has run Interaction Workspace and has been successfully authenticated at least once on the current workstation.
- Privileges that are granted to the agent have not been changed since their previous authentication.

The Figure - **Patching of the Interaction Workspace (IW) application through ClickOnce** shows the steps in a typical patch installation of Interaction Workspace in a ClickOnce environment:

1. The administrator installs a new version of the Interaction Workspace Bootstrap and upgrades one or more libraries.
2. Agents launch the Interaction Workspace application on their desktop by using the URL or by double-clicking the desktop icon. The agent is authenticated.
3. The Interaction Workspace application checks the ClickOnce HTTP Server to determine if the bootstrap binaries are up to date.
4. The updated bootstrap libraries are delivered to the agent workstation.
5. The Interaction Workspace application loads the list of privileges that are granted to each agent, based on agent authentication.
6. The Interaction Workspace application checks the ClickOnce HTTP Server to determine if the optional binaries are up to date.
7. Updated binaries, if any, are delivered to the agent workstation.
8. The Interaction Workspace application is fully initialized and ready for agent use.



Patching of the Interaction Workspace (IW) application through ClickOnce

### Limitation of Patching with ClickOnce

Because of the architecture of Interaction Workspace and the underlying Platform SDK and Enterprise SDK on which it is built, patches are applied to groups of assemblies, not just to a single assembly. Therefore if one assembly in a group is updated, the whole group must be patched.

## Update Agent Privilege Permissions

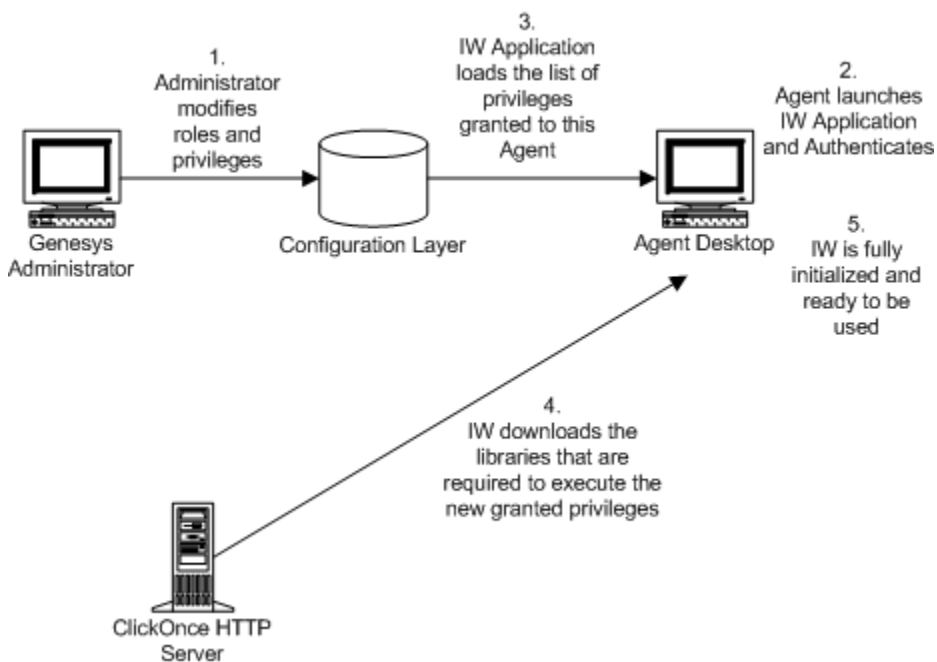
To update the Interaction Workspace installation on the client workstation with updated privilege permissions, the following prerequisites must be met:

- The agent has run Interaction Workspace and has been successfully authenticated at least once on the current workstation.
- The Interaction Workspace application has not been upgraded on the ClickOnce server since the previous login.

### Privilege Updates While the Agent is Not Logged In

The Figure - **Update of the agent's role through ClickOnce** shows the steps in a typical privilege-permission upgrade of Interaction Workspace in a ClickOnce environment if the agent is *not* already logged in:

1. The administrator modifies the roles and privileges of the contact-center agent by using Genesys Administrator and stores the modified configurations in the Configuration Layer.
2. Agents launch the Interaction Workspace application on their desktop by using the URL or by double-clicking the desktop icon. The agents are authenticated.
3. The Interaction Workspace application loads the list of privileges that are granted to each agent, based on agent authentication.
4. The Interaction Workspace application then downloads the missing libraries that are required to execute the new granted privileges.
5. Interaction Workspace is fully initialized and ready for agent use.



Update of the agent's role through ClickOnce (IW = Interaction Workspace)

## Privilege Updates While the Agent Is Logged In

If new privileges are granted to the agent while the agent is logged in, the additional libraries will not be downloaded to the agent's workstation; however, if privileges are removed, this change is taken into account immediately to ensure security.

## ClickOnce Updates for Shared Workstations

If multiple users share the same workstation, the download behavior depends on whether each agent has a unique account or whether all agents share the same account. If each agent has a unique account, then updates are downloaded by account. Therefore, each user will have to download updates. The advantage of this scenario is that multiple agents with different roles can share the same workstation without compromising security. If all users share a generic account, then only a single instance of the application is downloaded. This means that each user will have the same role as that assigned to the first user to download the application.

## Security Constraints

To deploy Interaction Workspace, three deliverable subsets are installed on the agent workstation:

- Prerequisites: Microsoft .NET Framework 3.5 Service Pack 1.
- Mandatory executable: Interaction Workspace Application Bootstrap (.exe file and mandatory DLL assemblies).
- Optional assemblies: The list of optional assemblies depends on the privileges that are granted to the agent who logs in to the application.

The .NET Framework and service pack are not installed through the ClickOnce system; they are installed by the ClickOnce Bootstrap application (see the Figure - **Initial ClickOnce installation of the Interaction Workspace (IW) application** and Figure **Patching of the Interaction Workspace (IW) application through ClickOnce**). Therefore, more rights are required on the target computer to install the prerequisite than to install Interaction Workspace. The Interaction Workspace Application Bootstrap and the optional assemblies are pure ClickOnce deliverables; therefore, the full ClickOnce security model applies to these installables. However, the .NET Framework does not have the same security constraints. Therefore, Genesys recommends that you deploy the agent application in two phases:

1. Installation of .NET Framework by the administrator **by using the ClickOnce Bootstrapper, or by using the standard network distribution.**
2. Installation of Interaction Workspace by the agents at the initial login.

You can find more information about ClickOnce security at this URL: [http://msdn.microsoft.com/en-us/library/76e4d2xw\(VS.80\).aspx](http://msdn.microsoft.com/en-us/library/76e4d2xw(VS.80).aspx)

## Code Access Security

Code Access Security (CAS) is a mechanism that limits system access to the permissions that are granted to each code. CAS protects resources and operations and enables you to grant permissions to assemblies -- giving a high degree of control over what resources the assemblies can access. For

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example, restrictions can be applied to file-system locations, the registry, and specific name spaces.

### Setting Code Access Security Permissions

You must set CAS permissions for both the Interaction Workspace ClickOnce application and the zone from which the application will be installed (for example, your local intranet, the Internet, and so on). Interaction Workspace must be defined as a Full Trust application. A Full Trust application is granted all access to any resource. Granting this level of permission is necessary because some of the embedded DLLs require Full Trust permissions. If Interaction Workspace is not defined as a Full Trust application, execution failures will occur when the application tries to access a restricted resource.

### Machine Access Security

The Interaction Workspace application, which is deployed by ClickOnce, uses CAS permissions. This means that Interaction Workspace might require more permissions than are allowed by your security policy. In this case, ClickOnce will allow an automatic elevation of privileges. However, if the publisher is not trusted, a Machine Access security warning is prompted, but no security warning is prompted if the publisher of Interaction Workspace is trusted.



**Note:** ClickOnce supports Windows Vista User Account Control (UAC); therefore no additional messages are displayed.

### ClickOnce and Installation Security

The minimum class privilege for running a ClickOnce application is User. A Guest account cannot deploy a ClickOnce application through the network. If an agent is logged in with a User account, ClickOnce will automatically elevate the privileges for installing the application on the agent's workstation. If the publisher of ClickOnce deployment is Trusted, the installation will run without any prompting; however, if the publisher is not Trusted, the agent will be prompted to Trust the publisher of the deployment.

### ClickOnce and Location Security

To deploy an application via ClickOnce, the ClickOnce HTTP server must be in a Trusted Zone, such as your local intranet, or be listed in Trusted Sites.

### ClickOnce and Publisher Security

You must consider two publishers when you are deploying a ClickOnce application: the publisher of the application and the publisher of the deployment. The Interaction Workspace Deployment Wizard updates some application files; therefore, the application manifest must be signed after these updates. The Interaction Workspace Deployment Wizard must be enabled to sign both the application and deployment manifests. To sign the manifests, the Interaction Workspace Deployment Wizard requires a security certificate. The same security certificate can be used to sign both manifests.

### Certificate Deployment Overview

You must provide a permanent certificate that is used to sign the Interaction Workspace installer manifest. This certificate is pointed to during installation. You can obtain your own certificate by one of the following methods:

- Generate a self-signed certificate by using the Makecert .exe file.
- Purchase a third-party verified certificate
- Generate a certificate by using Windows Certificate Server

**Note:** The certificate can be stored on the client side and the server side in the Windows domain. The certificate must be on the target workstation. The certificate can be declared at the Network level.

Refer to the *Genesys 8 Security Deployment Guide* to review a detailed procedure about how to create a certificate.

### Deploying Certificates on a Workstation

The Interaction Workspace Deployment Wizard requires you to do one of the following:

- Provide a security certificate.
- Generate a self-signed security certificate in the Interaction Workspace Deployment Wizard.

You must retain the Certificate file for all upcoming updates. If the updated version is signed by a different certificate, ClickOnce will consider it as a new installation, which means that you will have to uninstall the previous version by using Add/Remove Programs command *on each client workstation*.

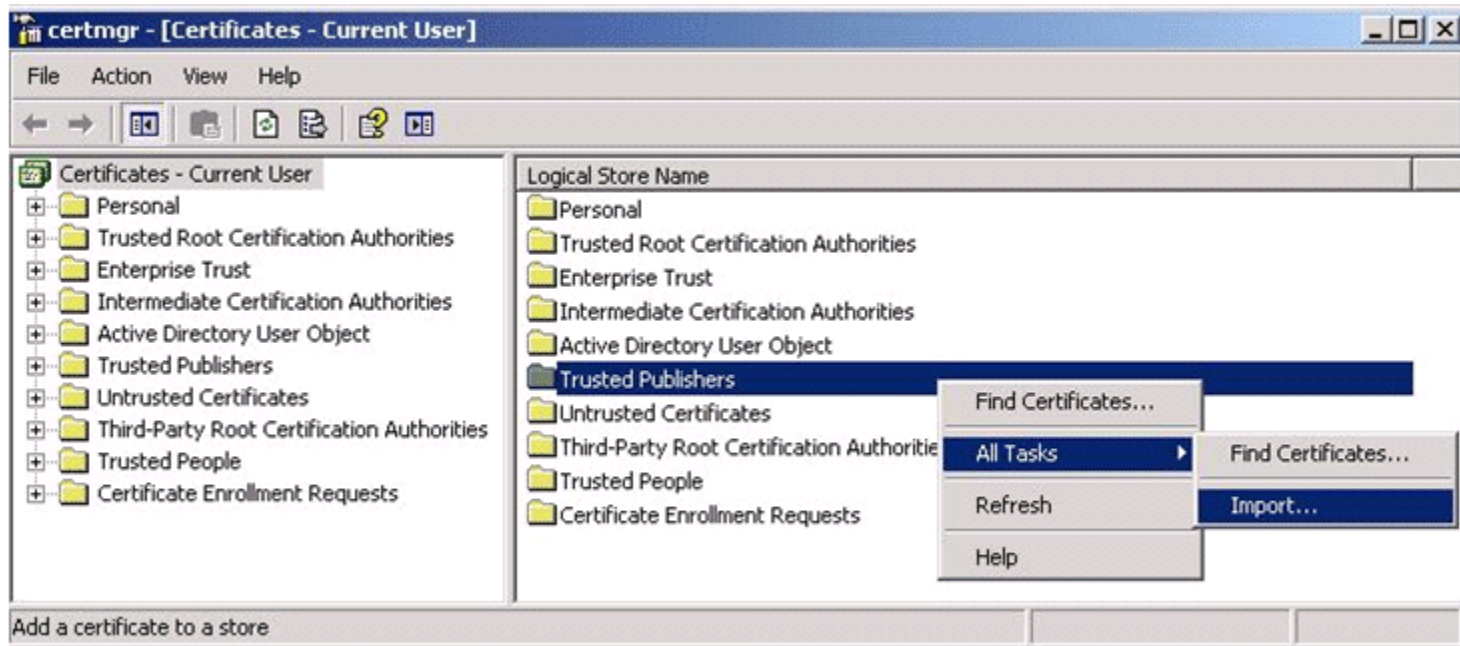
### Application and Deployment Signing Cases

The Table - **Summary of the Cases for Signing the Application and the Deployment for the Integrator and the User** provides a summary of the cases for signing the application and the deployment for the Integrator and the User, along with the impact for the user.

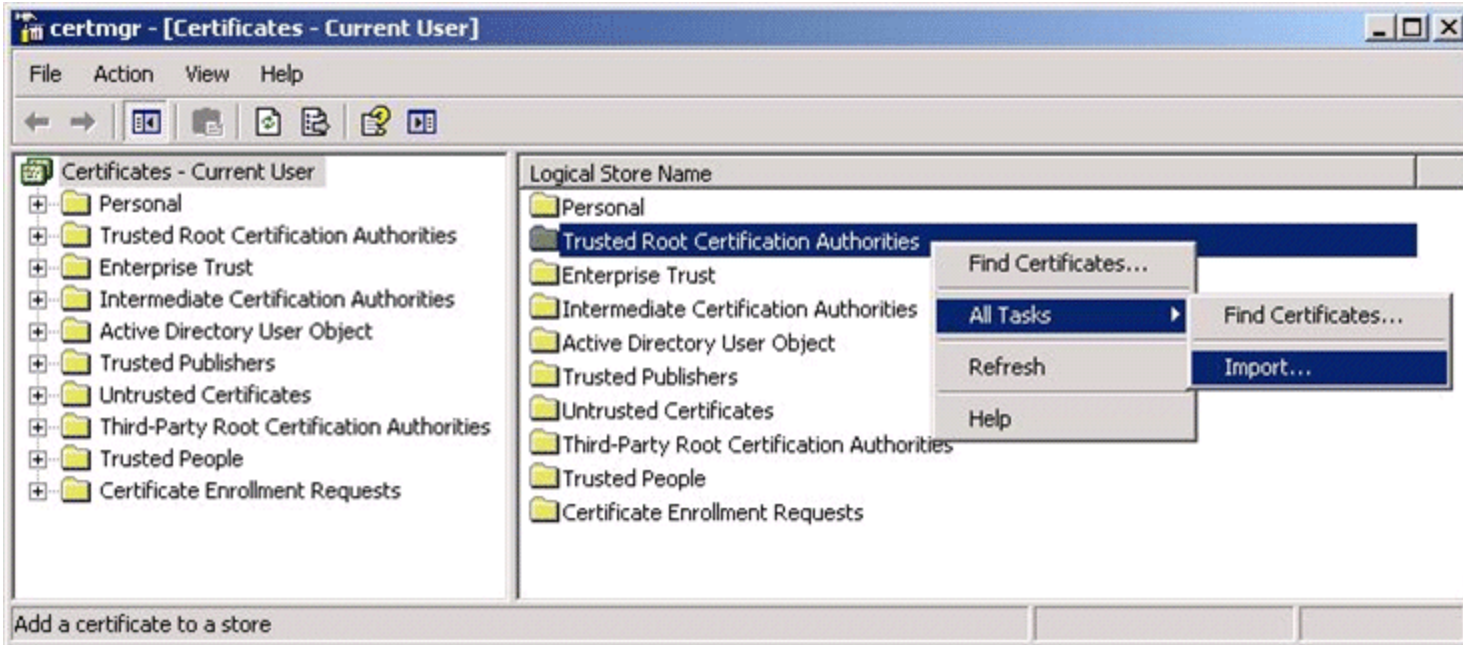
**Summary of the Cases for Signing the Application and the Deployment for the Integrator and the User**

	Integration	User administration	User impact
<b>Application Verisign Certificate</b>	Non-modifiable application		A prompt to trust the known publisher is displayed.
		Add the certificate in Trusted Publishers store (see Figure - <b>Importing a Trusted Publisher</b> ).	No warning is displayed.
<b>Application Self-Certification</b>	Non-modifiable application		A prompt to trust the unknown publisher is displayed.
		Add the certificate in the Trusted Root Certification Authorities store (see Figure - <b>Importing a Trusted</b>	No warning is displayed.

	Integration	User administration	User impact
		<b>Root Certification Authority</b> ) and in the Trusted Publishers store (see Figure - <b>Importing a Trusted Publisher</b> ).	
<b>Deployment Verisign Certificate</b>	N/A	Sign the Deployment.  Sign the Deployment and Add the certificate in the Trusted Publishers store (see Figure - <b>Importing a Trusted Publisher</b> ).	A prompt to trust the known publisher is displayed.  No warning is displayed.
<b>Deployment Self-Certification</b>	N/A	Sign the Deployment.  Sign the Deployment and Add certificate in the Trusted Root Certification Authorities store (see Figure 2) and in the Trusted Publishers store (see Figure 1).	A prompt to trust the unknown publisher is displayed.  No warning is displayed.



Importing a Trusted Publisher



Importing a Trusted Root Certification Authority

### Trusted Publishers

For a publishers to be consider a Trusted Publisher, the following criteria must be met:

- The publisher certificate must be installed in the Trusted Publishers certificate store on the user's computer.
- The issuing authority of the publisher certificate must have its own certificate installed in the Trusted Root Certification Authorities certificate store (This is already included in Verisign).

If the issuer of the certificate is not in the Trusted Root Certification Authorities certificate store, or if the publisher is not in the Trusted Publishers certificate store, the user will be prompted with a dialog box that asks for confirmation. For more information on Trusted Publisher certificates, refer to the following article: <http://msdn.microsoft.com/en-us/library/ms996418.aspx>

### Deploying Certificates on the Network

There are two methods for deploying certificates over a network to a large number of client workstations:

1. Active Directory domain
2. certmgr.exe tool

#### Active Directory Domain

If you run in an Active Directory (AD) domain, use the AD Group Policy Objects (GPO) to distribute certificates centrally. For the root Certificate Authorities (CA) certificate, add a GPO to AD, and then link to the appropriate level (usually the domain level).



1. Go to: Computer Settings>Windows Settings>Security>Public Key Policies.
2. Add the root CA certificate under Trusted Root Certification Authorities.

Next you must distribute the trusted publisher. Add a GPO to AD and link at the appropriate level (usually for the organizational unit that should trust the application).

1. Go to User Settings>Windows Settings>Internet Explorer Maintenance>Security>Authenticode Settings.
2. Click Import.
3. Click Modify.
4. Enable the Lock down Trusted Publishers feature to prevent users from modifying their Trusted Publisher certificate store.

After the standard GPO-replication-to-clients occurs, every client trusts your CA and the Trusted Publisher certificate. Users will not receive Trust challenges for applications that are signed with corporate certificates. For more information on this topic, refer to the following technical article: [http://msdn.microsoft.com/en-us/library/aa719097.aspx#clickonce\\_topic6](http://msdn.microsoft.com/en-us/library/aa719097.aspx#clickonce_topic6)

### certmgr.exe Tool

You can use the certmgr.exe tool to install the certificate on each client workstation. See the following technical article for more information: [http://msdn.microsoft.com/en-us/library/ms996418.aspx#clickoncetrustpub\\_topic5](http://msdn.microsoft.com/en-us/library/ms996418.aspx#clickoncetrustpub_topic5)

## Modifying Agent Workstations

Installation of Interaction Workspace results in the following modifications to your agent workstations:

- Interaction Workspace is added to the Start menu.
- Interaction Workspace is added to the Add/Remove Programs group in the Control Panel.
- The Interaction Workspace icon is added to the desktop.
- ClickOnce stores the application binaries and associated data files in directories that it creates and manages in the user-profile Local Settings folder or other location.

To determine the folder locations at which ClickOnce has stored the application binaries, launch Interaction Workspace, and open the About dialog box from the Help menu. Press Ctrl-Click on the Genesys icon to display hidden buttons that enable you to access the exe, data, log, and GC folders. Nothing is added to the Program Files folder or the registry. No administrative rights are required for the agent to install the application.

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# ClickOnce Deployment Prerequisites

ClickOnce provides a centralized deployment environment that enables you to distribute software and updates from a single server to all agent workstations.

A ClickOnce deployment requires certain conditions to be met both on the client-side and on the server side. This section summarizes the prerequisites for deployment on different web servers and on the client workstation. Refer to the [Tables Of Supported Systems](#) topic for information about the specific environment, system, and operating system versions that are supported by Interaction Workspace.

## Licensing and Certificate Management


For details on deploying security certificates, refer to [Constraints Security Constraints](#).

## Deployment on an Apache Server

You must have a Windows server, Linux server, or Solaris server, and Apache Server (refer to [Tables Of Supported Systems](#)). You must also configure Apache by using the following [Procedure: Configuring Apache to enable the ClickOnce package](#).

## Deployment on an IIS Server

Your environment must have Windows Server and Microsoft IIS (Refer to the [Tables Of Supported Systems](#)). The Interaction Workspace Deployment Manager is installed on the server along with the application material. To deploy Interaction Workspace, launch the Interaction Workspace Deployment Manager wizard. The wizard prompts for the required information. You must sign the ClickOnce deployment using a corporate certificate or a test certificate.

 **Note:** To avoid an error with Interaction Workspace Deployment Manager, you must log in as Administrator.

## Deployment on the Client

Interaction Workspace runs on the Windows client-side operating system. The workstation must have the .NET Framework installed. The following browsers are supported: Microsoft Internet Explorer and Mozilla Firefox. Refer to the [Tables Of Supported Systems](#) for the specific versions that are supported.

 **Note:**

- Other browsers, such as Safari, Opera, and Chrome are not officially supported and might not function correctly.
- To properly deploy the Workspace ClickOnce

package on agent workstations, the end users must have write access to the StartMenu folder of their Windows Users Profile.


## Mass Deployment of .NET Framework

If you do not have the .NET Framework installed on all of your client workstation, you can use the procedures that are found on the Microsoft Developer Network to perform a mass deployment.  
<http://msdn.microsoft.com/en-us/library/cc160717.aspx>

# Non-ClickOnce Deployment Prerequisites

A non-ClickOnce deployment does not give you the advantages of managing updates to privileges, permissions, or software upgrades. A non-ClickOnce deployment is done typically for testing or development purposes where the agent workstation is not in a production environment. Only the Interaction Workspace application is installed on the client workstation.

Interaction Workspace runs on the following client-side operating systems: Windows XP, Vista, 2003, or 2008. The workstation must have the .NET Framework 3.5, SP 1 installed. The following browsers are supported: Microsoft Internet Explorer 6, 7, and 8; and Mozilla Firefox 2 and 3.

 **Note:** Other browsers, such as Safari, Opera, and Chrome are not officially supported and might not function correctly.

## Mass Deployment of .NET Framework

If you do not have the .NET Framework installed on all of your client workstation, you can use the procedures found on the Microsoft Developer Network to perform a mass deployment.

<http://msdn.microsoft.com/en-us/library/cc160717.aspx>

# Configuring System-Access Permissions

For Interaction Workspace to run correctly, the agent application must be granted permission to access specific system objects. When Interaction Workspace is launched, it connects to Configuration Server using the credentials of the agent who is logging in. Therefore, the required permissions to access system objects are typically much higher than those granted to an agent who uses Interaction Workspace. To mitigate this situation you must assign three different kinds of permissions to the agent login:

- Execute permissions
- Read permissions
- Write permissions

The following subsections describe how to configure these permissions in the Permissions tab of the specified object. You can choose to configure agents individually by the Person object, or as a group by Access Group. Refer to *Framework 8.1 Genesys Administrator Help* and *Genesys Security Guide* for detailed information on how to use Genesys Administrator and Management Framework to configure access permissions

## Configuring Execute Permissions

You must grant execute permissions for the Interaction Workspace application to each agent or groups of agents so that Interaction Workspace can connect to Configuration Server to start the application.

## Configuring Read Permissions

Agents might require permissions to read from the Application objects that are referenced in the Connection list of the Interaction Workspace application object. They might be required to connect to one of these servers to activate its associated features. The following is a list of items to which an agent might require read access:

- The host of any application objects that are referenced in the Connection list of the Interaction Workspace application object.
  - The Person object that corresponds to the agent.
  - The Place object that corresponds to the voice channel to which the agent is assigned.
  - The DN object that determines the capacity of the channel (Voice, IM). This information is stored in annex of the DN.
  - The Switch and the T-Server object to determine the possible channel.
  - The Tenant object.
  - The Person objects of the Tenant to enable Team Communicator to access the firstname, lastname, and username of internal targets.
  - The Skills objects of the Tenant to enable Team Communicator to access the names of Skills.
-

- The Agent Group objects of the Tenant to enable Team Communicator to access the names of Agent Groups.
- The Routing Point objects of the Tenant to enable Team Communicator to access the number, name, and switch.name of Routing Points.
- The ACD Queue objects of the Tenant to enable Team Communicator to access the number, name, and switch.name of ACD Queues.
- The User Properties of the agent's Tenant, logged in application, and agent's Agent Groups, to read corporate favorites for display in Team Communicator.
- The Business Attributes of the Tenant to enable the Contact module to use Business Attributes.
- The transaction object of the Tenant that can be used for overriding options of the strategy.
- The applications used as Backup servers and configuration Server application to have HA.
- Script objects of the tenant Interaction queue and workbins.

## Configuring Write Permissions

If you have configured the agent to store preferences in their Person annex instead of on their local desktop, you must grant that agent write permissions on their Person object. If you have configured your system to prompt for a the agent's phone number at login time (this requires SIP Server), you must grant write access to the agent on the SIP DN in which the agent logs in, to set the request-uri.

# Deployment Procedures

This chapter provides the procedures that are required to install and deploy Interaction Workspace in a Genesys 8 environment. The following task table provides an overview of how to set up your Genesys 8 Configuration Layer for Interaction Workspace, install and deploy Interaction Workspace, and perform additional (optional) installations. Refer to *Framework 8.1 Genesys Administrator Help* and *Genesys Security Guide* for detailed information on how to use Genesys Administrator and Management Framework to configure access permissions.

## Preparing the Configuration Layer and Installing Interaction Workspace

Objective	Related procedures and actions
1. <b>Preparing The Configuration Layer</b>	<ul style="list-style-type: none"> <li>• <a href="#">Procedure: Installing Interaction Workspace Deployment Package on the Windows operating system</a></li> <li>• <a href="#">Procedure: Using Genesys Administrator to set up the Interaction Workspace application</a></li> <li>• (Optional) <a href="#">Procedure: Enabling client-side port definition</a></li> </ul>
2. <b>Installing The Deployment Package</b>	<ol style="list-style-type: none"> <li>1. <a href="#">Procedure: Installing Interaction Workspace Deployment Package on the Windows operating system</a></li> <li>2. (Optional) <a href="#">Install Language Packs for Workspace</a></li> </ol>
3. (Optional) <b>Deploying The ClickOnce Application On Your Web Server</b> . Choose this option if you want to deploy Interaction Workspace as a ClickOnce application.	<ol style="list-style-type: none"> <li>1. <a href="#">Procedure: Deploying the Interaction Workspace downloadable package (ClickOnce) on your web server</a></li> <li>2. (Optional) <a href="#">Procedure: Installing the Interaction Workspace SIP Endpoint</a></li> <li>3. <a href="#">Procedure: Configuring Apache to enable the ClickOnce package</a></li> <li>4. <a href="#">Procedure: Configuration verification--Testing the client</a></li> </ol>
4. (Optional) <b>Installing The Interaction Workspace Developer Toolkit</b> . Choose this option if you want to deploy the Interaction Workspace developer package.	<ol style="list-style-type: none"> <li>1. <a href="#">Procedure: Installing Interaction Workspace Customization on the Windows operating system</a></li> <li>2. (Optional) <a href="#">Procedure: Installing the Interaction Workspace SIP Endpoint</a></li> <li>3. (Optional) <a href="#">Install Language Packs for Workspace</a></li> </ol>

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Objective	Related procedures and actions
<p>5. (Optional) <b>Installing The Interaction Workspace Application</b>. Choose this option if you want to deploy a non-ClickOnce version of Interaction Workspace.</p>	<ol style="list-style-type: none"><li>1. <b>Procedure: Installing the Interaction Workspace application on a client desktop</b></li><li>2. (Optional) <b>Procedure: Installing the Interaction Workspace SIP Endpoint</b></li><li>3. (Optional) <b>Procedure: Installing the Screen Capture Application</b></li><li>4. (Optional) <b>Installing Plug-ins for Interaction Workspace</b></li><li>5. (Optional) <b>Install Language Packs for Workspace</b></li></ol>



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# Configuring the Interaction Workspace Application Object

Interaction Workspace is designed to be used with the Genesys 8 Suite. Before you install Interaction Workspace, you must deploy the Genesys 8 Management Framework. You must also be familiar with Genesys Administrator 8.0.2 or higher. For more information on these products, please consult the following documents:


- Genesys Framework documentation set
- Genesys Administrator Deployment Guide
- Framework 8.1 Genesys Administrator Help

## Procedure: Using Genesys Administrator to create and provision the Interaction Workspace application

**Purpose:** To create and configure an Interaction Workspace Application object in Genesys Administrator to enable you to deploy and provision Interaction Workspace.

The Interaction Workspace Application Template and the configuration metadata are included in the standard application-template set that comes with Genesys Suite 8.

Use the Options tab of the Interaction Workspace Application object to provision Interaction Workspace by setting configuration options. Refer to [Provisioning Interaction Workspace](#) for more details.

 **Note:** To use the cClientPort feature with Configuration Server, you must use the Interaction\_Workspace\_810.apd (or later) template for your application.

### Prerequisites

- Genesys Administrator 8.0.2 or higher, configured to show Advanced View
- A working knowledge of Genesys Administrator 8

### Start

1. In Genesys Administrator, choose the Provisioning view.
2. Upload the following Application Template: Interaction\_Workspace\_8xx.apd (where xx represents the version of Interaction Workspace that you are installing)
3. Upload the following application metadata: Interaction\_Workspace\_8xx.xml (where xx represents the version of Interaction Workspace that you are installing)
4. Save the Application Template.

5. Create a new Interaction Workspace application.
6. Set the application name.
7. Save the application.

**End****Next Steps**

- [Using Genesys Administrator to set up the Interaction Workspace application](#)

## Procedure: Using Genesys Administrator to set up the Interaction Workspace application

**Purpose:** After you create the Interaction Workspace Application object, you must set up connections to various Genesys components.

**Prerequisites**

- [Procedure: Using Genesys Administrator to create and provision the Interaction Workspace application](#)

**Start**

1. In Genesys Administrator, choose the Provisioning view.
  2. Open the Interaction Workspace Application object that you created.
  3. Add the following connections:
    - T-Server or SIP Server (for Voice and IM features)
    - Statistics Server (for Statistics feature and Presence)
    - Universal Contact Server (for Contact Management)
    - Interaction Server (for eServices)
- Grant execution rights to the agents that will log on to this application.
  - Grant read rights to the agents that will log on to this application for the objects listed in Steps 3.
  - (Optional) To use HA functionality, grant Read rights to backup applications of the object that are listed in Step 3 and Configuration Server application, and the associated Host objects.

**End****Next Steps**

- (Optional) [Procedure: Enabling client-side port definition](#)
- [Installing The Deployment Package](#)

## Procedure: Configuring Interaction Workspace for Business Continuity

**Purpose:** To manage server and switch connections to enable Interaction Workspace to connect to an alternate (Peer) SIP Server in the event of a disaster at the Preferred agent login site.

Interaction Workspace enables you to use SIP Server Business Continuity (disaster recovery) to ensure that your agents can keep working in the event that one of your sites experiences a disaster or other loss of service.

### 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.
- Two synchronized sites, each with configured High Availability (HA) pairs.

### Start

1. On the SIP Server object at the Preferred site, configure the `disaster-recovery.site` option in the `interaction-workspace` section with a symbolic name, such as `Site X`, for the server. The symbolic name is how the server will be identified to the Business Continuity functionality. The Preferred site for one agent or group of agents will also be the Peer site for another agent or group of agents. The concept of Preferred site and Peer site is then configured agent by agent (or agent group by agent group) as described below.
2. You can also use the optional `disaster-recovery.name` option in the `interaction-workspace` section of both SIP Server objects of an HA pair to identify two SIP Servers as belonging to the same pair. If no name is specified for this option, the value `default` is assumed.
3. On the SIP Server object at the Peer site, configure the `disaster-recovery.site` option in the `interaction-workspace` section with a symbolic name, such as `Site Y`, for the server. The symbolic name is how the server will be identified to the Business Continuity functionality.
4. For each agent, agent group, or tenant, configure the `disaster-recovery.preferred-site` option in the `interaction-workspace` section by specifying the symbolic site name of the SIP Server that you specified with the `disaster-recovery.site` option.
5. For each agent, agent group, or tenant, configure the `disaster-recovery.peer-site` option in the `interaction-workspace` section with the symbolic site name of the SIP Server that you specified with the `disaster-recovery.site` option.
6. Enable Business Continuity for each agent, agent group, or tenant and specify the Business Continuity behavior by configuring the other Business Continuity options that are listed in the [Business Continuity Configuration Options](#) reference.

### End

## Procedure: Enabling client-side port definition

**Purpose:** To enhance security by defining a client-side port.

Defining the access ports for each application to which Interaction Workspace connects ensures the security of the system. This feature is configured partially on Framework Configuration Server and partially on the Interaction Workspace application in Genesys Administrator.

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## Prerequisites

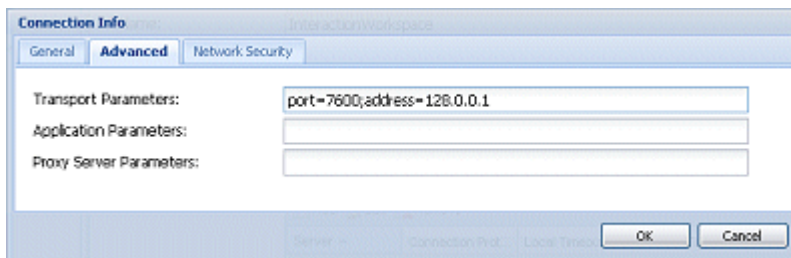
- **Procedure: Using Genesys Administrator to set up the Interaction Workspace application.** To use the clientPort feature with Configuration Server, you must use the Interaction\_Workspace\_810.apd (or later) template for your application.

## Start

1. Configure the connection to Configuration Server.
  - a. Open the InteractionWorkspace.exe.config file. This file is in the Interaction Workspace directory on the Interaction Workspace CD/DVD.
  - b. In the appSettings section, modify the value of the transport-port and transport-address keys as follows:  
For the transport-address key, specify the IP address or the host name that a client will use to make a TCP/IP connection to Configuration Server. If the value is empty, this parameter is not used.  
For the transport-port key, specify the port number that a client will use to make a TCP/IP connection to Configuration Server. If the value is empty, this parameter is not used.

```
<appSettings>
<add key="login.url" value="tcp://[ToBeChanged config_hostname]:[ToBeChanged
config_port]<br/>/[ToBeChanged config_ApplicationName]" />
<add key="login.connections.parameters.isenable" value="true" />
<add key="options.record-option-locally-only" value="false" />
<add key="about.view-region.isvisible" value="false"/>
<add key="transport-address" value="[ToBeChanged transport_address]"/>
<add key="transport-port" value="[ToBeChanged transport_port]"/>
</appSettings>
```

3. Configure the connection to Statistic Server. For additional information, refer to the *Client-Side Port Definition* chapter of the *Genesys 8.0 Security Deployment Guide*.
  - a. In Genesys Administrator, open the Interaction Workspace application.
  - b. Select StatSever in the Connections area.
  - c. Click Edit.
  - d. In the Connection Info dialog box, click the Advanced tab.
  - e. In the Transport Parameters field (see Figure - **Genesys Administrator Application Connection Info dialog box**), specify the following parameters:  
port=<port number>;address=<IP address>  
Where: <port number> is the port number that a client will use for its TCP/IP connection to the server, and <IP address> is the IP address (or host name) that a client will use for its TCP/IP connection to the server.  
You can configure one or two parameters. If you configure two parameters, they must be separated by a semicolon.



Genesys Administrator Application Connection Info dialog box

- f. Click OK.
  - g. In the Interaction Workspace application configuration window, click either Save or Save and Close.
8. Configure the connection to T-Server and/or SIP Server. For additional information, refer to the *Client-Side Port Definition* chapter of the *Genesys 8.0 Security Deployment Guide*.
- a. In Genesys Administrator, open the Interaction Workspace application.
  - b. In the Connections area, select your T-Server. If you have connections to more than one T-Server, repeat Step 3 for each connection.
  - c. Click Edit.
  - d. In the Connection Info dialog box, click the Advanced tab.
  - e. In the Transport Parameters field (see Figure - **Genesys Administrator Application Connection Info dialog box**), specify the following parameters:  
port=<port number>;address=<IP address>  
Where: <port number> is the port number that a client will use for its TCP/IP connection to the server, and <IP address> is the IP address (or host name) that a client will use for its TCP/IP connection to the server.  
You can configure one or two parameters. If you configure two parameters, they must be separated by a semicolon.
  - f. Click OK.
  - g. In the Interaction Workspace application configuration window, click either Save or Save and Close.
8. Configure the connection to Universal Contact Server. For additional information, refer to the *Client-Side Port Definition* chapter of the *Genesys 8.0 Security Deployment Guide*.
- a. In Genesys Administrator, open the Interaction Workspace application.
  - b. Select UCS in the Connections area.
  - c. Click Edit.
  - d. In the Connection Info dialog box, click the Advanced tab.
  - e. In the Transport Parameters field (see Figure - **Genesys Administrator Application Connection Info dialog box**), specify the following parameters:  
port=<port number>;address=<IP address>  
Where: <port number> is the port number that a client will use for its TCP/IP connection to the server, and <IP address> is the IP address (or host name) that a client will use for its TCP/IP connection to the server.  
You can configure one or two parameters. If you configure two parameters, they must be separated by a semicolon.
  - f. Click OK.
  - g. In the Interaction Workspace application configuration window, click either Save or Save and Close.

## End

## Next Steps

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- [Installing The Deployment Package](#)
- [Enabling Client-side Port Definition](#)

# Installing The Deployment Package


This section explains how to begin installation on the supported operating system by using the [Procedure: Installing Interaction Workspace Deployment Package on the Windows operating system](#).

## Important

- Some releases of Workspace include Workspace language packs (localized User Interface and Help). These procedures include information about how to install language packs either as part of the Workspace deployment or after you have deployed Workspace.
- Genesys recommends that you always install the release of Workspace for which the language pack was developed rather than installing a language pack on a previously deployed release of Workspace. For example, you should not install an 8.5.1 language pack on top of an 8.5.0 release of Workspace; doing so might result in some UI text being displayed in English or some UI elements being incorrectly labelled.
- If you are not deploying from the Workspace International CD/DVD, you must **manually add Language Packs** to your deployment package.

## Procedure: Installing Interaction Workspace Deployment Package on the Windows operating system

**Purpose:** To install the deployment files for Interaction Workspace on the Windows web server.


 **Note:** After running one of the Windows installers, inspect the directory tree of your system to make sure that the files have been installed in the location that you intended.

### Prerequisites

- Have Administrative rights to the web server
- Framework .NET 2.0 installed

### Start

1. On your desktop, open the Interaction Workspace CD/DVD or the Interaction Workspace IP and double-click the Setup.exe file.  
You might be asked to reboot your system to delete or rename certain system files before the Installation Wizard runs.

 **Note:** You might have to reboot more than once. If you do

not want to reboot, or if the warning message that requests a reboot is still displayed after you reboot, do the following to force the installation: In Registry Editor, rename the PendingFileRenameOperations in the following key: HKEY\_LOCAL\_MACHINE\SYSTEM\CurrentControlSet\Control\Session Manager to Start IP After setup is complete, you can rename the registry item back to the original value.

The Genesys Installation Wizard launches and the Welcome panel is displayed.

2. On the Welcome panel, do one of the following:

- Click Next to begin the installation procedure.
- Click Cancel to exit the Genesys Installation Wizard.
- Click About to open the Interaction Workspace ReadMe file in your default browser.

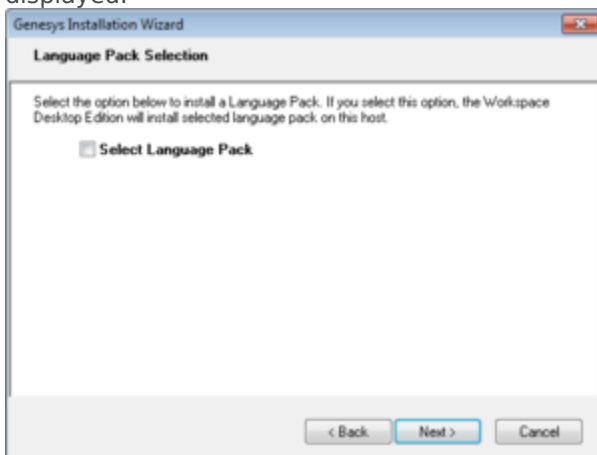
If you clicked Next, the Select Options panel is displayed.

- On the Select Options panel, do one of the following:
  - Choose Prepare a ClickOnce package, and click Next.
  - Click Back to return to the Welcome panel.
  - Click Cancel to exit the Genesys Installation Wizard.

For more information about installation options, see [Table - Interaction Workspace Install Mode Deployment Packages](#)).

If you clicked Next, the Choose Destination Location panel is displayed (see Figure - **Choose Destination Location panel of the Genesys Installation Wizard**).

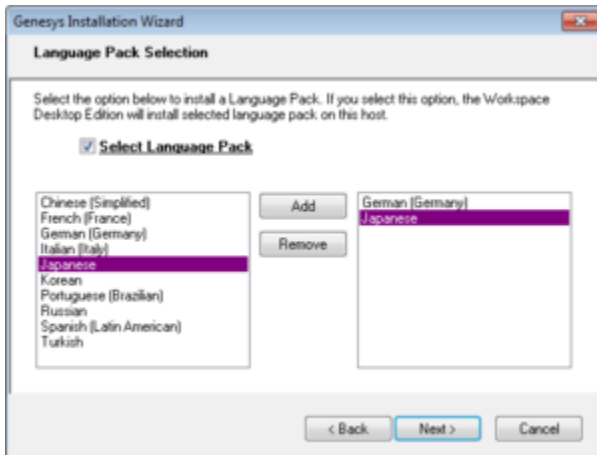
- (Optional) If you are installing from the International DVD, the Language Pack Selection panel is displayed.



Language Pack Selection panel of the Genesys Installation Wizard



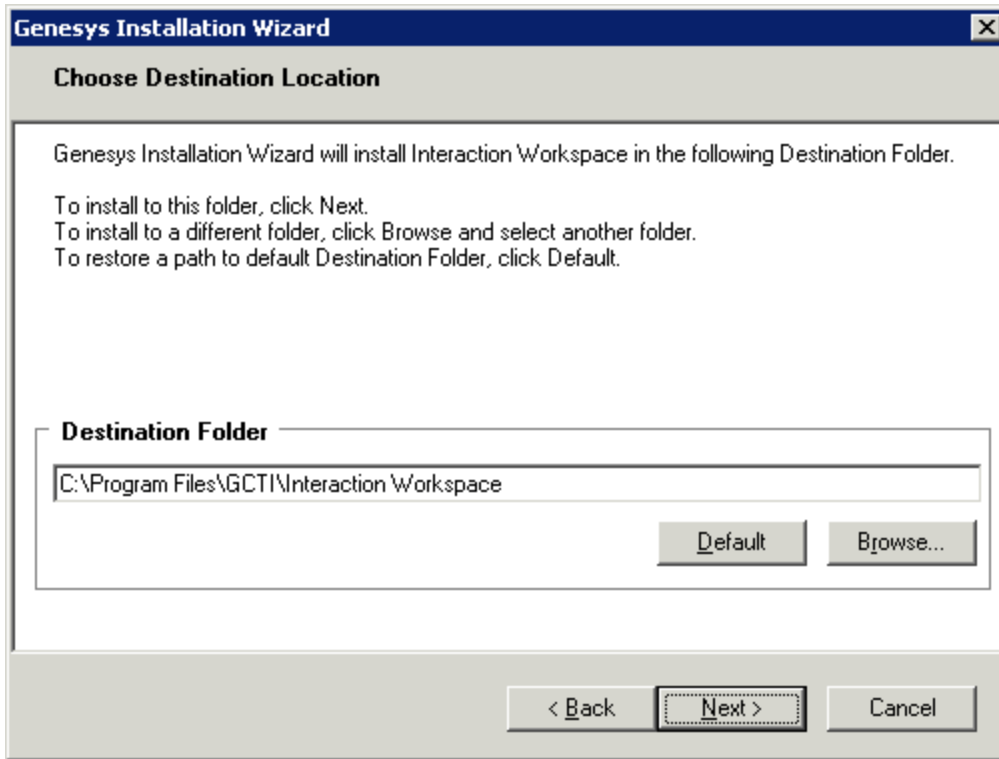
Select **Select Language Pack** to display the list of available language packs.



Adding and Removing languages by using the Language Pack Selection panel of the Genesys Installation Wizard

To select a language for installation, select it in the left hand box then click **Add**. The language is moved to the right hand box. To de-select a language for installation, select it and click **Remove**. The language is moved back to the left hand box and will not be installed. After you have added to the right hand box the languages that you want to install, do one of the following:

- Click **Next** to continue the installation procedure.
  - Click **Back** to return to the **Select Options** panel.
  - Click **Cancel** to exit the Genesys Installation Wizard.
- On the **Choose Destination Location** panel, specify the location on your web server in which Interaction Workspace is to be installed by doing one of the following:
    - Type a location in the **Destination Folder** text box.
    - Click **Default** to reset the location to the default location.
    - Click **Browse** to navigate to a destination folder.



Choose Destination Location panel of the Genesys Installation Wizard

- With the destination folder specified, do one of the following:
  - Click Next.
  - Click Back to return to the Select Options panel.
  - Click Cancel to exit the Genesys Installation Wizard.

If you clicked Next, the Ready to Install panel is displayed.

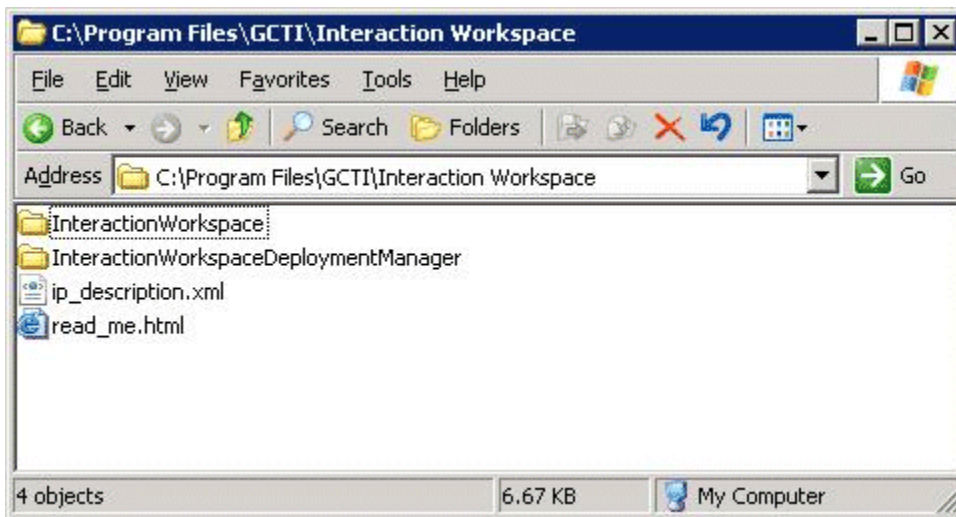
- On the Ready to Install panel, do one of the following:
  - Click Install to install Interaction Workspace on your web server.
  - Click Back to return to the Choose Destination Location panel.
  - Click Cancel to exit the Genesys Installation Wizard.

If you clicked Next, Interaction Workspace is installed in the location that you specified. When installation is complete, the Installation Complete panel is displayed.

Figure 13 - **Contents of the Interaction Workspace install disc or image copied onto the web-server host** shows the files that are installed by the Prepare a ClickOnce package option (for more information about installation

options, see [Table - Interaction Workspace Install Mode Deployment Packages](#)).

- The InteractionWorkspace folder contains the Interaction Workspace application files.
- The InteractionWorkspaceDeploymentManager folder contains the application files required for deployment, including the Deployment Manager application: InteractionWorkspaceDesktop.exe. This folder contains the following subfolder:
  - WebPublication"Contains the publish.htm and setup.exe (the bootstrap for client-side prerequisites). For more information, see [Procedure: Deploying the Interaction Workspace downloadable package \(ClickOnce\)](#) on your web server.



Contents of the Interaction Workspace install disc or image copied onto the web-server host

- Click Finish to exit the Genesys Installation Wizard.

### End Next Steps

- (optional) [Procedure: Installing the Interaction Workspace SIP Endpoint](#)
- (optional) [Procedure: Installing plugins for Interaction Workspace](#)
- [Procedure: Deploying the Interaction Workspace downloadable \(ClickOnce\) package on your web server](#)


---

# Deploying The ClickOnce Application On Your Web Server

Use the Interaction Workspace Deployment Manager wizard to generate the file hierarchy that is required by the ClickOnce application on your web server. During the deployment of the ClickOnce application, you are required to enter the following information in the Deployment Manager:


- The deployment URL
- The deployment version
- The deployment certificate:
  - If you do have a deployment certificate, select the Sign with a provided certificate option, and then browse to select the certificate. You must also input the password in the dedicated text box.
  - If you do not have a deployment certificate, do not select the Sign with a provided certificate option. Without a signed package, a security warning is displayed whenever the client downloads the package.

Be sure to have this information ready before you begin. [Procedure: Deploying the Interaction Workspace downloadable ClickOnce package on your web server](#) contains the deployment steps for deploying Interaction Workspace on your web server.

 **Note:** You can put the Interaction Workspace downloadable package in a shared directory instead of on your web server, and then install Interaction Workspace from a shared directory.

## Procedure: Deploying the Interaction Workspace downloadable ClickOnce package on your web server

**Purpose:** Deploy the Interaction Workspace downloadable package on your web server by using the Interaction Workspace Deployment Manager Wizard

 **Note:** The following procedure employs a Windows-based Deployment Wizard. If your HTTP server is running on a Solaris or Linux server, you must first build the deployment package on a computer that is running the Windows Operating System, and then copy the package to a compatible location on your Solaris or Linux HTTP server.

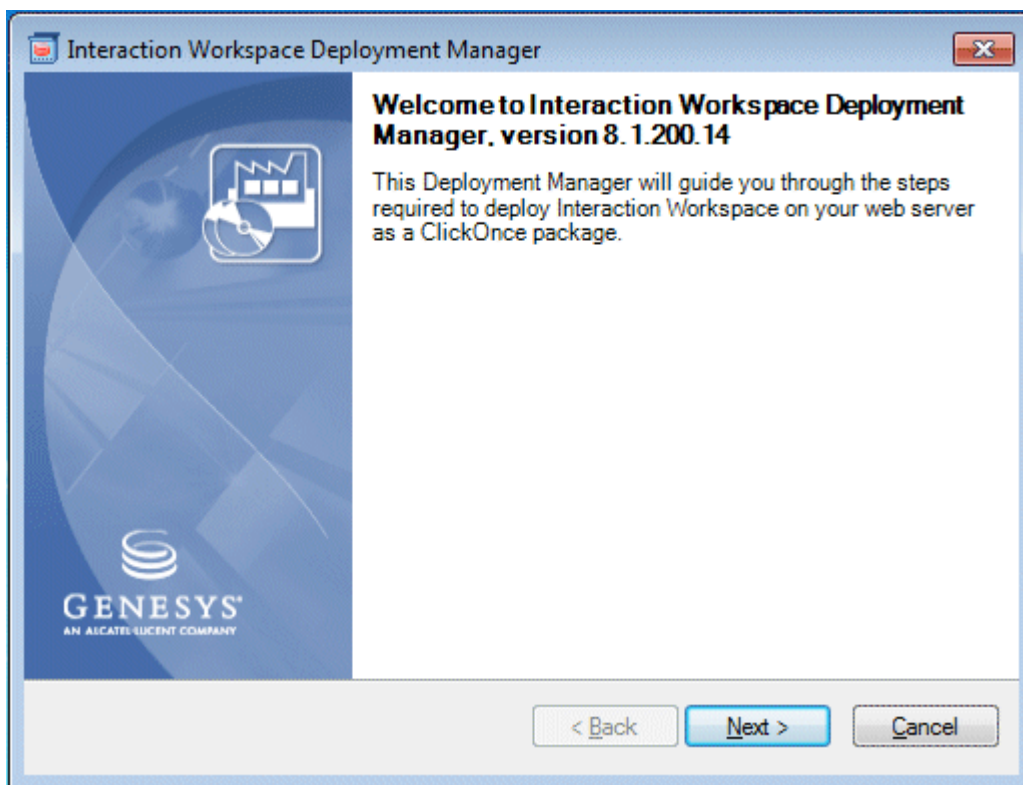
### Prerequisites

- Install the Deployment Manager and associated files from the Genesys Interaction Workspace disc or download image. See [Procedure: Installing Interaction Workspace Deployment Package on the Windows operating system](#).

- Create an Application object of type Interaction Workspace from the Interaction Workspace Application template.
- Microsoft .NET Framework 2.0 installed on the computer on which you run the wizard. This can be the computer on which you run your web server.

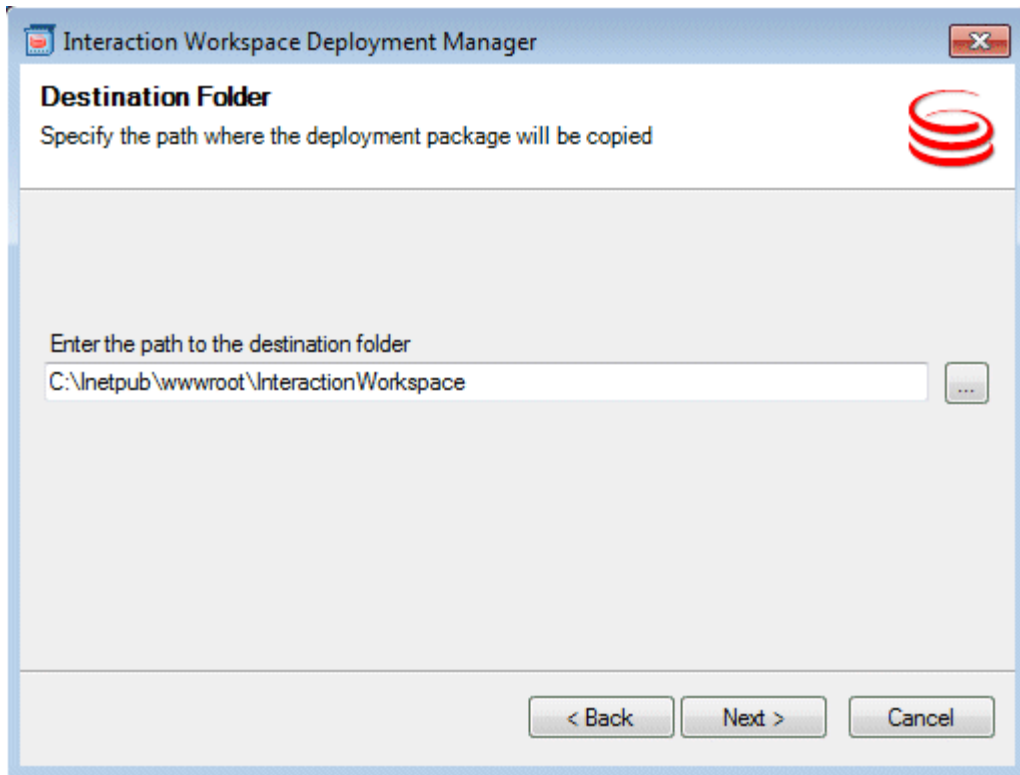
## Start

1. Open the InteractionWorkspaceDeploymentManager folder. This folder contains the application files required for deployment, including: InteractionWorkspaceDesktop.exe.
2. Launch the InteractionWorkspaceDeploymentManager.exe application by double-clicking the file or selecting it from the Start menu. The Deployment Manager installs the ClickOnce files on your web server. The Welcome pane of the Deployment Manager is displayed (refer to Figure - **The Interaction Workspace Deployment Manager splash page**).



The Interaction Workspace Deployment Manager splash page

3. Click Next to proceed with the installation. Click Cancel to cancel the deployment.
4. If you clicked Next, the Deployment Folder pane is displayed (refer to Figure - **Interaction Workspace Deployment Manager Deployment Folder pane**). Specify the location on your server in which you want the ClickOnce files to be deployed. If you are deploying to a Solaris server or a Linux server, specify a local folder on the Windows-based computer on which you are running the Deployment Wizard. From this location, you will build the deployment package that you must manually copy to your Solaris or Linux HTTP server.



Interaction Workspace Deployment Manager Deployment Folder pane

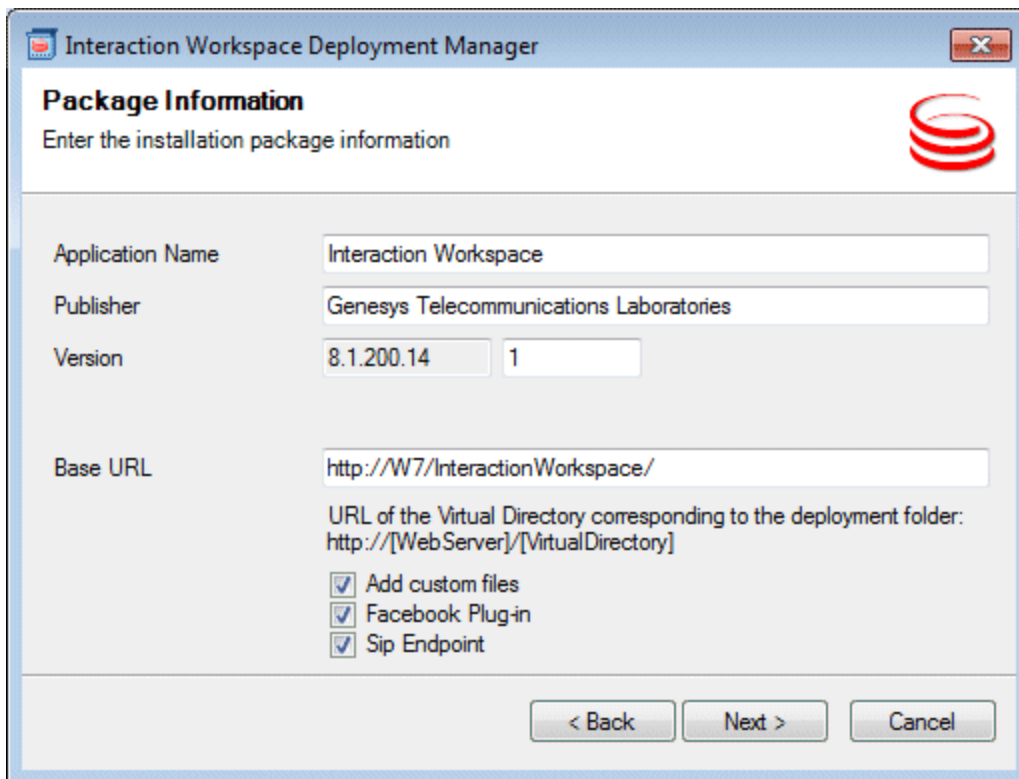
5. Click Next to proceed with the installation. Click Cancel to cancel the deployment. Click Back to return to the previous panel.
6. If you clicked Next, the Package Information pane is displayed (refer to Figure - **Interaction Workspace Deployment Manager Package Information pane**). This pane is filled-in automatically. Modify these parameters only if necessary.

You can change the application name, the publisher (which is displayed in the `publish.htm` page), and the base URL, which is the URL that corresponds with the virtual directory that is linked to the deployment folder.

There are one or more optional check boxes that you can use to add plug-ins to the Interaction Workspace application:

- Add custom files -- Select to add custom content such as simple data files, including rebranding icons or sound files, or file assemblies that implement your Interaction Workspace Customization API.
- <plug-in name> -- Select this option to use your installed plug-in, such as Interaction Workspace SIP Endpoint, Social Engagement plug-in, Localization Packs, and so on.

Click Next to proceed with the installation. Click Cancel to cancel the deployment. Click Back to return to the previous panel.



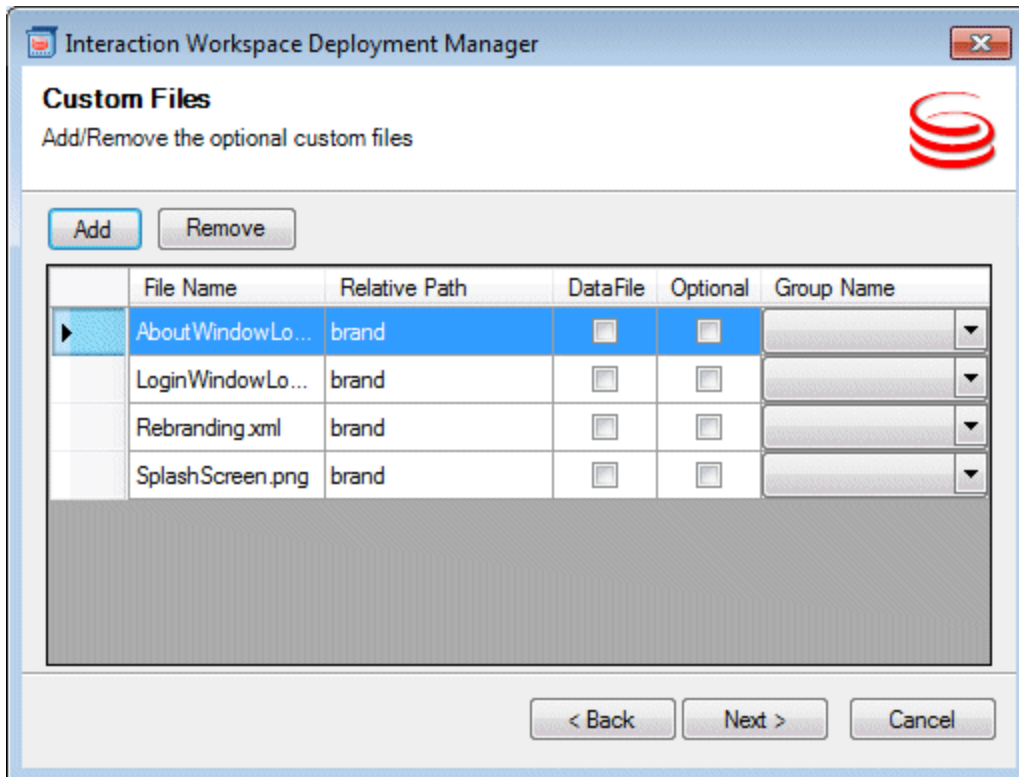
The screenshot shows a Windows-style dialog box titled "Interaction Workspace Deployment Manager". The main heading is "Package Information" with the instruction "Enter the installation package information". A red circular logo is in the top right corner. The form contains the following fields and options:

- Application Name: Interaction Workspace
- Publisher: Genesys Telecommunications Laboratories
- Version: 8.1.200.14 and 1
- Base URL: http://W7/InteractionWorkspace/
- URL of the Virtual Directory corresponding to the deployment folder: http://[WebServer]/[VirtualDirectory]
- Checkboxes:  Add custom files,  Facebook Plug-in,  Sip Endpoint

At the bottom are three buttons: "< Back", "Next >", and "Cancel".

Interaction Workspace Deployment Manager Package Information pane

- If you clicked Next, and if you selected Add Custom Files in the previous view, the Custom Files panel is displayed (refer to Figure - **Interaction Workspace Deployment Manager Custom Files pane**). This window enables you to add custom content to the out-of-the-box Interaction Workspace.



Interaction Workspace Deployment Manager Custom Files pane

- **Relative Path:** The path where the file will be copied relative to the core Workspace installation directory.
- **Data File:** Not used — This should be left unchecked.
- **Optional:** *Must* be checked if the file is part of an optional module that is loaded according to user privileges. A module is considered as optional if the value of the `startupLoaded` attribute is set to `false` in the `.module.config` file, and the same module is associated to a task in the same file.

## Important

The `.module.config` file that core Workspace uses for module declaration, as well as any language dictionary file required by the module, must be specified as NOT optional so that they are loaded unconditionally at Workspace start-up.

- **Group Name:** For mandatory files (files that have `Optional` unchecked), always specify `Core`. For optional files, specify the group name that is assigned to the module description in the `.module.config` file by the `clickOnceGroupsToDownload` attribute. For example:

```
<task name="InteractionWorkspace.Custom.ThePrivilege"
clickOnceGroupsToDownload="TheGroup"
modulesToLoad="TheModule" />
```

The following table provides examples of settings for a typical optional module comprising a DLL, a dictionary file, and a `.module.config` file:



File Name	Relative Path	Data File	Optional	Group Name
.module-config file	<empty>	unchecked	unchecked	Core
.dll file	<empty>	unchecked	checked	<custom group>
language file (.language- code.country- code.xml)	languages	unchecked	unchecked	Core

- Click Next to proceed with the installation. Click Cancel to cancel the deployment. Click Back to return to the previous panel.
- If you clicked Next, the Client Configuration pane is displayed (refer to Figure - **Interaction Workspace Deployment Manager Client Configuration pane**). In this pane, provide the following information:
  - The address and port number of your local Genesys Configuration Server
  - The name of the Interaction Workspace (client) application that you created in the Configuration Layer by using Genesys Administrator

#### Enabling Client-side Port Definition

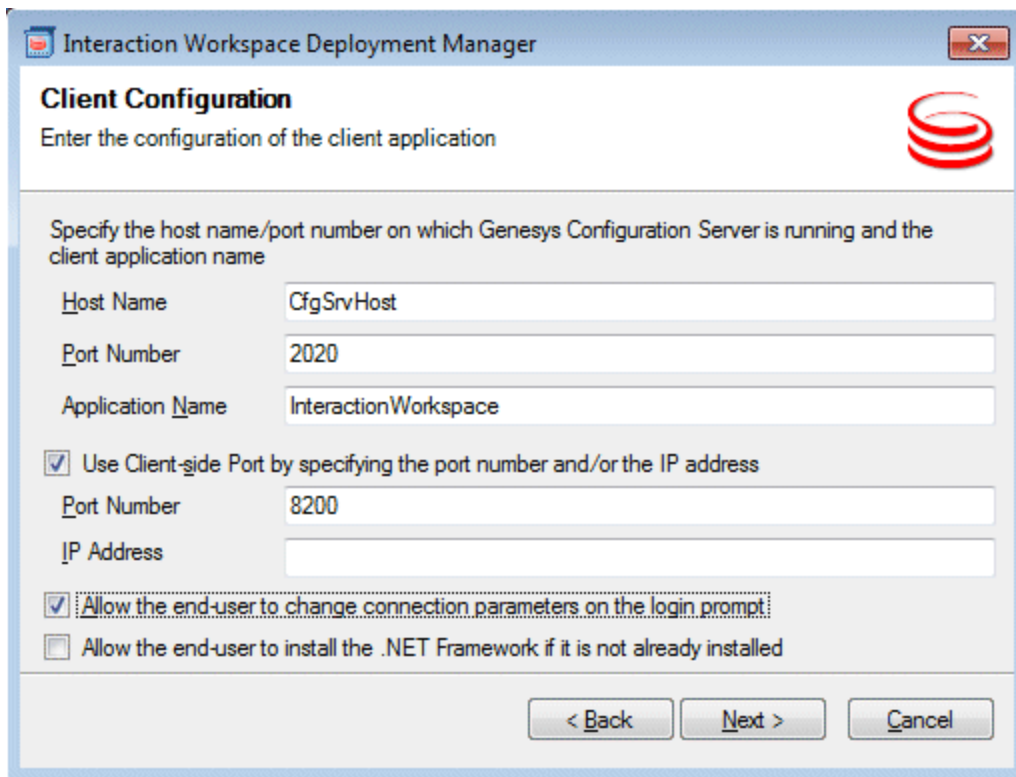
To define the client-side port functionality, check Use Client-side Port by specifying the port number and/or the IP address. Checking this option enables the following two text fields:

- Port Number -- The port number that a client will use to make a TCP/IP connection to Configuration Server. If the value is empty, this parameter is not used.
- IP Address -- The IP address or the host name that a client will use to make a TCP/IP connection to Configuration Server. If the value is empty, this parameter is not used.

If you specify one or both values, they will be set in the InteractionWorkspace.exe.config file.

There are two additional options in this dialog box:

- Allow the end-user to change connection parameters on the login prompt -- Enables agents to change their connection parameters when they log in.
- Allow the end-user to install the .NET Framework if it is not already installed -- Enables an agent to download and install .NET Framework to their workstation if you have not already installed it on the workstation.



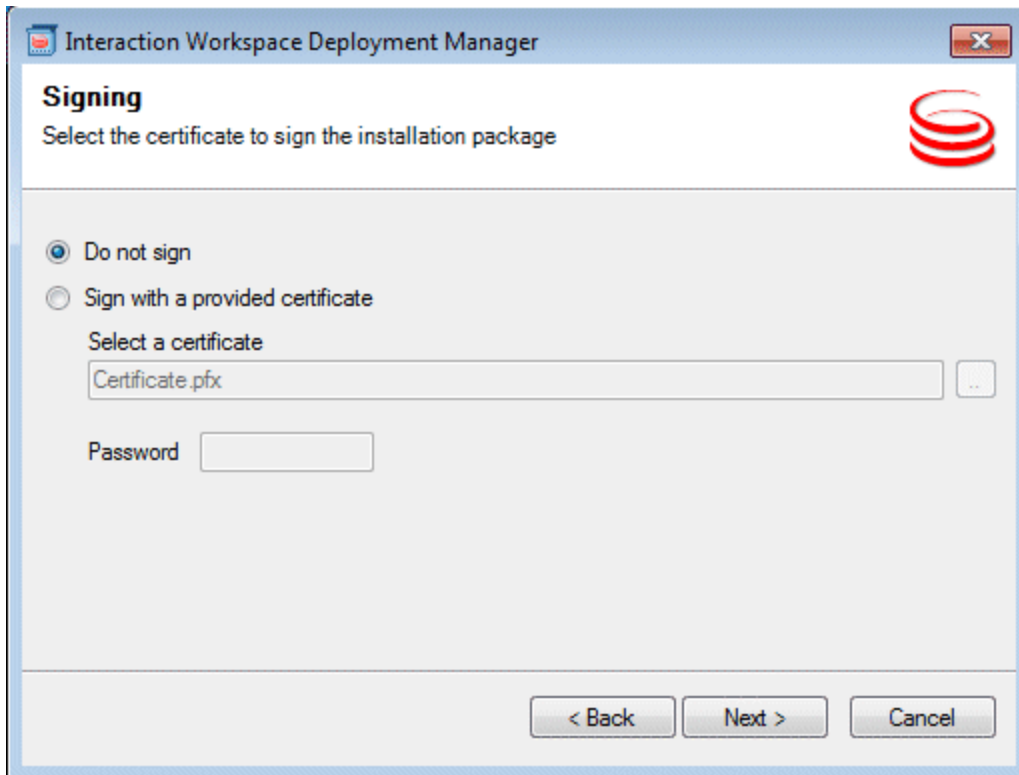
The screenshot shows a Windows-style dialog box titled "Interaction Workspace Deployment Manager". The main heading is "Client Configuration" with a sub-instruction: "Enter the configuration of the client application". A red circular logo is in the top right corner. The dialog contains several input fields and checkboxes:

- Instruction: "Specify the host name/port number on which Genesys Configuration Server is running and the client application name"
- Host Name: CfgSrvHost
- Port Number: 2020
- Application Name: InteractionWorkspace
- Checked checkbox: "Use Client-side Port by specifying the port number and/or the IP address"
- Port Number (under checked checkbox): 8200
- IP Address: (empty field)
- Checked checkbox: "Allow the end-user to change connection parameters on the login prompt:"
- Unchecked checkbox: "Allow the end-user to install the .NET Framework if it is not already installed"

At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

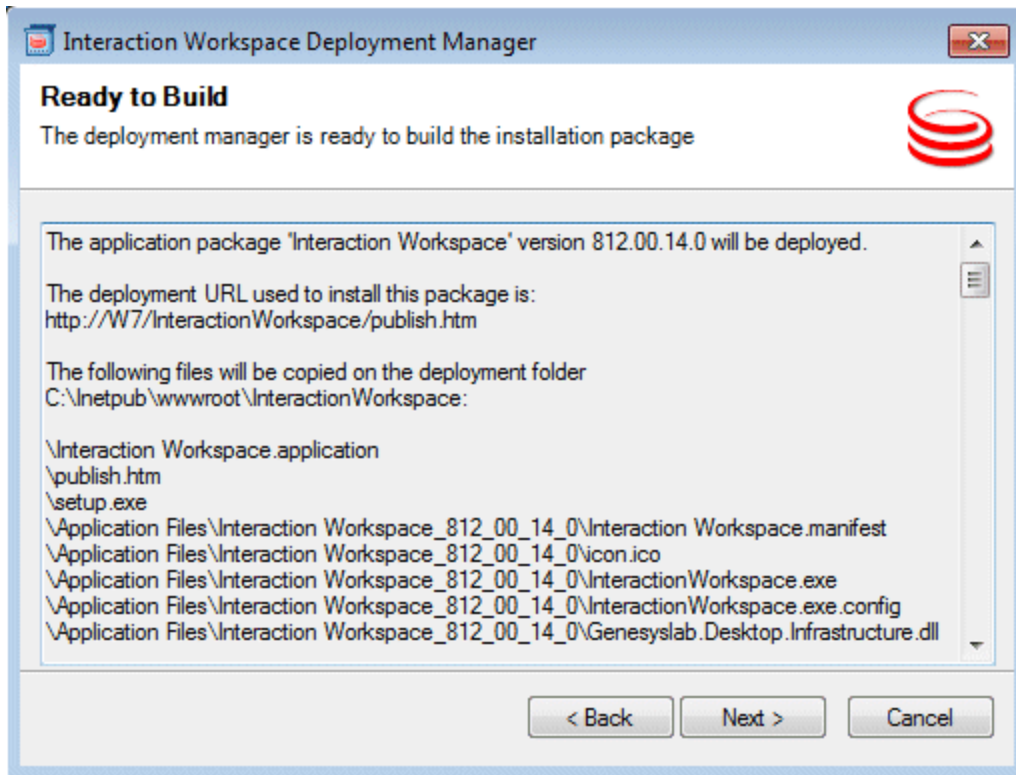
Interaction Workspace Deployment Manager Client Configuration pane

- Click Next to proceed with the installation. Click Cancel to cancel the deployment. Click Back to return to the previous panel.
- If you clicked Next, the Signing pane is displayed (refer to Figure - **Interaction Workspace Deployment Manager Signing pane**). For more information on how to create or obtain a signing certificate, refer to the "ClickOnce Deployment and Authenticode" page on the Microsoft Developer Network web site: <http://msdn.microsoft.com/en-us/library/ms172240.aspx>



Interaction Workspace Deployment Manager Signing pane

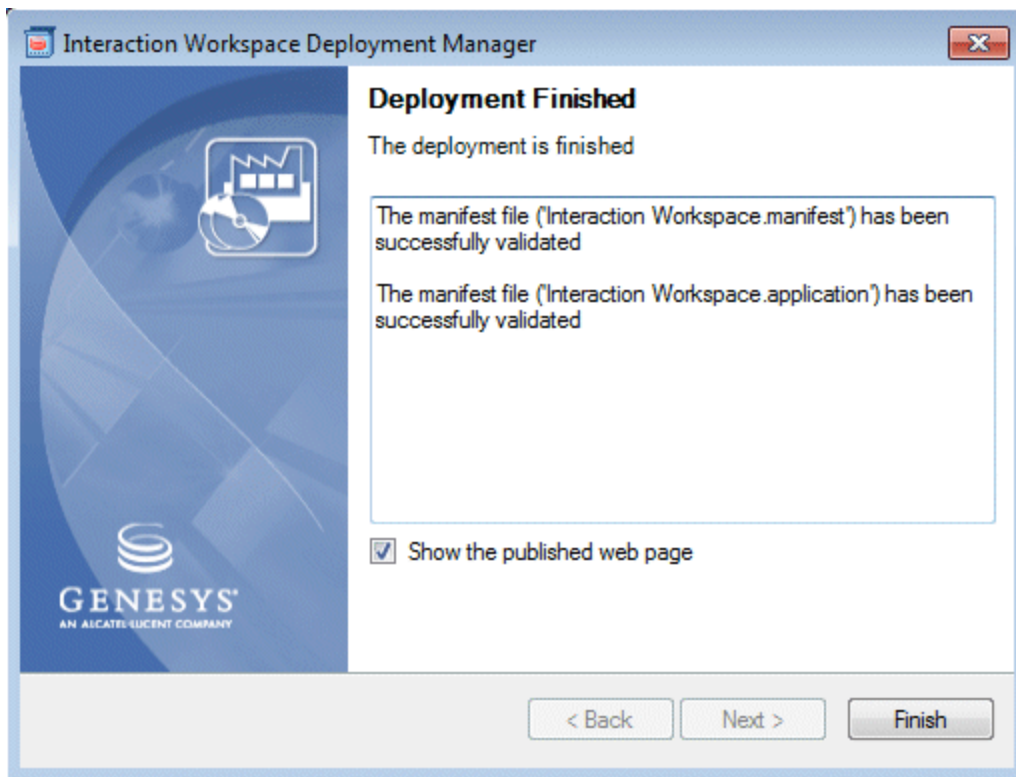
- Choose the type of signing certificate that you are using:
  - Click Do not Sign. If you do not provide a certificate, a security warning is displayed whenever the client downloads the package.
  - Click Sign with a provided certificate to enable the Selects a certificate field.
- Click the browse button to navigate to the certificate.
- Enter the password for the certificate in the Password field.
- Click Next to proceed with the installation. Click Cancel to cancel the deployment. Click Back to return to the previous panel.
- If you clicked Next, the Ready to Build pane is displayed (refer to Figure - **Interaction Workspace Deployment Manager Ready to Build pane**). This pane contains a summary of the files that will be deployed on your web server and a confirmation of the deployment URL.



Interaction Workspace Deployment Manager Ready to Build pane

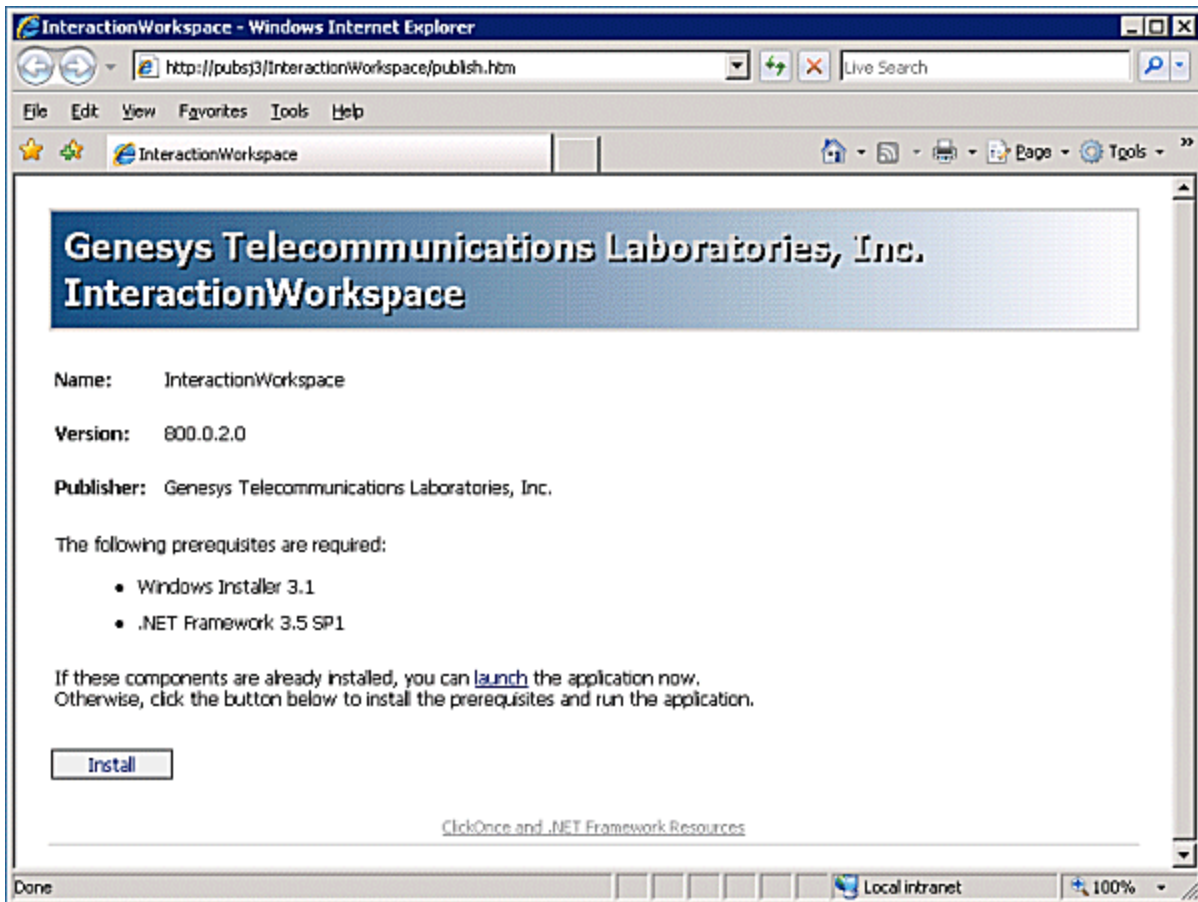
- Click Next to complete the deployment. Click Cancel to cancel the deployment. Click Back to modify any of the previous panes.
- If you clicked Next, the Deployment Manager will deploy the Interaction Workspace ClickOnce application in the path that you specified at the beginning of the wizard execution. This can be the appropriate place on your web server.

When the deployment is complete, the Deployment Finished pane is displayed (refer to Figure - **Interaction Workspace Deployment Manager Deployment Finished pane**). This pane contains messages that relate to the success of the deployment.



Interaction Workspace Deployment Manager Deployment Finished pane

- Click **Finish** to close the Interaction Workspace Deployment Manager. Deployment proceeds. When deployment is complete, the `publish.htm` web page is opened in your default browser automatically (refer to Figure - **Interaction Workspace publish.htm web page viewed through Microsoft Internet Explorer**).



Interaction Workspace publish.htm web page viewed through Microsoft Internet Explorer

The publish.htm web page confirms that the Interaction Workspace package is published and provides you with the version number.

If you have not installed the prerequisites, the page contains a link to the prerequisite installers.

- If you are deploying on a Solaris or Linux HTTP server, copy the collection of files that was created by the Deployment Wizard on your Windows-based computer to your HTTP server.

## End

## Next Steps

- If you have not installed the prerequisites, in the publish.htm web page, click Install to launch setup.exe to install the prerequisite installers.
- If you already have installed the prerequisites, the application bootstrap either installs a new version automatically, upgrades your existing version, if necessary, or starts the application, if it is installed and up to date.

## Procedure: Configuring Apache to enable the ClickOnce package

**Purpose:** By default, the Apache web server does not permit the download of documents of specific MIME types. Apache must be configured to enable the ClickOnce package. **Prerequisites**

- Windows Server 2003 or Windows Server 2008 server or Solaris Server or RHEL (Linux) server
- Apache Server 2.2

### Start

1. In the conf/mime.types file (in the Apache install folder), add the following lines:  
application/x-ms-application application  
application/x-ms-application manifest  
application/octet-stream deploy
2. Save the file.

### End

### Next Steps

- [Procedure: Configuration verification--Testing the client](#)

## Procedure: Configuring Microsoft IIS6 to enable the ClickOnce package

**Purpose:** By default, the Microsoft IIS6 web server on Windows 2003 does not permit the downloading of documents of specific MIME types. IIS6 must be configured to enable the ClickOnce package. **Prerequisites**

- Windows Server 2003
- Microsoft IIS6

### Start

1. From Administrative Tools, start Internet Information Services Manager.
2. Right click the tree leaf that represents your server.
3. Select Properties from the contextual menu.
4. In the Properties dialog box, click Mime Types.
5. Click New to add each of the following configuration pairs:  
.application => application/x-ms-application  
.manifest => application/x-ms-application  
.deploy => application/octet-stream
6. Click OK.
7. Click OK to validate the new MIME types list.

### End

### Next Steps

---

- [Procedure: Configuration verification: Testing the client](#)

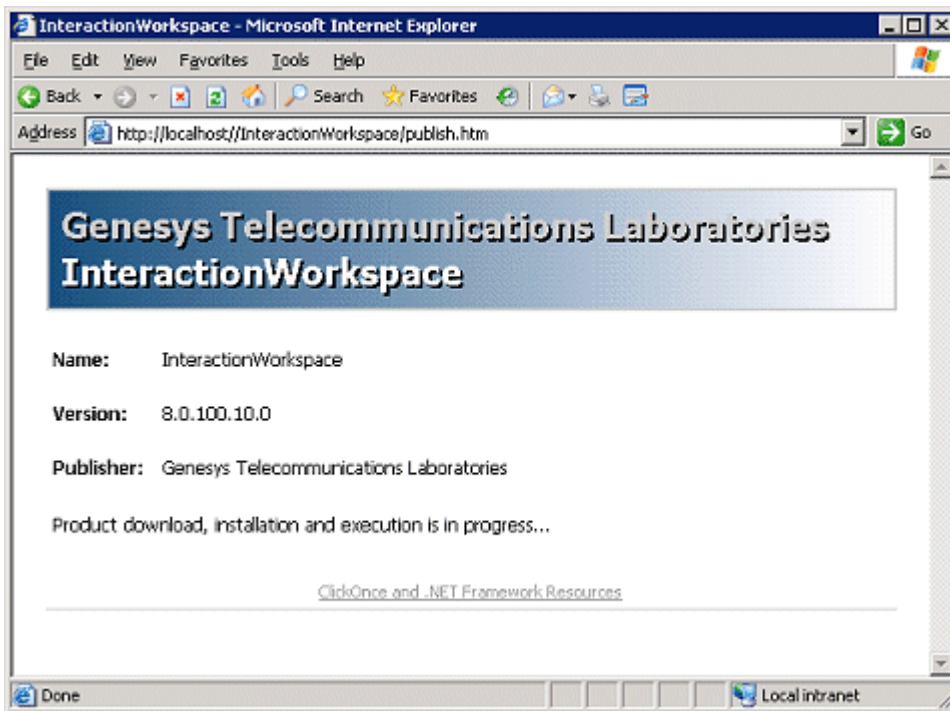
## Procedure: Configuration verification: Testing the client

**Purpose:** To ensure that the Interaction Workspace application was correctly deployed on your web server and client workstation. **Prerequisites**

- [Procedure: Deploying the Interaction Workspace downloadable ClickOnce package on your web server](#)
- [Procedure: Configuring Apache to enable the ClickOnce package](#)

### Start

1. On a client workstation, open a new Internet browser window.
2. In the Address field, enter the URL of the Interaction Workspace web application:  
http://<host>/<application name>/publish.htm  
For example:  
<http://SUITE80/InteractionWorkspace/publish.htm>
3. Press Enter on your keyboard. The Interaction Workspace ClickOnce publish window opens (see the Figure - Interaction Workspace publish window).



Interaction Workspace publish window

4. If all prerequisites are installed, setup is started automatically. If all prerequisites are not installed, a warning is displayed with the list of missing prerequisites. Click Install to install the Interaction Workspace application prerequisites.
5. If a security-warning dialog box appears, click Install.  
When installation is complete, a shortcut is placed on the desktop, after which the application launches. The Interaction Workspace agent-login window is displayed.



6. Enter the following information into the agent-login panel and the connection-parameters panel:
  - User Name -- A valid user name that is configured in the Configuration Layer
  - Password -- The valid password for the specified user name
- Click Login to continue logging in to Interaction Workspace; click Cancel to close the agent-login window without logging in.  
Refer to [Interaction Workspace User's Guide](#) for more information on how to log in to Interaction Workspace and use the application.

**End****Next Steps**

- Installation is complete. You can now provision Interaction Workspace functionality:
  - [Interaction Workspace Functionality Overview](#)
  - [Provisioning Interaction Workspace](#)

---

# Installing The Interaction Workspace Developer Toolkit

Use [Procedure: Installing Interaction Workspace Customization on the Windows operating system](#) to install the Interaction Workspace application and Developer's Kit on your development workstation. This procedure installs everything that is required to build and test an Interaction Workspace extension. For information about how to build a custom extension or customize Interaction Workspace, see the *Interaction Workspace 8.1 .NET Developer's Guide & API Reference*.

## Important

- Some releases of Workspace include Workspace language packs (localized User Interface and Help). These procedures include information about how to install language packs either as part of the Workspace deployment or after you have deployed Workspace.
- Genesys recommends that you always install the release of Workspace for which the language pack was developed rather than installing a language pack on a previously deployed release of Workspace. For example, you should not install an 8.5.1 language pack on top of an 8.5.0 release of Workspace; doing so might result in some UI text being displayed in English or some UI elements being incorrectly labelled.
- If you are not deploying from the Workspace International CD/DVD, you must **manually add Language Packs** to your deployment package.


## Procedure: Installing Interaction Workspace Customization on the Windows operating system

**Purpose:** To install the deployment files for Interaction Workspace Customization on your development workstation. **Prerequisites**

- [Preparing The Configuration Layer](#)
- Microsoft Visual Studio 2008 or Microsoft Visual Studio 2008 Express Edition
- .NET Framework 3.5, SP 1

### Start

1. On your desktop, open the Interaction Workspace disc or the Interaction Workspace IP and double-click the Setup.exe file.  
You might be asked to reboot your system to delete or rename certain system files before the Installation Wizard runs.

 **Note:** You might have to reboot more than once. If you do not want to reboot or if the warning message that requests a reboot is still displayed after you reboot, do the following to force the installation: In Registry Editor, rename the PendingFileRenameOperations in the following key: HKEY\_LOCAL\_MACHINE\SYSTEM\CurrentControlSet\Control\Session Manager to Start IP After setup is complete, you can rename the registry item back to the original value.

The Genesys Installation Wizard launches and the Welcome panel is displayed.

2. On the Welcome panel, do one of the following:

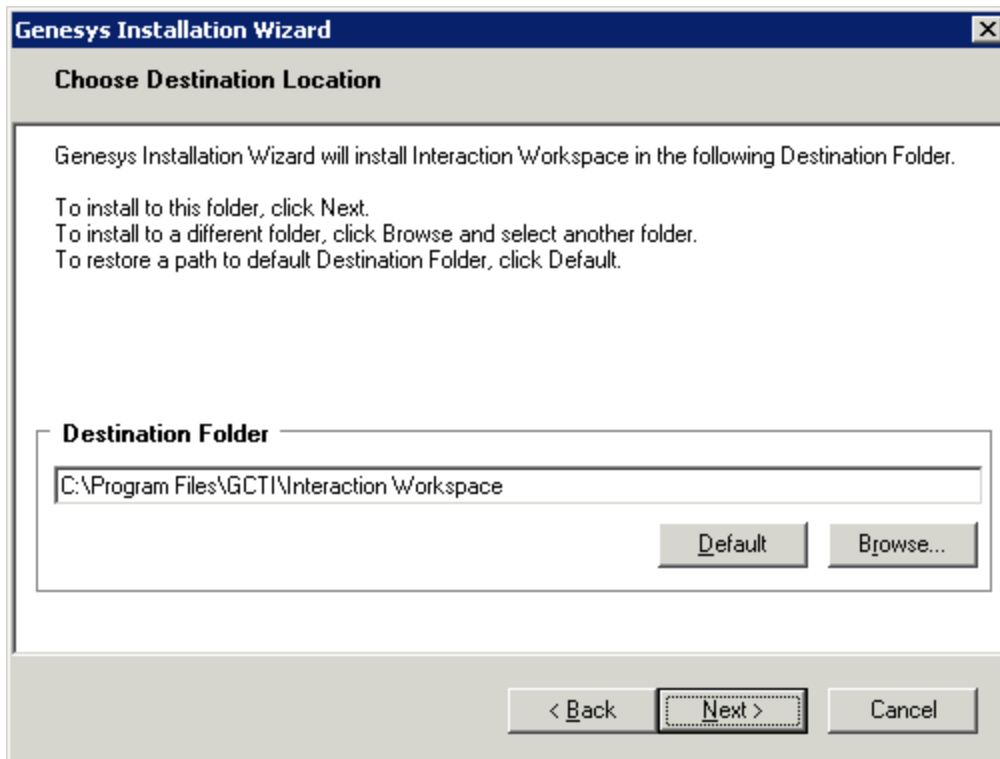
- Click Next to begin the installation procedure.
- Click Cancel to exit the Genesys Installation Wizard.
- Click About to open the Interaction Workspace ReadMe file in your default browser.

If you clicked Next, the Select Options panel is displayed.

- On the Select Options panel, do one of the following:
  - Choose Install Interaction Workspace Developer Toolkit, and click Next.
  - Click Back to return to the Welcome panel.
  - Click Cancel to exit the Genesys Installation Wizard.

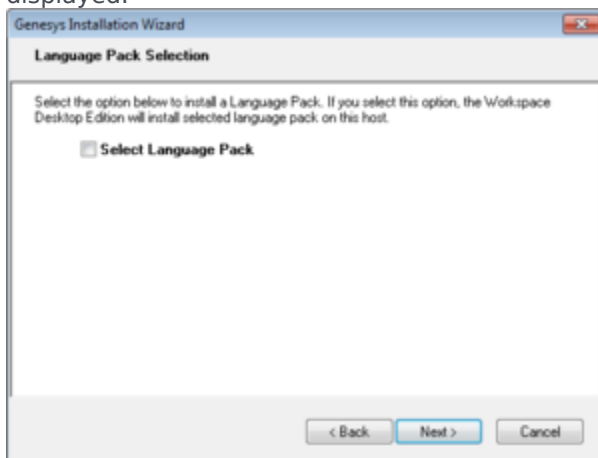
For more information on installation options, see the **Table 4 - Interaction Workspace Install Mode Deployment Packages**.

If you clicked Next, the Choose Destination Location panel is displayed (see the Figure - **Choose Destination Location panel of the Genesys Installation Wizard**).



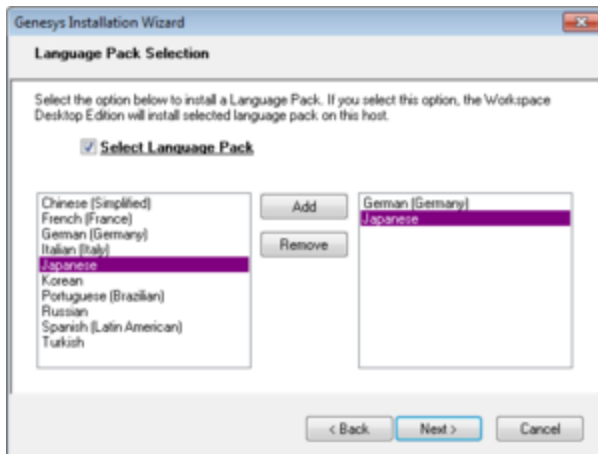
Choose Destination Location panel of the Genesys Installation Wizard

- (Optional) If you are installing from the International DVD, the Language Pack Selection panel is displayed.



Language Pack Selection panel of the Genesys Installation Wizard

Select Select Language Pack to display the list of available language packs.



Adding and Removing languages by using the Language Pack Selection panel of the Genesys Installation Wizard

To select a language for installation, select it in the left hand box then click **Add**. The language is moved to the right hand box. To de-select a language for installation, select it and click **Remove**. The language is moved back to the left hand box and will not be installed. After you have added to the right hand box the languages that you want to install, do one of the following:

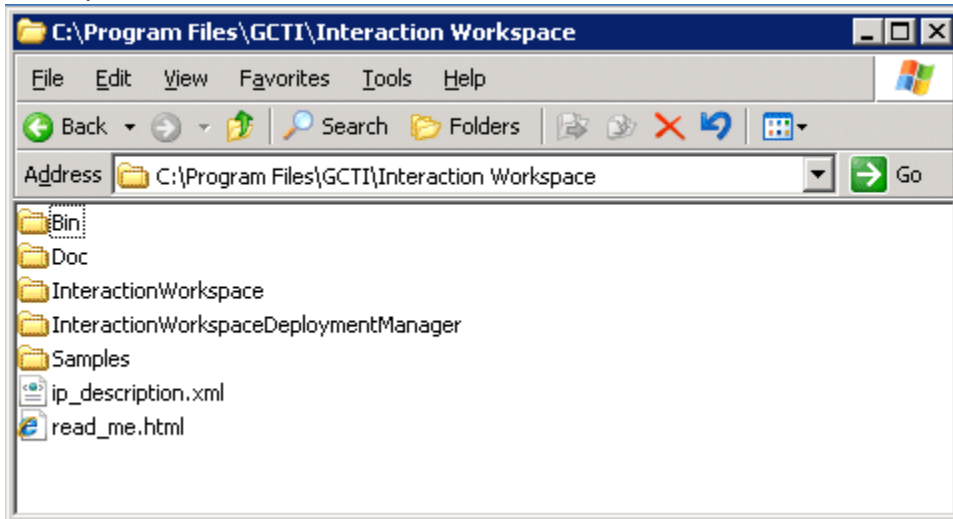
- Click Next to continue the installation procedure.
- Click Back to return to the Select Options panel.
- Click Cancel to exit the Genesys Installation Wizard.
- On the Choose Destination Location panel, specify the location on your development workstation in which the Interaction Workspace customization files are to be installed by doing one of the following:
  - Type a location in the Destination Folder text box.
  - Click Default to reset the location to the default location.
  - Click Browse to navigate to a destination folder.
- With the destination folder specified, do one of the following:
  - Click Next.
  - Click Back to return to the Select Options panel.
  - Click Cancel to exit the Genesys Installation Wizard.

If you clicked Next, the Ready to Install panel is displayed.

- On the Ready to Install panel do one of the following:
  - Click Install to install the Interaction Workspace customization files.
  - Click Back to return to the Choose Destination Location panel.
  - Click Cancel to exit the Genesys Installation Wizard.

If you clicked Install, the Interaction Workspace customization files are

installed in the location that you specified (see the Figure - **Contents of the Interaction Workspace install disc or image copied onto the web-server host**).



Contents of the Interaction Workspace install disc or image copied onto the web-server host

The Interaction Workspace folder contains the following:

- The Bin folder, which contains the Interaction Workspace API
  - The Doc directory, which contains the *Interaction Workspace 8.1 .NET Developer's Guide & API Reference* (InteractionWorkspaceSDKNet.chm)
  - The InteractionWorkspace folder, which contains Interaction Workspace application files
  - The InteractionWorkspaceDeploymentManager folder, which contains the application files that are required to deploy customized code, including the Deployment Manager application (InteractionWorkspaceDeploymentManager.exe), and the following subfolder:
  - WebPublication"Contains publish.htm and setup.exe files (the bootstrap files for client-side prerequisites)
  - The Samples directory, which contains code samples that demonstrate Genesys best-practices recommendations for developers
- When installation is complete, the Installation Complete panel is displayed.
    - Click Finish to exit the Genesys Installation Wizard.

**End**

### Next Steps

- (optional) [Procedure: Installing the Interaction Workspace SIP Endpoint.](#)
- Refer to the [Interaction Workspace 8.1 .NET Developer's Guide & API Reference](#) for information about how to use the toolkit and samples to customize Interaction Workspace.

# Installing The Application

Install the out-of-the-box Interaction Workspace application on an end-user desktop. The installation contains only the agent application. Use these procedures if you are not going to use the ClickOnce centralized deployment.

## Important

- Some releases of Workspace include Workspace language packs (localized User Interface and Help). These procedures include information about how to install language packs either as part of the Workspace deployment or after you have deployed Workspace.
- Genesys recommends that you always install the release of Workspace for which the language pack was developed rather than installing a language pack on a previously deployed release of Workspace. For example, you should not install an 8.5.1 language pack on top of an 8.5.0 release of Workspace; doing so might result in some UI text being displayed in English or some UI elements being incorrectly labelled.
- If you are not deploying from the Workspace International CD/DVD, you must **manually add Language Packs** to your deployment package.


## Procedure: Installing the Interaction Workspace application on a client desktop

**Purpose:** To install the Interaction Workspace client application on your local agent workstation or virtual machine to test the Interaction Workspace application. **Prerequisites**

- .NET Framework 3.5, SP 1

### Start

1. On your desktop, open the Interaction Workspace disc or the Interaction Workspace IP and double-click the Setup.exe file.  
You might be asked to reboot your system to delete or rename certain system files before the Installation Wizard runs.

 **Note:** You might have to reboot more than once. If you do not want to reboot or if the warning message that requests a reboot is still displayed after you reboot, do the following to force the installation: In Registry Editor, rename the PendingFileRenameOperations in the following key: HKEY\_LOCAL\_MACHINE\SYSTEM\CurrentControlSet\Control\Session Manager to Start IP After setup is complete, you can rename the registry item back to the original value.

The Genesys Installation Wizard launches, and the Welcome panel is displayed.

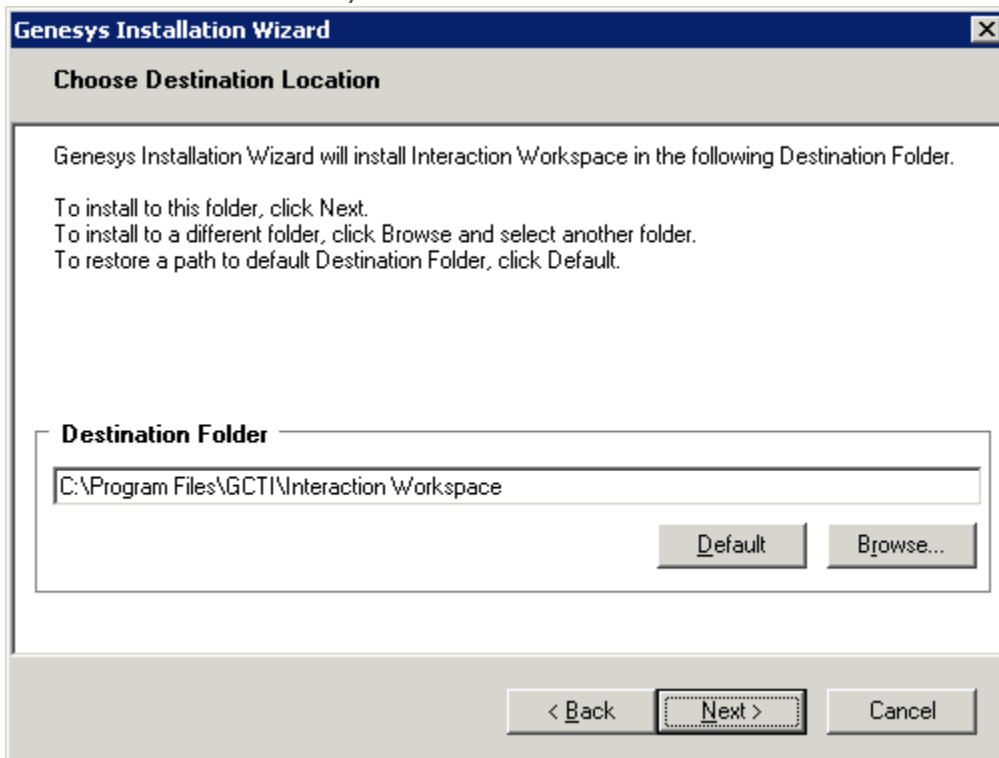
2. On the Welcome panel, do one of the following:

- Click Next to begin the installation procedure.
- Click Cancel to exit the Genesys Installation Wizard.
- Click About to open the Interaction Workspace ReadMe in your default browser.

If you clicked Next, the Select Options panel is displayed.

- On the Select Options panel, do one of the following:
  - Choose Install Interaction Workspace application, and click Next.
  - Click Back to return to the Welcome panel.
  - Click Cancel to exit the Genesys Installation Wizard.

If you clicked Next, the Choose Destination Location panel is displayed (see the Figure - **Choose Destination Location panel of the Genesys Installation Wizard**).



Choose Destination Location panel of the Genesys Installation Wizard

- On the Choose Destination Location panel, specify the location on your agent workstation in which



Interaction Workspace is to be installed by doing one of the following:

- Enter a location in the Destination Folder text box.
- Click Default to reset the location to the default location.
- Click Browse to navigate to a destination folder.
- With the destination folder specified, do one of the following:
  - Click Next.
  - Click Back to return to the Select Options panel.
  - Click Cancel to exit the Genesys Installation Wizard.

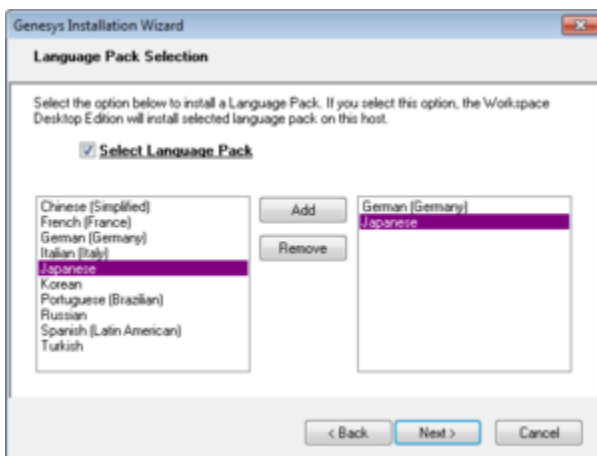
If you clicked Next, the Ready to Install panel is displayed.

- (Optional) If you are installing from the International DVD, the Language Pack Selection panel is displayed.



Language Pack Selection panel of the Genesys Installation Wizard

Select Select Language Pack to display the list of available language packs.



Adding and Removing languages by using the Language Pack Selection panel of the Genesys Installation Wizard

To select a language for installation, select it in the left hand box then click **Add**. The language is moved to the right hand box. To de-select a language for installation, select it and click **Remove**. The language is moved back to the left hand box and will not be installed. After you have added to the right hand box the languages that you want to install, do one of the following:

- Click Next to continue the installation procedure.
- Click Back to return to the Select Options panel.
- Click Cancel to exit the Genesys Installation Wizard.
- On the Ready to Install panel, do one of the following:
  - Click Install to install Interaction Workspace on the client desktop.
  - Click Back to return to the Choose Destination Location panel.
  - Click Cancel to exit the Genesys Installation Wizard.

If you clicked Next, the Interaction Workspace client application is installed in the location that you specified. When installation is complete, the Installation Complete panel is displayed.

The Interaction Workspace agent application is installed by the Install Interaction Workspace application option into the folder that you specified (for more information about installation options, see the [Workspace Install Mode Deployment Packages Table - Interaction Workspace Install Mode Deployment Packages](#)).

- Click Finish to exit the Genesys Installation Wizard.
- (optional) [Procedure: Installing the Interaction Workspace SIP Endpoint](#).
- To launch the Interaction Workspace client application on the client desktop, select it from the Start menu or navigate to the installation folder that you specified and double-click the InteractionWorkspace.exe file.

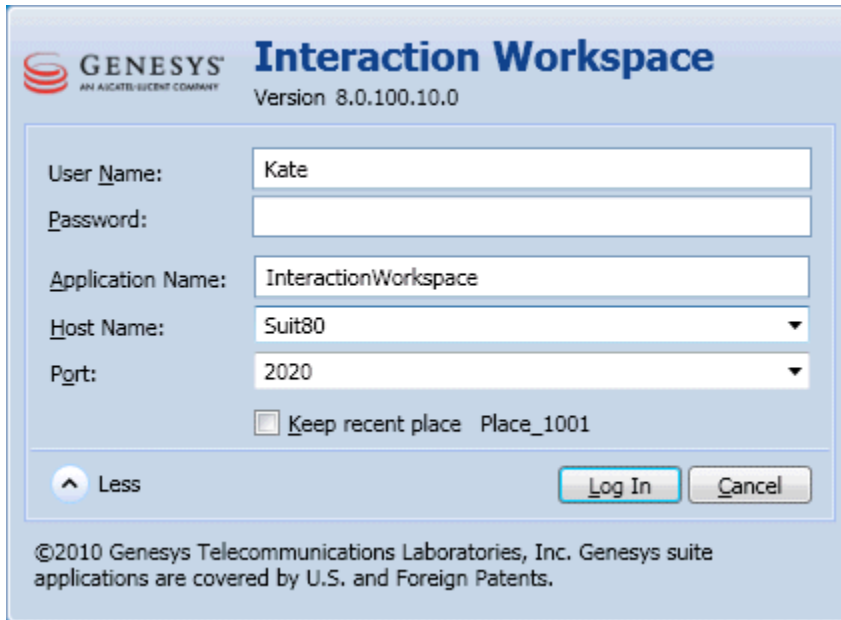
The Interaction Workspace login window is displayed on the client desktop (see the Figure - **Interaction Workspace agent Login window with no connection parameters**). The connection panel of the login window indicates that no connection has been specified. Before the agent can log in, you must connect to the Interaction Workspace application in your Genesys Framework.



Interaction Workspace agent Login window with no connection parameters

- Click the More Options drop-down list to open the connection options panel (see the Figure - **Interaction**

Workspace agent Login window with the connection-parameters panel displayed).



Interaction Workspace agent Login window with the connection-parameters panel displayed

- Enter the following information into the agent-login panel and the connection-parameters panel:
  - User Name--A valid user name that is configured in the Configuration Layer
  - Password--The valid password for the specified user name
  - Application Name--The name that is specified for the Interaction Workspace application object to which you want to connect
  - Host Name--The name of the web server.
  - Port--The port that is configured for your web-server application

See the Figure - **Interaction Workspace agent Login window with the connection-parameters panel displayed** for an example of how to populate the fields in the Interaction Workspace login window.

- Click Login to continue logging in to Interaction Workspace; click Cancel to close the agent-login window without logging in. Refer to *Interaction Workspace User's Guide* for more information on how to log in to Interaction Workspace and use the application.

**End**

### Next Steps

- [Interaction Workspace Functionality Overview](#)
- [Provisioning Interaction Workspace](#)

# Adding and Removing Language Packs

Use the following procedures to manually add and remove Workspace Language Packs after you have deployed Workspace.

## Adding a Language Pack to Workspace after Deployment

Language packs (localized content for Workspace) are not always released at the same time as the English version of Workspace, and new language packs are added as demanded by Genesys' customers.

Language packs are available as part of the Genesys International DVD/IP. If you are installing a new release of Workspace from an International DVD/IP, use the standard ClickOnce, Developer, and Non-ClickOnce procedures in the other tabs of this topic.

Use the following procedure to add a language pack to your existing Workspace deployment.

### Procedure

Installing a Workspace Language Pack on an existing Workspace deployment or ClickOnce package

**Purpose:** To install a Workspace language pack on your existing Workspace deployment on a client desktop or on an existing ClickOnce package.

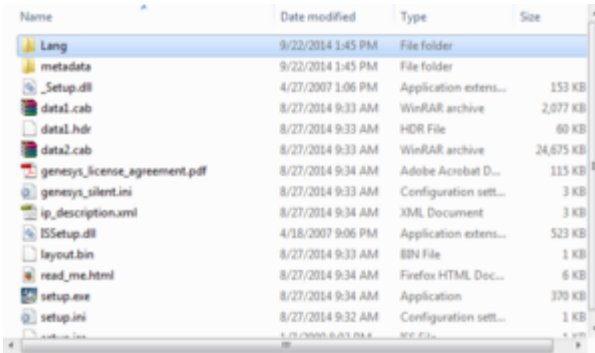
#### Prerequisites

Workspace must already be installed using one of the following deployment types:

- [ClickOnce Deployment](#)
- [Developer Deployment](#)
- [Non-ClickOnce Deployment](#)

### Start

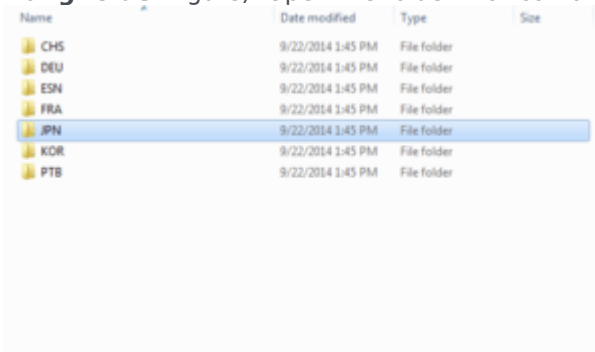
1. If you are deploying from the Workspace Desktop Edition DVD, open the **Lang** folder (refer to the **Lang (Language) folder in the Workspace Install Package** figure).



Lang (Language) folder in the Workspace Install Package

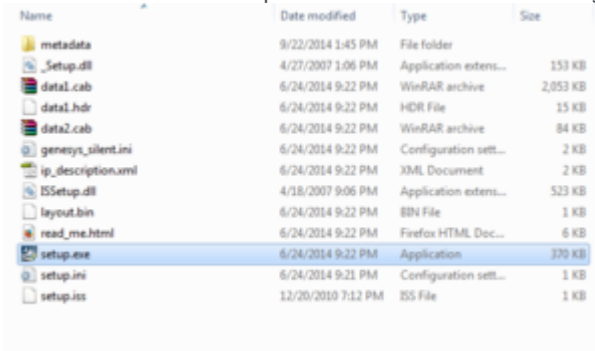
If you are installing from a language specific IP, go to Step 3.

- The **Lang** folder contains folders named with three-letter language codes. These folders contain the language specific language pack installers (refer to the **Three letter language-code folders in the Lang folder** figure). Open the folder that contains the language installer that you want to use.



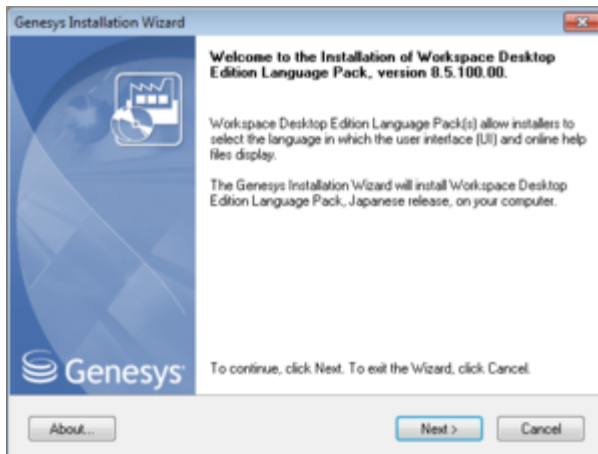
Three letter language-code folders in the Lang folder

- Double-click the `setup.exe` file to launch the language pack installer.



Language pack specific installer setup.exe

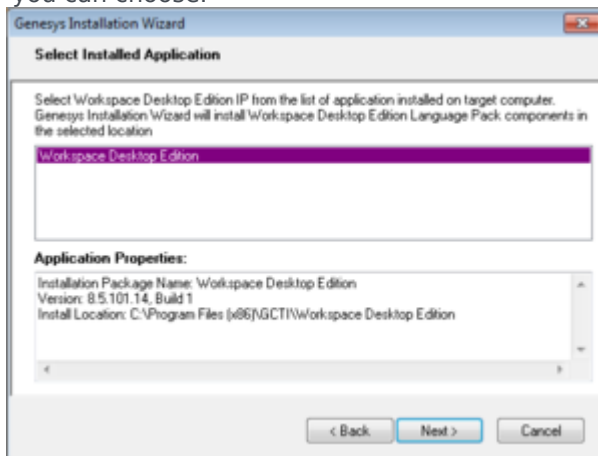
The Genesys Installation Wizard launches and the Welcome panel is displayed.



Genesys Installation Wizard language pack splash screen panel

4. On the **Welcome** panel, do one of the following:
  - Click **Next** to begin the installation procedure.
  - Click **Cancel** to exit the Genesys Installation Wizard.
  - Click **About** to open the Workspace Desktop Edition ReadMe file in your default browser.

If you clicked **Next**, the installer searches for instances of the Workspace application installed on your computer and displays a list of installations in the **Select Installed Application** panel from which you can choose.



Genesys Installation Wizard Select Installed Application panel

5. On the **Select Installed Application** panel, do one of the following:
  - Select the application to which you want to add a language pack and click **Next** to begin the installation procedure.
  - Click **Cancel** to exit the Genesys Installation Wizard.
  - Click **Back** to return to the splash screen.

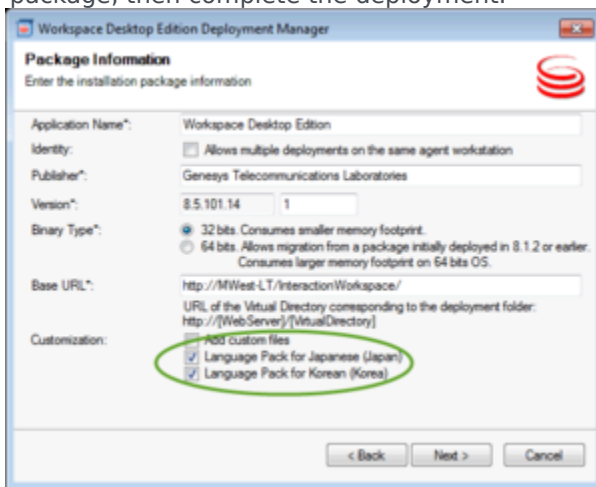
If you clicked **Next**, the **Ready to Install** panel is displayed.

6. In the **Ready to Install** panel, do one of the following:
  - Click **Install** to install the language pack.

- Click Cancel to exit the Genesys Installation Wizard.
- Click Back to return to the Select Installed Application panel.

If you clicked Next the update is installed and the Installation Complete panel is displayed.

7. Click Finish to close the Installation Complete panel and complete the installation.
8. Depending on whether you are updating an existing installation or adding a language pack to a ClickOnce package, do one of the following:
  - If you are adding a language to an existing non-ClickOnce installation, launch Workspace and select the new language from the Login view Language drop-down menu.
  - If you are adding a language pack to a ClickOnce installation, launch Workspace Desktop Edition Deployment Manager (InteractionWorkspaceDeploymentManager.exe). In the Package Information panel, select the installed language packs that you want to add to your ClickOnce package, then complete the deployment.



Genesys Installation Wizard Package Information panel

**End**

## Removing a Language Pack From Workspace after Deployment

For non-ClickOnce deployments, use **Add/Remove Programs** to select which Language Packs you want to remove from your workstation.

For ClickOnce deployments, run **Workspace Deployment Manager** and de-select language packs in the Package Information panel and push new ClickOnce package to your web server.

# Installing The Interaction Workspace SIP Endpoint

The Interaction Workspace SIP Endpoint is an optional plug-in for Interaction Workspace. It is available as a separate IP that you install from a separate CD/DVD. Install the Interaction Workspace SIP Endpoint after you install the Interaction Workspace application on your server, but before you run the Interaction Workspace Deployment Manager. If you deploy Interaction Workspace SIP Endpoint as part of a ClickOnce deployment, the behavior of the ClickOnce download depends on the privileges that are assigned to the agent who is logging in. If the agent is granted the privilege to execute a local Interaction Workspace SIP Endpoint, the following files are downloaded to the agent workstation:

- The SIP Endpoint Communication plug-in (part of Interaction Workspace runtime)
- The Interaction Workspace SIP Endpoint executable and associated assemblies.

## Procedure: Installing the Interaction Workspace SIP Endpoint

**Purpose:** To install the Interaction Workspace SIP Endpoint on your web server, an agent workstation, or a development workstation.

### Prerequisites

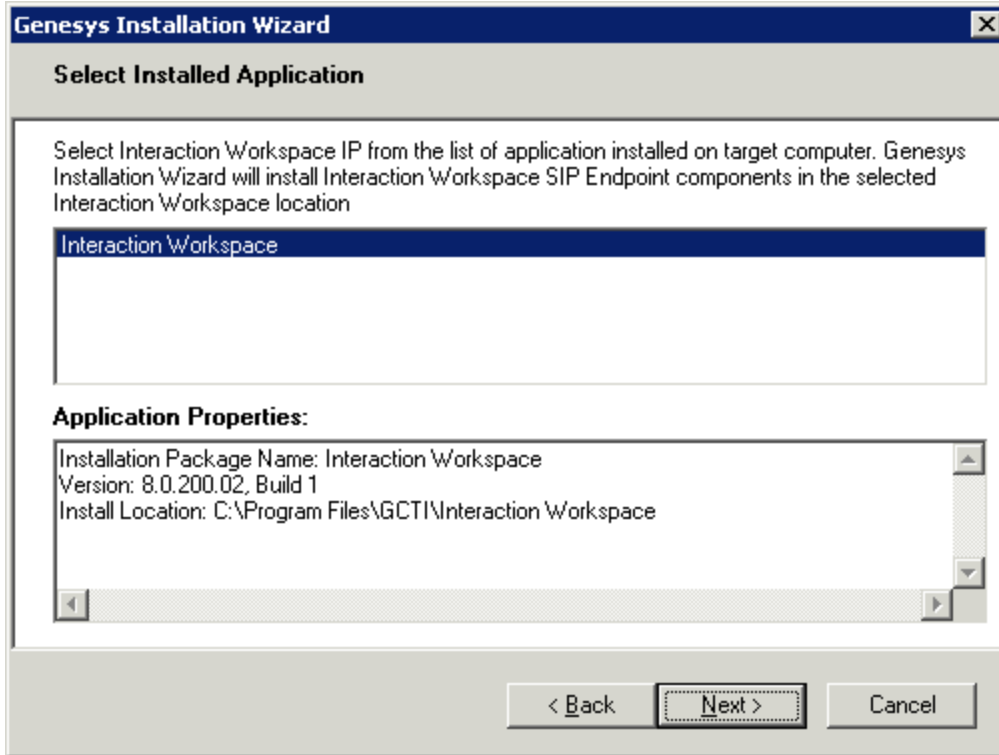
- .NET Framework 3.5, SP 1
- Install the Interaction Workspace application by using one of the following procedures:
  - [Deploying The ClickOnce Application On Your Web Server](#). Choose this option if you want to deploy Interaction Workspace as a ClickOnce application.
  - [Installing The Interaction Workspace Developer Toolkit](#). Choose this option if you want to deploy the Interaction Workspace developer package.
  - [Installing The Interaction Workspace Application](#). Choose this option if you want to deploy a non-ClickOnce version of Interaction Workspace.

### Start

1. On your desktop, open the Interaction Workspace SIP Endpoint disc or the Interaction Workspace SIP Endpoint IP and double-click the Setup.exe file.  
You might be asked to reboot your system to delete or rename certain system files before the Installation Wizard runs.  
The Genesys Installation Wizard launches and the Welcome panel is displayed.
2. On the Welcome panel, do one of the following:
  - Click Next to begin the installation procedure.
  - Click Cancel to exit the Genesys Installation Wizard.
  - Click About to open the Interaction Workspace SIP Endpoint ReadMe in your default browser.



If you clicked Next, the Select Installed Application panel is displayed (see the Figure - **Select Installed Application Panel of the Genesys Installation Wizard**).



Select Installed Application Panel of the Genesys Installation Wizard

- The Select Installed Application panel enables you to select the Interaction Workspace application instance to which you want to add Interaction Workspace SIP Endpoint as a plug-in. The Genesys Installation Wizard searches the target computer for an installed version of Interaction Workspace. Select the version of Interaction Workspace in the location in which you want Interaction Workspace SIP Endpoint to be installed. The Application Properties pane displays the name, version, and location of the selected Interaction Workspace application (see the Figure - **Select Installed Application Panel of the Genesys Installation Wizard**).
- After you have selected the version of Interaction Workspace that you want to use with Interaction Workspace SIP Endpoint, do one of the following:
  - Click Next to proceed to the next panel.
  - Click Cancel to exit the Genesys Installation Wizard.
  - Click Back to return to the previous panel.

If you clicked Next, the Ready to Install panel is displayed.

- On the Ready to Install panel do one of the following:

- Click **Install** to install Interaction Workspace SIP Endpoint on your web server, development workstation, or agent workstation.
- Click **Back** to return to the **Select Installed Application** panel.
- Click **Cancel** to exit the Genesys Installation Wizard.

If you clicked **Next**, Interaction Workspace SIP Endpoint is installed in the location that you specified. When installation is complete, the **Installation Complete** panel is displayed.

- Click **Finish** to exit the Genesys Installation Wizard.  
A folder that is named `InteractionWorkspaceSIPEndpoint` is created in the **Interaction Workspace** folder. The `InteractionWorkspaceSIPEndpoint` folder contains the Interaction Workspace SIP Endpoint application and associated files.  
After the Interaction Workspace SIP Endpoint application is installed on the agent or developer workstation, or after it is downloaded by the `ClickOnce` application (see [Deploying The ClickOnce Application On Your Web Server](#)), and after the agent is granted permission to use the application, agents must login Interaction Workspace on a **Place** that is associated with a SIP DN to start the Interaction Workspace SIP Endpoint. The Interaction Workspace SIP Endpoint process is started automatically when Interaction Workspace application is being initialized.

## End

## Next Steps

- (Optional) If you are deploying Interaction Workspace as a `ClickOnce` application on your web server, go to [Deploying The ClickOnce Application On Your Web Server](#).
- Installation is complete. You can now provision Interaction Workspace SIP Endpoint functionality. Refer to:
  - [Workspace Functionality Overview Interaction Workspace Functionality Overview](#).
  - [Interaction Workspace Provisioning Interaction Workspace](#).

# Installing Plug-ins For Interaction Workspace

Interaction Workspace enables you to install optional **plug-ins** for Interaction Workspace. Plug-ins, such as **eServices** Social Media interaction handling, are available as separate IPs that you install from a separate CD/DVD. If you deploy a plug-in as part of a ClickOnce deployment, the behavior of the ClickOnce download depends on the privileges that are assigned to the agent who is logging in. If the agent is granted the privilege to execute a plug-in, the plug-in is downloaded as part of the deployment. The **Procedure: Installing plug-ins for Interaction Workspace** is a general procedure that describes how to install plug-ins for Interaction Workspace. The documentation for your plug-in provides specific information about how to install and deploy your plug-in. **Consult the documentation that comes with your plug-in for specific information about how to install and provision your plug-in.** Before you install your plug-in, you must provision it in Genesys Administrator (refer to the Genesys Administrator documentation for more information) in the same way that you **provision Interaction Workspace**. Interaction Workspace plug-ins come with <Plug-In Name>.apd and <Plug-In Name>.xml (privileges) files, both of type Interaction Workspace. Upload the <Plug-In Name>.apd file and attach the <Plug-In Name>.xml file to create the <Plug-In Name> Template. The Interaction Workspace application object is **created** based on the Interaction Workspace Template. When you provision the Privileges that are assigned to a Role, the list of Privileges that are available for the Interaction Workspace application type combine the privileges that are specified in the InteractionWorkspace.xml and <Plug-In Name>.xml files. Note: ensure you don't use template and metadata file "Interaction Workspace (Agent desktop).apd" and "Interaction Workspace (Agent desktop).xml" when working with plug-ins

## Procedure: Installing plug-ins for Interaction Workspace

**Purpose:** To install plug-ins for Interaction Workspace on your web server, an agent workstation, or a development workstation.

### Prerequisites

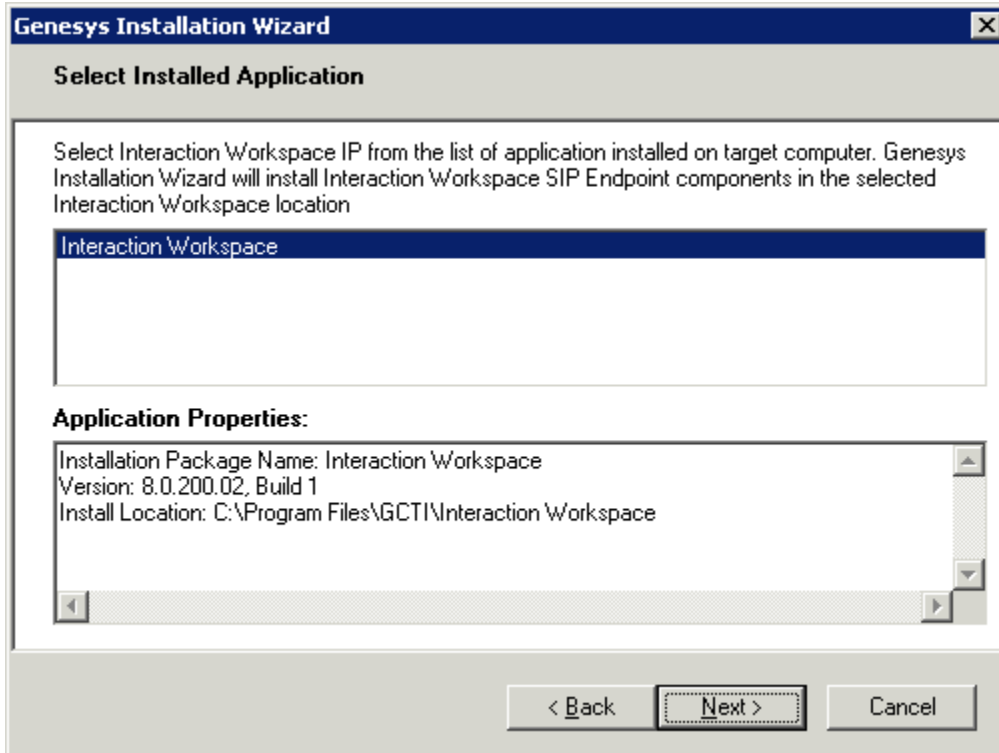
- .NET Framework 3.5, SP 1
- Installation of the Interaction Workspace application by using one of the following procedures:
  - **DeployingTheClickOnceApplicationOnYourWebServer.** Choose this option if you want to deploy Interaction Workspace as a ClickOnce application. Install the plug-ins after you install the Interaction Workspace application on your server, but before you run the Interaction Workspace Deployment Manager.
  - **InstallingTheDeveloperToolkit.** Choose this option if you want to deploy the Interaction Workspace developer package. Refer to **About Interaction Workspace Extension Samples** and **Deploying and Executing the Extension Samples** for information about reorganizing files to enable the debugging of samples with plug-ins.
  - **InstallingTheApplication.** Choose this option if you want to deploy a non-ClickOnce version of Interaction Workspace.

### Start

---

1. On your desktop, open the disc that contains the plug-in IP or the plug-in IP and double-click the Setup.exe file.  
You might be asked to reboot your system to delete or rename certain system files before the Installation Wizard runs.  
The Genesys Installation Wizard launches and the Welcome panel is displayed.
2. On the Welcome panel, do one of the following:
  - Click Next to begin the installation procedure.
  - Click Cancel to exit the Genesys Installation Wizard.
  - Click About to open the plug-in ReadMe in your default browser.

If you clicked Next, the Select Installed Application panel is displayed (see the Figure - **Select Installed Application Panel of the Genesys Installation Wizard**).



Select Installed Application Panel of the Genesys Installation Wizard

- The Select Installed Application panel enables you to select the Interaction Workspace application instance to which you want to add the plug-in.  
The Genesys Installation Wizard searches the target computer for an installed version of Interaction Workspace. Select the version of Interaction Workspace in the location in which you want plug-in to be installed.  
The Application Properties pane displays the name, version, and location of the selected Interaction Workspace application (see the Figure - **Select Installed Application Panel of the Genesys Installation Wizard**).

- After you have selected the version of Interaction Workspace that you want to use with the plug-in, do one of the following:
  - Click **Next** to proceed to the next panel.
  - Click **Cancel** to exit the Genesys Installation Wizard.
  - Click **Back** to return to the previous panel.

If you clicked **Next**, the **Ready to Install** panel is displayed.

- On the **Ready to Install** panel do one of the following:
  - Click **Install** to install the plug-in on your web server, development workstation, or agent workstation.
  - Click **Back** to return to the **Select Installed Application** panel.
  - Click **Cancel** to exit the Genesys Installation Wizard.

If you clicked **Next**, plug-in is installed in the location that you specified. When installation is complete, the **Installation Complete** panel is displayed.

- Click **Finish** to exit the Genesys Installation Wizard.  
Plug-in files are copied into the target installation directory of the original Interaction Workspace deployment.  
After the plug-in application is installed on the agent or developer workstation, or after it is downloaded by the ClickOnce application (see [DeployingTheClickOnceApplicationOnYourWebServer](#)), and after the agent is granted permission to use the application, agents must login Interaction Workspace on a Place that is associated with a SIP DN to use the plug-in with Interaction Workspace. The plug-in process is started automatically when Interaction Workspace application is being initialized.

**End**

### Next Steps

- (Optional) If you are deploying Interaction Workspace as a ClickOnce application on your web server, go to [Procedure: Deploying the Interaction Workspace downloadable package \(ClickOnce\) on your web server](#). When the **Interaction Workspace Deployment Manager Package Information** pane is displayed, you can specify that your plug-in is installed with the ClickOnce package.
- (Optional) If you are deploying Interaction Workspace for development purposes, go to [About Interaction Workspace Extension Samples](#).
- Installation is complete. You can now provision the plug-in functionality. Refer to the documentation that accompanies your plug-in IP.

# Installing The Screen Capture Application

Screen Capture is not currently available for Interaction Workspace.

---

# Functionality Overview

This category introduces the functionality of Interaction Workspace. For details about using the functionality, refer to *User's Guide* and *Interaction Workspace Context-Sensitive Help*. Interaction Workspace provides a secure agent interface to the Genesys 8 Suite. The functionality of Interaction Workspace is controlled for each agent by Role Based Access Control (RBAC). This section describes the functionality in general terms. Refer to *User's Guide* and *Interaction Workspace Context-Sensitive Help* for detailed explanations of the functionality and interface use. The general functionality of Interaction Workspace is described in the following sections:

- [Agent Login And Authentication](#)
- [Managing Agent Status](#)
- [Managing Agent Inactivity](#)
- [Previewing Incoming Interactions](#)
- [Handling Interactions](#)
- [Interaction Workspace SIP Endpoint](#)
- [Recording SIP Voice Interactions](#)
- [Active Recording And Screen Capture](#)
- [E-Mail Quality Assurance](#)
- [Monitoring SIP Voice Interactions](#) (including Team Lead functionality)
- [Monitoring Chat Interactions](#) (including Team Lead functionality)
- [Communicating Internally](#)
- [Viewing Broadcast Messages](#)
- [Viewing User And Group Metrics](#)
- [Viewing Contact-Center Metrics](#)
- [Managing Contacts](#)
- [Hiding Selected Data In Logs](#)
- [Client-side Port Security](#)
- [Business Continuity](#)
- [Accessibility And Navigation](#)

Interaction Workspace features two modal views: Main View and Gadget. Refer to *User's Guide* and *Interaction Workspace Context-Sensitive Help* for detailed explanations of how to use these two different views. For information about configuring the Main View, see [Main view](#). For information about configuring the Gadget, see [Gadget and Statistics Gadget](#).

# Agent Login And Authentication

Agent login is a two-step process:

1. User authentication in the primary login dialog box
2. Selection of Place and advanced parameters in the secondary login dialog box, when it is required

Interaction Workspace enhances the security of your system by limiting agent login to basic authentication. Interaction Workspace further enhances security by enabling you to limit the choices that are presented to an agent at login.

## User Authentication

When Interaction Workspace is launched by an agent, the agent must provide a user name and password as authentication. After authentication the Configuration Layer is accessed by Interaction Workspace to obtain the list of existing places and privileges that are granted to the agent as well as the configuration of the Interaction Workspace application for that agent.

## Changing Passwords

You can require agents to automatically change their password the first time that they log in to the system. You can assign temporary passwords to new agent objects when you create them, and then specify that the password must be changed before the new agent is able to log in to Interaction Workspace for the first time.

You can also enable agents to change their passwords by selecting the Change Password action from the Interaction Workspace Main Menu.

Use the following Security privilege to enable the password change feature:

- Can Change Password

Refer to the *Genesys 8.1 Security Deployment Guide* for a complete description of password policies and how to configure them.

## Place Selection

Genesys 8 requires that each agent connect to a unique Place. After authentication, the agent must specify a Place. The default Place that is specified by the agent is displayed in the Place field of the secondary login dialog box. Place information is stored locally and is provided to the agent for confirmation. Agents can be configured to specify a Place other than their default Place.



---

## Specification of Advanced Login Parameters

Advanced login parameters are defined by the privileges that are assigned to a particular agent. The privileges assigned to a particular agent, therefore, determine which advanced parameters, if any, are displayed in the secondary login dialog box. The Place that is specified by an agent also determines the advanced login parameters that is available to be specified by the agent. For example, if the Place is associated with a voice channel, the agent must also provide login and queue information for each assigned DN. Other advanced parameters that might be required include SIP phone numbers. Advanced parameters can be preset for agents making it unnecessary for the agent to specify advanced parameters.

### Application Options that Control Login

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

- `login.default-place`--Specifies the default Place that is proposed to the authenticated agent at login.
- `login.enable-place-completion`--Enables the name of the Place to be completed as the agent types.
- `login.im.can-unactivate-channel`--Specifies whether the agent can select and deselect (activate and deactivate) IM channels.
- `login.im.prompt-agent-login-id`--Specifies whether the agent can select a login id from the configured ones for the IM channel in the login window.
- `login.im.prompt-dn-password`--If applicable, prompts for the IM channel password in the secondary login dialog box.
- `login.im.prompt-queue`--If applicable, prompts for the ACD Queue in the secondary login dialog box.
- `login.prompt-place`--Specifies whether the agent must enter a place in the login window.
- `login.store-recent-place`--Specifies whether the most recently used Place on the workstation is stored and displayed for the agent at the next login.
- `login.voice.can-unactivate-channel`--Specifies whether the agent can select and deselect (activate and deactivate) voice channels.
- `login.voice.prompt-agent-login-id`--Specifies whether the agent can select a login id from those configured for the voice channel in the login window.
- `login.voice.prompt-dn-less-phone-number`--Specifies whether a DN-less phone number is prompted for in the login window. This option is specific to the SIP Server environment.
- `login.voice.prompt-dn-password`--If applicable, prompts for the DN password in the secondary login dialog box.
- `login.voice.prompt-queue`--If applicable, prompts for the ACD Queue in the secondary login dialog box.
- `login.workmode`--Specifies the work mode that is applied when the user of the voice DN logs in. If set to `auto-in`, the agent is automatically in Ready state. If set to `manual-in`, the agent must manually activate the Ready state. To determine whether your switch supports the work mode, refer to the Deployment Guide of the relevant T-Server.
- `login.<media-type>.can-unactivate-channel`--Specifies whether the agent can select and deselect (activate and deactivate) particular channels.
- `login.<media-type>.is-auto-ready`--Specifies whether the indicated workitem channel is

automatically set to the Ready state at login.

## Using the Command Line to Start Interaction Workspace

You can pass certain Interaction Workspace login information through the command line when you start the Interaction Workspace application:

```
Interactionworkspace.exe -url tcp://<host>:<port>/<appli> -u <user> -p <password> -place <place>
```

where:

<host> – (mandatory) host name or IP Address of Configuration Server

<port> – (mandatory) port of Configuration Server

<appli> – (mandatory) Interaction Workspace application name in Management Framework

<user> – (mandatory) Username of the agent

<password> – (optional) Password of the agent

<place> – (optional) Place to where the agent logs

### Important

You must pass all of the mandatory parameters on the command line. For example, you cannot pass only the `-url` parameter, and then prompt for username and password.

If parameters are typed manually in the first login window, they are stored in the local user profile and restored to the login window at the next login session. If the parameters of the first login window are passed by the command line, thereby bypassing the first login window, then the parameters are not saved in the local user profile.

---

# Managing Agent Status

Interaction Workspace provides options that enable agents to control their status. Use these options to populate the Interaction 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

Interaction 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)

Other configurable agent privileges include the following:

- Refine advanced login parameters, when applicable (for example, Place, and Queue)

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

You can set automatic not-ready reasons for individual channels by media-type at login time. Use the `login.<media-type>.auto-not-ready-reason` option to specify the Not Ready Reason code that is displayed for the specified channel. If the `login.<media-type>.is-auto-ready` option is set to `true`, the `login.<media-type>.auto-not-ready-reason` is ignored.



**Note:** 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.

# Managing Agent Inactivity

For security purposes, Interaction Workspace can be configured to lock the application, if an agent has not used the keyboard or mouse for a period that you specify. All user input is blocked until the agent provides login information to unlock the application. When Interaction Workspace is locked, the following conditions occur:

- The following windows are minimized or hidden when the application is locked:
  - Main window
  - Gadget
  - Statistics Gadget
  - Interaction window
  - My Channels
  - My History
  - My Statistics
  - My Contact Center Statistics
  - My Messages
- The following windows/controls remain visible, but are disabled:
  - Interaction notifications (case information is not displayed)
  - System tray icon
- An authentication dialog window is displayed.
- A notification that the agent should authenticate to unlock Interaction Workspace is displayed.
- System notices are not locked.

You can use the following option in the `interaction-workspace` section to control the inactivity timeout.

- `security.inactivity-timeout` -- Specifies the amount of time in minutes of agent inactivity (no mouse or keyboard usage) that triggers application locking. If the agent has been inactive longer than the number of minutes that are specified by the inactivity timeout, the agent must reauthenticate to be able to use the Interaction Workspace application. A value of 0 disables this functionality.
- `security.inactivity-set-agent-not-ready` -- Specifies whether the agent is automatically set to Not Ready when agent inactivity is detected.
- `security.inactivity-not-ready-reason` -- Specifies the Not Ready Reason if the `security.inactivity-set-agent-not-ready` option is set to true.


---

# Previewing Incoming Interactions

Interaction Preview is rendered through an Interactive Notification pop-up from the System Tray from the Interaction Workspace icon. The Interactive Notification pop-up preview handles inbound notification for ringing voice interactions (SIP or TDM) or SIP interaction preview or incoming eServices interactions (e-mail, chat, or workitem). The preview contains sufficient information to enable agents to determine whether to accept or reject an interaction. The following privileges enable these actions:

- Accept Interaction or Accept Preview
- Reject Interaction or Decline Preview

In a Voice environment, if the Reject privilege is granted to an agent, the Reject function is available only for an incoming voice call if T-Server provides information about the queue or Routing Point that is used to deliver the call to the agent.

 **Note:** You can control the behavior of the Voice Reject function by using the `interaction.reject-route` configuration option.

You can use the following options in the `interaction-workspace` section to configure the Interaction preview:

- `interaction.case-data.format-business-attribute` -- Specifies the case-data format.
- `interaction.case-data.frame-color` -- Specifies the color of the border of the Case Data view frame. Examples: `#FFFFBA00` for a Gold color, `#FF6F7074` for a Silver color, and `#FFB8400B` for a Bronze color. This option can be overridden by a routing strategy.
- `voice.ringing-bell` -- Specifies the voice channel ringing sound configuration string.
- `interaction.override-option-key=IW_OverrideOptions`.

To configure an agent for SIP Preview, see [Procedure: Enabling an agent to use the SIP Preview feature](#).

# Handling Interactions

- Voice and SIP Voice
- Outbound Campaigns
- E-Mail
- Chat
- SMS
- Web Callback
- Workitems
- Social Media:
  - Facebook (by using an eServices plug-in)
  - Twitter (by using an eServices plug-in)
  - RSS (by using an eServices plug-in)

Interaction Workspace also supports the following functionality for various interaction types:

- Interaction Bar
- Workbins
- Standard Response Library
- Spelling Check

## Voice Interactions

Interaction Workspace employs the following privileges for all voice interactions:

- Release Call
- Hold Call
- Resume Call
- Mark done
- Set Disposition
- Send DTMF

Interaction Workspace also enables privileges for outbound interactions:

- Can Make Call

You use the following options in the interaction-workspace section to configure voice interactions:

---

- `voice.mark-done-on-release` -- Specifies whether the Mark Done function is required to complete the release of the call.
- `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.
- `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.use-connection-id` -- Specifies whether the connection id is sent as part of the user event that is sent for disposition code. 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.

## Dial Plan: Prefix Management

The Dial Plan feature enables you to define the rules that Interaction Workspace applies to the dialed digits. The rules enable Interaction Workspace to transform the digits that it receives into the actual digits that are used to make the call. Interaction Workspace receives digits from chat and SMS interactions when an agent uses the click-to-dial feature. The Dial Plan Call Flow feature is applied to the following events:

- TMakeCall
- TInitiateTransfer
- TInitiateConference
- TSingleStepTransfer
- TMuteTransfer
- TSingleStepConference
- TSingleStepConference

## Pattern Matching

The table [plan pattern matching values](#) **Dial plan pattern matching values** provides the list of special characters that you can use to define dialed number patterns to be matched.

**Dial plan pattern matching values**

Special Character	Pattern Matching
X	Matches any single digit from 0-9.



Special Character	Pattern Matching
Z	Matches any single digit from 1-9.
N	Matches any single digit from 2-9.
[...]	Matches any one of the digits that are found in the square brackets. For example, using the special characters [12345], Interaction Workspace can match any of the digits: 1, 2, 3, 4, or 5.
[a-b]	The hyphen inside square brackets acts as a range indicator. Matches any one digit that falls in a range of digits. For example, [125-8] matches any of the digits 1, 2, 5, 6, 7, 8.

The following are some examples of the use of special characters to match the patterns for dialed number Pattern Matching:

- 9NXXXXXXXX -- Matches any 11-digit number that begins with 9, where the second digit is between 2 and 9.
- 9[54]10XXXXXX -- Matches any 11-digit number that begins with either 9510 or 9410.
- [45]XXX -- Matches any 4-digit number that begins with either 4 or 5.

### Digit Translation

After the number to be dialed is matched to the pattern that is defined in the dial-plan rule, Interaction Workspace uses the `digits` parameter to determine which number to use to make the call. These digits can be any alphanumeric string. The string must be terminated with a semicolon. This parameter can also use the `{DIGITS}` variable, which provides flexibility in defining the digits to be dialed. `{DIGITS}` Variable: The digits variable in the dial-plan rule must take one of the following formats:

- `${DIGITS}`
- `${DIGITS:x}`
- `${DIGITS:x:y}`

Where:

- DIGITS defines the actual digits dialed from the endpoint.
- X defines the starting position of the variable, identified by the character position in the digit string. The value 0 represents the first character in the string (starting from the left). This value can be negative, which indicates a character position that starts from the right instead of left. For example, -1 indicates the right-most character. The default value is 0.
- Y specifies the number of characters to be included, starting from the position that is defined by X. By default, all characters in the string are included.

For example, if the number 96501235678 is dialed, here are some examples of how the `{DIGITS}` translate:

- 
- `${DIGITS}` translates to 96501235678.
  - `${DIGITS:1}` translates to 6501235678.
  - `${DIGITS:-4:4}` translates to 5678.
  - `${DIGITS:0:4}` translates to 9650.

You must configure a Dial-Plan Rule in the `dial-plan-rule-<name>` option that uses the following format: `pattern => digit translation \# comment` For example:

- `5XXX=>4351707${DIGITS} # This rule matches any 4-digit number starting with 5 and translates it to the number 43517075XXX`
- `5002=>43517075002 # This rule matches the dialed number 5002 and translates it to the number 43517075002`

## Outbound Campaign Interactions

Interaction Workspace supports the following 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 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.
- **Active Switching Matrix (ASM)** -- Contacts are retrieved and dialed automatically by the campaign, like Progressive and Predictive, but the agent is connected immediately to the contact.

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

- **Can Use** -- Enables access to the Outbound Campaign functions
- **Can Cancel Record** -- Enables agents to decline a preview record so that it is not processed during the current campaign.
- **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.
- **Can Edit Record Data** -- Enables agents to edit the outbound record fields that are configured as editable.
- **Can Get Next Preview Record** -- Enables agents to request a new preview record while terminating the processing of the previous record.
- **Can Mark Do Not Call** -- Enables agents to mark a contact as Do Not Call.

- 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.
- Can Reschedule -- Enables agents to reschedule an outbound record of an active call for callback at a different date and/or time.
- 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.
- 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.
- Can Set Call Result -- Enables agents to set a call result for the outbound record.
- Can Set Interaction Disposition -- Enables agent to set a disposition code for Outbound interactions.

Interaction Workspace also enables privileges for Outbound Push Preview campaigns interactions:

- Can Use Push Preview -- Enables agents to actively participate in Outbound Push Preview campaigns.

To ensure that this feature behaves correctly in Interaction Workspace, you must configure the `send_attribute` key-value pair as specified in the *Outbound Reference Guide*. For example, where the *Outbound Reference Guide* recommends that you set the field name to `GSW_UNTIL` or `GSW_FROM`, consider setting those values to `GSW_UNTIL` or `GSW_FROM` only. To set an alternative display name in the agent facing interface, you can use the `display-name` key-value as described in the following table:

**Configuration of the interaction-workspace section in the objects of type 'Field' in Genesys Administrator**

Option	Valid Values	Default Value	Description
display-type	bool, enum	(none)	Defines the type of the outbound field to be displayed on Interaction-Workspace side. If set to enum, the outbound field possible values will be displayed in a combo box. In this case, the list of possible values is defined in the <code>enum.business-attribute</code> option. If set to bool, the outbound field value will be displayed as a checkbox. enum and bool display types are taken into account only if the outbound field data type is char or varchar If this option is not set, the outbound field is

Option	Valid Values	Default Value	Description
			displayed either as a string, or as an integer, or as a Date, or as a float, according to the outbound field data type.
read-only	true, false	true (for system fields), false (for user-defined fields)	Specifies whether this outbound field can be modified
display-name	any string	(none)	Defines the name that is displayed for this outbound field on Interaction-Workspace side. If this option is not set, the outbound field is displayed using the <code>send_attribute</code> value.
display	true, false	true	Defines if the outbound field is displayed or not on Interaction-Workspace side. This option is used in addition to the creation of the <code>send_attribute</code> . If the <code>send_attribute</code> is defined, use this option to hide the outbound field.
bool.true-value	any string	true	Defines the string that corresponds to 'true'. Used only if <code>display_type</code> is set to <code>bool</code>
bool.false-value	any string	false	Defines the string that corresponds to 'false'. Used only if <code>display_type</code> is set to <code>bool</code>
enum.business-attribute	(link to business attributes)	(none)	Link to business attributes that define the enum value. Used only if <code>display_type</code> is set to <code>enum</code> . By default the items are sorted alphabetically in this list. To move some or all of these fields to the top of the list, you can use the <code>order</code> option.

Option	Valid Values	Default Value	Description
			<p>Create this option in the annex of the Business Attribute object that contains the list of values:</p> <ul style="list-style-type: none"> <li>Section: interaction-workspace</li> <li>Option: order</li> <li>Default value: ""</li> <li>Valid values: A comma-separated list of Business Attribute Value names.</li> </ul>
int.min-value	integer	0	Minimum value accepted. Used only if the outbound field data type is int
int.max-value	integer	2147483647	Maximum value accepted. Used only if the outbound field data type is int
float.min-value	float	0	Minimum value accepted. Used only if the outbound field data type is float
float.max-value	float	3.40282347E+38	Maximum value accepted. Used only if the outbound field data type is float

Next, you must configure the `send_attribute` key-value pair as specified in the *Outbound Reference Guide* for the calling list. To set an alternative display name in the agent facing interface, you can use the `outbound.fields.order` key-value as described in the following table:

**Configuration of the interaction-workspace section in the objects of type 'Calling List' in Genesys Administrator**

Option	Valid Values	Default Value	Description
outbound.fields.order	A comma-separated list of Outbound fields, identified by the value of the key <code>send_attribute</code> that is configured in section OCServer or default in	""	Defines the order in which the outbound fields are sorted in the outbound data area. The fields that are not listed in this option are listed after the sorted

Option	Valid Values	Default Value	Description
	the annex of the Field object.		fields, retaining their default sorting as specified by OCS.

You use the following options in the interaction-workspace section to configure voice interactions:

- `outbound.record-information.frame-color` -- Specifies the color of the border of the Case Data view frame. This option can be **overridden by a routing strategy**.
- `outbound.record-information.header-foreground-color` -- Specifies the color of the foreground of the Case Data view header. This option can be **overridden by a routing strategy**.
- `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.push-preview.auto-answer` -- Specifies whether a push-preview outbound interaction is automatically accepted and joined when an Interaction Server Invite event is received. This option can be **overridden by a routing strategy**.
- `outbound.push-preview.use-combined-channel` -- Specifies whether the outbound push-preview channel is combined with the voice channel.
- `display-format.interaction-outbound-pull-preview-name` -- Defines the display format of outbound pull-preview (preview) interactions by specifying a string of field codes.
- `display-format.interaction-outbound-push-preview-name` -- Defines the display format of outbound push-preview interactions by specifying a string of field codes.
- `login.outboundpreview.can-unactivate-channel` -- Specifies whether the agent can select and unselect (auto-login or not) the outbound preview channel.

## Dialing an alternate number in Outbound Preview Mode

You can now configure an alternate dialing number for an Outbound call that has a NoAnswer or Busy result, or some other result than Answered.

To enable this functionality, you must create a new Treatment object in the Outbound Contact Server (OCS) application in the Genesys Configuration layer. The Treatment object specifies that the next number in the dialing chain for the contact is dialed. The Treatment ensures that each number in the dialing chain is tried until the agent applies a different disposition to the call.

1. In Genesys Administrator, open PROVISIONING > Outbound Contact > Treatments.
2. Click New.
3. In the New Treatment view, set the following field values:
  - **Name:** ReDial\_NoAnswer
  - **Call Result:** No Answer
  - **Apply to Record:** Next in chain
  - **Number in Sequence:** 1

- **State:** Enabled
  - **Cycle Attempt:** 10
  - **Interval, minutes:** 1
4. Assign the new Treatment to the calling list. Open one or more of your Calling List objects in Genesys Administrator and select the Treatments tab.
  5. Click Add.
  6. In the Browse dialog box, select the treatment that you just created.
  7. Click OK.
  8. Click Save & Close.
  9. In Genesys Administrator, open the Interaction Workspace Application object and configure it to use the Treatment.
  10. In the interaction-workspace section assign the value `personal` to the `outbound.treatment-mode` option. Setting this option to `personal` adds the `GSW_TREATMENT = RecordTreatPersonal` attached data to the `EventUserEvent` that is generated when the record is marked as processed. This attached data informs OCS that a treatment should be applied to the outbound record if the call result matches the result that is set for the record. This ensures that the callback is assigned to the agent who set the `No Answer` disposition for the call and not to the next available agent who is working on the same campaign. Refer to the scenario that is described below.

## Scenario

1. Your Outbound campaign is started in Preview mode.
2. An agent logs in to Interaction Workspace.
3. The agent clicks `Get Record` to retrieve an Outbound Record from the Outbound Campaign on which they are working.
4. The agent receives an Outbound Record and selects the number to be dialed from the list of available phone numbers in the Outbound Chain.
5. The agent calls the selected number.
6. When the call is over, the agent sets the `Call Result` to `No Answer` and then clicks `Done`, closing the interaction.
7. OCS applies the `ReDial_NoAnswer` call treatment that you created to handle the `No Answer` call result.
8. An immediate callback for the Outbound Record is triggered (refer to the "Call Handling/Treatments" section in the *Outbound Contact 8.1 Deployment Guide*).
9. The agent immediately receives a *personal* callback for this outbound record because the value of the `outbound.treatment-mode` option is set to `personal`.
10. The agent accepts the *personal* callback.
11. The preview record is displayed and the agent is able to dial one of the available numbers from the outbound chain.

## E-Mail Interactions

Interaction Workspace enables agents to handle e-mail interactions, including the following functionality:

- Reply to inbound e-mails (with or without the original text)
- Create new outbound e-mails
- Check the spelling of an outbound e-mail
- Apply a signature to an outbound e-mail
- Store e-mails in a workbin
- Transfer an e-mail to an internal target
- Forward an e-mail to an external resource
- Set a disposition code
- Mark the interaction as Done
- **Quality Assurance (QA) review of e-mails**
- View and copy links to non-embedded images in inbound and outbound e-mail 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
- Printing e-mails

Interaction Workspace employs the following privileges for all E-mail interactions:

- Can Use E-mail media
- Can Decline
- Can Release
- Can Move to Workbin
- Can Reply
- Can Reply All
- Can Add Attachments
- Can Send
- Can Save
- Can Delete
- Can One Step Transfer
- Can Set Interaction Disposition
- Can Interim Send

Mandatory options for correct e-mail handling:

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- `email.default-queue` -- Specifies the default queue for e-mail interactions.
- `email.outbound-queue` -- Specifies the default queue for e-mail interactions.
- `workbin.email.draft` -- Specifies the name of the Workbin to be used to store draft e-mails
- `workbin.email.in-progress` -- Specifies the workbin to be used to store e-mails which are in the In Progress state.

Interaction Workspace handles linked images in the HTML content of inbound and outbound e-mails. Images are loaded from their respective web servers in the background so that display of the e-mail does not block the application. For environments where Internet proxies require user authentication, the following options have been added to the template:

- `webproxy.address`--Specifies the the web proxy address.
- `webproxy.username`--Specifies the the web proxy username.
- `webproxy.password`--Specifies the the web proxy password.

## Signatures

Interaction Workspace enables you to assign default signature templates to outbound e-mail interactions. E-mail signatures allow the insertion of tagged-data fields with data that is related to the agent, such as name, job title, department, phone number, e-mail 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 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.

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

## Inbound E-Mail Forward to External Resource

Interaction Workspace enables agents to forward active inbound e-mail interactions to an external resource by selecting a valid e-mail address in Team Communicator, either by manually entering the address or by selecting it from a searched Contact or a Corporate or Personal Favorite. Depending on the Business Process that you are using, the agent who has forwarded an e-mail interaction to an external resource might retain the ownership of the interaction and be responsible for closing the interaction. A set of key-value pairs that include the destination e-mail address and other information is added to the inbound e-mail before it is placed in the Forward queue so that they can be used in a Business Process:

- `GD_ExternalAgentAddress`--The e-mail address destination. This is added only if the `general.gad.attached-data` option is set to true.
- `GD_OriginalAgentEmployeeId`--The Employee Id of the agent. This is added only if the `general.gad.attached-data` option is set to true.
- `GD_TransferrerUserName`--The UserName of the agent. This is added only if the `general.gad.attached-data` option is set to true.

- IW\_ExternalAgentAddress--The e-mail address destination.
- IW\_OriginalAgentEmployeeId--The Employee Id of the agent.
- IW\_TransferrerUserName--The UserName of the agent.
- IW\_EmailNotepad--The current notepad text of the e-mail view.

Refer to [EServices](#) e-mail workflow samples for more information about forwarding e-mail interactions to external resources. The following task controls the use of the forwarding feature:

- Can Forward E-Mail to External Resource

Use the `email.forward-queue` configuration option in the `interaction-workspace` section to specify the Interaction Queue in which the inbound e-mail is placed when an agent forwards it to an external resource. Use the `keyboard.shortcut.interaction.email.forward` configuration option in the `interaction-workspace` section to specify the shortcut that forwards an active inbound e-mail.

### E-Mail Can Mark Done Privilege

The Can Mark Done privilege controls how e-mails are marked as done. When this privilege is allowed, the Done button is displayed in the toolbar when an inbound e-mail is presented. If an agent clicks Done, the inbound e-mail is terminated (removed from the Business Process). It will then not be possible to submit any corresponding outbound reply from the interaction view. It can only be reopened from the Contact History. When this privilege is not allowed, the Done button is not displayed in the toolbar when an inbound e-mail is displayed. The agent must handle the e-mail by replying to it, transferring it, or placing it in a workbin.

### E-Mail Interaction History

An agent can take ownership of e-mail interactions that are in-progress if you grant the permissions that are listed in the table **Agent Privileges that Control E-Mail Interaction History Functionality**. The E-mail Interaction History feature displays the status of the interaction to agents by using the detailed status information that is provided by Interaction Server. The in-progress status of an e-mail enables agents to find and process inbound e-mail interactions that are in a queue but are not assigned, or are in the process of being routed. The in-progress status can also be used to restrict which agents can handle an in-progress interaction.

**Agent Privileges that Control E-Mail Interaction History Functionality**

Privilege	Agent Functionality
Workbin - Can Use	Agents can open any e-mail that is present in the agent's personal workbins or in shared workbins to which the agent has access from the Workbin view.
Contact - Can Pull From Other Personal Workbins	Agents can select an e-mail that is currently in the workbin of another agent.
Contact - Can Pull From unassigned shared workbin	Agents can select an e-mail from a shared workbin to which the agent is not assigned or is in the scope of a group to which the agent is not a member.

Privilege	Agent Functionality
Contact - Can Pull Queued Emails	Agents can select an e-mail that is in a queue or that is currently being delivered.

## Printing

From the E-Mail Interaction window, agents can display the Print Preview window which provides the following functionality:

- Print preview
- Printer selection
- Page range
- Page layout
- Configurable page margins

Enable the following privilege to allow agents to print e-mail interactions:

- Can Print Email

Configure the following option to specify whether the Print Preview window is displayed to the agent:

- `printing.use-print-preview`

## Chat Interactions

Interaction Workspace employs the following privileges for all Chat interactions:

- Can Use Chat Media
- Can Decline Chat
- Can Release
- Can One Step Transfer
- Can One Step Conference
- Can Push Url
- Can Set Interaction Disposition
- Show Silent Monitoring

You use the following options in the `interaction-workspace` section to configure Chat interactions:

- `options.record-option-locally-only` -- Specifies whether the display settings for the agent are stored locally or in the agent annex.
- `interaction-workspace-pushed-url` -- Specifies the section in the agent annex in which pushed URL

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titles are saved.

- `chat.pending-response-to-customer` -- Defines two alarm thresholds, in seconds, that warn agents that they have a pending response to a chat. Three levels are displayed: below the warning time, between the warning time and the maximum time, and above the maximum time. Agents are warned by the flashing of various elements in the user interface, including the taskbar, collapse/expand button, the interaction bar, and the pending response timer. If the agent places his or her mouse pointer on any of these flashing elements, a preview of the last received message from the contact is displayed.
- `chat.toast-information-key` -- Specifies whether the Information area is displayed in the Chat interaction notification. The option specifies the name of the attached data key that contains the information.
- `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.
- `chat.new-message-bell` -- Specifies the new Chat sound configuration string.
- `chat.reconnect-attempts`--Defines the number of attempts to reconnect to the chat session. This applies to environments that implement Chat High Availability (HA) but also to simple environments if network disconnection occurs during a chat session.
- `chat.reconnect-timeout`--Defines the interval between each attempt to reconnect to the chat session. This applies to environments that implement Chat High Availability (HA) but also to simple environments if network disconnection occurs during a chat session.
- `chat.nickname`--Specifies that a nickname (pseudonym) is used in chat sessions instead of the agent's user name, and defines the nickname.
- `display-format.chat-agent-name`--Specifies the display format of agent identifiers in agent and team supervisor views.

## Configuring Chat Conference and Consultation with a Skill, Group, or Interaction Queue

Agents can use the Team Communicator to find an "Instant Chat Conference" and "Start Chat Consultation" target based on a skill, group, or interaction queue instead of searching for a specific individual or DN. The system router finds the next available target from a list of targets based on the skill, group, or interaction queue that is selected by the agent. A Business Process tries to route the call based on attached data. You can configure the contact attempt interval and the number of attempts to find an available target with the specified skill or in the specified agent group or interaction queue before the request times out. The requesting agent is informed if the request has timed out. The following attached data keys are populated by Interaction Workspace:

- `InternalConferenceInviteOwnerId`--The `employeeId` of the agent who is requesting the conference or consultation.
- `InternalConferenceInviteOwnerInteractionId`--The `Interaction Id` of parent Interaction.

To enable this feature, allow the following privilege:

- Can One Step Conference

To configure the features of the Chat conference or consultation with a skill, an agent group, or an interaction queue, set the following configuration options:

- Set the value of the `intercommunication.chat.conference.invite-timeout` to specify the length of the

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interval before the conference invitation times out.

- Set the value of the `intercommunication.chat.queue` to the name of the interaction queue that is used by the routing based feature for chat.

## SMS Interactions

There are two media types that you can configure in the Configuration Server Manager Media Type business attribute. You can set the following media types:

- `sms` -- Use this media type to enable page mode (single message inbound and reply).
- `smsession` -- Use this media type to enable session mode (multiple message "chat"-like session).

In page mode, messages are handled individually. A contact sends a message, the agent handles the message (replies or forwards it), and the SMS interaction view is closed. In session mode, a keyword is sent by the contact that indicates that the SMS is to be part of a chat-like session. Multiple SMS messages are exchanged between an agent and a contact in a single interface. In addition to the keyword, session mode also functions when the SMS is sent to a specific, pre-configured inbound phone number. Interaction Workspace employs the following privileges for all SMS interactions:

- `Can Use SMS` -- Enables access to the SMS channel.
- `Can Decline SMS` -- Enables the agent to decline an SMS interaction.
- `Can One Step Transfer` -- Enables the agent to transfer an SMS interaction.
- `Can Set Interaction Disposition` -- Enables the agent to set a disposition for an SMS interaction.
- `Can Create SMS` -- Enables the agent to create a new SMS interaction.

You use the following options in the `interaction-workspace` section to configure the channel to handle SMS interactions:

- `openmedia.bundle.sms` -- Specifies the list of media-types (SMS page mode and SMS Session mode) that are used to implement the SMS channel.
- `login.sms.can-unactivate-channel` -- Specifies whether the agent can select and unselect (activate and deactivate) the SMS channel.
- `login.sms.is-auto-ready` -- Specifies whether the SMS channel is automatically in the ready state at login.
- `sms.ringing-bell` -- Specifies the path to the sound file that is played when an sms message is received.

You can use the following intercommunication options in the `interaction-workspace` section to configure the routing of SMS interactions:

- `intercommunication.sms.routing-based-targets` -- Specifies the list of targets that are contacted through the Routing Base feature mechanism for the requests that are defined in the option `intercommunication.sms.routing-based-actions`.
- `intercommunication.sms.routing-based-actions` -- Specifies the list of routing-based actions that an agent may perform.

- `intercommunication.sms.queue` -- Specifies the name of the queue that is used by the Routing Base feature.

You can use the following options in the `interaction-workspace` section to configure SMS interactions:

- `sms.toast-information-key` -- Enables the display of Contact information in the interaction notification. These options defines the attached data that are displayed.
- `sms.max-message-number` -- Specifies the maximum number of SMS that are considered to be part of a single message.
- `sms.agent.text-color` -- Specifies the color of the text of the messages that are entered by an agent in the SMS interaction view.
- `sms.agent.prompt-color` -- Specifies the color of the prompt for the messages that are entered by an agent in the SMS interaction view.
- `sms.other-agent.text-color` -- Specifies the color of the text entered by another agent in the SMS interaction view.
- `sms.other-agent.prompt-color` -- Specifies the color of the prompt for the messages that are entered by the target agent in the SMS interaction view.
- `sms.client.text-color` -- Specifies the color of the text received by a contact in the SMS interaction view.
- `sms.client.prompt-color` -- Specifies the color of the prompt for the messages entered by a contact in the SMS interaction view.
- `sms.time-stamp` -- Specifies whether the time stamp is displayed in the SMS transcript area.
- `sms.auto-answer` -- Specifies whether an SMS interaction is accepted automatically when an Interaction Server Invite event is received.
- `sms.default-queue` -- Specifies the Interaction Queue to which a new or reply outbound SMS is submitted.
- `sms.outbound-queue` -- Specifies the Interaction Queue to which outbound SMS are moved when an agent clicks Send. This option is used only when the Interaction Workflow does not specify the Queue for New Interactions when Inbound SMS are being routed to an agent.
- `sms.from-numbers-business-attribute` -- Specifies the business attributes that contain the attribute values that are used as an enumerated value for the From number of an SMS interaction.
- `sms.transcript-time-frame` -- Specifies the range of time in which to search for previous interactions by the same contact.
- `sms.subject-max-chars` -- Specifies the maximum number of characters from an SMS message that are used to create the message subject if the SMS does not contain a subject.

## Web Callback Interactions

Interaction Workspace supports agent processing of Web Callbacks. Contacts can schedule a callback through your website. Interaction Workspace employs the following privileges for all Web Callback interactions:

- `Can Use Web Callback Channel` -- Enables access to the Web Callback channel. All other Web Callback

privileges are dependent on this one.

- Can Decline -- Enables agents to decline incoming Web Callback interactions.
- Can Set Interaction Disposition -- Enables agents to set disposition codes for Web Callback interactions.
- Can Reschedule -- Enables agents to reschedule a Web Callback interaction.
- Can Reschedule Before Call -- Enables agents to reschedule a Web Callback Preview at a different date and/or time. The Can Reschedule privilege must be enabled for this privilege to be active. If Can Reschedule is enabled but Can Reschedule Before Call is disabled, agents can still reschedule the Web Callback Preview after they have connected and disconnected the call.
- Can Reschedule On New Number -- Enables agents to reschedule a Web Callback interaction by using a new phone number.
- Can Mark Done -- Enables agents to mark inbound Web Callback interactions as Done without processing them further.

You must also allow the **voice** privileges since the Interaction Workspace Voice channel is used to complete Web Callback interactions. To function correctly, the Web Callback feature requires Interaction Server to be available in the environment (refer to the **EServices** documentation), as well as either a Voice TServer or SIP Server. To support the transfer of corresponding Voice calls, configure the `webcallback.park-queue` option. To automatically dial the call when the web Callback interaction is accepted, configure the `webcallback.auto-dial`. You use the following options in the `interaction-workspace` section to configure the channel to handle Web Callback interactions:

- `login.webcallback.auto-not-ready-reason` -- Specifies whether the channel is set to Not Ready Reason automatically when the agent logs in.
- `login.webcallback.can-unactivate-channel` -- Specifies whether the agent can unactivate the Web Callback Channel.
- `login.webcallback.is-auto-ready` -- Specifies whether the channel is set to Ready automatically when the agent logs in.
- `webcallback.auto-answer` -- Specifies whether a Web Callback interaction is automatically accepted when an 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**.
- `webcallback.auto-dial` -- Specifies whether Callback Phone Number is automatically dialed when an Interaction Web Callback is accepted.
- `webcallback.callback-information.content` -- Specifies the callback data that is displayed in the Callback Information Area. The callback data entries are displayed in the order in which they appear in the list.
- `webcallback.complete-queue` -- Specifies the Interaction Queue in which Web Callback interactions are placed when an agent marks it as Processed.
- `webcallback.park-queue` -- Specifies the Interaction Queue in which the parent Web Callback interaction is placed when an agent transfers a voice call that is created from a Web Callback interaction.
- `webcallback.ringing-bell` -- Specify the web callback ringing sound configuration string of a web callback is delivered to the agent.
- `webcallback.webcallback-information.frame-color` -- Specifies the color of the border of the Web Callback Information view frame of Web Callback interactions. This option can be overridden by a routing strategy, as described in **Overriding Options by Using a Routing Strategy**.
- `webcallback.webcallback-information.header-foreground-color` -- Specifies the color of the

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foreground of the Web Callback Information view frame of Web Callback interactions. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

- `webcallback.reschedule-queue` -- Specifies the Interaction Queue in which Web Callback interactions are placed when an agent reschedules it.

## 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 on who transferred a call and when it is attached to the case data. Not all agents in the chain will see the same case data. This information can be retrieved through the contact database by agent that have the following privileges assigned:

- Can Use Contact History CaseData
- Can Use Contact My History

## Displaying and Editing Case Information

### 1. Basic Attached Data Display

To display attached data key values in Interaction Workspace, you must first define a Business Attribute that has a list of Business Attribute Values. The Names of Business Attribute Values correspond to the names of the attached data keys that you want to display. The Display Names of the Business Attribute Values render the key in the User Interface. You must then assign the name of this Business Attribute to the `interaction.case-data.format-business-attribute` option.

### 2. Translated attached data values

To display a value of attached data by using a display name instead of raw data, in addition to what is described in step #1, you must define an additional Business Attribute in which each Business Attribute Value represents a way to render this value in the User Interface:

- Name of the Business Attribute Value is the raw attached value that is contained in the interaction
- Display Name of the Business Attribute Value is the label that is used for rendering in the User Interface.

Next, you must define the annex of the Business Attribute Value that was defined in step #1 to



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represent this attached data, such as the following:

- `interaction-workspace/enum.business-attribute` = the name of the Business Attribute that is defined to translated attached data value
- `interaction-workspace/read-only` = true
- `interaction-workspace/display-type` = enum

Example:

To make a key-value pair, such as `CallQuality = "0"`, in attached data be displayed in the Case Information area of an interaction in Interaction Workspace, perform the following steps:

In Genesys Administrator:

1. Create a Business Attribute that is named "CaseData".
2. In this Business Attribute, create a Business Attribute Value that has the name `Name="CallQuality"` and `Display Name = "Call Quality"`.
3. In the Interaction Workspace application object, set the value of the `interaction-workspace/interaction.case-data.format-business-attribute` to "CaseData"

Interaction Workspace can now display the attached data, but the value "0" will be displayed.

4. In Genesys Administrator:
  - a) Create a Business Attribute that is named `enumCallQuality`
  - b) In this Business Attribute, create the following Business Attribute Values:
    - `Name = '0'` and `display name = '0 - Good'`
    - `Name = '1'` and `display name '1 - Poor'`
    - `Name = '2'` and `display name '2 - No audio'`

5. In the "CallQuality" Business Attribute Value of the "CaseData" Business Attribute, set the following annex:

- `interaction-workspace/enum.business-attribute` = `enumCallQuality`
- `interaction-workspace/read-only` = true
- `interaction-workspace/display-type` = enum

Enabling Attached Data Edition

You can configure Interaction Workspace 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 in Genesys Administrator, and then defining its properties. When you define the properties of an attribute in a Business Attribute, you can also specify whether it has the property `readonly` or not. Attributes that are not `readonly` can be edited by agents that have the `Can Use Contact History CaseData` privilege configured. An agent can only edit case information key/value pairs of those attributes that are displayed to the agent. The table [Case Information Editing Case Information](#) lists the case information business-attribute keys that can be configured to be editable. For each 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	<code>display-type</code>	bool	bool (for this type)	
	<code>read-only</code>	true, false	true	Specifies whether this key name can be modified
	<code>bool.false-value</code>		false	Value accepted for false
	<code>bool.true-value</code>		true	Value accepted for true
string	<code>display-type</code>	string	string (for this type)	
	<code>read-only</code>	true, false	true	Specifies whether this key name can be modified
	<code>string.max-length</code>	0 to Max Length	255	Maximum number of characters that are accepted for this option
integer	<code>display-type</code>	int	int (for this type)	
	<code>read-only</code>	true, false	true	Specifies whether this key name can be modified
	<code>int.min-value</code>	integer	0	Minimum value accepted
	<code>int.max-value</code>	integer	2147483647	Maximum value accepted
	<code>int.storage-type</code>	int or string	string	Type storage of the value
enum	<code>display-type</code>	enum	enum (for this type)	
	<code>read-only</code>	true, false	true	Specifies whether this key name can be modified
	<code>enum.business-attribute</code>	(link to business attributes)	(none)	Link to business attributes that

Attribute type	Option	Valid Values	Default Value	Description
				<p>define the enum value. By default the items in this list are sorted alphabetically. To move some or all of the fields to the top of the list, use the order option. This option must be created in the annex of the Business Attribute object that contains the list of values:</p> <ul style="list-style-type: none"> <li>• Section: interaction-workspace</li> <li>• Option: Order</li> <li>• Default value: ""</li> <li>• Valid values: A comma-separated list of Business Attribute Value names.</li> </ul>
float	display-type	float	float (for this type)	
	read-only	true, false	true	Specifies whether this key name can be modified
	float.min-value	float	0	Minimum value accepted
	float.max-value	float	3.40282347E+38	Maximum value accepted
date	display-type	date	date (for this type)	
	read-only	true, false	true	Specifies whether this key name can be modified

### Displaying Active URLs in Case Information

You can configure Interaction Workspace 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

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active or not, and to enable the display of a tooltip that displays a preview of the web page.

- `expression.url`--The option is configured by default to display most valid URLs as clickable hyperlinks.
- `interaction.case-data.enable-url-preview`--If this option is set to `true`, the tooltip-preview of linked web pages is enabled.

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

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

The Business Attribute Value of the key that contains the URL must contain the following key value: `[interaction-workspace]/display-type=string`

## Add Key-Value Pair to the Case Information

You can enable the ability to edit the case information to add Key-Values 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.

### Pre-requisites:

- Enable the following privilege to allow editing of case information: Case Information Can Add
- To enable a key to be added, the key must be configured as editable (refer to [Editing Case Information](#)).

## Workitems

Workitems are custom media types or tasks that are processed by the intelligent Workload Distribution (iWD) solution. iWD is an application that works with the Genesys Customer Interaction Management (CIM) Platform to distribute tasks to the resources that are best suited to handle them. It is a collection of software components for:

- Capturing tasks from various enterprise work sources.
- Applying business rules to classify, prioritize, and reprioritize the tasks.
- Routing the tasks to agents or knowledge workers in the enterprise.
- Monitoring and reporting on the intraday and historical status of the tasks and the task handling.

Refer to the *intelligent Workload Distribution 8.0 Deployment Guide* for more information. You must define workitems in Configuration Server (refer to *Framework 8.0 Genesys Administrator Help* and the *eServices (Multimedia) 8.0 User's Guide* for information about defining Business Attributes (Media Type) in Configuration Server). Interaction Workspace employs the following privileges for all Workitem interactions:

- Can Use WorkItem Channel
- Can One Step Transfer
- Can Set Interaction Disposition

You use the following options in the `interaction-workspace` section to configure Workitem interactions:

- `intercommunication.<workitemchannel>.queue` -- Specifies the name of the queue to be used by the Routing Base feature. The following attached data are added by Interaction Workspace:

```
IW_RoutingBasedOriginalEmployeeId, IW_RoutingBasedTargetId,
IW_RoutingBasedTargetType, IW_RoutingBasedActionType.
```

- `intercommunication.<workitemchannel>.routing-based-targets` -- Specifies the list of targets (Agent and/or Queue) that are contacted through the routing-based mechanism, for the requests that are defined in the `intercommunication.<workitemchannel>.routing-based-actions` option. The AgentGroup and Skill targets are always addressed by routing; therefore, they are not affected by this option.
- `intercommunication.<workitemchannel>.routing-based-request` -- Specifies the list of routing-based actions (OneStepTransfer) that an agent is allowed to perform.
- `login.<workitemchannel>.can-unactivate-channel` -- Specifies whether an agent is allowed to select and unselect (activate and deactivate) a workitem channel during login, for example: `login.myworkitem.can-unactivate-channel=true`
- `login.<workitemchannel>.is-auto-ready` -- Specifies whether the Workitem channel is in the auto-ready state at agent login.
- `openmedia.workitem-channels` -- Specifies a list of Workitem channels that an agent can be enabled to use, for example: `openmedia.workitem-channels=myworkitem`
- `<workitemchannel>.auto-answer` -- Specifies whether a Workitem interaction is accepted automatically when an Invite event is received from Interaction Server.

## Workitem Can Mark Done Privilege

The Can Mark Done privilege controls how workitems are marked as done. When this privilege is allowed, the Done button is displayed in the toolbar when an inbound workitem is presented. If an agent clicks Done, the inbound workitem is terminated (removed from the Business Process). It will then not be possible to submit any corresponding outbound reply from the interaction view. It can only be reopened from the Contact History. When this privilege is not allowed, the Done button is not displayed when an inbound workitem is displayed. The agent must handle the workitem by replying to it, transferring it, or placing it in a workbin.

## Open In-progress Workitems from History

You can enable agents to open a workitem of a specified media type that is in progress and in a **workbin or a queue** and is not assigned to any agent that is listed in the contact history for that interaction. This feature enables an agent to immediately work on the workitem before it is assigned. This feature is useful for an agent who is interacting with a contact on another media channel.

To enable this feature, for the agent, agent group, or application object, allow the following privileges and set the value of the `<media-type>.pull-from-history-isenabled` option to true:

- 
- Contact - Can Pull From Queue
  - Contact - Can Pull Interactions In Shared Workbins
  - Contact - Can Pull Interactions In Workbins Not Owned By The User

## Interaction Bar

Interaction Workspace supports multiple simultaneous contact interactions. This means that agents can have more than one interaction open and active on their desktop simultaneously. The Interaction bar is a feature of the Main Window that enables agents to track and access all their current interactions. When an agent has an active interaction, the Interaction Summary View is displayed at the bottom of the Main Window. Each interaction is represented by a block in the view. The block contains contact information and interaction type to enable an agent to distinguish one interaction from another. An agent can click a block to activate it and open a set of controls, or to bring the Interaction window to the front of the desktop. Interaction Workspace employs the following privilege for the Interaction bar:

- Interaction Bar - Can Use

## 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 e-mail 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. Interactions can also be distributed to workbins by Universal Routing Server. For information about configuring Workbins, refer to *Universal Routing 8.1 Interaction Routing Designer Help*. The desktop-draft-workbin workbin is normally configured by the Multimedia Configuration Wizard. However, you might have to create your workbins. Refer to *Framework 8.1 Genesys Administrator Help* and the *eServices 8.1 User's Guide* for information about defining Scripts in Configuration Server. Interaction Workspace employs the following privileges for all Workbin interactions:

- Can Use Workbins

You can use configuration options in each section that defines a Workbin to configure the behavior of each Workbin in Interaction Workspace (refer to [Section: interaction-workspace](#)).

## Workbin and Queue Management

You can configure an agent who is specified as a Supervisor for an Agent Group to read and manage the contents of the workbins of the other Agent Group members. A Supervisor can also manage the contents of queues. This functionality is enabled by granting the following privileges according to the functionality that you want to enable:

- 
- Can Use My Team Workbins (`InteractionWorkspace.Workbins.canUseMyTeamWorkbins`)--Enables the Team Lead to see the Workbins of the agents who are members of the Agent Group for which the Team Lead is specified as a Supervisor.
  - Can Use Interaction Management (`InteractionWorkspace.InteractionManagement.canUse`)--Enables the Team Lead to see interactions that are **filtered by pre-defined criteria**.
  - Can Use Interaction Management Move to Queue (`InteractionWorkspace.InteractionManagement.canMoveToQueue`)--Enables the Team Lead who can use Interaction Management to move items from displayed workbins or from an Interaction Filter to an available Queue.
  - Can Use Interaction Management Move to Workbin (`InteractionWorkspace.InteractionManagement.canMoveToWorkbin`)--Enables the Team Lead who can use Interaction Management to move items from displayed workbins or from an Interaction Filter to another workbin.

Team Leads who are provisioned for Interaction Management can select single or multiple interactions in a workbin or a Queue and reassign them by moving them to other workbins or queues or mark them as Done.

## Creating Interaction Filters for Team Leads

Agents who are granted the `InteractionWorkspace.InteractionManagement.canUse` privilege can view "snapshots" from the Interaction Server database of all the interactions that belong to specified queues. System administrators use Genesys Administrator to build interaction filters, and then use the **`interaction-management.filters`** option to assign the filters to Team Lead agents.

An interaction filter is a database request that is sent to the Interaction Server database. The following are examples of criteria that could be used to create a filter:

- `mediaType`--The media type, for example `email`, of the interactions to be extracted.
- `age`--The age of the interactions to be extracted. You could use this criteria to find interactions that have been received in the last 4 hours, or the ones that are older than 1 day, and so on.
- `Priority`--The priority of the interactions to be extracted.
- `Queue`--The name of the queue or a comma-separated list of queues in which the interactions to be extracted are stored.
- `Time in Queue`--The time that the interactions to be extracted 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 in a range of two dates.

To create and use a filter in Interaction Workspace, do the following:

1. Create a new Section for the Interaction Workspace application object that is 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 to be extracted 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)`. Refer to **`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 this interactions 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`: (Optional) The list of queues to which this filter applies--for example: `email-routing-queue-inbound, email-default-queue`.
  - `case-data.business-attribute`: 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 the `case-data.business-attribute` 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 Interaction 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 Interaction Properties chapter of the *eServices 8.1 User's Guide* for detailed information about keywords, operators, and properties that can be used to query the Interaction Server database.

You can use System properties and Interaction Custom properties to define interaction filters. The following is the list of System properties:

- `AbandonedAt`
- `AssignedAt`
- `AssignedTo`--The Employee ID of the agent to whom the interaction was last delivered
- `CompletedAt`
- `DeliveredAt`
- `ExternalId`--The External interaction identifier (for example, the chat session ID)
- `HeldAt`
- `InQueues`--The suggested destination for the interaction (provided by Universal Routing Server(URS))
- `InteractionId`
- `InteractionState` (0=queued, 1=cached, 2=being processed by URS, 3=being handled by agent)
- `InteractionSubtype`--The list of values comes from Interaction Subtype business attribute
- `InteractionType`--The list of values comes from Interaction Type business attribute
- `IsLocked` (0=unlocked, 1=locked)
- `IsOnline` (0=offline, 1=online)



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- `MediaType`--The list of values comes from Media Type business attribute
  - `MovedToQueueAt`
  - `OutQueues`--The suggested destinations for a reply
  - `ParentId`
  - `PlacedInQueueAt`
  - `PlaceInQueueSeq`
  - `Queue`
  - `ReceivedAt`
  - `ScheduledAt`
  - `SubmittedAt`
  - `SubmittedBy`--The name of the client application that submitted the interaction
  - `SubmitSeq`
  - `TenantId`
  - `Workbin`
  - `WorkbinAgentGroupId`
  - `WorkbinAgentId`
  - `WorkbinPlaceGroupId`
  - `WorkbinPlacedId`

Custom Properties are defined in the Configuration Layer in the *Interaction Custom Properties* Business Attribute. Each Custom Property annex should have a section that is named `translation`. The `translation` section contains the `translate-to` option that has a value that corresponds to the name of the field column in the Interactions table of the Interactions database. The following property types for System and Custom are supported: Integer, String and Timestamp. The name of the custom property (name of the Business Attribute value) can be used to define the interaction filter.

Property values have different types:

- `string`--Strings are bracketed by single quote characters, for example: `'email'`
- `date`--Use the `_timestamp` keyword from Interaction Server for the value, for example: `_timestamp('2013-11-21 14:12:00')`
- `integer`

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, to avoid the problem of database formatting differences for empty strings, use the `_empty` and `_not_empty` keywords--for example, to filter all the interactions that have a `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 8.1 User's Guide*. Use the following `Timestamp` properties for filtering based on the Timestamps of interactions:

- `_age()`--for example, `_age() >= 86400` returns all interactions that are older than a day (86400 seconds)
- `_time_in_queue()`
- `_current_time()`
- `_timestamp()`
- `_timestampdiff()`
- `_timestampadd()`
- `_time_in_same_queue()`

To find all interactions that were received between November 24 and November 29, 2013, you would use the following conditions: `ReceivedAt >= _timestamp('2013-11-23 00:00:00')` AND `ReceivedAt <= _timestamp('2012-11-29 00:00:00')`

## 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 e-mail, chat message, or instant message, or they can read them to the contact during a voice interaction. Agents can modify the contents of a standard response after inserting it into an e-mail, chat message, or instant message. The following information about the usage of standard responses is provided automatically to the Universal Contact Server by Interaction Workspace:

- 0--The agent received suggested responses on the desktop but chose to ignore them and chose another one from the SRL.
- 2--The agent received suggested responses on the desktop and chose one of them and replied.
- 3--The agent did not receive a suggested response from the content analyzer and chose a standard response from the SRL.

Interaction Workspace employs the following privilege for the Standard Responses Library (SRL):

- Can Use Standard Response Library

You use the following options in the `interaction-workspace` section to configure the SRL:

- `standard-response.default-search-type` -- Specifies the default search type that is used to search for text in Standard Response Library. If empty, the default search type `AllKeywords` is used.
- `standard-response.suggested-responses-min-relevancy` -- Specifies the minimum level of relevancy above which Suggested Responses will be shown from the Standard Response Library.
- `standard-response.categories`--Specifies the Standard Response category names to which the agent is restricted. Only standard responses and sub-category trees of the specified categories are displayed to the agent.
- `standard-response.languages`--Specifies the Standard Response languages to which the agent is restricted. Only standard responses of the specified languages are displayed to the agent. Languages are defined as Business Attributes in the Configuration Layer.

The `standard-response.categories` and `standard-response.languages` options can be overridden by a routing strategy. For example:

1. Configure a Transaction object of type `list`. For example, the object could be named: `IW_StandardResponseOverrideOptions`.
2. In the `interaction-workspace` section of the Agent configure the following options:
  - `standard-response.languages = French`
  - `standard-response.categories = Financial Service,HTML,English/Email/Loan`
3. To the override options add the name of the key to be used in the Routing Strategy to the `interaction-workspace` section: `interaction.override-option-key = IW_OverrideOptions` (default).
4. To the `AttachedData` in the strategy, add the following object name: `IW_OverrideOptions = IW_StandardResponseOverrideOptions`

For more information, refer to [Modifying a Routing Strategy to Override Interaction Workspace Options, Based on Attached Data](#).

## Spelling Check

The spelling-check feature enables agents to verify the spelling of text that they have entered in an e-mail or chat interaction. The spelling of the contents of an outgoing e-mail or chat interaction is verified against the default language dictionary. The spelling-check feature steps through the text of replies, and underlines in red potentially misspelled words one by one. Agents can replace the underlined word with another word from a list of suggestions, add it to a custom dictionary, or ignore it. The following languages are supported by default: English (US), English (UK), French, German, Spanish, Czech, Russian, Portuguese, and Italian.

## Corporate Dictionary

There are two ways to add a corporate dictionary to the spelling-check feature. You can choose to combine these methods in the following execution order:

1. Configure the `spellchecker.corporate-dictionary` option with a list of comma-separated corporate dictionary words. Words in this list are limited to 7-bit ASCII characters. For words that require a different character set, use the `spellchecker.corporate-dictionary-file` option. The file can handle any type of encoded characters.
2. Configure the `spellchecker.corporate-dictionary-file` option with the absolute or relative path to your corporate dictionary text file. Each entry in the file should be on a separate line.

## Procedure: Adding a new language dictionary to Interaction Workspace

**Purpose:** To add a new spelling check language dictionary to Interaction Workspace.

### Start

1. Find the appropriate dictionary from the Open Office web site:  
<http://extensions.services.openoffice.org/en/dictionaries>
2. Download the `.oxl` file and save it.
3. Rename the `.oxl` file by using the following naming convention, which follows the ISO 639-1 and ISO 3166 standard codes:  
`<language-code>-<country-code>.oxl`
4. Copy this file to `[IW install location]/Dictionaries`.
5. Restart Interaction Workspace.
6. The new language is then available in the dictionary language selection available in rich edit toolbar or by right-clicking in text areas.  
The following languages are supported by default: English (US), English (UK), French, German, Spanish, Czech, Russian, Portuguese, and Italian.

### End

The [Spelling Check](#) *Interaction Workspace User's Guide* lesson demonstrates how to select a language in the E-Mail Interaction interface (it applies to the interfaces of other interaction types as well).

Use the information in the [Spelling Check](#) topic to add corporate or customer based custom words to your dictionary.

The above procedure implements two "`spellchecker`" configuration options. You can use these options to configure the behavior of the Spelling Check feature. Use the `spellchecker.corporate-dictionary-file` option to point to a text file that contains a list of spelling words.

You can also [customize the language pack](#) for Interaction Workspace.

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# Interaction Workspace SIP Endpoint

You can install an optional SIP Endpoint that can be added as a privilege to enable the agent workstation to handle SIP Voice-over-IP calls. The Interaction Workspace SIP Endpoint does not have an interface; instead, it adds interface elements to the Voice Interaction window, including muting and volume control for both the microphone channel and the speaker channel of the selected audio device(s) on the agent workstation.

## Tip

Any USB headset that is supported by the Windows Operating System should work normally with Interaction Workspace SIP Endpoint.

Other SIP Voice features include: automatic gain control, beep tone, auto-answer, unavailable headset detection, log-level support, Real-time Transport Protocol (RTP) support, and speaking detection.

The options related to Interaction Workspace SIP Endpoint is started and stopped by Interaction Workspace. Both applications employ a keep-alive mechanism that allows each to detect when the other is no longer running. If the SIP Endpoint detects that Interaction Workspace is no longer running, it waits for any active calls to end, and then exits. If Interaction Workspace detects that the SIP Endpoint is no longer running, it starts a new instance of Interaction Workspace SIP Endpoint.

The Interaction Workspace SIP Endpoint can be configured at any level of the configuration-layer hierarchy, from Tenant to agent. Interaction Workspace employs the following privilege for activating the Interaction Workspace SIP Endpoint:

- Use SIP Endpoint

## USB Headset Configuration

You can use the following options to configure Interaction Workspace to use a headset:

- `sipendpoint.genesyslab.device.use_headset`
- `sipendpoint.genesyslab.device.headset_name`

If these options are set, and the corresponding USB headset is connected to the agent workstation at start-up time, the headset is selected automatically.

If the configured USB headset is not connected to the agent workstation, then the behavior depends on the following configuration option in the `interaction-workspace` section of the Interaction Workspace Application object:

- `sipendpoint.enforce-configured-headset-usage`

This option specifies whether the agent must plug in the specified USB headset to complete logging in. By default, when it is set to false, and if the headset is not plugged in at start-up time, the default audio devices that are available on the workstation, if any, are selected. When it is set to true, and if the headset is not plugged in when the agent logs in, Interaction Workspace waits for the headset to be plugged in before finalizing the login of the voice channel. The behavior of other medias, such as e-mail and chat, are not affected by this option.

Interaction Workspace SIP Endpoint enables agents to switch to a pre-configured Not Ready state if the USB headset becomes unplugged after the agent has logged in to the SIP Voice Media. The agent will remain logged in to other eServices media such as e-mail and chat.

Use the following configuration options in the `interaction-workspace` section of the Interaction Workspace Application object to control the behavior of this feature:

- `sipendpoint.headset-unplugged.not-ready-reason`--Specifies the Not Ready reason to be set to the SIP DN if the USB headset that is used by the agent becomes unplugged.
- `sipendpoint.headset-unplugged-set-not-ready`--Specifies whether the SIP DN of the agent is set automatically to Not Ready if the USB Headset that is used by the agent becomes unplugged.
- `sipendpoint.headset-replugged-set-ready`--Specifies whether the SIP DN of the agent is set automatically to Ready if the USB Headset that is used by the agent is plugged back in.

Interaction Workspace SIP Endpoint can be configured to retain volume setting of the USB headset between agent sessions.

Use the following configuration options in the `interaction-workspace` section of the Interaction Workspace Application object to control the behavior of this feature:

- `sipendpoint.retain-volume-settings-between-sessions`--Specifies whether the volume settings are saved for both microphone and speaker, when the agent logs out.

## Session Border Controller

Interaction Workspace SIP Endpoint supports connecting to SIP Server through a Session Border Controller (SBC) (refer to *SIP Server 8.1 Deployment Guide*). You must configure Interaction Workspace to connect to SIP Server through an SBC instead of directly to SIP Server.

If you do not configure Interaction Workspace to connect to SIP Server by using an SBC, Interaction Workspace SIP Endpoint connects directly to SIP Server to register the agent SIP Endpoint by using the `TServer/sip-address` and `TServer/sip-port` options of the corresponding SIP Server application. When you configure Interaction Workspace to connect by using an SBC you decouple the address and port information that is sent to the SIP REGISTER from SIP Server and Interaction Workspace obtains the host address and port from the configuration.

Configure the following two options in the `interaction-workspace` section of the Application, Tenant, Agent Group, or User object.

- `sip-endpoint.sbc-register-address`--Specifies the address of your SBC to which Interaction Workspace SIP Endpoint connects.
- `sip-endpoint.sbc-register-port`--Specifies the port on your SBC to which Interaction Workspace SIP Endpoint connects.

# Recording SIP Voice Interactions

Agents can record SIP Voice interactions if you are running a Genesys Suite that include Genesys SIP Server and Genesys Stream Manager or Genesys Media Server. The SIP recording feature is implemented as a hidden conference with a special SIP DN (`gcti::record`). SIP call recordings are made by Genesys Stream Manager. Registered calls are placed in a Stream Manager subdirectory.

# Active Recording And Screen Capture

Interaction Workspace supports call recording. Conversations are stored as a set of files on a centralized storage location. Agents can control and monitor this feature.

## Active Call Recording

SIP Server supports call recording using two different methods, NETANN-based call recording, provided by Stream Manager or Genesys Media Server, and Media Server Markup Language (MSML)-based call recording, provided by Genesys Voice Platform (GVP) Genesys Media Server only. Interaction Workspace uses MSML-based call recording.

### MSML-based Call Recording

Active Call Recording can be used at any time during an active call. You can access all of the Genesys Quality Management 8.1 documentation through the [\[Technical Support website\]](#) and the Documentation DVD. Active Call Recording enables agents to do the following:

- Control Active Call Recording (start, stop, pause, and resume)
- Display the status of Active Call Recording

Active Call Recording functionality is enabled by the following Privileges:

- Voice - Can Use
- Active Recording - Can Use
- Voice - Can Control Voice Recording (optional)
- Voice - Can Monitor Voice Recording (optional)

Set the `active-recording.voice.recording-type` option in the interaction-workspace section to MSML (the default value).

### Legacy NETANN-based Call Recording

To use the legacy NETANN-based call recording instead of MSML-based call recording, enable the following privileges:

- Voice - Can Use
- Voice - Can Control Voice Recording

Set the `active-recording.voice.recording-type` option in the interaction-workspace section to NETANN (the default value). Monitoring of call recording that is activated by a non-agent party is not possible in the NETANN-based recording.



## Screen Capture

This functionality will be available in an upcoming release.

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# E-Mail Quality Assurance

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

## Designing a Routing Strategy for an E-Mail Quality Assurance Review

The e-mail 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 Interaction 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 routing strategy keys are not prefixed by "BP\_", and the keys that are defined by the business process are designated by the "BP\_" prefix.

1. An inbound e-mail is received by the Business Process
  2. The inbound e-mail is distributed to an agent
  3. The agent writes a reply e-mail and clicks Send
  4. Interaction Workspace makes the following updates to the attached data of the reply e-mail
    - `UCS.OwnerID` is set to `EMailAgent.DBID`
    - `IxnSvr.UserData.OriginalAgentEmployeeID` is set to `EMailAgent.EmployeeID`
    - `IxnSvr.UserData.OriginalAgentUserName` is set to `EMailAgent.UserName`
  - The e-mail is then directed to the Business Process, and the Business Process should make the following updates to the reply e-mail 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
  - The reviewer reviews the e-mail and edits it or provides feedback. If the reviewer sets the disposition to Rejected, it is sent back to the originating agent.
  - Interaction Workspace makes the following updates to the attached data of the rejected reply e-mail:
    - `UCS.ReviewerID` is set to `Reviewer.DBID`
    - `Ixn.UserData.QAReviewerEmployeeId` is set to `Reviewer.EmployeeID`
-

- 
- `Ixn.UserData.QAReviewerUserName` is set to `Reviewer.UserName`
  - `Ixn.UserData.QAReviewDisposition` is set to `Rejected`
  - The e-mail is then directed to the Business Process, and the Business Process should make the following updates to the reply e-mail and distribute it to the original agent:
    - `Ixn.UserData.QAReviewFlag` is set to `0`
  - The agent makes the required changes and then clicks `Send`.
  - Interaction Workspace makes the following updates to the attached data of the reply e-mail 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`
  - The Business Process should make the following updates to the reply e-mail 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`
  - The reviewer reviews the e-mail reply again and sets the disposition to `Accepted` and clicks `Send`
  - Interaction Workspace makes the following updates to the attached data of the accepted reply e-mail and directs it to the Business Process:
    - `UCS.ReviewerID` is set to `Reviewer.DBID`
    - `Ixn.UserData.QAReviewerEmployeeId` is set to `Reviewer.EmployeeID`
    - `Ixn.UserData.QAReviewerUserName` is set to `Reviewer.UserName`
    - `Ixn.UserData.QAReviewDisposition` is set to `Accepted`
  - The Business Process should make the following updates to the reply e-mail 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`
  - The e-mail reply is sent to the contact.

You can specify the behavior of the QA review by modifying the options of the `QAReview_BPOptions` Transaction object. The following are examples of how you can control the routing of e-mail interactions for QA Review:

- You can force e-mail interactions to go through QA review by setting the `qa - review/force-qa - review` option to `true`.

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- You can route e-mail interactions to a "QA-review Pending" workbin by setting the qa-review/pending-qa-use-workbin to true.
  - You can route rejected e-mail interactions to a shared workbin to enable all agents in a group to access the interactions by setting the qa-review/use-personal-rejected-workbin option to false.

## Outbound E-Mail Quality Assurance Review

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

- Outbound e-mail interactions can be redirected to a reviewer or workbin
- Reviewers can accept and send the outbound e-mail to the recipient
- Reviewers can reject the outbound e-mail interaction and send it back to the author to be reworked
- Review of outbound e-mail interactions can be configured to be handled through a workbin folder
- Rejected outbound e-mail interactions can be configured to be handled through a workbin folder

The following is a sample of the outbound e-mail review process workflow:

1. E-mail interaction is received from a contact and is routed to an agent who, by a business process is identified as an agent whose outbound e-mail interactions are to be sent for review before the e-mail is sent to the contact.
2. The agent creates a reply to the inbound e-mail interaction, or the agent creates a new outbound e-mail interaction, and clicks **Send**.
3. Interaction Workspace tags the e-mail interaction with the EmployeeID and UserName of the agent, and stores the OwnerID of the author in the e-mail interaction history in Universal Contact Server.
4. The outbound business process for the agent is activated and the e-mail 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 e-mail interaction is redirected to the agent, agent group, role, or workbin who/that is defined by the business process as the reviewer. The reviewer either receives the e-mail interaction directly or retrieves it from a workbin.
6. The e-mail interaction reviewer can modify the interaction, add information to the Notepad, and then accept or reject the e-mail interaction.
  - If the reviewer accepts the interaction, the e-mail interaction is sent to the contact.
  - If the reviewer rejects the interaction, the e-mail interaction is sent back to the agent who created the e-mail.
7. If the e-mail interaction is returned to the agent, the agent can change the e-mail 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 e-mail interaction and then clicks **Send**.
9. The outbound business process for the agent is activated and the e-mail interaction is flagged for second review.

10. The e-mail interaction is redirected to the agent or agent group or roles who is defined by the business process as the reviewer.
11. The e-mail interaction reviewer can modify the interaction, add information to the Notepad, and then accept or reject the e-mail interaction, or apply some other disposition that is specific to the design of your business process or routing strategy. Interaction Workspace tags the e-mail interaction with the EmployeeID and UserName of the reviewer, and stores the ReviewerID of the author in the e-mail interaction history in Universal Contact Server.
  - If the reviewer accepts the interaction, the e-mail interaction is sent to the contact.
  - If the reviewer rejects the interaction, the e-mail interaction is sent back to the agent who created the e-mail, either directly, or placed in a special workbin for rejected e-mail interactions, and the process begins again. The review count is incremented by one.

## Creating a For-Review Workbin

If you want to direct to a workbin outbound e-mails that require review, you must create the workbin in the eServices Business Process (script name="review\_outbound\_emails"). Configure a group or user and make it available only to agents, agent groups, tenants, or roles whom you want to be e-mail interaction reviewers by specifying the value `review_outbound_emails` for the `workbin.email.review` option in the `interaction-workspace` section.

## 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 e-mail 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.

## Creating a Rejected Outbound E-Mail Workbin

If you want to direct to a workbin outbound e-mails that were rejected by a reviewer, you must create the workbin in the eServices Business Process (script name="rejected\_outbound\_emails"). Configure a group or user and make it available only to agents, agent groups, tenants, or roles whom you want to be e-mail interaction reviewers by specifying the value `rejected_outbound_emails` for the `workbin.email.rejected` option in the `interaction-workspace` section.

# Monitoring SIP Voice Interactions

Interaction Workspace supports two approaches to monitoring, built-in Team Lead capabilities, and support for Genesys 7.6 Supervisor Desktop and 3rd-party Supervisor applications.

 **Note:** Depending on the technical environment of your voice channel, some voice specific supervisor switch-modes might not be available:

- Switching from coaching to barge-in is not possible for agents or supervisors who are logged in to an environment that uses T-Server for Cisco UCM.
- Switching from monitoring to barge-in might not be possible with T-Server for Cisco UCM.
- Only Interaction Workspace 8.1.3 and higher and Workspace Desktop Edition 8.5.0 and higher are compatible with T-Server for Cisco UCM.

## Team Lead Functionality


You can **configure an agent role to have the Team Lead capability**. Team Leads have capabilities that extend beyond the coaching and barge-in abilities that are enabled by **internal communications**. Interaction Workspace supports auto-monitoring of agents in an agent group by a team lead that is configured as the Supervisor of this Agent Group. A Team Lead can perform the following functions:

- Monitor the next interaction or the currently active interaction.
- Select an agent and monitor all the voice interactions of this agent in one of two modes:
  - silent--neither the agent nor the contact is aware of the monitoring
  - coaching--only the agent can hear the Team Lead
- Silently monitor voice interactions
- Start a coaching monitoring session from a silent session
- Start a barge-in (all parties on the call can hear the Team Lead) monitoring session from silent or coaching session
- Start a silent monitoring session from coaching or barge-in session

Enable Team Lead functionality by allowing the **Team Lead Privileges**.

To support the monitoring of currently active voice interactions, you must also configure the SIP Server or T-Server for Cisco UCM application object by setting the intrusion-enabled option in the TServer section to the value true.

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 **Note:** There are no options in the interaction-workspace section to control the Team Lead functionality; however, Genesys strongly recommends that you use different DNs for the voice and multimedia channels to ensure that voice and IM channels can be monitored independently.

## Third-Party Supervision

You can enable agents to be monitored by a supervisor that is using a Supervisor application, such as Genesys 7.6 Supervisor Desktop, if you are running a Genesys Suite that include Genesys SIP Server or T-Server for Cisco UCM and Genesys Media Server. The monitoring feature is implemented as a hidden conference with the SIP DN or Cisco UCM DN of a supervisor.

If configured, the agent is notified through the Interaction Workspace interface during supervisor monitoring. All monitoring is conducted through the supervisor application. If the supervisor is using whisper coaching or barge-in, an "eye" icon is displayed within the voice interaction window to indicate that the call is monitored. When the supervisor leaves the call, the icon disappears.

# Monitoring Chat Interactions

Interaction Workspace supports two approaches to monitoring, built-in Team Lead capabilities, and support for 3rd-party Supervisor applications, such as Genesys 7.6 Supervisor Desktop.

## Team Lead Functionality

You can **configure an agent role to have the Team Lead capability**. Team Leads have capabilities that extend beyond the coaching and barge-in abilities that are enabled by **internal communications**. Interaction Workspace supports auto-monitoring of agents in an agent group by a team lead that is configured as the Supervisor of this Agent Group. A Team Lead can perform the following functions:

- Monitor the next interaction or the currently active interaction.
- Select an agent and monitor all the chat interactions of this agent in one of two modes:
  - silent--neither the agent nor the contact is aware of the monitoring
  - coaching--only the agent can see the messages from the Team Lead
- Silently monitor chat interactions
- Start a coaching monitoring session from a silent session
- Start a barge-in (all parties on the chat can see the Team Lead) monitoring session from silent or coaching session
- Start a silent monitoring session from coaching or barge-in session

Enable Team Lead functionality by allowing the **Team Lead Privileges**.

## Third-Party Supervision

You can enable agents that are assigned the chat task to be monitored by a supervisor who is using a Supervisor application, such as Genesys Supervisor Desktop 7.6. If the agent is configured for notification, the agent is notified through the Interaction Workspace interface during supervisor monitoring. All monitoring is conducted through the supervisor application. An "eye" icon is displayed in the chat interaction window to indicate that the chat interaction is monitored. When the supervisor leaves the call, the icon disappears. Interaction Workspace employs the following privilege for activating the Interaction Workspace supervisor monitoring:

- Chat - Show Silent Monitoring



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# Communicating Internally

Interaction Workspace supports internal communication through Voice, Instant Messaging, and eServices Chat. The various interaction interfaces, such as Interactive Notifications, Interaction Window title bars, and lists of parties involved in an interaction, support the display of internal parties.

## Employing Internal Communication for Coaching and Barge-in

Interaction Workspace is an agent-only application that supports supervision in many different ways, including separate interactions integrated into one interaction window. Supervisors can silently monitor agents, and agents can be aware when they are being silently monitored. Agents can consult with internal targets (supervisors and others) about their voice, chat, and e-mail interactions, by starting a consultation interaction in the same window as their contact interaction. Agents can also communicate with a supervisor who has initiated coaching with the agent, or barge-in with the agent and the contact.

## Voice Communication

Interaction Workspace provides many facilities for voice communication between agents, between agents and supervisors, and between agents and internal experts. The following functionality is available:

- Originating a consultation call
- One-step transfer
- Two-step transfer
- One-step conference
- Two-step conference
- Sending DTMF from a consultation call
- Holding a call
- Retrieving a call
- Alternating (toggling) between calls
- Canceling calls

This functionality is handled by the following privileges:

- Complete Transfer
- Complete Conference
- Alternate
- Reconnect (Cancel consult)
- Send DTMF

You can use the following options in the `interaction-workspace` section to configure internal voice communications:

- `voice.one-step-trsf-mode` -- Specifies the type of one-step transfer. If you specify `default`, the default one step transfer type for your switch is applied. For a Lucent G3 switch, the default type is `mute-transfer`; for a SIP switch, the default type is `single-step-transfer`; for an Alcatel A4400 switch, the default type is `single-step-transfer`.

## Voice Conference Functions

Interaction Workspace supports four-way conferencing. Agents can mute and parties can drop out without ending the call. The following functionality is available:

- Prevent a party from listening to the conversation
- Re-allow a party to listen to the conversation
- Remove a party from the conference

Use the following privileges to enable these voice conferencing functions:

- Can Delete From Conference
- Can Prevent a Conferenced Party From Listening
- Can ReAllow Conferenced Party To Listen

## Instant Messaging Communication

Interaction Workspace provides many facilities for instant-messaging communication between agents, between agents and supervisors, and between agents and internal experts. The following functionality is available:

- Invite an internal target to join an Instant Messaging session
- Accept or Reject an invitation to join an Instant Messaging session
- Time-out if the internal target does not respond to an invitation

Use the following option in the `interaction-workspace` section to configure internal instant-messaging conferences:

- `im.toast-timeout` -- Defines the duration, in seconds, of Interactive Notification for interaction instant messaging in the Information area of the Main Window. The value `0` means the Interactive Notification is not displayed.

## eServices Chat Consultation

Interaction Workspace supports integrated chat consultation in the Chat Interaction window. A chat consultation enables an internal target to view the chat transcript between an agent and contact, and to chat with the agent privately in a second chat session in the same Chat Interaction window. The internal target can see the messages that are exchanged with the contact, but the contact does not see the messages that are exchanged with the internal target.

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## eServices Chat Conference

The Interaction Workspace Chat Interaction window enables agents to instant-conference the current chat interaction with an internal target. In an instant conference, the conference starts as soon as the other party accepts the interaction. All parties in a chat conference can read all messages that are sent by each party.

## Transitioning to a Different Channel

During a collaboration with an agent or a knowledge worker, agents can perform the following tasks:

- Change from an Instant Message consultation to a Voice consultation
- Change from a Voice consultation to an Instant Message consultation
- Change from an Chat consultation to a Voice consultation
- Change from an Chat consultation to an Instant Message consultation



**Note:** When an IM is transferred or conferenced to a different agent, or if an internal IM consultation is transitioned to a Voice consultation, or vice versa, all the information about the transferring agent is included with the interaction.

---

# Viewing Broadcast Messages

Interaction Workspace enables agents to receive messages that are sent simultaneously (broadcast) to multiple contact center parties. You must use an application that can publish messages, associated by topic, to a common communication DN. Interaction Workspace employs a simple protocol based on communication DN and provisioning to enable this functionality. Agents can be provisioned to receive messages that are addressed, by topic, to a property of the agent, a property of an agent group, or a property of a role (see [Procedure: Enabling agents to view Broadcast Messages](#)). Messages are displayed to agents by an Interactive Notification that is similar to the new interaction Interactive Notification. An audio alert can be configured to alert agents when a new broadcast message arrives. Messages are also displayed in the Interaction Workspace Main Window as a summary table in the Messages drop-down area. If the agent opens the message, a detailed view is displayed. If the agent uses the Gadget view, messages are displayed in a message gadget. A broadcast protocol message is defined by the following attributes:

- Message -- The content of the message.
- Sender -- The identity of the sender.
- Message Type -- The type of message, such as Error, Information, Notification, and so on.
- Subject -- The subject of the message (optional).
- Priority -- The relative importance of the broadcast message. The following subcategories are predefined; however, you can also configure your own values:
  - Minimal
  - Low
  - Normal
  - High
  - Important
- Date -- The date sent, in local time of the agent.
- Topic -- To which topic the message was sent.
- Custom Data -- Any custom data included with the message.

Use the following protocol on your supervisor client configuration:

```
IWS_Message
IWS_Sender
IWS_MessageType
IWS_Subject
IWS_Priority
IWS_Date (RFC1123 pattern.)
IWS_Topic
IWS_CustomData
```

The following is an example of a UserEvent configuration:

```
Event:EventUserEvent
  Server:65200
```

```

ReferenceID:7
CustomerID:Resources
ThisDN:BroadcastDN
UserData:
  (Str) IWS_Subject      Coffee Break
  (Int) IWS_Priority    3
  (Str) IWS_Message    Please take your coffee break NOW !!!
  (Str) IWS_Date        Thu, 11 Feb 2010 16:15:16 GMT
  (Str) IWS_Topic       Agent4
  (Str) IWS_Sender      Ministrator
  (Str) IWS_MessageType Error
Seconds:1265904964
USeconds:234000
Server Time:11/02/2010@17:16:04.234

```

You can use the following options in the interaction-workspace section to configure Broadcast Messaging:

- `broadcast.color.xxx-priority` -- Specifies the Hexidecimal-color code of the border of the Message view frames for messages that have the xxx priority.
- `broadcast.displayed-columns` -- Specifies the attribute columns that are displayed in the Broadcast Message window and the item tooltip in the My Messages tab/window.
- `broadcast.dn` -- The name of the DN and switch that is used for broadcasting. Use the following value format: DN@switch
- `broadcast.mark-read-timeout` -- Specifies the duration after which a message, as a tooltip, is considered to be read.
- `broadcast.message-content` -- Specifies the attributes that are displayed in the Broadcast Message window and the item tooltip in the My Messages tab/window.
- `broadcast.preview-timeout` -- Specifies the duration after which a message preview is closed.
- `broadcast.sound.xxx-priority` -- Specifies the sound configuration string for messages that have priority xxx.
- `broadcast.subscribed.topics` -- Specifies the list of subscription topics.
- `broadcast.toast-summary` -- Specifies the attributes that are displayed in the Interactive Notification.
- `broadcast.value-business-attribute` -- Specifies the name of the Business Attribute that contains the Attribute Values that are used as an enumerated value for a custom attribute of message.

Message types can be customized by adding the following lines to the `Genesyslab.Desktop.Modules.Windows.en-US.xml` dictionary file:

```

<Value Id="Broadcast.MessageType.System" String="System"/>
<Value Id="Broadcast.MessageType.Error" String="Error"/>
<Value Id="Broadcast.MessageType.Information" String="Information"/>
<Value Id="Broadcast.MessageType.Internal Note" String="Internal Note"/>

```

The value that is set in the String property is displayed as the message type.

---

# Viewing User And Group Metrics

Interaction Workspace enables agents to view real-time metrics of their performance and the performance of the contact center in a table view or in a dedicated gadget component. Statistical information is displayed in the form of industry standard- and contact center-defined Key Performance Indicators (KPIs). KPIs enable agents to focus on their efficiency and to compare their performance against that of their colleagues. Interaction Workspace enables you to configure which KPIs are displayed to your agents, with what frequency, and with what alarm conditions. Examples of statistics that can be displayed in Interaction Workspace:

## Login-time statistics:

- Login duration
- Ready duration
- Wrap duration
- Talk duration
- Hold duration
- Number of interaction transferred
- Number of internal calls
- Number of refused interactions
- Total number of interactions
- Average handling time
- Number of voice interactions
- Average handling time voice interactions
- Number of e-mail interactions
- Average handling time e-mail interactions
- Number of chat
- Average handling time chat

You can use the following options in the `interaction-workspace` section to configure the behavior of KPIs in Interaction Workspace:

- `kpi.displayed-kpis` -- Defines the KPIs that are displayed to the agent. The KPI names refer to names of the sections that are defined by the Application KPI options.
- `kpi.show-agent-groups` -- Defines whether KPIs are also calculated for the Agent Groups that contain the agent.
- `kpi.refresh-time` -- Defines the frequency of notification (in seconds) for statistics.

You can use configuration options in each section that defines a KPI to configure the behavior of KPIs in Interaction Workspace (refer to [Section: <KPI Name>](#)). Statistics are displayed in both the Main

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Window and the Statistics Gadget.

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# Viewing Contact-Center Metrics

Interaction Workspace enables agents to view real-time metrics of the performance of the contact center. Statistical information is displayed in the form of industry standard- and contact center-defined metrics. Metrics enable agents to focus on their efficiency and to compare their performance against that of their colleagues. Statistics are displayed only for the Tenant to which the agent is logged. Interaction Workspace enables you to configure which metrics are displayed to your agents, with what frequency, and with what alarm conditions.

## Queue statistics:

- Number of interactions in queue (In the Login Queue)
- Average waiting time (In the Login Queue)
- Number of distributed calls (In the Login Queue)
- Number of abandoned calls (In the Login Queue)
- Number of agents logged in to the ACD Queue

The Interaction Workspace default statistics are controlled by the following privileges set in the `interaction-workspace` section, except where noted otherwise:

- `statistics.refresh-time` -- Defines the frequency of notification (in seconds) for statistics.
- `statistics.queues` -- Specifies the list of queues for which queue statistics are calculated. A comma-separated list of queues are defined as follows: `<QueueName>@<SwitchName>`. This option is part of the regular option hierarchy; therefore, you can define the list of applicable objects per Tenant, Group, or User; however, if the list is defined in the statistic section, the list is global.
- `statistics.routing-points` -- Specifies the list of Routing Points for which routing point statistics are calculated. A comma-separated list of queues are defined as follows: `<RoutingPoint>@<SwitchName>`. This option is part of the regular option hierarchy; therefore, you can define the list of applicable objects per Tenant, Group, or User; however, if the list is defined in the statistic section, the list is global.

Statistics are calculated in the following way, the statistic is calculated for the list of objects specified by the `statistics.queues` option, which can be populated with the following tags; however, if the section contains an option named "object-id", the statistic is calculated only for that specific object:

- `$Agent.LoginQueue$` -- Returns the list of queue identifiers on which the agent logs in. Set this value either in the `object-id` option in the contact center statistics section, or in the `statistics.queues` option.
- `$AgentGroup.OriginationDns$` -- Returns the list of origination DNs for the list of agent groups to which the agent currently logged in. This value IS set by the `object-id` option in the contact center statistics section.

Contact Center Metrics are displayed in both the Main Window and the Statistics Gadget.



# Managing Contacts

You can configure Interaction Workspace to restrict the access of agents to the Contact History and the Contact Directory. Access to the contents of these views is restricted by using a custom filter based on the role of the Application, Tenant, Agent Group, or Agent. For example, you can create a contact search filter that is applied to the Team Communicator or the Contact Search for attributes such as department or customer. Interaction Workspace automatically restricts the results that are displayed on the contact list in the following interface view:

- Team Communicator
- Contact Directory list or grid
- Merge-Contact dialog list or grid
- Assign Contact list or grid
- E-mail address selection dialog list or grid

To provision restricted access to the Contact History and the Contact Directory, for each contact attribute that is used to grant permission to access contact records, use the following example as a guide: In the `interaction-workspace` section of the Application, Tenant, Agent Group, or Agent for whom you want to configure permissions, create one or more options like the following option examples:

- `contact.directory-permissions.<ContactAttributeName1>=AttributeValue1,AttributeValue2`
- `contact.directory-permissions.<ContactAttributeName2>=AttributeValue3,AttributeValue4`

The `contact.directory-permissions` option modifies the search logic whenever the Application, Tenant, Agent Group, or Agent makes a contact search request. For the example above, the following logical filtering criteria are added to the search criteria that are specified by the agent in the following way: `AND ((ContactAttributeName1=AttributeValue1) or (ContactAttributeName1=AttributeValue2)) AND ((ContactAttributeName2=AttributeValue3) or (ContactAttributeName2=AttributeValue4)) AND` The logic of the filtering might be slightly different than this depending on which search algorithm is being used. The attributes must be defined in Universal Contact Server (UCS). In the Annex of the custom contact attribute value, the `is-searchable` option in the settings section must be set to `true`. You can create Contact History filters that control the logic of the search and also adds the authorized attributes to the **Filter** menu.

- `contact.history.filters-<InteractionAttributeName1>=AttributeValue1,AttributeValue2`

## Tip

In environments with a large number of contacts, where contact segmentation is used, Genesys recommends that agents access the Contact Directory List View rather than the Grid View. Workspace 8.5.1 has the capability of limiting the Contact Directory access to List View only using the `contact.directory-enabled-modes` option.

---

## Example: Restricting Contact Search by Permissions

You have defined the following attributes in UCS: `IsVIP` and `DepartmentID`. You want to restrict members of the Agent Group ABC so that they cannot access to the "VIP" contacts, and you want to restrict them to the following departments: Sales and Pre-Sales. Configure the following interaction-workspace section options in the Annex of the ABC Agent Group:

- `contact.directory-permissions.IsVip=FALSE`
- `contact.directory-permissions.DepartmentID=Sales,PreSales`

## Example: Restricting Contact History Search by Permissions

You have defined the following attribute in UCS: `DepartmentID`. You want to restrict members of the Agent Group ABC so that they can filter the Contact History by the Sales department. Configure the following interaction-workspace section options in the Annex of the ABC Agent Group:

- `contact.history.filters-DepartmentID=Sales`

The Sales attribute is displayed as an option in the **Filter** menu and as an attribute in the ContactHistory view list or grid.

## Contact Management

Interaction Workspace enables agents to manage contacts. The privileges that can be enabled for an agent are the following:

- View Contact Record
- Edit Contact Record
- Delete Contact
- Create Contact
- Merge Contact
- Manually assign an interaction to a Contact
- Undo Merge Contact
- Search the Contact database
- Interaction Threads
- Interaction Ownership
- Populating the Contact History with eServices Interactions
- Resend e-mail interactions from the Contact History

Use the options in the contact section to configure the way in which agents can manage contacts.

- `contact.directory-displayed-columns` -- The list of contact fields displayed when the results of a contact search is rendered.
- `contact.directory-search-attributes` -- The list of Contact fields that can be used as search

---

parameters.

- `contact.displayed-attributes` -- The list of Contact fields that are displayed when a Contact record is rendered.
- `contact.multiple-value-attributes` -- A list of contact attributes that are allowed for use as contact field names.
- `contact.directory-search-types` -- The list of search types that are available for the agent to use to search the contact database. Specifying the value contains may have a performance impact.
- `contact.default-directory-page-size` -- The default value for the number of rows per page in the contact directory search result grid view. A value must be defined in the `contact.available-page-size` option.
- `contact.available-directory-page-sizes` -- The number of rows per page in the contact directory search result list view.
- `contact.timeout-delay` -- The delay, in seconds, before a UCS request times out.
- `contact.history-displayed-columns` -- Defines the list of Contact History items that are displayed in the interaction view.
- `contact.history-search-attributes` -- Defines the list of Contact History items that an agent can use to search the History database.
- `contact.history.media-filters` -- Specifies the list of media types that can be used to filter the Contact History.
- `contact.history.filters-service` -- Specifies a custom business attribute that is defined in Universal Contact Server that can be used to search the contact history.
- `contact.history.filters-level` -- Specifies a custom business attribute that is defined in Universal Contact Server that can be used to search the contact history.
- `contact.date-search-types` -- The list of search types that are available for the agent to use to search the contact database by date.
- `contact.lookup.enable` -- Specifies that the Universal Contact Server (UCS) identify service is to be used for contact lookup.
- `contact.lookup.enable-create-contact` -- Specifies that the Universal Contact Server (UCS) create a contact service is to be used if the identify service fails to find the contact.
- `contact.ucs-interaction.enable` -- Activates the Interaction Workspace feature that generates the voice interaction history in Universal Contact Server (UCS) based on the inbound and outbound interactions handled by Interaction Workspace.
- `contact.ucs-contact.attributefielddefaultmaxlength` -- The maximum field length for attributes in Universal Contact Server (UCS).

## Contact Management: Last Routed Agent

The Last Routed Agent Feature enables you to save in the Contact Profile, information about the last agent who handled interactions from that contact. The agent handling 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. You can activate this option globally by setting to true the `contact.last-called-agent.enable` option in the **Contact** section. Or you can activate it by media type by setting to true the `contact.last-called-agent.<media-type>.enable` option in the `[ContactOptions|Contact]` section.

## Contact Management: Summary of Activity that is Related to the Current Contact

In the interaction windows, Interaction Workspace displays visual indicators that inform the agent who is handling the interaction about the activities that are related to the current contact. To enable these features, allow the following privilege:

- Can Use Contacts

For Interaction Workspace 8.1.2 and later, this feature displays the number of in-progress interactions for a contact in an icon. This indicator measures the number of eServices interactions that are currently in-progress somewhere in the workflow, excluding the current one. You can activate this feature by configuring the `contact.metrics.enable-interactions-in-progress` option in the **Contact** section. If the agent clicks the icon, the interactions are immediately displayed in the History view. For Interaction Workspace 8.1.3 and later, the Recent Interaction Notification is also displayed. This indicator provides the number of interactions that have been exchanged with this contact in the past specified number of days, excluding current interaction. This feature is useful for predicting the level of contact frustration. Configure the `contact.metrics.time-frame-customer-notification` option in the **Contact** section to specify the time interval. If the following privilege is granted, Interaction Workspace displays the list of recent interactions with this contact as a tooltip for the icon:

- Can Use Contact History

You can specify the maximum number of items that are displayed in the tooltip by configuring the `contact.metrics.max-elements-customer-notification` option in the **Contact** section. If the agent clicks the icon, the interactions are immediately displayed in the History view.

## Interaction Threads

Interaction Workspace enables you to manage interaction threading in the Universal Contact Server (UCS) database. E-mail threading is set according to reply actions that are made by agents, automatic response, and contacts. Voice threading is set according to the transfer record of a call; each agent that handles the interaction generates an interaction in the UCS database. The `contact.threading-ucs-interaction.enable` option controls how multi-channel threading that results from the outbound interactions that are created during the handling of an original inbound or outbound contact interaction. For example, an inbound e-mail might result in an outbound e-mail, or or more outbound voice calls, and an SMS session. All of these related interactions can be associated as a single thread. In the Interaction Workspace Contact Directory and My History views, agents can view the interaction history as threads. Threads are sorted in reverse chronological order, with the most recent first, but within threads, interactions are sorted chronologically, from first to most recent. To use interaction threading, enable the following privilege:

- Can Use Contacts

Then, configure the following configuration option to true:

- `contact.threading-ucs-interaction.enable` -- Enables the Interaction Workspace feature that associates interactions that are submitted during multi-channel contact communication, such as `smssession`, in threads in Universal Contact Server history.

## Interaction Ownership

Interaction Workspace enables you to display the interaction owner that is defined in the UCS data base to the agents that can view the Contact History.

Display of interaction ownership is controlled by the following options:

- `display-format.agent-name` -- Specifies the format of the agent name in the Contact History view. Interaction Workspace uses this information to convert the owner ID from UCS to a label that is displayed in the Contact History view. If there is no owner ID associated with an interaction, then this field is blank.
- `contact.history-displayed-columns` -- Specifies which interaction attributes are displayed in the Contact History view. Add the value `OwnerId` to display the Interaction "Processed by" column.

## Populating the Contact History with eServices Interactions

eServices interactions differ by type in the way that they are submitted to the Contact History:

- `email` -- E-mail interactions are automatically submitted to the Contact History by Email Server and Interaction Workspace. They are completed by Interaction Workspace or by a Business Workflow.
- `chat` -- Chat interactions are automatically submitted to the Contact History by Chat Server. They are completed by Interaction Workspace or by a Business Workflow.
- `SMS Session` -- SMS Session interactions are automatically submitted to the Contact History by Chat Server. They are completed by Interaction Workspace or by a Business Workflow.
- `SMS Page` -- SMS Page interactions are submitted to the Contact History by a Business Workflow only. This is applicable to both inbound and outbound workflows.
- `workitem` -- Custom workitem interactions are submitted to the Contact History by a Business Workflow only. This is applicable to both inbound and outbound workflows.

### Notes:

- If the Contact History is created by a Business Workflow, the integrator is responsible for using the appropriate building blocks in the *ad-hoc* strategy.
- Interaction Workspace can submit interactions to the contact history if the `contact.ucs-interaction.<media-type>.enable-create`

---

	<p>option is set to true for any media.</p> <ul style="list-style-type: none"><li>Interaction Workspace can look for a matching contact for any media-type if the <code>optioncontact.ucs-interaction.&lt;media-type&gt;.enable-lookup</code> option is set to true.</li></ul>
--	--

## Media Filtering

The Filter menu of the Contact History view and My History view can be configured to display specific media types in a specific order by using the `contact.history.media-filters` option in the `interaction-workspace` section of the Interaction Workspace application object. You can use this option to add the media types of the workitems that are supported by 3rd party plug-ins.

## Custom Filtering

You can create custom business attributes in Universal Contact Server for contacts. For example, you might want to create a set of service areas from your business and use these as custom contact attributes, or you might want to create a set of contact levels, such as silver, gold, and platinum, and use these as custom attributes. When you define your custom business attribute, you must define the valid values. Use the following configuration option to enable filtering on your custom business attribute values:

- `contact.history.filters-<custom attribute>`

## Hiding Selected Data In Logs

Interaction Workspace enables you to specify and filter the contents of the application logs. You can choose to hide content by using asterisks or to skip specific key-value pairs. Use the options in the `log` section to configure the way in which logs are filtered.

- `log.default-filter-type` -- Specifies the default filter type for logging.
- `log.filter-data.<key_name>` -- Specifies the treatment of log data. This option enables you to filter for specific attached data keys, by specifying the key name in the option name. This option overrides any values specified by the `log.default-filter-type` option.

---

# Client-side Port Security

Use the [Procedure: Enabling client-side port definition](#) to define the access ports for each application to which Interaction Workspace connects to ensure the security of the system. This feature is configured partially on Framework Configuration Server and partially on the Interaction Workspace application in Genesys Administrator. The *Client-Side Port Definition* chapter of the *Genesys 8.0 Security Deployment Guide* provides detailed information on client-side port definition




**Note:** When you set the client-side port for the connection to Configuration Server, ensure that you use the `Interaction_Workspace_802.apd` template; do not use the `Interaction_Workspace_AgentDesktop_802.apd` template. If a connection to at least one back-end server is configured with an explicit client-side port, after exiting, the agent must wait for a system timeout before they are able to initialize Interaction Workspace application again. The timeout is positioned at the Windows OS level through the following registry key: `TcpTimedWaitDelay`. This is a system level limitation.



# Business Continuity

Business Continuity relies on pairs of servers. A pair is composed of regular linked Primary and Back-up SIP Servers. Two SIP Server pairs are considered peers when they support each other in a Business Continuity model. You can specify the name of the preferred connection site and the Business Continuity connection site, and the time-out interval for switch-over to the Business Continuity site.


 **Note:** All Interaction Workspace Business Continuity-related (disaster recovery) options can be configured for any object in the configuration hierarchy (Application, Tenant, Agent Group, and Person).

Use the [Procedure: Configuring Interaction Workspace for Business Continuity](#) to enable Business Continuity for your agents. By using that procedure, you specify the site name in the options of the corresponding server application (SIP Servers, Stat Servers and Configuration Servers) in the `interaction-workspace` section. Use the mandatory `disaster-recovery.site` option to specify the symbolic name of the site, such as `Site X` or `Site Y`. This value is matched against the value specified by the `disaster-recovery.preferred-site` or `disaster-recovery.peer-site` options of every agent. Based on the matching results, the server will be either the Business Continuity-Preferred site or the Business Continuity-Peer site for the agent.

- `disaster-recovery.site` -- Specifies the Business Continuity site name of the server.

The optional `disaster-recovery.name` option in the `interaction-workspace` section of the SIP Server objects specifies SIP Server pairs that are peers from the Business Continuity definition (preferred HA pair and peer HA pair). If there are more than two linked peers in Interaction Workspace connection configuration, this option must be configured, and each pair must have the same name configured. When the same "name" value is assigned to two primary SIP Servers, they are considered as Business Continuity peers. If no name is specified, the value `default` is assumed. For more information about Genesys High-Availability, refer to [Framework 8.1 SIP Server High-Availability Deployment Guide](#). Then, use the following options in the `interaction-workspace` section of the Interaction Workspace Application object to configure Business Continuity:

- `disaster-recovery.enabled` -- Specifies whether Business Continuity is enabled.
- `disaster-recovery.preferred-site` -- Specifies the name of the preferred connection site for the application, tenant, agent Group, or agent. It must correspond to the value of the `disaster-recovery.site` option on the server object at the preferred site.
- `disaster-recovery.peer-site` -- Specifies the name of the site that is to be the Business Continuity-peer. It must correspond to the value of the `disaster-recovery.site` option on the server object at the peer site.
- `disaster-recovery.timeout` -- Specifies the timeout interval in seconds after loss of connection to the High Availability (HA) Pair of servers and before Business Continuity switchover is initiated.
- `disaster-recovery.wait-for-sipphone-timeout` -- Specifies the time interval in seconds to wait for SipPhone(SIPEndpoint) registration before initiating the Business Continuity switchover if the current SipPhone(SIPEndpoint) connection was lost or registration was expired.
- `disaster-recovery.auto-restore` -- Specifies whether or not switching back to the Preferred site should occur if it becomes available.

 **Note:** Places must be configured identically on the Preferred site and the Peer site, and should be linked to the DN that belongs to the SIP Switch at the Preferred site or the Peer site. The Same DR number is used for both sites. Interaction Workspace automatically validates Business Continuity configuration when this feature is enabled.

## Optimizing Switchover

To ensure that the switchover from the peer to the preferred site occurs correctly when the preferred site is restored.

The default values for the following configuration options can cause the switchover to the preferred site to be delayed in some environments:

- `sipendpoint.proxies.proxy0.reregister_in_seconds=3600`
- `sipendpoint.proxies.proxy1.reregister_in_seconds=3600`

The default values of 3600 seconds means that the first SIP Endpoint re-registration attempt will occur after one hour. In scenarios where the preferred site is returned to service in a few minutes, there is a significant delay between the preferred site being available and the SIP Endpoint attempting to re-register with the preferred site.

You can choose much shorter re-registration attempt intervals by setting the values of these options to a value between 30 and 60 seconds.

# Accessibility And Navigation

Interaction Workspace enables you to navigate the user interface by using the keyboard and keyboard shortcuts. This feature enhances your productivity by enabling you to navigate without using the mouse. Navigation works panel to panel, and within a panel, component to component. Keyboard navigability enables users who are using a device for accessibility that relies on keyboard navigation, to manipulate the desktop components.

## Screen Reader Compatibility

Interaction Workspace employs a visual impairment profile feature. This feature enables more elements in the Main Window and the Interaction window to be able to have the focus to enhance step-wise navigation for screen reading applications such as Job Access With Speech (JAWS) Screen Reader from Freedom Scientific. Screen readers enable visually impaired (blind and low vision) agents to use the desktop interface through text-to-speech or text-to-braille. Interaction Workspace must be configured in the Configuration Layer to enable this compatibility. These options can be set in the Configuration Layer as default values that can be overwritten in the Agent Annex. The Interaction Workspace windows are designed to maximize content readability for screen reader applications.

## Configuring Accessibility Features

Use the [Procedure: Enabling Accessibility Features](#) to enable Accessibility features for your agents. Use the following options in the interaction-workspace section to configure Accessibility:

- `accessibility.agent-state-change-bell` -- Specifies the agent state change sound configuration string.
- `accessibility.interaction-state-change-bell` -- Specifies the interaction state change sound configuration string.
- `accessibility.warning-message-bell` -- Specifies the warning message sound configuration string.
- `accessibility.visual-impairment-profile` -- Specifies whether the profile for visually impaired users is active. This option enables more interface elements to be focusable (accessible from keyboard navigation and mouse-over).
- `chat.new-message-bell` -- Specifies the path to the alert sound file for new chat messages.
- `email.ringing-bell` -- Specifies the path to the alert sound file for new e-mail interactions.
- `im.new-message-bell` -- Specifies the path to the alert sound file for new SMS messages.
- `sms.new-message-bell` -- Specifies the path to the alert sound file for new chat messages.
- `sms.ringing-bell chat.ringing-bell` -- Specifies the path to the alert sound file for new SMS Session messages.
- `voice.ringing-bell accessibility.agent-state-change-bell` -- Specifies the path to the alert sound file for new voice interactions.
- `<media-type>.ringing-bell` -- Specifies the path to the alert sound file for new workitems.

# Provisioning

This category demonstrates how to provision the Interaction Workspace functionality and environment by using Genesys Administrator. For details on how to use Genesys Administrator, refer to *Framework 8.1 Genesys Administrator Help* and *Genesys Administrator Deployment Guide*. For details about using the functionality, refer to *Interaction Workspace User's Guide* and *Interaction Workspace Context-Sensitive Help*. This category contains the following sections:

- [Provisioning Functionality](#)
- [Setting Up Agents On The System](#)
- [Enabling Internal And External Communications](#)
- [Enabling Agents To View KPIs And Contact Center Statistics](#)
- [Enabling Agents To Manage Contacts](#)
- [Overriding Interaction Workspace Options](#)

# Provisioning Functionality

This section contains procedures that demonstrate how to configure frequently used Interaction Workspace functionality. Many of the procedures in this section are applicable to more than one privilege. For example, the procedure, [Provisioning Interaction Workspace for the Voice Channel](#) provides the general principles for connecting to a media channel. You can create a configuration that is segmented by tenants or groups. Instead of creating your configurations at the Environment level, assign the settings of each Interaction Workspace module to a tenant, agent group, or agent. For more information, see [Configuration\\_And\\_Administration\\_By\\_Using\\_Options\\_And\\_Annexes](#). The following task table provides an overview of how to configure agents to use Interaction workspace. Refer to *Framework 8.1 Genesys Administrator Help* and *Genesys Security Guide* for detailed information on how to use Genesys Administrator and Management Framework to configure access permissions

### Configuring Agents to Use Interaction Workspace

Objective	Related Procedure and Actions
Set up agents on the system	<ul style="list-style-type: none"> <li>• Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group</li> <li>• Procedure: Optimizing the Login Window</li> <li>• Procedure: Provisioning Interaction Workspace for the Voice channel</li> <li>• Procedure: Declaring and using new Not-Ready Reason codes</li> </ul>
Enable internal and external communications	<ul style="list-style-type: none"> <li>• Procedure: Enabling an agent to use the Interaction Workspace SIP Endpoint</li> <li>• Procedure: Enabling an agent to use the SIP Preview feature</li> <li>• Procedure: Enabling an agent to use Team Communicator to call/transfer to an agent group or a skill</li> <li>• Procedure: Enabling an agent to use Team Communicator to call a contact</li> <li>• Procedure: Enabling an agent to use Outbound Campaign functionality call to a contact</li> <li>• Procedure: Enabling an agent to use E-Mail to correspond with a contact</li> <li>• Procedure: Enabling an agent to use Chat to chat with a contact</li> <li>• Procedure: Enabling an agent to use SMS to</li> </ul>

Objective	Related Procedure and Actions
	<p>exchange SMS with a contact</p> <ul style="list-style-type: none"> <li>• Procedure: Enabling an agent to use Workitems to handle open media types</li> <li>• Procedure: Enabling an agent to use agent, place, agent group, or place group Workbins</li> <li>• Procedure: Enabling agents to use Instant Messaging</li> <li>• Procedure: Enabling an agent to use disposition codes</li> <li>• Procedure: Enabling agents to manage contact history</li> <li>• Procedure: Configuring the Interaction Workspace application to enable an agent to edit case information</li> <li>• Procedure: Enabling agents to use the Standard Responses Library (SRL)</li> <li>• Procedure: Enabling agents to view Broadcast Messages</li> <li>• Procedure: Enabling agents to be Team Leads</li> </ul>
Enable agents to view KPIs and contact center statistics	<ul style="list-style-type: none"> <li>• Procedure: Enabling an agent to view My Statistics (KPIs)</li> <li>• Procedure: Enabling an agent to view Contact Center Statistics (Object Metrics)</li> <li>• Procedure: Enabling an agent to view My Statistics (KPIs) and Contact Center Statistics in the Statistics Gadget</li> </ul>
Enable agents to manage contacts	<ul style="list-style-type: none"> <li>• Procedure: Enabling agents to manage contacts</li> <li>• Procedure: Configuring the Interaction Workspace application and Universal Contact Server to enable custom contact attributes</li> </ul>
Modify a routing strategy to override Interaction Workspace options, based on attached data	<ul style="list-style-type: none"> <li>• Procedure: Modifying a Routing Strategy to override an Interaction Workspace option, based on attached data</li> </ul>

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# Setting Up Agents On The System

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

## Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group

**Purpose:** To restrict the privileges that are assigned to an agent.

The `security.disable-rbac` configuration option in the `interaction-workspace` section determines whether agents have all privileges granted or whether the Role-Based Access Control (RBAC) control system is used.

 **Note:** RBAC requires Configuration Server 8.0.2 or higher.

If `security.disable-rbac` is set to `true`, RBAC is disabled and all privileges are assigned to all agents and Agent Groups. If `security.disable-rbac` is set to `false`, RBAC is enabled and you must assign roles to agents and Access Groups. For more information about roles refer to [Role-Based Approach of Genesys 8](#).

### Prerequisites

- Genesys Administrator 8.0.200.29 or higher, configured to show Advanced View.
- Configuration Server 8.0.2 or higher.
- A working knowledge of Genesys Administrator 8.
- Interaction Workspace Application Template in the Configuration Layer.

### Start

1. Create the Interaction Workspace Application object from the Interaction Workspace Application Template.
2. From the Tenant drop-down list, select the Tenant for which you want to create the role.
3. In the Genesys Administrator Provisioning view, select Accounts in the Navigation column.
4. Select the Roles view.
5. In the Roles view, click New.
6. In the Configuration tab, specify the following General parameters:
  - A name for the role.
  - A description of the role (optional).

- Whether or not the role is enabled.
- In the Configuration tab, specify a list of users or access groups in the Members view.
- In the Role Privileges tab, click Interaction Workspace privileges.
- Initially, all privileges are unassigned. To assign a privilege, click the drop-down list in the Value column that is associated with the privilege and select Allowed. Refer to [Role Privileges](#) for a list of all the privileges.
- To save the new role, click Save and Close. The new role is now applied to the specified agents and Agent Groups. For information on privilege conflicts, refer to [Resolution for Configuration Options Conflict Resolution for Configuration Options](#).  
To discard the new role without saving your changes, click Cancel.

**End**

## Procedure: Optimizing the Login Window

**Purpose:** To control the behavior of the Interaction Workspace Agent Login Window.

Agent login can be configured as either a one-step or a two-step process depending on whether you want to prompt the agent for connection parameters in the secondary login window or specify the parameters for the agent.

For a list of configuration options that are related to login, refer to [Login](#).

**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.

**Start**

1. Configure the agent for two-step login by setting the options that control Password, Queue, Switch, and Place.
  - a. If the agent must enter a phone-set Password, set the `login.prompt-dn-password` option to `true`. The second login window is displayed after the agent is authenticated. A phone-set Password prompt will be displayed in the secondary login window.
  - b. If the agent must enter a Queue at login, set the `login.prompt-queue` option to `true`. A Queue prompt will be displayed in the secondary login window.  
If the switch has multiple logins for the agent, the agent will be prompted to enter the particular login that they want to use.
  - c. Several options control Place login:
    - i. If the agent must enter a Place at each login, set the `login.prompt-place` option to `true`.
    - ii. If the agent always logs in to a default Place at each login, do the following:
      - Assign a default Place in the Agent Advanced tab.
      - Set the `login.prompt-place` option to `false`.
      - Set the `login.use-default-place` option to `true`.



- If the agent must specify a Place only the first time that the agent logs in (**Note:** The Place is stored in the local settings of the agent):
  - Set the `login.use-default-place` option to `false`.
  - Set the `login.prompt-place` option to `false`.
- Configure the agent for one-step login by using the following configuration-option settings:
  - Set the `login.prompt-dn-password` option to `false`.
  - Set the `login.prompt-queue` option to `false`.
  - Set the `login.prompt-place` option to `false`.

**Note:** If the default Place in the Agent Advanced tab is blank, the agent will have to perform a two-step login the first time that the agent logs in to a particular workstation.

## End

## Procedure: Provisioning Interaction Workspace for the Voice channel

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

### 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.
- T-Server with associated switch and switching office.
- A Switch that is configured with DNs that correspond to agent devices in the switch.
- Agent logins that are configured in the Switch that can be referred by agents.
- A Place that contains one or more DNs from the Switch.

### Start

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

1. Reference at least one AgentLogin from the Switch.
  2. Check the `isAgent` flag.
  3. Set a default Place. (Optional)
  4. Allow the voice media privilege (see [Voice Privileges](#)) for the role to which the agent is assigned (refer to the [Procedure: Creating a Role, allowing an Interaction Workspace privilege, and assigning a Role to an agent or agent group](#)).
  5. Allow the voice media privileges that you want the agent to use (see [Voice Privileges](#)).
  6. Configure the voice options in the `interaction-workspace` section of the Interaction Workspace
-

Application object (refer to the [Voice](#) configuration option reference for a list of Voice options and a description of how to configure them).

## End

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

**Purpose:** To enable an agent to use custom Not-Ready Reason codes and to support the aux work mode.

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

### Prerequisites

- 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.

### Start

1. Create a new Action Code in the following Genesys Administrator view: Provisioning > Desktop > Action Code.
2. Enable the new Action Code so that it can be used in the Configuration Layer.
3. To enable the Action Code to display in the Agent Interface, configure the `agent-status.enabled-actions-global` option in the `interaction-workspace` section of the Interaction Workspace Application object (refer to the [Agent status](#) configuration option reference for a list of agent status options and a description of how to configure them).
4. Configure the Interaction Workspace `agent-status.not-ready-reasons` option to include the value that is specified in the Action Code (refer to the [Agent status](#) configuration option reference). Not-Ready Reasons are displayed in the order that is defined by the value of the `agent-status.not-ready-reasons` option. If no value is specified for the `agent-status.not-ready-reasons` option, the default behavior is to display all Not-Ready Reasons that are defined and enabled in the Action Code folder.

## End

## Procedure: Enabling Accessibility Features

**Purpose:** To enable agents to use the Accessibility features of Interaction Workspace.

### 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.

### Start

---

1. In Genesys Administrator, open the Interaction Workspace Application.
2. Select the Options tab.
3. In the interaction-workspace section, configure the following option value:
  - `accessibility.visual-impairment-profile` -- Set to `true` to optimize the Interaction Workspace for keyboard navigation and screen reader applications.
4. In the interaction-workspace section, configure the following option values to add sounds to specific interface events:
  - `accessibility.agent-state-change-bell` -- Specify the name of the sound file that you want to play to the agent when the agent changes state.
  - `accessibility.interaction-state-change-bell` -- Specify the name of the sound file that you want to play when an interaction changes state.
  - `accessibility.warning-message-bell` -- Specify the name of the sound file that you want to play when a warning message is displayed to the agent.
  - `<media-type>.ringing-bell` -- Specify the name of the sound file that you want to play to the agent when an interaction of `<media-type>` is received.
  - `chat.new-message-bell` -- Specify the name of the sound file that you want to play to the agent when a new chat message is received.
  - `im.new-message-bell` -- Specify the name of the sound file that you want to play to the agent when a new IM message is received.

**End**

## Procedure: Enabling Security Features

**Purpose:** To enable the security features of Interaction Workspace.

**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.

**Start**

1. In Genesys Administrator, open the Interaction Workspace Application.
  2. Select the Options tab.
  3. Configure any of the following options in the Security section:
    - `security.disable-rbac` -- Specify whether Role Based Access is applied to agents to control access to Interaction Workspace features and functionality.
    - `security.inactivity-timeout` -- Specify whether the agent workstation locks after a certain period of inactivity.
    - `security.inactivity-set-agent-not-ready` -- Specify whether the agent is automatically set to Not Ready when agent inactivity is detected.
-

- `security.inactivity-not-ready-reason` -- Specify the default Not Ready Reason if the agent's workstation times out.
4. Configure any of the following options in the `sipendpoint` section:
    - `sipendpoint.genesyslab.system.log_level_Security` -- Specify the log level to be used for security.
  5. Configure any of the following options in the `log` section:
    - `log.default-filter-type` -- Specify the default filter type for logging.
    - `log.filter-data.<key_name>` -- Specify the treatment of log data. Enables you to filter for specific attached data keys, by specifying the key name in the option name.

## End

## Procedure: Creating Corporate Favorites

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

### 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.

### Start

1. In Genesys Administrator, open the Interaction Workspace Application.
2. Select the Options tab.
3. Create a new section and name it with the name of the Corporate Favorite that you want to create.
4. Configure the new Corporate Favorite section to be one of the following types:
  - Agent
  - Agent Group
  - Skill
  - Queue
  - Interaction Queue
  - Routing Point
  - Custom Contact

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


Corporate Favorite Options by Type

Type	Options	Mandatory	Valid values	Example
Agent	type	Yes	Agent	Agent
	id	Yes	<user name of the agent>	User123
	category	Yes	<a semicolon-separated list of category names>	CorporateCategory1;FavoriteAgent
Agent Group	type	Yes	AgentGroup	AgentGroup
	id	Yes	<name of the agent group>	Agent Group Meridian
	category	Yes	<a semicolon-separated list of category names>	CorporateCategory1;FavoriteAgent
Skill	type	Yes	Skill	Skill
	id	Yes	<name of the skill>	French
	category	Yes	<a semicolon-separated list of category names>	French Speaking Agents; Mandarin Speaking Agents
Queue	type	Yes	Queue	Queue
	id	Yes	DN number in the following format <DN>@<SwitchName>	123@MySwitch
	category	Yes	<a semicolon-separated list of category names>	CorporateCategory1;FavoriteAgent
Interaction Queue	type	Yes	InteractionQueue	InteractionQueue
	id	Yes	<script name of the interaction queue>	123@MySwitch
	category	Yes	<a semicolon-separated list of category names>	CorporateCategory1;FavoriteAgent
Routing Point	type	Yes	RoutingPoint	RoutingPoint
	id	Yes	DN number in the following format <DN>@<SwitchName>	123@MySwitch
	category	Yes	<a semicolon-separated list of category names>	CorpRoutingPoint
Custom Contact	type	Yes	CustomContact	CustomContact
	category	Yes	<a semicolon-separated list of category names>	External Resources

Type	Options	Mandatory	Valid values	Example
	firstname	No	<any string>	First
	lastname	No	<any string>	External
	phonenumber	Yes (one or both)	<a semicolon-separated list of phone numbers>	+1555234567890;+5551234543
	emailaddress		<a semicolon-separated list of e-mail addresses>	external1@mail.dom; external2@mail.dom

5. 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, Queue, Interaction Queue, 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.corporate-favorites-file` -- The name and the path to an XML file that contains a list and definition each corporate favorite. The path can be relative to the Interaction Workspace working directory (for example: Favorites\CorporateFavorites.xml) or an absolute path (for example: C:\PathToFavorites\CorporateFavorites.xml).

 **Note:** The list of corporate favorites can be defined by the `teamcommunicator.corporate-favorites` options or by using the `teamcommunicator.corporate-favorites` field in an XML file. If the valid list of corporate favorites is defined by an XML file, it will be used to display the corporate favorites, otherwise, the `teamcommunicator.corporate-favorites` option is used.

6. To enable each interaction to have an independent list of corporate favorites that are dynamically loaded into the corporate favorites in the team communicator view of the current interaction, configure the following options:

- Configure a Transaction object of type `list`. For example, you could configure a Transaction object that is named: `IW_CorporateFavoritesOverrideOptions`.
- In the `interaction-workspace` section configure the `teamcommunicator.corporate-favorites` option to a value such as `fav1` as described in the previous steps.
- To the `interaction.override-option-key` option in the `interaction-workspace` section, set a valid key name, for example `IW_OverrideOptions`.
- Add the Transaction object name to the `AttachedData` in your strategy. In this example, set the value of `IW_OverrideOptions` to `IW_CorporateFavoritesOverrideOptions`.

Refer to the [Modifying a Routing Strategy to Override Interaction Workspace Options, Based on Attached Data](#) section for a general description of this mechanism.

 **Note:** The list of corporate favorites by interaction can be defined by the `teamcommunicator.corporate-favorites` options or by using an XML file. If the valid list of corporate favorites is defined by an XML file, it will be used to display the corporate favorites, otherwise, the `teamcommunicator.corporate-favorites` option is used.

**End**

## Corporate Favorites Sample XML

The following is an example of an XML file that is used to define corporate favorites:

```
<?xml version="1.0" encoding="utf-8"?>
<options>
  <interaction-workspace>
    <teamcommunicator.corporate-favorites>fav2;fav3</teamcommunicator.corporate-favorites>
  </interaction-workspace>
  <fav3>
    <category>Partners</category>
    <type>Agent</type>
    <id>Jim</id>
  </fav3>
  <fav2>
    <category>CorporatePartners;Partners2</category>
    <type>Agent</type>
    <id>John</id>
  </fav2>
  <fav4CustomContact>
    <category>CorporatePartners</category>
    <type>CustomContact</type>
    <firstname>Bob</firstname>
    <lastname>Davis</lastname>
    <phonenumber>+12121231234;+18001231234</phonenumber>
    <emailaddress>bob@genesyslab.com;sales@genesys.ca</emailaddress>
  </fav4CustomContact>
  <fav5RoutingPt>
    <type>RoutingPoint</type>
    <category>RoutingPoint</category>
    <id>122@LucentG3</id>
  </fav5RoutingPt>
  <fav6AgentGroup>
    <category>CorpAgentGroup</category>
    <type>AgentGroup</type>
    <id>Agent Group Meridian</id>
  </fav6AgentGroup>
  <fav7Skill>
    <category>CorpSkill</category>
    <type>Skill</type>
    <id>Email-QualityConfidencePercentageSkill</id>
  </fav7Skill>
  <fav8ACDQueue>
    <category>CorpACDQueue</category>
    <type>Queue</type>
    <id>8000@1LucentG3</id>
  </fav8ACDQueue>
  <fav9IxnQueue>
    <category>CorpIxnQueues</category>
    <type>InteractionQueue</type>
    <id>route-to-agent-group-8002</id>
  </fav9IxnQueue>
</options>
```

```
</fav9IxnQueue>  
</options>
```



# Enabling Internal And External Communications

Refer to *Framework 8.1 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 an agent to use the Interaction Workspace SIP Endpoint

**Purpose:** To enable an agent to use the Interaction Workspace SIP Endpoint to send and receive SIP-based interactions.

### 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.

### Start

1. Allow the SIP Endpoint privileges (see [SIP Endpoint 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. If required, configure the SIP Endpoint options in the interaction-workspace section of the Interaction Workspace Application object (refer to the [SIP Endpoint](#) configuration option reference for a list of SIP Endpoint options and a description of how to configure them).
  3. Set the following TServer section options for the DNS of the Place to which the agent is logging in:
    - refer-enabled = false
    - sip-cti-control = talk,hold
    - voice = true
- Install Interaction Workspace SIP Endpoint (refer to [Procedure: Installing the Interaction Workspace SIP Endpoint](#)).

### End

## Procedure: Enabling an agent to use the SIP Preview feature

**Purpose:** To enable an agent to view a display that contains a preview of an inbound SIP interaction.

### Prerequisites

- Target agents are using an internal or external SIP endpoint.
-

- 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.

**Start**

1. Configure a SIP DN for an agent with the preview feature by setting the value of the preview-interaction option to true in the TServer section of the annex of the DN.
2. To test the configuration, log the agent in to Interaction Workspace on the place that contains the DN that you configured in Step 1.
3. Use a SipEndpoint sample application to connect to a different SIP DN.
4. Make a call to a queue (Call to sip:<QueueNumber>@<HostofTheSIPSErver>) that routes interactions to the agent's Place Group that contains the agent.
5. The SIP Preview Interactive Notification is displayed on the agent's desktop.

**End**

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

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

**Prerequisites**

- 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.

**Start**

1. In the Configuration tab of the Interaction Workspace application, add a connection to Statistics Server.
  2. In the connection, add a reference to the T-Server in which the agent logs in.
  3. Allow the Team Communicator privileges (see [Team Communicator 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](#)).
  4. Configure the Team Communicator options in the interaction-workspace section of the Interaction Workspace Application object (refer to the [Team Communicator](#) configuration option reference for a list of Team Communicator options and a description of how to configure them).
  5. In your routing configuration, configure a routing strategy that uses the routing targets that are connected to Interaction Workspace (see [intercommunication.im.routing-based-targets](#) and [intercommunication.voice.routing-points](#)).
  6. Load the routing strategy on the Routing Point that is defined by the `intercommunication.voice.routing-points` option.
-

7. Enable the agent to use the voice media by using the [intercommunication.voice.routing-points](#).
8. Allow any applicable privileges from the following list of voice privileges for the role to which the agent is assigned:
  - Can Answer Call
  - Can Forward Call
  - Can Hold/Retrieve Call
  - Can Make Call
  - Can One Step Conference
  - Can One Step Transfer
  - Can Reject Call
  - Can Release Call
  - Can Send DTMF
  - Can Set InteractionDisposition
  - Can Two Step Conference
  - Can Two Step Transfer

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

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

**Prerequisites**

- 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: Enabling agents to manage contacts](#).
- [Procedure: Provisioning Interaction Workspace for the Voice channel](#).

**Start**

1. Allow the Team Communicator privileges (see [Team Communicator Privileges](#)) for the role to which the agent is assigned (refer to the [Team Communicator Privileges](#)).
2. Configure the Team Communicator options in the `interaction-workspace` section of the Interaction Workspace Application object (refer to the [Team Communicator](#) configuration option reference for a list of Team Communicator options and a description of how to configure them).
3. Ensure that the UCS application to which Interaction Workspace is connected is configured to support index searches on 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 (Multimedia) 8.0 Reference Manual*.

- Allow the following voice privileges for the role to which the agent is assigned:
  - Can Hold/Retrieve Call
  - Can Make Call
  - Can Release Call
- Allow the following contact management privileges for the role to which the agent is assigned:
  - Can Use Contact Directory
  - Can Use Contact Information
  - Contact Module

## End

Procedure: Enabling an agent to use Outbound Campaign functionality call to a contact

**Purpose:** To enable an agent to join an Outbound Campaign call to a contact that is stored in Outbound Contact Server (OCS).

## Prerequisites

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

## Start

1. Allow the Outbound privileges (see [Outbound Campaign 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](#)).
    - Can Use
    - Can Reject Record
    - Can Cancel Record
    - Can Dial Alternative Chained Record
    - Can Get Next Preview Record
    - Can Use Push Preview
-

- Can Mark Do Not Call
  - Can Set Call Result
  - Can Reschedule
  - Can Reschedule On New Number
  - Can Edit Record Data
- Configure the Outbound options in the interaction-workspace section of the Interaction Workspace Application object (refer to the [Outbound](#) configuration option reference for a list of Outbound options and a description of how to configure them).

## End

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

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

### Prerequisites

- Genesys Administrator 8.0.2 or higher, configured to show Advanced View.
- A working knowledge of Genesys Administrator 8.
- Interaction Workspace Application object exists in the Configuration Database.
- Interaction Workspace has a connection to Universal Contact Server and Interaction Server.
- [Procedure: Enabling agents to manage contacts](#).

### Start

1. Allow the E-Mail privileges (see [E-Mail Access 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](#)).
- Can Use E-mail media
  - Can Decline E-mail
  - Can Release E-mail
  - Can Reply
  - Can Send
  - Can One Step Transfer
  - Can Set Interaction Disposition
- Configure the E-Mail options in the interaction-workspace section of the Interaction Workspace Application object (refer to the [E-Mail](#) configuration option reference for a list of E-Mail options and a description of how to configure them).
  - Configure the e-mail queue options in the email section that are mandatory for basic e-mail processing: `email.default-queue` and `email.outbound-queue`.
-

- (Optional for transfer or e-mail to queues) Configure the queue options in the `interaction-queue-presence`, `queue-presence`, `routing-point-presence` sections of the Interaction Workspace Application object (refer to [Section: interaction-queue-presence](#), [Section: queue-presence](#), [Section: routing-point-presence](#) in the configuration option reference for a list of queue options and a description of how to configure them).
- Configure the workbins options in the `interaction-workspace` section of the Interaction Workspace Application object (refer to the [Workbin](#) configuration option reference for a list of workbin options and a description of how to configure them), in particular: `workbin.email.in-progress` and `workbin.email.draft`.
- Configure the `email.signature` template [option](#) in the `interaction-workspace` section to enable automatic insertion of a signature in all new and reply outbound e-mails.

**End**

## Procedure: Configuring Filtered E-Mail From Address Functionality

**Purpose:** To enable an agent to access a configured list of Contact Center "From" e-mail addresses.

### 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 can handle email interactions.

**Start** The list of "From" e-mail addresses that can be used in outbound e-mails can be populated from two mutually exclusive sources, based on options that you configure:

- E-Mail Server POP addresses. Configure the `email.from-addresses` option with the value `$EMAILSERVER$`.
- An option that references a Business Attribute. Each Business Attribute Value corresponds to a "From" Address, where `Name` is the actual address, `Display name` is the human-readable name displayed to the agent, and `Default` tag is used to display a default value in the combo box that is used by the agent to select an address.

**End**

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

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

### Prerequisites

- 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 and Interaction Server.
-

- [Procedure: Enabling agents to manage contacts.](#)

**Start**

1. Allow the Chat privileges (see [Chat Access 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 Chat options in the interaction-workspace section of the Interaction Workspace Application object (refer to the [Chat](#) configuration option reference for a list of Chat options and a description of how to configure them).
3. Allow the following Chat privileges for the role to which the agent is assigned:
  - Can Use Chat Media
  - Can Decline Chat
  - Can Release
  - Can One Step Transfer
  - Can One Step Conference
  - Can Set Interaction Disposition

**End**

## Procedure: Enabling Chat HA

**Purpose:** To enable Chat for High Availability (HA).

**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 and Interaction Server.
- Chat Server 8.1.0 or higher.
- [Procedure: Enabling agents to manage contacts.](#)

**Start**

1. Configure Chat Server for Warm Stand-by. Set the following values for the following Chat Server options for both the primary and backup Chat Servers:
    - session-restoration-mode = simple
    - transcript-auto-save = 2
    - transcript-resend-attempts = 10
    - transcript-resend-delay = 15
    - transcript-save-on-error = continue
-

Refer to the [EServices](#) documentation for more information on setting up Chat Server.

2. For the Web API Server application, add a connection to the primary Chat Server.
3. Configure the following options in the `interaction-workspace` section of the Interaction Workspace Application object:
  - `chat.reconnect-attempts`--Defines the number of attempts to reconnect to the chat session.
  - `chat.reconnect-timeout`--Defines the interval between each attempt to reconnect to the chat session.

Refer to the [Chat](#) configuration option reference for information about how to configure these options.

## End

## Procedure: Enabling an agent to use SMS to exchange SMS with a contact

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

### 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 and Interaction Server.
- [Procedure: Enabling agents to manage contacts](#).

### Start

1. Allow the SMS privileges (see [SMS Access 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 SMS options in the `interaction-workspace` section of the Interaction Workspace Application object (refer to the [SMS](#) configuration option reference for a list of SMS options and a description of how to configure them, and to [SMS Interactions](#) for a list of other configuration options).
3. Allow the following SMS privileges for the role to which the agent is assigned:
  - Can Use SMS -- Enables access to the SMS channel.
  - Can Decline Chat -- Enables the agent to decline an SMS interaction.
  - Can One Step Transfer -- Enables the agent to transfer an SMS interaction.
  - Can Set Interaction Disposition -- Enables the agent to set a disposition for an SMS interaction.
  - Can Create SMS -- Enables the agent to create a new SMS interaction.

## End

---



## Procedure: Enabling an agent to use Workitems to handle custom media types

**Purpose:** To enable an agent to use custom media types as Workitem interactions.

### 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 (optional, depending on the workitem type).
- Interaction Workspace has a connection to Interaction Server.
- [Procedure: Enabling agents to manage contacts.](#)

### Start

1. In Genesys Administrator, add the Workitem media in the Media Type Business Attribute. (refer to *Framework 8.1 Genesys Administrator Help* and the *eServices (Multimedia) 8.0 User's Guide* for information about defining Business Attributes in Configuration Server ).
  2. Update the capacity rules for the Workitem (refer to *Genesys 8.0 Resource Capacity Planning Guide*).
  3. Allow the Workitem privileges (see [Workitem Access 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](#)).
- Can Use Workbins
  - Can One Step Transfer
- Configure the Workitem options in the interaction-workspace section of the Interaction Workspace Application object (refer to the [Workitem](#) configuration option reference for a list of Workitem options and a description of how to configure them).
  - Configure the options that support Workitems (refer to [Workitems](#)).

### End

## Procedure: Enabling an agent to use agent, place, agent group, or place group Workbins

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

### 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 and Interaction Server.
- **Procedure: Enabling agents to manage contacts.**

### Start

1. Use Genesys Interaction Routing Designer (IRD) or Genesys Composer to create a Workbin.
  2. In Genesys Administrator, create a reference to the Workbin in the Interaction Workspace Application object, following the generic rule: `workbin.<media_type>.<workbin-nick-name>=<workbin-script-name>`  
Refer to the **Section: interaction-workspace** and **Workbin** configuration option reference for a list of Workbin options and a description of how to configure them.
  3. Allow the Workbin privileges (see **Workbin Access 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**).
- Can Use Workbins

### End

## Procedure: Enabling agents to use Instant Messaging

**Purpose:** To enable an agent to use Instant Messaging (IM) to send and receive text messages with an internal target.

### 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 SIP Server.

### Start

1. Allow the Team Communicator privileges (see **Team Communicator 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 Team Communicator options in the `interaction-workspace` section of the Interaction Workspace Application object (refer to the **Team Communicator** configuration option reference for a list of Team Communicator options and a description of how to configure them).
  3. Allow the following IM privileges for the role to which the agent is assigned:
    - Can Release IM
    - Can Make IM
    - Can Use IM
- Configure the IM options in the `interaction-workspace` section of the Interaction Workspace Application object (refer to the **IM** configuration option reference for a list of IM options and a description of how to configure them).
-

- Ensure that the SIP DN of the Place used for Instant Messaging has the following options defined in the TServer section:
  - sip-signaling-chat = none
  - multimedia = true
  - voice = false (optional)

## End

## Procedure: Enabling an agent to use disposition codes

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

### 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.
- [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)
- [Procedure: Provisioning Interaction Workspace for the Voice channel](#)

### Start

1. Create or update a Business Attribute in the tenant(s) that contain(s) your agents.
    - The Type of the Business Attribute is Interaction Operation Attributes.
    - The Display Name of the Business Attribute is used as the name of the section in the Agent interface.
    - The Attribute values are the codes that are available for the agent:
      - name"Used in attached data.
      - display name"Used in the Agent interface.
  - In the Interaction Workspace application Configuration tab, in the interaction-workspace section, set the value of the voice.disposition.value-business-attribute option to the name of the business attribute that you previously configured.
  - Allow the Can Set Interaction Disposition privilege (see [Voice 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](#)).
  - Configure the following Interaction options in the interaction-workspace section of the Interaction Workspace Application object (refer to the [Interaction](#) configuration option reference for a list of Interaction options and a description of how to configure them):
    - interaction.disposition.is-mandatory
    - interaction.disposition.is-read-only-on-idle
    - interaction.disposition.key-name
-

- `interaction.disposition.use-attached-data`
- `interaction.disposition.use-connection-id`
- `interaction.disposition.value-business-attribute`

**End**

## Procedure: Enabling agents to manage contact history

**Purpose:** To enable an agent to view and update the history of a contact.

**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.](#)
- [Procedure: Provisioning Interaction Workspace for the Voice channel.](#)

**Start**

1. Allow the following 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](#)):

- Can Use Contact Directory
  - Can Use Contact History
  - Can Use Contact History CaseData
  - Can Use Contact History Detail
  - Can Use Contact History Notepad
  - Can Use Contact Information
  - Can Use Contact my History
  - Can Use Save Contact
  - Contact Module
- 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).
  - Enable an index search on contacts to enable searches on contact interactions. For more information about enabling index searches refer to the *eServices (Multimedia) 8.0 User's Guide*.

**End**

---

## Procedure: Configuring the Interaction Workspace application to enable an agent to edit case information

**Purpose:** To enable an agent to edit the contents of case 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.
- One or more custom Case Information Business Attributes in the Configuration Layer

### Start

1. In Genesys Administrator, open a Case Information Business Attribute.
2. In the Attributes Values tab, open an attribute value.
3. Select the Options tab.
4. Add a new section named interaction-workspace.
5. Configure the option according to the values in the table [Business Attributes Configuration for the interaction-workspace section](#).
6. Save your updates.

### End

## Procedure: Enabling agents to use the Standard Responses Library (SRL)

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

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

### 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](#).
  - (Optional) [Procedure: Provisioning Interaction Workspace for the Voice channel](#).
  - (Optional) [Procedure: Enabling an agent to use E-Mail to correspond with a contact](#).
  - (Optional) [Procedure: Enabling an agent to use Chat to chat with a contact](#).
-

**Start**

1. Allow the following SRL privileges (see [SRL Access 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](#)):
  - Can Use SRL
- 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 Reference Manual*.

- Configure the relevancy level for Suggested Responses:
  - Set the `standard-response.suggested-responses-min-relevancy` option to display responses in order according to their relevancy to the inbound interaction.

**End**

## Procedure: Enabling agents to view Broadcast Messages

**Purpose:** To enable an agent to receive and view messages that are sent simultaneously (broadcast) to multiple contact center parties.

**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.
- [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#).

**Start**

1. Allow the following Broadcast Message privilege (see [Broadcast 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](#)):
  - Can Use Broadcast Message
- Create a communication DN and configure it in `broadcast.dn`.
- Configure the broadcast message topics to which an agent can be subscribed by using `broadcast.subscribed.topics`. Topics can be associated with different configuration objects such as agents (`$Agent$`), agent groups (`$AgentGroup$`), and roles (`$Role$`); or they can be the names of custom topics such as `team` (for example,

billing) or site (for example main\_campus).

- Ensure that you have a Sender application that implements the protocol described in [Viewing Broadcast Messages](#) that sends messages to topics that match what is configured in your system.

## End

## Procedure: Enabling agents to be Team Leads

**Purpose:** To enable an agent to automatically monitor the SIP Voice and Chat interactions that are handled by other agents.

### 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.
- [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group.](#)

### Start

1. Allow the following Team Lead privilege (see [Team Lead Privileges](#)) for one of the roles to which the users who will be Team Leads are members:
  - Can Use Team Lead
- Allow the following optional Team Lead privileges (see [Team Lead Privileges](#)) for the role to which the agents who will be Team Leads are members:
  - Can Auto-Monitor (Voice or Chat)
  - Can Switch to Barge-in (Voice or Chat)
  - Can Switch to Coaching (Voice or Chat)
  - Can Switch to Silent Monitoring (Voice or Chat)
  - Can End Monitoring (Voice or Chat)
- Create or select an agent group to be used to specify the list of Agents that a Team Lead will monitor.
- Add the agents to be monitored by that team lead to that agent group.
- In Genesys Administrator Configuration tab for the agent group, open the Advanced view.
- In the Supervisor field, add the name of the user that will be acting as Team Lead for that agent group.
- Save the changes to the Agent Group object.

## End

---

# Enabling Agents to View KPIs and Contact Center Statistics

Refer to *Framework 8.1 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 an agent to view My Statistics (KPIs)

**Purpose:** To enable an agent to view their Key Performance Indicators (KPIs).

### 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 Stat Server.

### Start

1. Configure Stat Server as described in Framework Stat Server 8.1 Deployment Guide. to produce the metrics that you want to employ to measure the KPIs in your contact center.
  2. In the Interaction Workspace Application, configure the Interaction Workspace KPIs section following the option reference in [Section: <KPI Name>](#).
  3. Allow the following Statistics Access privileges (see [Statistics Access Privileges](#)) for the role to which the agent is assigned (refer to the [Procedure: Creating a Role, allowing an Interaction Workspace privilege, and assigning a Role to an agent or agent group](#)):
    - KPI module
- Configure the KPI options in the interaction-workspace section of the Interaction Workspace Application object (refer to the [KPI](#) configuration option reference for a list of KPI options and a description of how to configure them).

### End

## Procedure: Enabling an agent to view Contact Center Statistics (Object Metrics)

**Purpose:** To enable an agent to view the overall performance of the contact center by viewing statistics regarding Queues, Routing Points, and so on.

An agent can log in to a queue or a routing point if the estimated wait times are particularly high or if the object is displaying a warning or error. Agents should log in to those queues that are experiencing high levels of abandoned calls.



For each Contact Center Statistic (Object Metric) that you want to define and use, you must define a section in the Interaction Workspace Application object in the Configuration 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 Statistics Server.

### Start

1. In Genesys Administrator, create a new section named after the Object Statistic that you want to use.
  2. Define the mandatory and optional options and values for the statistic (refer to [Section: <Object Statistic Name>](#)).
  3. Allow the following Statistics Access privileges (see [Statistics Access Privileges](#)) for the role to which the agent is assigned (refer to the [Procedure: Creating a Role, allowing an Interaction Workspace privilege, and assigning a Role to an agent or agent group](#)):
    - Object Statistics module
- Configure the Statistics options in the interaction-workspace section of the Interaction Workspace Application object (refer to the [Statistics](#) configuration option reference for a list of Statistics options and a description of how to configure them).

### End

## Procedure: Enabling an agent to view My Statistics and Contact Center Statistics in the Statistics Gadget

**Purpose:** To enable an agent to view Statistics and Contact Center Metrics in the Statistics Gadget.

The Statistics Gadget provides a small, convenient viewer for Statistics and Contact Center Metrics that does not require agents to keep opening the My Statistics tab and the Contact Center Statistics tab in the Workspace. The Statistics Gadget provides continuous updates and warnings.

### 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 Statistics Server.
- Complete one or both of the following:
  - [Procedure: Enabling an agent to view My Statistics \(KPIs\)](#)
  - [Procedure: Enabling an agent to view Contact Center Statistics \(Object Metrics\)](#)

### Start

---

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

**End**

# Enabling Agents To Manage Contacts

Refer to *Framework 8.1 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](#)
- [Procedure: Provisioning Interaction Workspace for the Voice channel](#)

### 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.
- Add the Business Attribute to the list of searchable attributes in the Interaction Workspace `contact.directory-search-attributes` option.
  - 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).
  - 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

# Overriding Interaction Workspace Options

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

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

### Procedure: Modifying a Routing Strategy to override an Interaction Workspace option based on attached data

**Purpose:** To override previously defined configuration options by using a Routing Strategy.

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

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

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

#### Prerequisites

- [Deploying Interaction Workspace](#)
- Strategy that routes to your Interaction Workspace agent workstations.

#### Start

1. Configure one or more Transaction objects, of type `list`, in Genesys Administrator or Composer, by using the standard approach that is used for other object types in the hierarchy (these rely on the option reference to determine if a particular option can be overridden in a Transaction). You can only override options in the `interaction-workspace` section. Therefore, you must replicate the `interaction-workspace` section in the annex of the object level where you want the override to occur (Tenant, Group, User, or Transaction).
2. Configure the option `interaction.override-options` to define the key where the Transaction object(s) are to be listed in attached data (refer to the [Interaction](#) configuration option reference for a list of Interaction options and a description of how to configure them).
3. Using either IRD or Composer, edit your routing strategy by adding an "Attach" or "Multi-attach" block that attaches the key value pair that is defined below:

- `key` -- The name of the key that you defined in the option set in Step 2.
- `value` -- One or several comma-separated Transaction objects, as defined in Step 1.

**End**

# System Support


This category lists supported systems and their limitations and constraints. It contains the following section:

- [Tables Of Supported Systems](#)

## Tables Of Supported Systems

The Table - **Interaction Workspace Deployment Client-Side Platform Supported Operating Systems** lists the supported operating systems for client-side deployment of Interaction Workspace.

Operating System
Microsoft Windows 2003
Microsoft Windows 2008
Microsoft Windows XP/Intel 32-bit
Microsoft Windows Vista
Microsoft Windows 7
Microsoft Windows 8 (in legacy mode)

 **Note:** To play the sounds that are specified in various configuration options Microsoft Windows Media Player 10 or higher must be installed on the client.

The Table - **Interaction Workspace Deployment Supported Virtualized Platforms** lists the supported virtualized platforms for client-side deployment of Interaction Workspace.

Virtualized Platform
Citrix XenDesktop 5.6
Citrix XenApp 6.x
Citrix Presentation Server 4.5
VMWare View 5.x
VMWare ThinApp 4.6

### ClickOnce Deployment System Requirements

The Table - **Interaction Workspace Deployment Server-Side Platform Supported Operating Systems** lists the supported operating systems for server-side deployment of ClickOnce and Interaction Workspace.

OS	Version range
Microsoft Windows Server/Intel 32-bit & 64-bit	2003, 2008, 2008 R2
Solaris/Sparc 32-bit	7, 8, 9, 10
Solaris/Sparc 64-bit	7, 8, 9, 10



OS	Version range
Linux	RHEL 5.0 - 32-bit, 6.0 - 64-bit

ClickOnce requires one of the web server applications that are listed in the Table - **Interaction Workspace Supported Web Server Applications**.

Web server	Version range
Apache	2.2
IIS	6, 7, 7.5

The Table - **Interaction Workspace Client-Side Platform Supported Browsers** lists the supported client-side browsers for a ClickOnce deployment.

Browser	Version range
Microsoft Internet Explorer	6.0 - 10.0
Mozilla FireFox (a)(b)	2.0 - 7.0

(a) To use Mozilla Firefox, you must install the following add-on : "Microsoft .NET Framework Assistant". This add-on enables you to start the application directly and have Framework .NET detection. This add-on is found here: <https://addons.mozilla.org/en-US/firefox/addon/9449>

(b) If you have Microsoft .NET Framework Assistant 1.3.0 or higher installed, then the publish.htm page might not detect the installed prerequisites and might display a warning. In this case, click on the launch link.

## Supported Switches

The following switches are supported:

- Avaya Communication Server
- SIP Server
- Alcatel OmniPCX Enterprise (OXE)/A4400
- Cisco CallManager (CM) IP PBX
- EADS Telecom Intecom E Series
- EADS Telecom Intecom M6880 PointSpan
- Ericsson MD110
- Ericsson MX-ONE
- Nortel Communication Server 1000
- Nortel Communication Server 2000/2100
- NEC Small TDM

- NEC Large TDM
- NEC Small Hybrid
- NEC Large Hybrid
- NEC SV7000
- Spectrum
- Siemens HiPath 4000 v (including family: 4000, 4300, 4500, 4900)

See *Genesys Supported Media Interfaces Reference Manual* for a list of switches that are supported by the Interaction Workspace Voice Section. To achieve full support of the following switches, configure the place at which the agent logs in as described in the following tables, for the following DN configurations:

• **Place Configuration for Agent Login: 2 DNs (1 Extension and 1 Position)**

Switches	DN in Configuration Manager	Agent login in Configuration Manager	DN ID reflected
Nortel Communication Server 1000 with SCCS/MLS (formerly Nortel Symposium and Nortel Meridian 1)Nortel Communication Server 2000/2100 (formerly DMS 100)NEC APEX (American Version)NEC SV7000	2 DNs: <ul style="list-style-type: none"> <li>• 1 Extension</li> <li>• 1 ACD Position</li> </ul>	No constraint	1 Voice DN (ACD Position number)

• **Place Configuration for Agent Login: 1 DN or More**

Switches	DN in Configuration Manager	Agent login in Configuration Manager	DN ID reflected
Ericsson MD110Ericsson MX-ONENEC SV7000	1 DN or more: <ul style="list-style-type: none"> <li>• 1 Extension (ODN)</li> <li>• n= 0/1 ACD Positions (ADN)</li> </ul>	No constraint	1 Voice DN (Extension number)


• **Place Configuration for Agent Login: 1 DN (1 Extension or 1 Position)**

Switches	DN in Configuration Manager	Agent login in Configuration Manager	DN ID reflected
Avaya Definity G3Cisco CallManagerEADS Telecom M6500EADS (Intecom) EEADS	1 DN: <ul style="list-style-type: none"> <li>• 1 Extension <i>or</i></li> </ul>	No constraint	1 Voice DN (Extension number or ACD Position number)

Switches	DN in Configuration Manager	Agent login in Configuration Manager	DN ID reflected
(Intecom) Point SpanRockwell SpectrumSiemens HiPath 4000 CSTA 3SIP Server	<ul style="list-style-type: none"> <li>• 1 ACD Position</li> </ul>		

• **Place Configuration for Agent Login: Alcatel OmniPCX Enterprise (OXE)/A4400-specific**

Switches	DN in Configuration Manager	Agent login in Configuration Manager	DN ID reflected
Alcatel OmniPCX Enterprise (OXE)/A4400 Agent Substitute	In switch: <ul style="list-style-type: none"> <li>• 1 Extension</li> <li>• 1 ACD Position</li> </ul> In place: <ul style="list-style-type: none"> <li>• Shortcut to Extension only</li> </ul>	LoginID equal to ACD Position number	(T-server option: agent- substitute=true) Extension if logged outPosition if logged in
Alcatel OmniPCX Enterprise (OXE)/A4400 Agent emulated	In switch: <ul style="list-style-type: none"> <li>• 1 Extension</li> </ul> In place: <ul style="list-style-type: none"> <li>• Shortcut to Extension</li> </ul>	Not define position for login ID	agent- substitute=true/ false

 **Note:** In some cases, for some of the switches that are listed in the Table - **Place Configuration for Agent Login: 2 DNs (1 Extension and 1 Position)**, an agent cannot see all of the DNs in the place configuration; sometimes only one DN is visible that includes the features of all of the other DNs.

For some switches you must set the following option in the switch annex or the DN annex to specify the operating mode of the switch:

Section: interaction-workspace

spl.switch-policy-label

Possible values:

For the Nortel CS 1000 switch:

- Default Value: NortelMeridianCallCenter::MLS
- Valid Values: NortelMeridianCallCenter::MLS, NortelMeridianCallCenter::SCCS

For the Nortel Communication Server 2000 switch:

- Default Value: NortelDMS100
- Valid Values: NortelDMS100, NortelDMS100::PDNMode

# Configuration Options Reference

This category is an appendix of Interaction Workspace configuration options, grouped by Configuration Section. This category contains the following sections:

- [Introduction To Configuration Options](#)
- [Section: interaction-workspace](#)
- [Section: interaction-queue-presence](#)
- [Section: queue-presence](#)
- [Section: routing-point-presence](#)
- [Section: KPIName](#)
- [Section: ObjectStatisticName](#)
- [Not Ready Reason Codes](#)
- [Role Privileges](#)

The complete list of Interaction Workspace Configuration options is available [here](#).

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# Introduction To Configuration Options

As with all other Genesys 8 applications, the Interaction Workspace 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 Interaction Workspace configuration options. KPI and statistics options are not part of the XML metadata file, because they are not composed of fixed key names. To use the KPIs section, create as many option blocks as the number of KPIs that you want to declare. For details, see [Section: KPIName](#). To use the Statistics section, create as many option blocks as the number of statistics that you want to declare. For details, see [Section: ObjectStatisticName](#). Lists of privileges are currently implemented as Boolean options in the Annex of individual agents (see [Role Privileges](#)). 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 [Provisioning Interaction Workspace](#). 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. The `security.disable-rbac` configuration option in the `interaction-workspace` section determines whether agents have all privileges allowed or whether the Role Based Access Control (RBAC) control system is used. Refer to [Role Privileges](#) for a list of all the privileges.

 **Warning:** RBAC requires Configuration Server 8.0.2 or higher.

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

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## Section interaction-workspace

These options can be configured on the Interaction Workspace Application object, a Tenant, a Group, or an Agent Group. The options are grouped into the following categories:

- **Accessibility** -- Options that enhance the application for hearing and visually impaired agents
- **Active Recording** -- Options that control how agents use Active Call Recording.
- **Agent status** -- Options that control how agents set their Ready status
- **Broadcast** -- Options that control how broadcast messages appear and behave
- **Business Continuity** -- Options that control the behavior of Interaction Workspace during a long term loss of connection to the primary host site.
- **Chat** -- Options that control the appearance and behavior of the Chat interface
- **Contact** -- Options that control contact management
- **Disaster Recovery** -- Options that control the behavior of Interaction Workspace during a long term loss of connection to the primary host site. See **Business Continuity** options.
- **Display formats** -- Options that control the appearance of various text elements in the various application windows
- **Editor** — Options that control the display of fonts in text editor boxes in Workspace.
- **E-Mail** -- Options that control the appearance and behavior of the E-Mail interface
- **Expression** -- Options that control the parsing of phone numbers in contact interaction
- **Gadget and Statistics Gadget** -- Options that control the use and appearance of the Gadget and Statistics Gadget
- **General** -- Options that control the general behavior of Interaction Workspace.
- **IM** -- Options that control the appearance and behavior of the Internal Instant Messaging interface
- **Interaction** -- Options that control the behavior and appearance of various elements related to the Interaction window
- **Interaction Management** -- Options that control the way that Team Leads view and manage interactions in Queues and Workbins for their team members.
- **Intercommunication** -- Options that control the routing of internal IM and voice interactions
- **Keyboard** -- Options that enable keyboard shortcuts
- **KPI** -- Options that control the display of My Statistics (KPIs) on the agent Workspace
- **Log** -- Options that control logging of the application
- **Login** -- Options that control the appearance and behavior of the agent login window
- **Main view** -- Options that control the behavior of the Main Window
- **Open Media** -- Options that enable open media features
- **Outbound** -- Options that enable agents to participate in outbound campaigns
- **Security** -- Options that control the timing and behavior of the keyboard and mouse inactivity timeout

feature and other security features

- **SIP Endpoint** -- Options that control the functionality and display of Interaction Workspace SIP Endpoint enabled interactions
- **SMS** -- Options that control the appearance and behavior of the SMS interface
- **Spellchecker** -- Options that control the use of corporate dictionaries in the spelling check feature
- **Standard Responses** -- Options that control the functionality and display of the Response view
- **Statistics** -- Options that control the display of contact center statistics on the agent Workspace
- **Team Communicator** -- Options that control the appearance and behavior of the Team Communicator
- **Toast (Interactive Notification)** -- Options that control the appearance and behavior of the interaction preview Interactive Notification
- **View** -- Options that control the tab order and activation order of windows and menus.
- **Voice** -- Options that control various features of the Voice channel
- **Web Callback** -- Options that control the various features of the Web Callback channel
- **Webproxy** -- Options that control the use of a Webproxy for environments where Internet proxies require user authentication
- **Workbin** -- Options that control various features of Workbins
- **Workitem** -- Options that control various features of the Workitem channel
- **Miscellaneous** -- Options that control the appearance of the Interaction Workspace application windows, the recording of options, the evaluation of presence, the enabling of RBAC, and many other miscellaneous features



# Accessibility Options

## Accessibility

### accessibility.agent-state-change-bell

- Default Value: ""
- 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: At the next interaction.
- Description: Specify the agent state change sound configuration string -- for example: Sounds\bell.mp3|7|0  
The value has three components that are separated by the character '|':
  1. The file name and folder relative to the application folder.
  2. The priority -- The higher the integer the higher the priority.
  3. The duration:
    - a. 0 means play the whole sound one time.
    - b. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

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

- Default Value: ""
- 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: At the next interaction.
- Description: Specify the interaction state change sound configuration string -- for example: Sounds\chord.mp3|5|0  
The value has three components that are separated by the character '|':
  1. The file name and folder relative to the application folder.
  2. The priority. The higher the integer the higher the priority.
  3. The duration:
    - a. 0 means play the whole sound one time.
    - b. An integer > 0 means a 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 application is started or restarted.
- Description: Specifies whether the profile for visually impaired users is active. This option enables more interface elements to be focusable (accessible from keyboard navigation and mouse-over) so that they can be navigated from Screen Reader applications.

## accessibility.warning-message-bell

- Default Value: ""
- 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: At the next interaction.
- Description: Specify the warning message sound configuration string -- for example: Sounds\warning.mp3|10|0  
The value has three components that are separated by the character '|':

1. The file name and folder relative to the application folder.
2. The priority -- The higher the integer the higher the priority.
3. The duration:
  - a. 0 means play the whole sound one time.
  - b. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

# Active Recording Options

## Active Recording

### active-recording.voice.recording-type

- Default Value: NETANN
- Valid Values: NETANN or MSML
- Changes take effect: When the application is started or restarted.
- Description: Specifies the type of voice recording to be used. NETANN and MSML are supported.
  - NETANN: Legacy call recording using NETANN can be provided by Stream Manager or Genesys Media Server.
  - MSML (Active Recording): Call recording through Media Server Markup Language (MSML) is provided through Genesys Media Server only. For details about this type of recording, refer to "Call Recording—MSML-based" in the *SIP Server Deployment Guide*.

### active-recording.voice.recorder-uri

- Default Value: ""
- Valid Values: A string in format sip:host:port
- Changes take effect: When the application is started or restarted.
- Description: Specifies the URI of the voice recorder. Use this option if you will use a voice recorder other than the one that is configured in GVP.

# Agent Status Options

## Agent status

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

- Default Value: Ready, NotReady, NotReadyReason, AfterCallWork, Dnd, Logon, LogOff
- Valid Values: Comma-separated list of action names from the following list: LogOn, LogOff, Ready, NotReady, Dnd, AfterCallWork, NotReadyReason
- Changes take effect: Immediately.
- 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, Logon, LogOff
- Valid Values: Comma-separated list of action names from the following list: LogOn, LogOff, Ready, NotReady, Dnd, AfterCallWork, NotReadyReason
- Changes take effect: Immediately.
- 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 all not ready action codes are considered.
- Changes take effect: Immediately.
- Description: Defines the available reasons in the Agent Status menus (global and My Channels). The reason commands are displayed in the order in which they appear in the list.

# Broadcast Options

## Broadcast

### `broadcast.color.minimal-priority`

- Default Value: #FFCCCCC
- Valid Values: <hexidecimal color value>
- Changes take effect: Immediately.
- Description: The color of the Interactive Notification border that indicates that the message has the lowest (minimal) priority.

### `broadcast.color.low-priority`

- Default Value: #FF999999
- Valid Values: <hexidecimal color value>
- Changes take effect: Immediately.
- Description: The color of the Interactive Notification border that indicates that the message has low priority.

### `broadcast.color.normal-priority`

- Default Value: #FFDFE8F6
- Valid Values: <hexidecimal color value>
- Changes take effect: Immediately.
- Description: The color of the Interactive Notification border that indicates that the message has normal priority.

### `broadcast.color.high-priority`

- Default Value: #FF663399
- Valid Values: <hexidecimal color value>
- Changes take effect: Immediately.
- Description: The color of the Interactive Notification border that indicates that the message has high priority.

## broadcast.color.important-priority

- Default Value: #FFFF0000
- Valid Values: <hexidecimal color value>
- Changes take effect: Immediately.
- Description: The color of the Interactive Notification border that indicates that the message has highest priority.

## broadcast.displayed-columns

- Default Value: MessageTypeIcon,MessageType,Sender,Subject,Priority,Date,Topic
- Valid Values: A comma-separated list of valid object types from the following list: MessageTypeIcon, MessageType, Sender, Subject, Priority, Date, Topic, Id, <any custom key>
- Changes take effect: When the application is started or restarted.
- Description: Specifies the names of the columns that are displayed, and the column, order in the My Messages view.

## broadcast.dn

### **Updated:** 8.1.30x.xx

- Default Value: ""
- Valid Values: A comma-separated list of DN and switch names in the following format: dn\_name@switch
- Changes take effect: When the application is started or restarted.
- Description: Specifies the list of Communication DNs that are used for Broadcasting. Interaction Workspace registers to the specified DNs when a corresponding TServer connection is configured in the application and then considers all messages sent on these connections.

## broadcast.mark-read-timeout

- Default Value: 5
- Valid Values: Any integer from 0 to MAXINT.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the duration, in seconds, that the broadcast message tooltip is displayed before the message is marked as read. If the duration is 0, this feature is not applied; then, the message is not considered to be read until the agent selects it for reading.

## broadcast.message-content

- Default Value: Subject, Sender, Priority, Date, Topic, Body
  - Valid Values: A comma-separated list of valid object types from the following list: Subject, Sender,
-

Priority, Date, Topic, Body, MessageType, Id, <any custom key>

- Changes take effect: At the next message.
- Description: Specifies the content of the message when the message window is displayed. This option also configures the content of the tooltip in the My Messages tab. Any property that is not listed is not displayed.

### broadcast.preview-timeout

- Default Value: 10
- Valid Values: Any integer from 0 to MAXINT.
- Changes take effect: At the next interaction.
- Description: Specifies the duration, in seconds, that the broadcast message Interactive Notification is displayed if the agent does not click Show or Dismiss. The value 0 means that the Interactive Notification is not displayed.

### broadcast.sound.minimal-priority

- Default Value: ""
- 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: At the next interaction.
- Description: Specify sound that is played when the Interactive Notification is displayed if the priority of the message is minimal (lowest) priority using the new message configuration string -- for example: Sounds\minimal-bell.mp3|7|0  
The value has three components that are separated by the character '|':

1. The file name and folder relative to the application folder.
2. The priority. The higher the integer, the higher the priority.
3. The duration:
  - a. -1 means play the whole sound and repeat the sound until the Interactive Notification is closed.
  - b. 0 means play the whole sound one time.
  - c. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

### broadcast.sound.low-priority

- Default Value: ""
- 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: At the next interaction.
- Description: Specify sound that is played when the Interactive Notification is displayed if the priority of the message is low priority using the new message configuration string -- for example: Sounds\low-bell.mp3|7|0

The value has three components that are separated by the character '|':

1. The file name and folder relative to the application folder.
2. The priority -- The higher the integer the higher the priority.
3. The duration:
  - a. -1 means play the whole sound and repeat the sound until the Interactive Notification is closed.
  - b. 0 means play the whole sound one time.
  - c. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

### broadcast.sound.normal-priority

- Default Value: ""
- 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: At the next interaction.
- Description: Specify sound that is played when the Interactive Notification is displayed if the priority of the message is normal priority using the new message configuration string -- for example: Sounds\  
normal-bell.mp3|7|0  
The value has three components that are separated by the character '|':

1. The file name and folder relative to the application folder.
2. The priority -- The higher the integer the higher the priority.
3. The duration:
  - a. -1 means play the whole sound and repeat the sound until the Interactive Notification is closed.
  - b. 0 means play the whole sound one time.
  - c. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

### broadcast.sound.high-priority

- Default Value: ""
- 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: At the next interaction.
- Description: Specify sound that is played when the Interactive Notification is displayed if the priority of the message is high priority using the new message configuration string -- for example: Sounds\  
high-bell.mp3|7|0  
The value has three components that are separated by the character '|':

1. The file name and folder relative to the application folder.
  2. The priority -- The higher the integer the higher the priority.
    - a. -1 means play the whole sound and repeat the sound until the Interactive Notification is closed.
-



- b. 0 means play the whole sound one time.
- c. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

### broadcast.sound.important-priority

- Default Value: ""
- 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: At the next interaction.
- Description: Specify sound that is played when the Interactive Notification is displayed if the priority of the message is important (highest) priority using the new message configuration string -- for example: Sounds\important-bell.mp3|7|0  
The value has three components that are separated by the character '|':
  1. The file name and folder relative to the application folder.
  2. The priority -- The higher the integer the higher the priority.
  3. The duration:
    - a. -1 means play the whole sound and repeat the sound until the Interactive Notification is closed.
    - b. 0 means play the whole sound one time.
    - c. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

### broadcast.subscribed.topics

- Default Value: All, \$Agent\$, \$AgentGroup\$
- Valid Values: A comma-separated list of valid message topics.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the list of topics to which agents can be subscribed. \$Agent\$ defines the username of the agent; \$AgentGroup\$ defines all agent groups that contain the agent.

### broadcast.toast-summary

- Default Value: Sender, Priority, Subject, FewWords
- Valid Values: A comma-separated of valid object types from the following list: Sender, Priority, Subject, FewWords, Topic, MessageType, <any key of custom data>
- Changes take effect: At the next message.
- Description: Specifies the content of the Interactive Notification. Items are displayed in the Interactive Notification in the order that is specified. Any item that is not specified is not displayed.

### broadcast.value-business-attribute

- Default Value: ""
-

- Valid Values: A valid name of a Business Attribute.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the name of the Business Attribute that contains the attribute values that are used for the custom attribute of the message

# Business Continuity Options

## Business Continuity

Options that have the `disaster-recovery.*` prefix are used to configure the Business Continuity functionality.

### `disaster-recovery.auto-restore`

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether agent should be relogged in to the Preferred site as soon as it is available.

### `disaster-recovery.disable-login-errors`

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether Interaction Workspace should display media voice login errors in the Login window.

### `disaster-recovery.enabled`

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether Business Continuity is enabled.

### `disaster-recovery.preferred-site`

- Default Value: Preferred
- Valid Values: A unique symbolic name of the site or location to be used as the preferred login site. Letters A to Z and a to z. Numbers 0 through 9. The underscore, @ and space characters.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the site name to be used as preferred when connecting to any back-end server.

That is, it specifies the name of the preferred connection site for the application, tenant, agent Group, or agent. There must be a connection to this site in the Connections tab of the corresponding server. This option should match the name specified by the `disaster-recovery.site` option that is configured on the server object.

### `disaster-recovery.peer-site`

- Default Value: DRPeer
- Valid Values: A unique symbolic name of the site or location to be used as the preferred login site. Symbolic name of the site or location. Letters A to Z and a to z. Numbers 0 through 9. The underscore, @ and space characters. Letters A to Z and a to z. Numbers 0 through 9. The underscore, @ and space characters.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the name of the site that is to be the secondary (Business Continuity peer) when connecting to any back-end server for the site that is specified by the `disaster-recovery.site` option. There must be a connection to this site in the Connections tab of the corresponding server.

### `disaster-recovery.restore-agent-state`

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether Interaction Workspace should restore last agent state after logging on to the reserved site after the current site fails.

### `disaster-recovery.timeout`

- Default Value: 60
- Valid Values: A valid positive integer.
- Changes take effect: When the application is started or restarted.
- Description: Specifies time in seconds to wait after Preferred Site HA Pair disconnection is detected before switching connection to the Business Continuity site.

### `disaster-recovery.wait-for-sipphone-timeout`

- Default Value: 0
- Valid Values: A valid positive integer.
- Changes take effect: When the application is started or restarted.
- Description: Specifies time in seconds during which an agent should wait for SipEndpoint before a disaster is considered. A value of 0 means no limit.

# Chat Options

## Chat

### chat.agent.prompt-color

- Default Value: #FF385078
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: Immediately.
- 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: #FF385078
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: Immediately.
- 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: At the next interaction.
- Description: Specifies whether a chat 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 [Overriding Options by Using a Routing Strategy](#).

### chat.client.prompt-color

- Default Value: #FF166FFF
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the prompt for the messages that are entered by the contact in the Chat view.

## chat.client.text-color

- Default Value: #FF166FFF
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the text of the messages that are entered by the client in the Chat view.

## chat.enable-auto-disconnect

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

## chat.new-message-bell

- Default Value: ""
- 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: Immediately.
- Description: Specifies the configuration string for the new Chat Message sound -- for example: Sounds\bell.mp3|7|0  
The value has three components that are separated by the character '|':

1. The file name and folder relative to the application folder.
2. The priority -- The higher the integer the higher the priority.
3. The duration:
  - a. 0 means that the whole sound is played one time.
  - b. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

## chat.nickname

- Default Value: \$Agent.UserName\$
  - Valid Values: A string that contains a compilation of characters and field codes from the following list: \$Agent.FullName\$, \$Agent.UserName\$, \$Agent.LastName\$, \$Agent.FirstName\$, \$Agent.EmployeeId\$, \$AttachedData.Y\$ (where Y is an attached data key name).
  - Changes take effect: At the next interaction.
  - Description: Specifies that a nickname (pseudonym) is used in chat sessions instead of the agent's user name, and defines the nickname.
-

This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### chat.other-agent.prompt-color

- Default Value: #FFD88000
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the prompt for the messages that are entered by the other (conferenced) agent in the Chat view.

### chat.other-agent.text-color

- Default Value: #FFD88000
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the text of the messages that are entered by the other (conferenced) agent in the Chat view.

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

- Default Value: 30, 50
- Valid Values: A comma-separated list value: <warning time>, <maximum time>.
- Changes take effect: At the next interaction.
- Description: Defines two alarm thresholds, in seconds, that warn agents that they have a pending response to a chat. Three levels are displayed: before the warning time, between the warning time and the maximum time, and after the maximum time. Agents are warned by the flashing of various elements in the user interface, including the taskbar, collapse/expand button, the interaction bar, and the pending response timer. If the agent places his or her mouse pointer on any of these flashing elements, a preview of the last received message from the contact is displayed.

### chat.prompt-for-end

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies if the application prompts a confirmation message when the user clicks End. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

## chat.reconnect-attempts

- Default Value: 5
- Valid Values: Any integer greater than or equal to 0.
- Changes take effect: At the next interaction.
- Description: Specifies the number of attempts to reconnect to the chat session to make in the case of a connection loss.

## chat.reconnect-timeout

- Default Value: 5
- Valid Values: Any integer greater than or equal to 0.
- Changes take effect: At the next interaction.
- Description: Specifies the duration, in seconds, between each attempt to reconnect to the chat session in the case of connection loss.

## chat.ringing-bell

- Default Value: Sounds\Ring.mp3|10|-1
- 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: At the next interaction.
- Description: Specify the Chat channel ringing sound configuration string, for example: Sounds\Ring.mp3|10|-1  
The value has three components that are separated by the character '|':

1. The file name and folder relative to the application folder.
2. The priority. The higher the integer the higher the priority.
3. The duration:
  - a. -1 means plays and repeats until an explicit message stops it. For example, the established event stops the ringing sound.
  - b. 0 means play the whole sound one time.
  - c. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

## chat.system.text-color

- Default Value: #FF8C8C8C
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the text of the system messages in the Chat view.



## chat.time-stamp

- Default Value: true
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: Specifies whether the timestamp is displayed in the Chat transcript area.

## chat.toast-information-key

- Default Value: Subject
- Valid Values: Any valid attached data key name.
- Changes take effect: At the next interaction.
- Description: Specifies whether the Information area is displayed in the Chat interaction notification. The option specifies the name of the attached data key that contains the information. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

## chat.typing-isenabled

- Default Value: true
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether typing notification is enabled. It should be disabled for Chat Server lower than 8.0.1.

## chat.typing-timeout

- Default Value: 10
- Valid Values: An integer value from 0 to MAXINT.
- Changes take effect: At the next interaction.
- Description: Specifies the duration, in seconds, that the typing notification is displayed after the last keystroke and before the agent or contact sends their message.

# Contact Options

## Contact

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

- Default Value: 5, 10, 25, 50
- Valid Values: A comma-separated list of numbers that define the number of rows per result page from which the agent can make selections.
- Changes take effect: When the application is started or restarted.
- Description: The possible values for 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 application is started or restarted.
- Description: 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
- Valid Values: On, OnOrAfter, Before
- Changes take effect: When the application is started or restarted.
- Description: 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 application is started or restarted.
- Description: The default value for the number of rows per page in the contact directory search result view. The value must be defined in the contact.available-directory-page-sizes option.

## contact.directory-advanced-default

- Default Value: LastName,PhoneNumber
- Valid Values: A comma-separated value list of Attribute Value names that correspond to searchable contact field names.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the list of contact attributes that are presented by default in the advanced search form of the **Contact Directory** view.

## contact.directory-default-mode

- Default Value: ListView
- Valid Values: A value from the following list: ListView, GridView
- Changes take effect: Immediately.
- Description: Specifies which view of the Contact Directory is displayed by default. ListView provides 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 application is started or restarted.
- Description: The list of contact fields that are displayed when the results of a contact search are rendered.

## contact.directory-permissions.<ContactAttributeName>

- Default Value: ""
- Valid Values: In a key, a valid searchable contact attribute name. In a value, a comma-separated list of strings that are applicable to the specified contact attribute.
- Changes take effect: At the next contact search.
- Description: This option can be used as a template to specify a contact attribute name (in a key) and the associated values (in a value) that is used to restrict the access of specific agents to the contact directory. Modifies the search logic whenever the Application, Tenant, Agent Group, or Agent makes a contact search request based on a set of attribute values that are configured for contacts in your Universal Contact Server database. Refer to the [Restricting Access to the Contact History and Contact Directory](#) section for information about how to configure this option.

## contact.directory-search-attributes

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

## contact.directory-search-types

### **Modified:** 8.5.1xx.xx

- Default Value: begins-with,is
- Valid Values: A comma-separated list of values from the following: contains, begins-with, is
- Changes take effect: When the application is started or restarted.
- Description: The list of search types that are available for the agent to use to search the contact database in Advanced Search mode. Specifying the value contains might have a performance impact on Universal Contact Server.

## 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 application is started or restarted.
- Description: The list of contact fields that are displayed when a Contact record is rendered.

## contact.history.filters-<custom attribute>

- Default Value: ""
- Valid Values: In the key, a valid searchable interaction attribute name. In the value, a comma-separated list of strings applicable to the specified interaction attribute. Use the \$All\$ and \$Other\$ keywords to enable filtering on "all" or "other" values for this attribute.
- Changes take effect: At the next contact search.
- Description: This option can be used as a template to specify an interaction attribute name (in key) and the associated values (in value) that is used to automatically filter the contact history. Refer to [Managing Contacts](#) for more information.

## contact.history.media-filters

- Default Value: voice,email,chat,sms
-

- Valid Values: A comma-separated value of valid media type names.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the list of media types that can be used to filter the Contact History.

## contact.history-advanced-default

- Default Value: Status,StartDate
- Valid Values: A comma-separated value list of Contact History items to display in the interaction view.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the list of interaction attributes that are presented by default in the advanced search form of the **Contact History**, **My History** and **Interaction Search** views.

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

### **Added:** 8.1.402.xx

- Default Value: 1M
- Valid Values: A value from the following list: All, 1M, 1W, 1D.
- Changes take effect: When the application is started or restarted.
- Description: Specifies which Time Filter is selected by default in the Contact History view when an agent accesses the main history data source.
  - All: all interactions from Main UCS Data Base.
  - 1M: interactions from Main UCS Data Base that were created less than 1 month ago.
  - 1W: interactions from Main UCS Data Base that were created less than 1 week ago.
  - 1D: interactions from Main UCS Data Base that were created less than 1 day ago.

## contact.history-displayed-columns

- 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.
- Changes take effect: When the application is started or restarted.
- Description: Defines the list of Contact History items that are displayed in the interaction view.

## contact.history-displayed-columns-treeview

- Default Value: Subject,Status,StartDate
- Valid Values: A comma-separated value list of Contact History items to display in the threaded view of interactions, for example: Status,Subject,StartDate,EndDate,OwnerId
- Changes take effect: When the application is started or restarted.

- Description: Specifies the list of Contact History items that are displayed in the threaded view of interactions.

## contact.history-search-attributes

- Default Value: Status,StartDate,EndDate
- Valid Values: A comma-separated value list of Contact History items to display in the interaction view -- for example: Status,StartDate,EndDate,Subject
- Changes take effect: When the application is started or restarted.
- Description: Defines the list of Contact History items that an agent can use to search the History database.

## contact.last-called-agent.enable

- Default Value: true
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: When this option is set to true, the LastCalledAgent\_EmployeeID of the contact is set to employee ID of the agent when an interaction is presented to the agent. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

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: true
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: When this option is set to true, the LastCalledAgent\_EmployeeID of the contact is set to the employee ID of the agent 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](#).

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: Immediately.
- Description: Activates the Interaction Workspace features that rely on the Universal Contact Server

(UCS) for contact lookup when an interaction is presented to the Agent.

This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

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

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

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: Immediately.
- Description: Activates the Interaction Workspace features that rely on the Universal Contact Server (UCS) `IdentifyService` for contact lookup when an interaction is presented to the Agent. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).  
**Note:** This option is overridden by the attached data `IdentifyCreateContact`. The media-type `voice-campaign` refers to outbound campaign interactions. Valid values for `media-type` are: `voice`, `email`, `chat`, `smssession`, and `workitem`.

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

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: Immediately.
- Description: When option `contact.lookup.enable` is set to `true`, this option specifies that the Universal Contact Server (UCS) can 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](#).  
**Note:** 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: Immediately.
- Description: Activates the Interaction 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](#).  
**Note:** 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: Immediately.
- Description: When contact lookup is enabled in the context of the current interaction, this option specifies that the Universal Contact Server (UCS) can 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](#).  
**Note:** 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.lookup.voice.use-dialed-phone-number

### **Added:** 8.1.401.49

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: When the value of this option is set to true, Workspace executes the UCS Contact Look-up request using the normalized value of the number that was manually dialed by the agent.  
**Note:** The normalized phone number is the string that results from the execution of the logic that is configured by the `expression.phone-number.supported-characters` option and before the `dial-plan-rule-<name>` is applied. When the value is set to false, Workspace applies the Contact Look-up with the phone number that is returned by the T-Server in the EventDialing, which can contain the string transformed by the execution of the dialing rules.

## contact.mandatory-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 application is started or restarted.
- Description: The list of contact fields that must be filled to be able to save a contact.

## contact.metrics.enable-interactions-in-progress

- Default Value: true
  - Valid Values: true, false
  - Changes take effect: When the application is started or restarted.
  - Description: Activates the Interaction Workspace features that display the number of eServices
-



interactions that are in progress in the current contact history.

### contact.metrics.time-frame-customer-notification

- Default Value: 1
- Valid Values: 0 or any positive integer value less than or equal to 1000.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the search timeframe, in days, from which existing open and closed interactions are to be reported. If the value is set to 0, the feature is disabled. If the value is set to a number that is greater than 0, the feature that displays in the interaction view the number of interactions that were sent or received by the contact for the specified number of days is activated.

### contact.multiple-value-attributes

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

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

#### **Added:** 8.1.402.xx

- Default Value: 1M
- Valid Values: A value from the following list: All, 1M, 1W, 1D.
- Changes take effect: When the application is started or restarted.
- Description: Specifies which Time Filter is selected by default in the My History view when an agent accesses the main history data source.
  - All: all interactions from Main UCS Data Base.
  - 1M: interactions from Main UCS Data Base that were created less than 1 month ago.
  - 1W: interactions from Main UCS Data Base that were created less than 1 week ago.
  - 1D: interactions from Main UCS Data Base that were created less than 1 day ago.

### contact.myhistory-displayed-columns-treeview

- Default Value: Subject, Status, StartDate
  - Valid Values: A comma-separated value list of Contact History items to be displayed in the threaded view of interactions in the MyHistory view, for example: Status, Subject, StartDate, and EndDate.
  - Changes take effect: When the application is started or restarted.
  - Description: Specifies the list of Contact History items that are displayed in the threaded mode of the
-

MyHistory view.

## contact.timeout-delay

- Default Value: 60
- Valid Values: An integer from 1 through 3600.
- Changes take effect: When the application is started or restarted.
- Description: The delay, in seconds, before a UCS request times out.

## contact.threading-ucs-interaction.enable

- Default Value: true
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: Activates the Interaction Workspace feature that associates interactions that are submitted during multi-channel contact communication, such as `smssession`, in threads in Universal Contact Server history.

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

- Default Value: true
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: Activates the Interaction Workspace feature that generates the interaction history in Universal Contact Server (UCS) based on the inbound and outbound interactions of type `<media-type>` that are handled by Interaction Workspace. Enable agents to create interactions of type `<media-type>`. The option is forced to the value `false` for the media-types `email`, `chat`, and `smssession`, as Media Server is responsible for submitting those interactions in UCS. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

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

- Default Value: true
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: Activates the Interaction Workspace feature that looks up the history of existing interactions of the given `<media-type>` in Universal Contact Server (UCS) to update their content and status according to live interaction lifecycle. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).  
**Note:** For the media type `email`, this option is forced to the value `true`.

`contact.ucs-interaction.<media-type>.use-server-date`**Added:** 8.1.402.xx

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies for the specified <media-type> whether Interaction Workspace sets the start and end dates of interactions by using the time of the local agent workstation, or uses the date and time specified by Universal Contact Server (UCS) when it creates or updates an interaction record in UCS. Use this option as a template and modify its name by replacing the <media-type> by an actual media type that is defined in Management Framework.  
**Note:** Depending on which UCS version you are using, setting this option to true might generate an additional request to UCS when Mark Done is set.

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# Display Formats Options

## Display formats

### display-format.acd-queue-name

- Default Value: `$ACDQueue.Alias|$ACDQueue.Number@$ACDQueue.Location$`
- Valid Values: A string that contains a compilation of characters and field codes from the following list:  
`$ACDQueue.Number$, $ACDQueue.Alias$, $ACDQueue.Location$`
- Changes take effect: Immediately.
- Description: Defines the display format of ACD Queues by specifying a string that contains the following field codes:  
`$ACDQueue.Number$, $ACDQueue.Alias$, $ACDQueue.Location$`  
If all field codes are empty, the following field codes are used:  
`$ACDQueue.Number@$ACDQueue.Location$`

### display-format.agent-name

- Default Value: `$Agent.FullName|$Agent.UserName$`
- Valid Values: `$Agent.UserName$, $Agent.LastName$, $Agent.FirstName$, $Agent.EmployeeId$`
- Changes take effect: Immediately.
- Description: Defines the display format of other agents by specifying a string that contains the following field codes:  
`$Agent.UserName$, $Agent.LastName$, $Agent.FirstName$, $Agent.EmployeeId$.`

### display-format.caller-name

- Default Value: `$Contact.FirstName$ $Contact.LastName|$Interaction.MainParty$`
- Valid Values: `$Interaction.CaseId$, $Interaction.Id$, $Interaction.MainParty$, $Contact.X$, $AttachedData.Y$`
- Changes take effect: Immediately.
- Description: Specifies the content of the 'Origin; field of the Case Information area. This option is enabled when the value of the `interaction.case-data.content` option contains the 'History' key. This content is typically used when placing an outbound call where the origin contains a string such as 'outbound call to xxx'.  
The content is populated based on contact attributes and attached data keys that are defined by a string that contains the following field codes: `$Interaction.CaseId$, $Interaction.MainParty$, $Contact.X$, $AttachedData.Y$` (where X is the name of the contact attribute and Y is the attached data key name). If all field codes are empty, the following field code is used: `$Interaction.MainParty$.`

## display-format.case-name-format

- Default Value: `$Contact.FirstName$ $Contact.LastName|$Interaction.MainParty$`
- Valid Values: A string that contains a compilation of characters and field codes from the following list:  
`$Case.Id$, $Interaction.Id$, $Interaction.MainParty$, $Contact.X$, $AttachedData.Y$`
- Changes take effect: Immediately.
- Description: Defines the display format of the case label that is currently used by the application by specifying a string that contains the following field codes:  
`$Case.Id$, $Interaction.Id$, $Interaction.MainParty$, $Contact.X$, $AttachedData.Y$`  
Where X is the name of the contact attribute and Y is the name of the attached data key.

## display-format.chat-agent-name

- Default Value: `$ChatAgent.Nickname|$ChatAgent.FullName|$ChatAgent.UserName$`
- Valid Values: A string that contains a compilation of characters and field codes from the following list:  
`$ChatAgent.Nickname$, $ChatAgent.FullName$, $ChatAgent.UserName$,  
$ChatAgent.LastName$, $ChatAgent.FirstName$, $ChatAgent.EmployeeId$`
- Changes take effect: Immediately.
- Description: Specifies the display format of **chat nicknames** for agents. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

## display-format.current-agent-name

- Default Value: `$Agent.FullName|$Agent.UserName$`
- Valid Values: A string that contains a compilation of characters and field codes from the following list:  
`$Agent.UserName$, $Agent.LastName$, $Agent.FirstName$, $Agent.EmployeeId$`
- Changes take effect: Immediately.
- Description: Defines the display format of the agent that is currently using the application by specifying a string that contains the following field codes:  
`$Agent.UserName$, $Agent.LastName$, $Agent.FirstName$, $Agent.EmployeeId$.`  
If all field codes are empty, the following field codes are used:  
`$Agent.UserName$`

## display-format.customer-name-format

- Default Value: `$Contact.FirstName$ Contact.LastName|$Party.DisplayName$`
- Valid Values: A string that contains a compilation of characters and field codes from the following list:  
`$Contact.X$`
- Where X is the name of the contact attribute.
- Changes take effect: Immediately.
- Description: Specifies the content of the text that represents the contact in the call participants area of the voice interaction interface. This option is applicable when a UCS Contact has been assigned either automatically or manually to the interaction.

The content is populated based on contact attributes and attached data keys that are defined by a string that contains the following field codes: `$Interaction.CaseId$`, `$Interaction.MainParty$`, `$Contact.X$`, `$AttachedData.Y$` (where X is the name of the contact attribute, and Y is the attached data key name). 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 [Overriding Options by Using a Routing Strategy](#).

## display-format.interaction-callback-name

- Default Value: `$Interaction.Type$ ($Contact.FirstName$ $Contact.LastName|$Interaction.MainParty$)`
- Valid Values: A string that contains a compilation of characters and field codes from the following list: `$Interaction.Type$`, `$Interaction.CaseId$`, `$Interaction.Id$`, `$Interaction.MainParty$`, `$Contact.X$`, `$AttachedData.Y$`
- Changes take effect: Immediately.
- Description: If the main interaction is a Callback, this option defines the format of the tooltip that is displayed when you place your mouse pointer on the 'Case' tab at the top of the window. It is specified by specifying a string of field codes: `$Interaction.Type$`, `$Interaction.CaseId$`, `$Interaction.Id$`, `$Interaction.MainParty$`, `$Contact.X$`, `$AttachedData.Y$`  
Where X is the name of the contact attribute and Y is the name of the attached data key.

## display-format.interaction-chat-name

- Default Value: `$Interaction.Type$ ($Contact.FirstName$ $Contact.LastName|$Interaction.MainParty$)$`
- Valid Values: A string that contains a compilation of characters and field codes from the following list: `$Interaction.CaseId$`, `$Interaction.Id$`, `$Interaction.MainParty$`, `$Contact.X$`, `$AttachedData.Y$`
- Changes take effect: Immediately.
- Description: If the main interaction is a Chat, this option defines the format of the tooltip that is displayed when you place your mouse pointer on the 'Case' tab at the top of the window. It is specified by specifying a string of field codes: `$Interaction.CaseId$`, `$Interaction.Id$`, `$Interaction.MainParty$`, `$Contact.X$`, `$AttachedData.Y$`  
Where X is the name of the contact attribute and Y is the name of the attached data key.

## display-format.interaction-email-name

- Default Value: `$Interaction.Type$ ($Contact.FirstName$ $Contact.LastName|$Interaction.MainParty$)$`
- Valid Values: A string that contains a compilation of characters and field codes from the following list: `$Interaction.CaseId$`, `$Interaction.Id$`, `$Interaction.MainParty$`, `$Contact.X$`, `$AttachedData.Y$`
- Changes take effect: Immediately.
- Description: If the main interaction is an e-mail, this option defines the format of the tooltip that is displayed when you place your mouse pointer on the 'Case' tab at the top of the window. It is specified

by specifying a string of field codes:

```
$Interaction.CaseId$, $Interaction.Id$, $Interaction.MainParty$, $Contact.X$,  
$AttachedData.Y$
```

Where X is the name of the contact attribute and Y is the name of the attached data key.

## display-format.interaction-im-name

- Default Value: `$Interaction.Type$ $Interaction.MainParty$`
- Valid Values: A string that contains a compilation of characters and field codes from the following list:  
`$Interaction.Type$, $Interaction.CaseId$, $Interaction.Id$, $Interaction.MainParty$,  
$AttachedData.Y$`
- Changes take effect: Immediately.
- Description: If the main interaction is an Instant Message, this option defines the format of the tooltip that is displayed when you place your mouse pointer on the 'Case' tab at the top of the window. It is specified by specifying a string of field codes:  
`$Interaction.Type$, $Interaction.CaseId$, $Interaction.Id$, $Interaction.MainParty$,  
$AttachedData.Y$`  
Where Y is the name of the attached data key.

## display-format.interaction-outbound-pull-preview-name

- Default Value: `$Interaction.Type$ ($Contact.FirstName$  
$Contact.LastName|$Interaction.MainParty$)`
- Valid Values: A string that contains a compilation of characters and field codes from the following list:  
`$Interaction.CaseId$, $Interaction.Id$, $Interaction.MainParty$, $Contact.X$,  
$AttachedData.Y$.`
- Changes take effect: Immediately.
- Description: If the main interaction is an Outbound Pull Preview, this option defines the format of the tooltip that is displayed when you place your mouse pointer on the 'Case' tab at the top of the window. It is specified by specifying a string of field codes.. Where X is the name of contact attribute, and Y is the attached data key name.

## display-format.interaction-outbound-push-preview-name

- Default Value: `$Interaction.Type$ ($Contact.FirstName$  
$Contact.LastName|$Interaction.MainParty$)`
  - Valid Values: A string that contains a compilation of characters and field codes from the following list:  
`$Interaction.CaseId$, $Interaction.Id$, $Interaction.MainParty$, $Contact.X$,  
$AttachedData.Y$`
  - Changes take effect: Immediately.
  - Description: If the main interaction is an Outbound Push Preview, this option defines the format of the tooltip that is displayed when you place your mouse pointer on the 'Case' tab at the top of the window. It is specified by specifying a string of field codes. Where X name of contact attribute, and Y is the attached data key name.
-

## display-format.interaction-queue.name

- Default Value: `$InteractionQueue.Media@$InteractionQueue.Name$`
- Valid Values: A string that contains a compilation of characters and field codes from the following list: `$InteractionQueue.Name$, $InteractionQueue.Media$`
- Changes take effect: When the application is started or restarted.
- Description: Defines the display format of Interaction Queues by specifying a string that contains the following field codes:  
`$InteractionQueue.Name$, $InteractionQueue.Media$`. If all field codes are empty, the following field codes are used: `$InteractionQueue.Media@$InteractionQueue.Name$`.

## display-format.interaction-sms-name

- Default Value: `$Interaction.Type$ ($Contact.FirstName$ $Contact.LastName|$Interaction.MainParty$)$`
- Valid Values: A string that contains a compilation of characters and field codes from the following list: `$Interaction.CaseId$, $Interaction.Id$, $Interaction.MainParty$, $Contact.X$, $AttachedData.Y$`
- Changes take effect: Immediately.
- Description: If the main interaction is an SMS, this option defines the format of the tooltip that is displayed when you place your mouse pointer on the 'Case' tab at the top of the window. It is specified by specifying a string of field codes:  
`$Interaction.CaseId$, $Interaction.Id$, $Interaction.MainParty$, $Contact.X$, $AttachedData.Y$`  
Where X is the name of the contact attribute and Y is the name of the attached data key.

## display-format.interaction-voice-name

- Default Value: `$Interaction.Type$ ($Contact.FirstName$ $Contact.LastName|$Interaction.MainParty$)`
- Valid Values: A string that contains a compilation of characters and field codes from the following list: `$Interaction.CaseId$, $Interaction.Id$, $Interaction.MainParty$, $Contact.X$, $AttachedData.Y$`
- Changes take effect: Immediately.
- Description: If the main interaction media type is voice, this option defines the format of the tooltip that is displayed when you place your mouse pointer on the 'Case' tab at the top of the window. It is specified by specifying a string of field codes:  
`$Interaction.CaseId$, $Interaction.Id$, $Interaction.MainParty$, $Contact.X$, $AttachedData.Y$`  
Where X is the name of the contact attribute and Y is the name of the attached data key.

## display-format.interaction-workitem-name

- Default Value: `$Interaction.Type$ ($Contact.FirstName$ $Contact.LastName|$Interaction.MainParty$)$`
-



- Valid Values: A string that contains a compilation of characters and field codes from the following list:  
\$Interaction.CaseId\$, \$Interaction.Id\$, \$Interaction.MainParty\$, \$Contact.X\$,  
\$AttachedData.Y\$
- Changes take effect: Immediately.
- Description: If the main interaction is a workitem, this option defines the format of the tooltip that is displayed when you place your mouse pointer on the 'Case' tab at the top of the window. It is specified by specifying a string of field codes:  
\$Interaction.CaseId\$, \$Interaction.Id\$, \$Interaction.MainParty\$, \$Contact.X\$,  
\$AttachedData.Y\$  
Where X is the name of the contact attribute and Y is the name of the attached data key.

## display-format.routing-point-name

- Default Value: A string that contains a compilation of characters and field codes from the following list:  
\$RoutingPoint.Alias|\$RoutingPoint.Number@\$RoutingPoint.Location\$
- Valid Values: \$RoutingPoint.Number\$, \$RoutingPoint.Alias\$, \$RoutingPoint.Location\$
- Changes take effect: Immediately.
- Description: Defines the display format of Routing Points by specifying a string that contains the following field codes:  
\$RoutingPoint.Number\$, \$RoutingPoint.Alias\$, \$RoutingPoint.Location\$  
If all field codes are empty, the following field codes are used:  
\$RoutingPoint.Number@\$RoutingPoint.Location\$

# Editor Options

## editor.font-size-units

### **Added:** 8.1.400.24

- Default Value: point
- Valid Values: A valid font size unit. The following units are supported: pixel, point
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether points or pixels are used for the units of font size in the Rich Editor view for e-mail and other rich text based interactions.

### **Important**

Font size is always stored in pixels in the configuration layer. This option defines how font size is displayed.

## editor.user-agent-http-header

### **Added:** 8.1.401.63

- Default Value: Mozilla/4.0 (compatible; MSIE 7.0)
- Valid Values: A string representing a valid User-Agent HTTP header according to RFC 1945.
- Changes take effect: At the next interaction.
- Description: Specifies the User-Agent HTTP header value set in the HTTP requests used by the rich text editor to download external images.

# E-Mail Options

## E-Mail

### email.attachment-download-timeout

- Default Value: 20
- Valid Values: -1, 1 to 3600
- Changes take effect: Immediately.
- Description: Specifies the maximum duration, in seconds, that an attachment will be allowed to download. The value -1 means that there is no maximum time.

### email.auto-answer

- Default Value: false
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: Specifies whether an e-mail interaction is accepted automatically when an 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](#).

### email.default-queue

- Default Value: ""
- Valid Values: A valid name of a Script of type Interaction Queue.
- Changes take effect: At the next interaction.
- Description: Specifies the Interaction queue in which new or reply outbound e-mails are submitted.

### email.forward-queue

- Default Value: ""
- Valid Values: The name of a valid Script of type Interaction Queue.
- Changes take effect: Immediately.
- Description: Specifies the Interaction Queue in which inbound e-mails are placed when an agent forwards an inbound e-mail to an External Resource.

## email.from-addresses

- Default Value: \$EMAILSERVER\$
- Valid Values: Letters A to Z and a to z. Numbers 0 through 9. The underscore and space characters.
- Changes take effect: When the application 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 available *from addresses* of e-mail interactions. The value \$EMAILSERVER\$ specifies that *from addresses* are populated from the POP client sections of Email Server applications.

## email.html-format

- Default Value: true
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether or not the format of a new outbound e-mail is html or plain text. When set to true, new e-mail will be formatted in HTML.

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

- Default Value: true
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether the text of the original inbound e-mail is included in the outbound reply e-mail. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

## email.max-attachments-size

### **Added:** 8.1.40x.xx

- Default Value: 0
- Valid Values: A positive integer.
- Changes take effect: At the next interaction.
- Description: The total maximum number of megabytes of files that agents can attach to an outbound e-mail 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.move-inbound-to-in-progress-workbin-on-reply

### **Added:** 8.1.402.xx

---

- Default Value: false
- Valid Values: true, false.
- Changes take effect: At the next interaction.
- Description: If the value of this option is set to true, when an agent replies or replies-all to an inbound e-mail interaction that is stored either in a personal in-progress or a shared workbin or in the Contact History, the inbound e-mail interaction is moved to the workbin that is configured as the in-progress workbin (refer to the [workbin.email.in-progress](#) option).

## email.outbound-queue

- Default Value: ""
- Valid Values: Name of a valid Script of type Interaction Queue.
- Changes take effect: Immediately.
- Description: Specifies the Interaction Queue in which outbound e-mails are placed when agents click Send or Send Interim. This option is used only when Interaction Workflow does not set Queue for New Interactions, when it is routing inbound e-mails to agents.

## email.pull-from-history-isenabled

### **Added:** 8.1.30x.xx

- Default Value: true
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: Specifies whether it is possible to pull an E-Mail interaction from Contact History. This option is applicable only if at least one of the following privileges has been granted to the agent: Contact - Can Pull From Queue, Contact - Can Pull Interactions In Shared Workbins, and Contact - Can Pull Interactions In Workbins Not Owned By The User.

## email.prompt-for-done

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- 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 [Overriding Options by Using a Routing Strategy](#).

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

- Default Value: ""
  - Valid Values: A valid name of a Business Attribute.
-

- Changes take effect: At the next interaction.
- Description: A character string that specifies the name of the Business Attribute that contains the Attribute Values that are used to populate the E-Mail QA Review Dispositions drop-down button (on the reviewer's desktop). This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

## email.quote-char

- Default Value: >
- Valid Values: Any valid character string.
- Changes take effect: Immediately.
- Description: For outbound e-mail that is formatted as plain text, specifies the characters that are used to quote the contents of the inbound e-mail interaction in the outbound e-mail interaction body.

## email.quote-header

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

## email.reply-format

- Default Value: auto
- Valid Values: Select a value from the following list: auto, html, plain-text
- Changes take effect: At the next interaction.
- Description: Specifies the format of an outbound e-mail reply.
  - auto--Outbound e-mail reply format is the same as corresponding inbound e-mail.
  - html--Outbound e-mail reply format is forced to HTML.
  - plain-text--Outbound e-mail reply format is forced to plain text.

## email.reply-prefix

- Default Value: Re : <SPACE>
  - Valid Values: Any valid character string.
  - Changes take effect: Immediately.
  - Description: Specifies the reply-prefix that is added to subject of the inbound e-mail.
-

## email.ringing-bell

- Default Value: Sounds\Ring.mp3|10|-1
- 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: At the next interaction.
- Description: Specify the E-mail channel ringing sound configuration string, for example: Sounds\Ring.mp3|10|-1  
The value has three components that are separated by the character '|':
  1. The file name and folder relative to the application folder.
  2. The priority. The higher the integer the higher the priority.
  3. The duration:
    - a. -1 means plays and repeats until an explicit message stops it. For example, the established event stops the ringing sound.
    - b. 0 means play the whole sound one time.
    - c. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

## email.set-ownerid-on-send

- Default Value: true
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether the owner id of the interaction should be updated with the dbid of the agent when the e-mail is sent. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

## email.signature

- Default Value: ""
- Valid Values: file: followed by the file name and path or response: followed by the response path in the Standard Response Library.
- Changes take effect: At the next interaction.
- Description: Specifies the type and the location of the signature template that is to be added to outbound e-mails. For example, file:Signatures\Signature.txt  
The value has two components that are separated by the character ':', type and location.
  1. The type of signature file:
    - a. file to specify a file
    - b. response to specify a response from the Standard Response Library
  2. The location of the signature template:

- a. The file name and folder relative to the application folder
- b. The response name and full path of the parent category in the Standard Response Library

This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### email.toast-information-key

- Default Value: Subject
- Valid Values: Any valid character string.
- Changes take effect: At the next interaction.
- Description: Specifies whether the Information area is displayed in the e-mail interaction notification. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).



# Expression Options

## Expression

### expression.email-address

- Default Value: `\w+([-.\ ]\w+)*@\w+([-.\ ]\w+)*\.\w+([-.\ ]\w+)*`
- Valid Values: A regular expression. Letters A to Z and a to z. Numbers 0 through 9. All special characters that are valid Windows file names.
- Changes take effect: At the next interaction.
- Description: Specifies the regular expression to identify an e-mail address in the chat or SMS transcript. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### expression.phone-number

- Default Value: `(?:([+]?([\d]{1,3})?:[ ]*|[\-\.]))?([()?([\d]{1,3})[\-\/])?(?:[ ]+|[\-\.])?)?([\d]{5,})`
- Valid Values: A regular expression. Letters A to Z and a to z. Numbers 0 through 9. All special characters that are valid Windows file names.
- Changes take effect: At the next interaction.
- Description: Specifies the regular expression to identify a phone number in the chat or SMS transcript. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### 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: At the next interaction.
- Description: Specifies the characters that are considered 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 [Overriding Options by Using a Routing Strategy](#).

### expression.url

- Default Value:
-

```
(?#Protocol)(?:(:ht|f)tp(?:s?)\:\/\/|~|/)?(?#Username:Password)(?:\w+:\w+@)?(?#Subdomains)(?:([-w]+\.)+)?(?#TopLevelDomains)(?:com|org|net|gov|mil|biz|info|mobi|name|aero|jobs|museum|travel|[a-z]{2}))(?#Port)(?:[0-9]{1,5})?(?#Directories)(?:((?:/([-w~!$+|. ,*]|%[a-f\d]{2})+)+|/)+|\?|#)?(?#Query)(?:((?:\?([-w~!$+|. ,*]|%[a-f\d]{2})+=([-w~!$+|. ,*:=]|%[a-f\d]{2})*)(&([-w~!$+|. ,*]|%[a-f\d]{2})+=([-w~!$+|. ,*:=]|%[a-f\d]{2})*)*)?)(?#Anchor)(?:#([-w~!$+|. ,*:=]|%[a-f\d]{2})*)?
```

- Valid Values: A regular expression representing a URL.
- Changes take effect: At the next interaction.
- Description: Specifies the regular expression to identify an URL in Case Information area. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

# Gadget and Statistics Gadget Options

## Gadget and Statistics Gadget

### gadget.window-title

- Default Value: `$Window.Title$`
- Valid Values: `$Window.Title$, $Application.Title$, $Application.Name$, $Agent.UserName$, $Agent.LastName$, $Agent.FirstName$, $Agent.EmployeeId$`
- Changes take effect: Immediately.
- Description: Defines the title of the window in which the Gadget is rendered by specifying a string that contains the following field codes:  
`$Window.Title$, $Application.Title$, $Application.Name$, $Agent.UserName$, $Agent.LastName$, $Agent.FirstName$, $Agent.EmployeeId$`  
If all field codes are empty, the default string is:  
`$Window.Title$`  
This title is visible in the Task Bar only.

### gadget-statistics.displayed-call-center-statistics

- Default Value: ""
- Valid Values: A comma-separated list of Statistic names.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the statistics that are displayed in the Statistics Gadget. The statistics name refers to the names of the Application Options Sections that define the statistics.

### gadget-statistics.nb-tagged-stats-per-page

- Default Value: 5
- Valid Values: An integer from 1 to 10.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the number of tagged statistics that are displayed as individual gadget pages with the Gadget. If the number of tagged statistics is exceeded, paging buttons are displayed on the Gadget Statistics page area. The agent tags and untags statistics for display on statistics pages by clicking the Tag and Untag buttons. Untagged statistics are displayed only in the Statistics Ticking area of the Statistics Gadget.

### gadget-statistics.displayed-kpis

- Default Value: ""
- Valid Values: A comma-separated list of KPI names.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the KPIs that are displayed to the agent in the Statistics Gadget. The KPI names refer to the names of the Application Option sections that are defining the KPIs.

### gadget-statistics.show

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether or not the Statistics Gadget is displayed when the application is launched.

# General Options

## General

### general.configuration-update-notification

- Default Value: All
- Valid Values: A comma-separated value list of items that are to be notified, for example: None, All, ThisAgent, ThisApplication, ThisTenant, Transactions, Persons, Skills, AgentGroups, BusinessAttributes, BusinessAttributeValue, Script
- Changes take effect: When the application is started or restarted.
- Description: Defines the list of Configuration Server objects that require notification when there is an update.

### general.gad.attached-data

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether attached data keys are added. If this option is set to true, Interaction Workspace adds to the attached data the equivalent of GAD Keys. In the case in which routing base is used, Interaction Workspace adds the following keys: GD\_TransferTargetType, GD\_TransferTargetId

### general.non-unicode-connection-encoding

- Default Value: ""
- Valid Values: .Net Name of Code Page Identifier
- Changes take effect: When the application is started or restarted.
- Description: This option specifies the code page encoding that is used to connect to back-end servers that do not rely on Unicode communication (all back-end servers except UCS). The possible values can be obtained from the ".Net Name" column of the Code Page Identifier that is defined in the following document: [http://msdn.microsoft.com/en-us/library/windows/desktop/dd317756\(v=vs.85\).aspx](http://msdn.microsoft.com/en-us/library/windows/desktop/dd317756(v=vs.85).aspx) When this option is empty, the applied encoding corresponds to the language for non-unicode programs, which is also known as the system-locale of the agent Workstation.

# IM Options

## IM

### im.agent.prompt-color

- Default Value: #FF385078
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the prompt for the messages that are entered by the agent in the IM view.

### im.agent.text-color

- Default Value: #FF000000
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the text of the messages that are entered by the agent in the IM view.

### im.auto-answer

- Default Value: false
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: Specify whether an IM interaction is automatically answered when a TServer Ringing event is received. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### im.new-message-bell

- Default Value: ""
- 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: Immediately.
- Description: Specify the new Instant Message sound configuration string -- for example: Sounds\bell.mp3|7|0  
The value has three components that are separated by the character '|':

1. The file name and folder relative to the application folder.
2. The priority -- The higher the integer the higher the priority.
3. The duration:
  - a. 0 means play the whole sound one time.
  - b. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

### im.other-agent.prompt-color

- Default Value: #FFD88000
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the color of the text of the messages that are entered by the target agent in the IM view.

### im.other-agent.text-color

- Default Value: #FF000000
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the text of the messages that are entered by the target agent in the IM view.

### im.prompt-for-end

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether Interaction Workspace displays a confirmation message when the agent clicks End during an Instant Messaging session. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### im.system.text-color

- Default Value: #FF8C8C8C
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the text of the system messages in the IM view.

## im.time-stamp

- Default Value: true
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: Specifies whether the timestamp is displayed in the transcript area.

## im.toast-timeout

- Default Value: 10
- Valid Values: An integer from 0 to MAXINT.
- Changes take effect: At the next interaction.
- 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 that the Interactive Notification is displayed until the agent accepts the instant message invitation.



# Interaction Options

## Interaction

### interaction.case-data.content

- Default Value: History, CaseData
- Valid Values: History, CaseData
- Changes take effect: At the next interaction.
- Description: Defines the content of the Case Information area. 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. The order of the keys 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 Options by Using a Routing Strategy](#). Starting from the 8.1.1 release, this option no longer controls the display of case information in the toast view. Please refer to the `toast.case-data.content` option for this purpose.

### interaction.case-data.enable-url-preview

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Enables the display of a preview of the web page that is linked from the Case Information if the value is set to true. Also see [expression.url](#). This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

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

- Default Value: ""
  - Valid Values: A valid name of a Business Attribute.
  - Changes take effect: At the next interaction.
  - Description: Specifies the name of the Business Attribute that contains the Attribute Values that are used to filter and render attached data. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#). 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 the `interaction.case-data.order` option are put at the bottom of the list. Starting with the 8.1.1 release this option does no longer controls the display of case information in the toast view. Please refer to the `toast.case-data.format-business-attribute` option for this purpose.
-

## interaction.case-data.frame-color

- Default Value: #FFFFBA00
- Valid Values: Valid hexadecimal (HTML) color code.
- Changes take effect: At the next interaction.
- Description: Specifies the color of the border of the Case Data view frame. Examples: #FFFFBA00 for a Gold color, #FF6F7074 for a Silver color, and #FFB8400B for a Bronze color. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

## interaction.case-data.is-read-only-on-idle

- Default Value: true
- Valid Values: true, false.
- Changes take effect: At the next interaction.
- Description: If the value of this option is true, changes to the case data after a voice interaction has been released are prevented. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

## interaction.consult-user-data

- Default Value: public
- Valid Values: public, private, none
- Changes take effect: Immediately.
- Description: Specifies if and how the business data (original interaction user data, contact identifier, and so on) of the customer interaction is shared in a consultation interaction and how. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).
  - none -- No data is shared in the consultation.
  - public -- User data of the customer interaction is shared in the consultation. The user data is copied at the root level of the consultation user data. Keys that start with an underscore are not copied into the consultation leg.
  - private -- User data of the customer interaction is shared in the consultation. The user data is copied in a sub-list of the consultation user data, named SharedInformation. Keys that start with an underscore are not copied into the consultation leg. This is Interaction Workspace 8.1.0 compatibility mode.

## interaction.disposition.disposition-code-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: At the next interaction.
  - 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 Options by Using a Routing Strategy](#).

### interaction.disposition.is-mandatory

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specify 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 Options by Using a Routing Strategy](#).

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

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Prevents changes to the disposition code after a voice interaction has been released. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### 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: At the next interaction.
- 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 Options by Using a Routing Strategy](#).

### interaction.disposition.use-attached-data

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Enables the adding of attached data from the interaction in UserEvent. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### interaction.disposition.use-connection-id

- Default Value: true
-

- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether the connection id is sent as part of the user event that is sent for disposition code. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### interaction.disposition.value-business-attribute

- Default Value: DispositionCode
- Valid Values: A valid name of a Business Attribute.
- Changes take effect: At the next interaction.
- 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 a disposition code. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### interaction.evaluate-real-party-for-agent

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether Interaction Workspace attempts to transform the name of the party DN into an Agent name during a voice interaction.

### interaction.override-option-key

- Default Value: IW\_OverrideOptions
- Valid Values: An attached data name or an attached data key name (string). The list is provided in the Attached Data in the strategy.
- Changes take effect: At the next interaction.
- Description: Enables 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. Refer to [Modifying a Routing Strategy to Override Interaction Workspace Options, Based on Attached Data](#)

### interaction.reject-route

- Default value: ""
- Valid Values: A string that matches the format: <reject-method>:<dn>@<switch>
- Changes take effect: At the next interaction.
- Description: Interaction 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 the `interaction.reject-route` 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>`.

### Tip

In releases 8.1.2 and earlier, the format was defined by `<dn>@<switch>` only.

The `<reject-method>` attribute is optional to maintain backward-compatibility with pre-8.1.3 configurations.

When `<reject-method>` is specified, ensure that the following characters are also specified: `':'`, `'@'`, and the `<switch>` field.

The following are the possible values for the `<reject-method>` attribute:

- **pullback** (default value)—**Reject** applies the following action: `SingleStepTransfer(OtherDN=' ', Location=<switch>, extensions contains *pullback*)`. This is the legacy behavior for multi-site reject. This approach works only when the value of the `TServer/divert-on-ringing SIP Server` configuration option is set to `true`.
- **sst—Reject** applies the following action: `SingleStepTransfer(OtherDN=<dn>, Location=<switch>)`. **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`.
- **release**—Reject applies **releaseCall**. This value must be applied when the value of the `TServer/divert-on-ringing SIP Server` option is set to `false`.

## interactions.window.allows-transparency-on-winos6

- Default value: `true`
- Valid Values: `true`, `false`.
- Changes take effect: At the next interaction.
- Description: Specifies whether the interaction window is presented in transparent style on Windows 6 or higher (Windows Vista, Windows 7, and Windows Server 2008, and so on). Unmanaged controls, such as web browsers, are not able to function in Windows Vista, Windows 7, Windows Server 2008 if non-transparent windows are used. Set the value to `false` to permit the display of unmanaged controls.

## interaction.window.popup-topmost-z-order

- Default value: `false`
- Valid Values: `true`, `false`.
- Changes take effect: At the next interaction.
- Description: Indicates whether the interaction window can steal focus from other active applications

when auto-answer is enabled. When set to false, the Interaction Window tries to gracefully get the focus; however, due to certain Windows Operating System settings, this might not result in moving the interaction window to the front.

## interaction.window.show-case-interaction-panel-button

### **Added:** 8.1.40x.xx

- Default value: true
- Valid Values: true, false.
- Changes take effect: At the next interaction.
- Description: Specifies whether the collapse/expand button on interaction windows is enabled. If the value of this option is set to true, the button is enabled, and agents can collapse and expand the interaction view (left panel). The interaction view contains the controls and content of the interaction. If this view is collapsed, only the right panel is displayed. This is typically the Contact Information and Contact History view or Standard Responses view or any available customized view. If the value of this option is set to false, the button is not enabled, and the interaction view cannot be collapsed.

## interaction.window.show-in-taskbar

- Default value: true
- Valid Values: true, false.
- Changes take effect: At the next interaction.
- Description: Indicates whether the interaction window has a Windows taskbar button. If not, when minimized the window can be restored from the Interaction Bar. Enables the minimizing of Interaction windows to the Interaction bar of the Main Window instead of the Windows taskbar.

## interaction.window-title

- Default Value: (`$Contact.FirstName$ $Contact.LastName|$Interaction.MainParty$`) - `$Interaction.Type$ - $Window.Title$`
- Valid Values: `$Window.Title$, $Application.Title$, $Application.Name$, $Agent.UserName$, $Agent.LastName$, $Agent.FirstName$, $Agent.EmployeeId$, $Contact.FirstName$, $Contact.LastName$, $Interaction.MainParty$, $Interaction.Type$`
- Changes take effect: When the application is started or restarted.
- Description: Defines the title of the interaction window that appears in the Windows Task Bar by specifying a string that contains the following field codes:  
`$Window.Title$, $Application.Title$, $Application.Name$, $Agent.UserName$, $Agent.LastName$, $Agent.FirstName$, $Agent.EmployeeId$, $Contact.FirstName$, $Contact.LastName$, $Interaction.MainParty$, $Interaction.Type$`

# Interaction Management Options

## interaction-management

**Added:** 8.1.40x.xx

### 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 application is started or restarted.
- Description: The possible values for the number of rows per page in the Interaction Filters content view.

### interaction-management.filters

**Added:** 8.1.40x.xx

- Default Value: ""
- Valid Values: A comma-separated list of Filter names.
- Changes take effect: When the application 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 are defining the Filters. Refer to the following topic for more information: [Creating Interaction Filters for Team Leads](#).

### interaction-management.interactions-filter.displayed-columns

**Added:** 8.1.40x.xx

- Default Value: MessageType, From, To, Subject, Received
- Valid Values: A comma-separated list of attached data values, for example: From, Subject, Received
- Changes take effect: When the application is started or restarted.
- Description: The list of interaction fields that are displayed as columns in the Interaction Queue view.

# Intercommunication Options

## Intercommunication

### intercommunication.chat.conference.invite-timeout

**Added:** 8.1.40x.xx

- Default Value: 30
- Valid Values: Any positive integer value.
- Changes take effect: At the next interaction.
- Description: Specifies the time-out interval for a chat conference or chat consultation invitation to a skill, agent group, or interaction queue.

### intercommunication.chat.queue

- Default Value: ""
- Valid Values: Name of a valid Script object of type InteractionQueue.
- Changes take effect: At the next interaction.
- Description: Specifies the name of the InteractionQueue that is used by the routing based feature for chat. The following attached data are added by Interaction Workspace:  
IW\_RoutingBasedOriginalEmployeeId, IW\_RoutingBasedTargetId, IW\_RoutingBasedTargetType, IW\_RoutingBasedActionType

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

- Default Value: ""
- Valid Values: A comma-separated list of valid operation names from the following list: OneStepTransfer
- Changes take effect: At the next interaction.
- Description: Specifies the list of routing based actions that an agent is allowed to perform.

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

**Modified:** 8.1.40x.xx

- Default Value: ""
  - Valid Values: A comma-separated list of valid object types from the following list: Agent, InteractionQueue
-



- Changes take effect: At the next interaction.
- Description: Defines the list of targets that are contacted through the routing based mechanism for requests that are defined by the following option: `intercommunication.chat.routing-based-actions`

### Warning

The AgentGroup and Skill targets are always addressed through routing; therefore, these are not affected by this option.

## intercommunication.email.queue

- Default Value: ""
- Valid Values: Name of a valid Script object of type InteractionQueue.
- Changes take effect: At the next interaction.
- Description: Specifies the name of the InteractionQueue that is used by the routing based feature for e-mail. The following attached data are added by Interaction Worskspace:  
`IW_RoutingBasedOriginalEmployeeId, IW_RoutingBasedTargetId, IW_RoutingBasedTargetType, IW_RoutingBasedActionType`

## intercommunication.email.routing-based-actions

- Default Value: ""
- Valid Values: A comma-separated list of valid operation names from the following list: OneStepTransfer
- Changes take effect: At the next interaction.
- Description: Specifies the list of routing based actions that an agent is allowed to perform.

## intercommunication.email.routing-based-targets

### Modified: 8.1.40x.xx

- Default Value: ""
- Valid Values: A comma-separated list of valid object types from the following list: Agent, InteractionQueue
- Changes take effect: At the next interaction.
- Description: Specifies the list of targets that are contacted through the routing based mechanism for requests that are defined by the following option: `intercommunication.e-mail.routing-based-actions`

### Warning

The AgentGroup and Skill targets are always addressed through routing; therefore, these are not affected by this option.

### intercommunication.im.routing-based-actions

- Default Value: MakeIM
- Valid Values: MakeIM
- Changes take effect: When the application is started or restarted.
- Description: Defines 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, ACDQueue, RoutingPoint
- Changes take effect: At the next interaction.
- Description: Defines the list of targets that are contacted through the routing-based mechanism for requests that are defined by the following option: `intercommunication.im.routing-based-actions`

#### Warning

The AgentGroup and Skill targets are always addressed through routing; therefore, these are not affected by this option.

### intercommunication.im.routing-points

- Default Value: ""
- Valid Values: A comma-separated list of call number names in the following format: `$dn_name@switch$`
- Changes take effect: At the next interaction.
- Description: Determines the call number that is used by the routing-based feature. The following attached data are added by Interaction Worskspace: `IW_RoutingBasedOriginalEmployeeId`, `IW_RoutingBasedTargetId`, `IW_RoutingBasedTargetType`, `IW_RoutingBasedActionType`, `IW_RoutingBasedRequestType`, `IW_RoutingBasedLocation`

### intercommunication.sms.routing-based-actions

- Default Value: OneStepTransfer
- Valid Values: OneStepTransfer.

- Changes take effect: At the next interaction.
- Description:

### Warning

This option is included in the 8.1.4 template; however, this option is not supported in the 8.1.4 release. To take advantage of this option, Genesys recommends that you upgrade to Workspace 8.5.1

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

## intercommunication.sms.routing-based-targets

- Default Value: Agent
- Valid Values: Agent, Queue.
- Changes take effect: At the next interaction.
- Description:

### Warning

This option is included in the 8.1.4 template; however, this option is not supported in the 8.1.4 release. To take advantage of this option, Genesys recommends that you upgrade to Workspace 8.5.1

Specifies the list of targets that are contacted through the routing-based functionality for requests that are defined by the `intercommunication.sms.routing-based-actions` option.

### Important

The `AgentGroup` and `Skill` targets are always addressed through routing; therefore, they are not affected by this option.

## intercommunication.sms.queue

- Default Value: ""
- Valid Values: Name of a valid Script object of type `InteractionQueue`.
- Changes take effect: At the next interaction.
- Description: Specifies the name of the queue that is used by the routing-based feature. The following attached data are added by Interaction Worskpace: `IW_RoutingBasedOriginalEmployeeId`,

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`IW_RoutingBasedTargetId`, `IW_RoutingBasedTargetType`, `IW_RoutingBasedActionType`.

### `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: At the next interaction.
- Description: Defines the list of routing-based actions that an agent may perform.

### `intercommunication.voice.routing-based-targets`

- Default Value: ""
- Valid Values: A comma-separated list of valid object types from the following list: `Agent, ACDQueue, RoutingPoint, Contact, TypeDestination`.
- Changes take effect: At the next interaction.
- Description: Defines the list of targets that are contacted through the routing-based mechanism for the requests that are defined in the option `intercommunication.voice.routing-based-actions`.

#### Warning

The targets `AgentGroup` and `Skill` are always addressed through routing; therefore, these are not affected by this option.

### `intercommunication.voice.routing-points`

- Default Value: ""
- Valid Values: A comma-separated list of call number names in the following format: `$dn_name@switch$`
- Changes take effect: At the next interaction.
- Description: Determines the call number that is used by the routing-based feature. The following attached data are added by Interaction Worskspace: `IW_RoutingBasedOriginalEmployeeId, IW_RoutingBasedTargetId, IW_RoutingBasedTargetType, IW_RoutingBasedActionType, IW_RoutingBasedRequestType, IW_RoutingBasedLocation`

### `intercommunication.<media-type>.routing-based-actions`

- Default Value: ""
- Valid Values: A comma-separated list of valid operation names from the following list: `OneStepTransfer`.
- Changes take effect: At the next interaction.

- Description: Use this option as a template for any specific workitem media type to define the list of routing-based actions that an agent is allowed to perform for the specified workitem media-type.

### intercommunication.<media-type>.queue

- Default Value: ""
- Valid Values: Name of a valid Script object of type InteractionQueue
- Changes take effect: At the next interaction.
- Description: Use this option as a template for any specific workitem media-type to specify the name of the Interaction Queue that is used by the 'routing based' feature for the specified workitem media-type. The following attached data are added by Interaction Workspace:  
IW\_RoutingBasedOriginalEmployeeId,IW\_RoutingBasedTargetId,IW\_RoutingBasedTargetType,IW\_RoutingBasedRequestType.

### intercommunication.<media-type>.routing-based-targets

#### **Modified:** 8.1.40x.xx

- Default Value: ""
- Valid Values: A comma-separated list of valid object types from the following list: Agent, InteractionQueue.
- Changes take effect: At the next interaction.
- Description: Use this option as a template for any specific workitem media type to define the list of targets that are contacted through the routing based mechanism for the requests that are defined in the option intercommunication.<media-type>.routing-based-actions. Note: The targets AgentGroup and Skill are always addressed through routing; therefore, they are not affected by this option.

# Keyboard Options

## Keyboard

### keyboard.hotkey.agent-not-ready

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to set the agent state to Not Ready. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.hotkey.agent-not-ready-with-reason.<Action Code>

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to set the agent state to Not Ready with a reason. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V. You must also name the option by adding the Action Code 'code' attribute to the name of the option. For example, if the name of the "Not Ready" Action Code is "Meeting" and its code is '1001', then the option key name is specified as "keyboard.hotkey.agent-not-ready-with-reason.1001" and the value should be specified as Ctrl+Alt+M.

### keyboard.hotkey.agent-ready

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to set the agent state to Ready. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.hotkey.decrease-microphone-volume-active-sip-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to decrease the volume of the microphone during an active SIP call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.hotkey.decrease-speaker-volume-active-sip-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to decrease the volume of the speaker during an active SIP call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.hotkey.hold-active-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to hold the active call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.hotkey.increase-microphone-volume-active-sip-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to increase the volume of the microphone during an active SIP call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.hotkey.increase-speaker-volume-active-sip-call

- Default Value: ""
-

- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to increase the volume of the speaker during an active SIP call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.hotkey.mute-microphone-active-sip-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to mute the microphone during an active SIP call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.hotkey.mute-speaker-active-sip-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to mute the speaker during an active SIP call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.hotkey.release-active-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to release the active call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.hotkey.toaster-accept

- Default Value: ""
  - Valid Values: The name of a key or a key combination that 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 application is started or restarted.
-



- Description: A shortcut key to accept the interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.hotkey.toaster-decline

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to decline the interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.action.help

- Default Value: F1
- Valid Values: Only the name of a key or a key combination that 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 by using the + character.
- Changes take effect: When the application is started or restarted.
- Description: A shortcut key to open the help. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.campaign.get-record

- Default Value: "Ctrl+Shift+R"
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to get a new campaign record. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.contact.assigncontact

- Default Value: Ctrl+A
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to assign a contact to the current interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.chat.conference

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to start a chat conference. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.chat.end

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to end a chat conference. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.chat.transfer

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to transfer a chat. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.email.forward

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A valid shortcut key to forward an e-mail. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.email.print

- Default Value: ""
  - Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A valid shortcut key to print an e-mail. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.im.release

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to release an IM interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.preview.call-record

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to view a call record for a preview interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.preview.cancel-record

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to cancel a record for a preview interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.preview.mark-done

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.

- Description: A shortcut key to mark a preview interaction as done. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.preview.mark-done-get-next

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to mark a preview interaction as done and get a new preview interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.preview.reject-record

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to reject a preview interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.pull-preview.mark-done

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to mark a pull-preview interaction as done. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.pull-preview.mark-done-get-next

- Default Value: ""
  - Valid Values: The name of a key or a key combination that 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 application is started or restarted.
  - Description: A shortcut key mark a pull-preview interaction as done and get the next pull-preview interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.
-

## keyboard.shortcut.interaction.voice.answer-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to answer a voice call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.voice.hold-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to hold a voice call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.voice.pause-recording-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to pause the recording of a voice call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.voice.resume-recording-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to resume recording of a voice call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.voice.reconnect-call

- Default Value: ""
  - Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to reconnect to a voice call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.voice.release-call

- Default Value: CTRL+D
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to release a voice call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.voice.resume-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to resume a voice call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.voice.single-step-conference

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to start an instant voice conference. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.voice.single-step-transfer

- Default Value: ""
  - Valid Values: The name of a key or a key combination that 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 application is started or restarted.
  - Description: A shortcut key to instantly transfer a voice interaction. For example: F1, Ctrl+Alt+V,
-

Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.voice.start-recording-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to start recording a voice call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.voice.stop-recording-call

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to stop recording a voice call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.webcallback.call-contact

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to call a contact who has requested a web callback interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.webcallback.mark-done

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to mark a web callback interaction as Done. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.contact.reset

- Default Value: Ctrl+R
- Valid Values: Only the name of a key or a key combination that 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 by using the + character.
- Changes take effect: When the application is started or restarted.
- Description: A shortcut key to reset a contact record. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.contact.save

- Default Value: Ctrl+S
- Valid Values: Only the name of a key or a key combination that 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 by using the + character.
- Changes take effect: When the application is started or restarted.
- Description: A shortcut key to save the contact record. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.consult

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to start a consultation. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.email.add-attachments

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to add an attachment to the active e-mail interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.email.delete

- Default Value: ""
  - Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to delete the current e-mail interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.email.interim-send

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to send an interim copy of the current e-mail interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.email.reply

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to reply to the current e-mail interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.email.reply-all

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to reply to the sender and all recipients of the current e-mail interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.email.save

- Default Value: ""
  - Valid Values: The name of a key or a key combination that 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 application is started or restarted.
-

- Description: A shortcut key to save the current e-mail interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.email.save-in-workbin

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to save the current e-mail interaction in a workbin. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.email.send

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to send the current e-mail interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.email.transfer

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to transfer the current e-mail interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.mark-done

- Default Value: Ctrl+E
  - Valid Values: Only the name of a key or a key combination that 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 by using the + character.
  - Changes take effect: When the application is started or restarted.
  - Description: A shortcut key to mark the current interaction as done. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.
-

## keyboard.shortcut.interaction.reply-all-email

- Default Value: Ctrl+Shift+A
- Valid Values: Only the name of a key or a key combination that 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 by using the + character.
- Changes take effect: When the application is started or restarted.
- Description: A shortcut key to reply to the sender and all recipients of the current inbound e-mail interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.reply-email

- Default Value: Ctrl+R
- Valid Values: Only the name of a key or a key combination that 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 by using the + character.
- Changes take effect: When the application is started or restarted.
- Description: A shortcut key to reply to the sender of the current e-mail interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.save-email

- Default Value: Ctrl+S
- Valid Values: Only the name of a key or a key combination that 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 by using the + character.
- Changes take effect: When the application is started or restarted.
- Description: A shortcut key to save the current e-mail interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.save-email-in-workbin

- Default Value: Ctrl+Y
- Valid Values: Only the name of a key or a key combination that 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 by using the + character.
- Changes take effect: When the application is started or restarted.
- Description: A shortcut key to save the current e-mail interaction in a workbin. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.send-email

- Default Value: Ctrl+Enter
- Valid Values: Only the name of a key or a key combination that 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 by using the + character.
- Changes take effect: When the application is started or restarted.
- Description: A shortcut key to send the current e-mail interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.sms.delete

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to delete the current SMS interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.sms.transfer

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to transfer the current SMS interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.voice.release-call

- Default Value: ""
- Valid Values: Only the name of a key or a key combination that 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 by using the + character.
- Changes take effect: When the application is started or restarted.
- Description: A shortcut key to release a voice call. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

## keyboard.shortcut.interaction.workitem.move-to-workbin

- Default Value: ""
-

- **Valid Values:** The name of a key or a key combination that 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 application is started or restarted.
- **Description:** A shortcut key to move the current workitem to a workbin. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.interaction.workitem.transfer

- **Default Value:** ""
- **Valid Values:** The name of a key or a key combination that 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 application is started or restarted.
- **Description:** A shortcut key to transfer the current workitem. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.state.logout

- **Default Value:** Ctrl+Alt+X
- **Valid Values:** Only the name of a key or a key combination that 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 by using the + character.
- **Changes take effect:** When the application is started or restarted.
- **Description:** A shortcut key to logout. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.state.not-ready

- **Default Value:** Ctrl+Alt+N
- **Valid Values:** Only the name of a key or a key combination that 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 by using the + character.
- **Changes take effect:** When the application is started or restarted.
- **Description:** A shortcut key to set the agent state to Not Ready. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.state.not-ready-after-call-work

- **Default Value:** Ctrl+Alt+Z
  - **Valid Values:** Only the name of a key or a key combination that 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 by using the + character.
  - **Changes take effect:** When the application is started or restarted.
-

- Description: A shortcut key to set the agent state to Not Ready After Call Work. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.state.ready

- Default Value: Ctrl+Alt+R
- Valid Values: Only the name of a key or a key combination that 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 by using the + character.
- Changes take effect: When the application is started or restarted.
- Description: A shortcut key to set the agent state to Ready. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.teamlead.chat.bargein

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A valid shortcut key to forward an e-mail. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.teamlead.chat.stop-monitoring

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A valid shortcut key to forward an e-mail. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.teamlead.stop-monitoring

- Default Value: ""
  - Valid Values: The name of a key or a key combination that 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 application is started or restarted.
  - Description: A valid shortcut key to forward an e-mail. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.
-

### keyboard.shortcut.teamlead.voice.bargein

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A valid shortcut key to barge in to a voice interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.teamlead.voice.stop-monitoring

- Default Value: ""
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A valid shortcut key to forward an e-mail. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.toaster.accept

- Default Value: Ctrl+G
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to accept a new interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

### keyboard.shortcut.toaster.reject

- Default Value: Ctrl+M
- Valid Values: The name of a key or a key combination that 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 application is started or restarted.
- Description: A shortcut key to reject a new interaction. For example: F1, Ctrl+Alt+V, Ctrl+Shift+Alt+V.

# KPI Options

## KPI

### kpi.displayed-kpis

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

### kpi.refresh-time

- Default Value: 10
- Valid Values: An integer value greater than 0.
- Changes take effect: When the application is started or restarted.
- Description: Defines the frequency of notification (in seconds) for KPIs.

### kpi.show-agent-groups

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specify if agent group KPI information is displayed to the agent for all groups to which the agent is a member.



# Log Options

## Log

### log.default-filter-type

- Default Value: copy
- Valid Values: copy, skip, hide, hide-first, hide-last, unhide-first, unhide-last, custom-filter, <KeyPrefix>, <KeyPost>, <ValuePrefix>, <ValuePost>
- Changes take effect: Immediately.
- Description: Specifies the default view of KVLlist information (including UserData, Extensions, and Reasons) in the log. It is applied to the attributes of all KVLlist pairs except those that are explicitly defined in the log-filter-data key. The filter custom-filter enables you to define KeyPrefix, KeyPost, ValuePrefix, and ValuePost. For example: log.default-filter-type: custom-filter, <, >, <#, #>

### log.ESDK

- Default Value: All
- Valid Values: One value from this list: All, Debug, Trace, Interaction, Alarm.
- Changes take effect: Immediately.
- Description: Defines the level of logging for ESDK API.

### log.expire

- Default Value: 10
- Valid Values: An integer value from 1 through 100.
- Changes take effect: Immediately.
- Description: Specifies if log files are to be stored. If they are stored, specifies the maximum number of files (segments) to be stored before the oldest file is removed. The value \$number\$ sets the maximum number of log files to store.

### log.filter-data.<key\_name>

- Default Value: copy
  - Valid Values: copy, skip, hide, hide-first, hide-last, unhide-first, unhide-last, custom-filter, <KeyPrefix>, <KeyPost>, <ValuePrefix>, <ValuePost>
  - Changes take effect: Immediately.
-

- Description: Specifies the treatment of specific data in the log. It overrides the general settings specified by the `log.default-filter-type` option, which specifies the default view of KVLlist information (including UserData, Extensions, and Reasons) in the log. It is applied to the attributes of all KVLlist pairs except those that are explicitly defined in the `log-filter-data` key. The filter `custom-filter` enables you to define KeyPrefix, KeyPost, ValuePrefix, and ValuePost. For example: `log.default-filter-type: custom-filter,<,><#,#>`

## log.max-age

- Default Value: 10
- Valid Values: Any positive integer.
- Changes take effect: When the application is started or restarted
- Description: Specifies the maximum number of days for which Interaction Workspace log files are kept. If the option value is greater than 0, the application deletes the old log files (older than the value of this option) at startup. If the option value is set to 0, log files are not deleted at startup.

## log.PSDK

- Default Value: Standard
- Valid Values: One value from this list: All, Debug, Trace, Interaction, Standard, Alarm.
- Changes take effect: Immediately.
- Description: Define the level of logging for the PSDK API.

## log.segment

- Default Value: 10MB
- Valid Values: The value `$number$KB` sets the maximum segment size, in kilobytes. The minimum segment size is 100KB. The value `$number$MB` sets the maximum segment size, in megabytes.
- Changes take effect: When the application is started or restarted.
- Description: If set, specifies that there is a segmentation limit for a log file and defines the limit size in either kilobytes (KB) or megabytes (MB). If the current log segment exceeds the defined size, the file is closed and a new one is created.

## log.Trace

- Default Value: `$Application.RootApplicationData$\log\InteractionWorkspace`
- Valid Values: A valid path relative to the agent workstation.
- Changes take effect: When the application is started or restarted.
- Description: Defines the full path of the log file relative to the agent workstation. The file name requires the following extension:  
`.%date{yyyyMMdd_HHmss_fff}.log`  
 The full path can also contain the following field codes:  
`$Agent.UserName$, $Agent.LastName$, $Agent.FirstName$, $Agent.EmployeeId$,`

`$Application.Exe$, $Application.ApplicationData$, $Application.RootApplicationData$`  
The path should be specified by the level that is specified by the `log.verbose` option, as follows:  
`log.x<path>`  
where x is the verbose level.

## log.verbose

- Default Value: Trace
- Valid Values: One value from the following list: All, Debug, Trace, Interaction, Standard, Alarm, None.
- Changes take effect: Immediately.
- Description: Defines the level of logging of overall application. If the value is set lower than the level specified by ESDK or PSDK, all levels are set to verbose. The levels correspond with the following keywords in the log file:
  - Debug corresponds with the DEBUG keyword.
  - Trace corresponds with the INFO keyword.
  - Interaction corresponds with the WARN keyword.
  - Standard corresponds with the ERROR keyword.
  - Alarm corresponds with the FATAL keyword.

# Login Options

## Login

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

- Default Value: ""
- Valid Values: A valid Not-Ready Reason Action Code name of type "Not Ready"
- Changes take effect: Immediately.
- Description: Specifies the Not Ready Reason that is displayed after an agent logs in on a channel that is not automatically set to Ready. The Not Ready Reason corresponds to the name of a Not Ready Action Code. If the reason is empty, no Not Ready Reason is displayed for the channel at log in time if the channel is in the Not Ready state. This option is ignored if the option `login.chat.is-auto-ready` is set to `true`.

### login.chat.can-unactivate-channel

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent can select and unselect (auto-login or not auto-login) the chat channel.

### login.chat.is-auto-ready

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the chat channel is automatically set to the Ready state at login.

### login.default-place

- Default Value: ""
- Valid Values: Letters A to Z and a to z. Numbers 0 through 9. The underscore character.
- Changes take effect: When the application is started or restarted.
- Description: Specify the place name populated by default during login. This option can be filled by the variable `$Agent.DefaultPlace$` (if the agent has a default place specified in the agent configuration,

that place is used. However, if no default place exists, the agent must enter their place in the Place field).

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

- Default Value: ""
- Valid Values: A valid Not-Ready Reason Action Code name of type "Not Ready"
- Changes take effect: Immediately.
- Description: Specifies the Not Ready Reason that is displayed after an agent logs in on a channel that is not automatically set to Ready. The Not Ready Reason corresponds to the name of a Not Ready Action Code. If the reason is empty, no Not Ready Reason is displayed for the channel at log in time if the channel is in the Not Ready state. This option is ignored if the option `login.email.is-auto-ready` is set to `true`.

### login.email.can-unactivate-channel

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent can select and unselect (auto-login or not auto-login) the e-mail channel.

### login.email.is-auto-ready

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the e-mail channel is automatically set to the Ready state at login.

### login.enable-login-without-channel

#### **Added:** 8.1.40x.xx

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether agents can login to the Interaction Workspace application without being logged in to any channels.

### login.enable-place-completion

- Default Value: `true`
-

- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Enables the name of the Place to be completed as the agent types.

## login.enable-same-agent-place

- Default Value: true
- Valid Values: true, false, prompt
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent can login on the same Place from different workstations. The value prompt allows the agent to login on the same Place from different workstations, but the agent is first prompted for confirmation before an additional login is permitted.

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

- Default Value: ""
- Valid Values: A valid Not-Ready Reason Action Code name of type "Not Ready"
- Changes take effect: When the application is started or restarted.
- Description: Specifies the Not Ready Reason that is displayed after an agent logs in on a channel that is not automatically set to Ready. The Not Ready Reason corresponds to the name of a Not Ready Action Code. If the reason is empty, no Not Ready Reason is displayed for the channel at log in time if the channel is in the Not Ready state. This option is ignored if the option login.im.is-auto-ready is set to true. For a channel with the capacity "voice/im", if the login.voice.auto-not-ready-reason option is empty, the channel uses the value of the login.im.auto-not-ready-reason option to determine the Not Ready Reason.

## login.im.available-queues

- Default Value: ACDQueue
- Valid Values: "" or a combination of: ACDQueue, RoutingPoint, VirtualQueue
- Changes take effect: When the application is started or restarted.
- Description: Specifies the way the list of available queues is displayed to the agent. If the option value is left blank, no queue is displayed to the agent; the agent can enter any valid login queue name. If set to a combination of the valid values, the agent must select the queue from the list of objects that is provided by the configuration.

## login.im.can-unactivate-channel

- Default Value: false
  - Valid Values: true, false
  - Changes take effect: When the application is started or restarted.
  - Description: Specifies whether the agent can select and unselect (auto-login or not auto-login) the
-

Instant Messaging channel.

### login.im.is-auto-ready

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the IM channel is automatically set to the Ready state at login.

### login.im.prompt-agent-login-id

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent can select a login id from the configured ones for the IM channel in the login window.

### login.im.prompt-dn-password

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent must enter a password for the IM channel in the login window.

### login.im.prompt-queue

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent must enter the ACD Queue for the IM channel in the login window.

### login.prompt-place

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent must enter a place in the login window.

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

- Default Value: ""
- Valid Values: A valid Not-Ready Reason Action Code name of type "Not Ready"
- Changes take effect: Immediately.
- Description: Specifies the Not Ready Reason that is displayed after an agent logs in on a channel that is not automatically set to Ready. The Not Ready Reason corresponds to the name of a Not Ready Action Code. If the reason is empty, no Not Ready Reason is displayed for the channel at log in time if the channel is in the Not Ready state. This option is ignored if the option `login.sms.is-auto-ready` is set to `true`.

## login.sms.can-unactivate-channel

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent can select and unselect (activate and deactivate) the SMS channel.

## login.sms.is-auto-ready

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the SMS channel is automatically in the ready state at agent login.

## login.store-recent-place

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the most recently used Place is stored. This option is available if the `login.default-place` option is not set to `$Agent.DefaultPlace$`.

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

- Default Value: ""
  - Valid Values: A valid Not-Ready Reason Action Code name of type "Not Ready"
  - Changes take effect: When the application is started or restarted.
  - Description: Specifies the Not Ready Reason that is displayed after an agent logs in on a channel that is
-



not automatically set to Ready. The Not Ready Reason corresponds to the name of a Not Ready Action Code. If the reason is empty, no Not Ready Reason is displayed for the channel at log in time if the channel is in the Not Ready state. This option is ignored if the option `login.voice.is-auto-ready` is set to `true`. For a channel with the capacity "voice/im", if the `login.voice.auto-not-ready-reason` option is empty, the channel uses the value of the `login.im.auto-not-ready-reason` option to determine the Not Ready Reason.

## login.voice.available-queues

- Default Value: ACDQueue
- Valid Values: "", or a combination of ACDQueue, RoutingPoint, VirtualQueue
- Changes take effect: When the application is started or restarted.
- Description: Specifies the way the list of available queues is displayed to the agent. If the option value is left blank, no queue is displayed to the agent; the agent can enter any valid login queue name. If this option is set to a combination of the valid values, the agent must select the queue from the list of objects that is provided by the configuration.

## login.voice.can-unactivate-channel

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent can select and unselect (auto-login or not auto-login) the voice channels.

## login.voice.force-relogin

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the voice channels should be re-logged on automatically if logged off from outside the application.

**Note:** This option was previously incorrectly documented as `login.force-relogin`

## login.voice.is-auto-ready

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

### login.voice.prompt-agent-login-id

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent can select a login ID from the ones that are configured for the Voice channel in the login window.

### login.voice.prompt-dn-less-phone-number

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether a DN-less phone number is prompted for in the login window. This option is specific to SIP Server environment.

### login.voice.prompt-dn-password

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent must enter his password for the Voice channel in the login window.

### login.voice.prompt-queue

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent must enter the ACD Queue for the Voice channel in the login window.

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

- Default Value: ""
- Valid Values: A valid Not-Ready Reason Action Code name of type "Not Ready"
- Changes take effect: When the application is started or restarted.
- Description: Specifies the Not Ready Reason that is displayed after an agent logs in on a channel that is not automatically set to Ready. The Not Ready Reason corresponds to the name of a Not Ready Action Code. If the reason is empty, no Not Ready Reason is displayed for the channel at log in time if the

channel is in the Not Ready state. This option is ignored if the option `login.webcallback.is-auto-ready` is set to `true`.

### `login.webcallback.can-unactivate-channel`

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent can select and unselect (auto-login or not auto-login) the web callback channel.

### `login.webcallback.is-auto-ready`

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the web callback channel is automatically set to the Ready state at login.

### `login.workmode`

- Default Value: `unknown`
- Valid Values: `unknown`, `auto-in`, `manual-in`
- Changes take effect: When the application is started or restarted or if the agent changes place.
- Description: Specifies the workmode that is applied when the voice DN logs in. If this option is set to `auto-in`, the agent is automatically in Ready state. If this option is set to `manual-in`, the agent must manually activate the Ready state. To determine whether your switch supports the workmode, refer to the Deployment Guide of the relevant T-Server.

### `login.<keyworditemchannel>.auto-not-ready-reason`

- Default Value: `""`
- Valid Values: A valid Not-Ready Reason Action Code name of type "Not Ready"
- Changes take effect: Immediately.
- Description: Specifies the Not Ready Reason that is displayed after an agent logs in on a channel that is not automatically set to Ready. The Not Ready Reason corresponds to the name of a Not Ready Action Code. If the reason is empty, no Not Ready Reason is displayed for the channel at log in time if the channel is in the Not Ready state. This option is ignored if the option `login.<keyworditemchannel>.is-auto-ready` is set to `true`.

### `login.<keyworditemchannel>.can-unactivate-channel`

- Default Value: `false`
-

- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent can select and unselect (auto-login or not auto-login) the specific Workitem channel.

### login.<keyworkitemchannel>.is-auto-ready

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the specific workitem channel is automatically set to the Ready state at login.

# Main View Options

## Main view

### main-window.dockable

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Enables the docking feature of the Main Window. If this option is set to true, the Main Window can be docked to the top or the bottom of the display. If this option is set to false, the Main Window is not dockable.

### main-window.window-title

- Default Value: `$Window.Title$`
- Valid Values: `$Window.Title$`, `$Application.Title$`, `$Application.Name$`, `$Agent.UserName$`, `$Agent.LastName$`, `$Agent.FirstName$`, `$Agent.EmployeeId$`
- Changes take effect: Immediately.
- Description: Defines the title of the Main Window that appears in the Windows Task Bar by specifying a string that contains the following field codes:  
`$Window.Title$`, `$Application.Title$`, `$Application.Name$`, `$Agent.UserName$`, `$Agent.LastName$`, `$Agent.FirstName$`, `$Agent.EmployeeId$`  
If all field codes are empty, the following field codes are used:  
`$Window.Title$`

# Open Media Options

## Open Media

### `openmedia.bundle.sms`

- Default Value: `sms, smssession`
- Valid Values: `sms, smssession`.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the list of media types that are used to implement the SMS channel. The value `sms` specifies the SMS Page media-type, and the value `smssession` specifies the SMS Session media-type.

### `openmedia.workitem-channels`

- Default Value: `" "`
- Valid Values: A comma-separated list of valid media types.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the list of workitem channels that are used by the agent.

# Outbound Options

## Outbound

### outbound-callback.ringing-bell

- Default Value: Sounds\Ring.mp3|10|-1
- 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: At the next interaction.
- Description: Specify the Outbound callback ringing sound configuration string of a scheduled callback pushed to the agent as a preview, for example: Sounds\Ring.mp3|10|-1  
The value has three components that are separated by the character '|':
  1. The file name and folder relative to the application folder.
  2. The priority. The higher the integer the higher the priority.
  3. The duration:
    - a. -1 means plays and repeats until an explicit message stops it. For example, the established event stops the ringing sound.
    - b. 0 means play the whole sound one time.
    - c. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

### outbound.call-result-automatically-selected

#### **Added:** 8.1.402.xx

- Default Value: ""
- Valid Values: Any available call result value.
- 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.

### outbound.call-result-values

- Default Value: Answered, NoAnswer, AnsweringMachine, Busy, WrongNumber
  - Valid Values: One or more items from the following list: Abandoned (Abandoned), AgentCallbackError
-

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(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.

## outbound.campaign-stale-timeout

- Default Value: 0
- Valid Values: -1, 0, any positive integer value.
- Changes take effect: When the application is started or restarted.
- Description: Records remain editable for a specified period of time after a campaign is unloaded, to reflect the Outbound Contact Server (OCS) OCServer section stale\_clean\_timeout option. A value of 0 means that the outbound record becomes read-only when the campaign is unloaded. A positive value is the duration, in minutes, during which the outbound record remains editable. A value of -1 means that the outbound record is always editable (however, this action may fail in the OCS).

## outbound.fields.float-separator-in-db

- Default Value: ""
- Valid Values: A valid float separator. Typical float separators are: '.' (period), ',' (comma), and '\' (backslash).
- Changes take effect: Immediately.
- Description: Specifies the separator that is used for floating point numbers in the database for outbound fields. This option should be used when the decimal symbol in the regional settings of the agent workstation is different from the one provided by the database.

## outbound.push-preview.auto-answer

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether a push-preview outbound interaction is automatically accepted and joined when an Interaction Server Invite event is received. This option can be **overridden by a routing strategy**.



## outbound.push-preview.media-types

- Default Value: `outboundpreview`
- Valid Values: A comma separated list of valid media-types.
- Changes take effect: When the application is started or restarted.
- Description: The list of media types that are available for the agent to use for outbound push-preview interactions.

## outbound.push-preview.use-combined-channel

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the "outboundpreview" channel is combined with the voice channel in the User Interface. If set to `true`, only the voice channel is presented, and any change in the status of one channel is applied to the other channel.

## outbound.record-information.frame-color

- Default Value: `#FFDFE8F6`
- Valid Values: A valid Hexadecimal color code.
- Changes take effect: At the next interaction.
- Description: Specifies the color of the border of the Record Information view frame of Outbound interactions. Examples: `#FFFFBA00` for a Gold color, `#FF6F7074` for a Silver color, `#FFB8400B` for a Bronze color. This option can be **overridden by a routing strategy**.

## outbound.record-information.header-foreground-color

- Default Value: `#FF15428B`
- Valid Values: A valid Hexadecimal color code.
- Changes take effect: At the next interaction.
- Description: Specifies the color of the foreground of the Record Information view frame of Outbound interactions. Example `#FFFFFF` for white color. This option can be **overridden by a routing strategy**.

## outbound.sound.campaign-updated

- Default Value: `""`
- 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: At the next interaction.

- Description: Specify the outbound campaign status updated sound configuration string, for example: Sounds\Ring.mp3|10|-1  
The value has three components that are separated by the character '|':
  1. The file name and folder relative to the application folder.
  2. The priority. The higher the integer the higher the priority.
  3. The duration:
    - a. -1 means plays and repeats until an explicit message stops it. For example, the established event stops the ringing sound.
    - b. 0 means play the whole sound one time.
    - c. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

### outbound.treatment-mode

- Default Value: none
- Valid Values: Select one value from the following list: personal, campaign, none.
- Changes take effect: Immediately.
- Description: Specifies the type of treatment to be applied for the outbound record after it is marked as processed. If set to none, no treatment is applied for the outbound record.

# Security Options

## Security

### security.disable-rbac

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Disables role based access (RBAC). If this option is set to true, all the Interaction Workspace privileges are available to the agents. If this option is set to false, the list of agent privileges must be defined in Genesys Administrator.

### security.enable-debug-information

- Default Value: false
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: For the About window, this option specifies whether agents are able to display the controls that provide quick access to the Executable directory, the Log directory, the GC, and so on, if they CTRL+Click on the Genesys logo in the About box.

### security.inactivity-timeout

- Default Value: 0
- Valid Values: Any integer from 0 through 100.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the amount of time in minutes of agent inactivity (no mouse or keyboard usage) that triggers application locking. If the agent has been inactive longer than the number of minutes that are specified by the inactivity timeout, the agent must reauthenticate to be able to use the Interaction Workspace application. A value of 0 disables this functionality.

### security.inactivity-set-agent-not-ready

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

- Description: Specifies whether the agent is automatically set to Not Ready when agent inactivity is detected.

### security.inactivity-not-ready-reason

- Default Value: ""
- Valid Values: A valid Not Ready Reason.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the Not Ready Reason if the `inactivity.set-agent-not-ready` option is set to `true`.

# Interaction Workspace SIP Endpoint Options

## SIP Endpoint

### `sipendpoint.audio.headset.audio_in_agc_enabled`

- Default Value: 1
- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether automatic gain control (AGC) is enabled for the outgoing headset audio stream.

### `sipendpoint.audio.incoming.use_agc`

- Default Value: 1
- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether automatic gain control (AGC) is enabled for the incoming audio stream.

### `sipendpoint.authenticate-with-dn-password`

- Default Value: false
- Valid Values: true, false.
- Changes take effect: At next Log Off operation or at next login.
- Description: Specifies whether the DN password that is specified in the Login window is used to authenticate at the SIP Endpoint level.

### `sipendpoint.exit-on-voice-logoff`

#### **Added:** 8.1.400.xx

- Default Value: false
  - Valid Values: true, false.
  - Changes take effect: At next Log Off operation or at next login.
-

- Description: Specifies whether Interaction Workspace SIP Endpoint is unregistered and stopped if the voice channel is logged off manually by an agent. If the value of this option is set to `true`, the corresponding voice DN is also unregistered from SIP Server and therefore Interaction Workspace does not get notifications of any activity that occurs on it. If an agent manually Logs On to the voice channel, the corresponding DN is registered again and Interaction Workspace SIP Endpoint is restarted.

### `sipendpoint.genesyslab.beeptone.beeptone_timeout`

- Default Value: 30000
- Valid Values: Any positive integer value.
- Changes take effect: When the application is started or restarted.
- Description: Timeout time, in milliseconds, for the SIP beep tone that signals an incoming SIP interaction.

### `sipendpoint.genesyslab.beeptone.enable_beeptone`

- Default Value: 1
- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the beep tone that signals an incoming SIP interaction is enabled.

### `sipendpoint.genesyslab.beeptone.play_locally`

- Default Value: 0
- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the beep tone that signals an incoming SIP interaction is played on the agent workstation or only in the selected speaker audio device.

### `sipendpoint.genesyslab.control.auto_answer`

- Default Value: 0
- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether incoming SIP interactions are automatically answered.

### `sipendpoint.genesyslab.device.audio_in_device`

- Default Value: ""
- Valid Values: A valid audio device name.

- Changes take effect: When the application is started or restarted.
- Description: Device name for the agent's microphone.

### `sipendpoint.genesyslab.device.audio_out_device`

- Default Value: ""
- Valid Values: A valid audio device name.
- Changes take effect: When the application is started or restarted.
- Description: Device name for the agent's speakers.

### `sipendpoint.genesyslab.device.error_code_when_headset_na`

- Default Value: 480
- Valid Values: Any positive integer value.
- Changes take effect: When the application is started or restarted.
- Description: Error code for an unavailable USB headset. The error code is sent if a call is rejected because of the unavailability of a headset.

### `sipendpoint.genesyslab.device.headset_name`

- Default Value: ""
- Valid Values: A valid audio device name.
- Changes take effect: When the application is started or restarted.
- Description: The name of the agent's USB headset device.

### `sipendpoint.genesyslab.device.manual_audio_devices_configure`

- Default Value: 0
- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Specifies that a non-USB headset is used.

### `sipendpoint.genesyslab.device.reject_call_when_headset_na`

- Default Value: 0
- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether calls are rejected if a headset is unavailable.

### sipendpoint.genesyslab.device.use\_headset

- Default Value: 0
- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Specifies that a USB headset is used.

### sipendpoint.genesyslab.dtmf.pause\_start\_stop\_dtmf

- Default Value: 100
- Valid Values: Any positive integer value.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the pause time, in milliseconds, between each DTMF when the application is dialing.

### sipendpoint.genesyslab.dtmf.play\_locally

- Default Value: 0
- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the DTMF tones are played on the agent workstation or in the selected speaker audio device.

### sipendpoint.genesyslab.system.log\_level\_AbstractPhone

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for an abstract phone.

### sipendpoint.genesyslab.system.log\_level\_Audio

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for audio level.



## sipendpoint.genesyslab.system.log\_level\_Auto Configuration

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for auto-configuration.

## sipendpoint.genesyslab.system.log\_level\_CCM

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for call control manager (CCM).

## sipendpoint.genesyslab.system.log\_level\_Conferencing

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for conferencing.

## sipendpoint.genesyslab.system.log\_level\_Contacts

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for contacts.

## sipendpoint.genesyslab.system.log\_level\_DNS

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for Domain Name Systems (DNS).

## sipendpoint.genesyslab.system.log\_level\_Endpoint

- Default Value: 0
-

- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for the SIP Endpoint.

### sipendpoint.genesyslab.system.log\_level\_Jitter

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for Jitter.

### sipendpoint.genesyslab.system.log\_level\_Licensing

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for licensing.

### sipendpoint.genesyslab.system.log\_level\_Media

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for media.

### sipendpoint.genesyslab.system.log\_level\_Privacy

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for privacy.

### sipendpoint.genesyslab.system.log\_level\_RTP

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for Real-time Transfer Protocol (RTP).

### sipendpoint.genesyslab.system.log\_level\_Security

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for security.

### sipendpoint.genesyslab.system.log\_level\_Storage

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for storage.

### sipendpoint.genesyslab.system.log\_level\_STUN

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for Session Traversal Utilities for Network Address Translator (STUN) network protocol.

### sipendpoint.genesyslab.system.log\_level\_Transport

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for transport.

### sipendpoint.genesyslab.system.log\_level\_USB Devices

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for USB devices.

### sipendpoint.genesyslab.system.log\_level\_Uutilities

- Default Value: 0
-

- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for utilities.

### `sipendpoint.genesyslab.system.log_level_Voice Quality`

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for voice quality.

### `sipendpoint.genesyslab.system.log_level_XMPP`

- Default Value: 0
- Valid Values: A positive integer value that corresponds to a valid log level.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for Extensible Messaging and Presence Protocol (XMPP).

### `sipendpoint.headset-enforce-configured-usage`

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the SIP Endpoint must wait for the detection of the headset that is configured in the `sipendpoint.genesyslab.device.headset_name` option before finalizing initialization. The agent remains logged out until the headset is detected.

### `sipendpoint.headset-unplugged-set-not-ready`

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the application 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.headset-unplugged.not-ready-reason`

- Default Value: ""
  - Valid Values: A valid Not Ready reason
-

- Changes take effect: When the application 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 and `sipendpoint.headset-unplugged-set-not-ready` option is set to `true`.

### `sipendpoint.headset-replugged-set-ready`

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent SIP DN is set automatically to Ready when the headset that is used by the agent is plugged back in.

### `sipendpoint.init-attempt-nb`

- Default Value: `10`
- Valid Values: A positive integer value.
- Changes take effect: When the application is started or restarted
- Description: The maximum number of communication attempts between Interaction Workspace and Interaction Workspace SIP Endpoint during initialization. This option works in conjunction with the `sipendpoint.init-attempt-timer` option.

### `sipendpoint.init-attempt-timer`

- Default Value: `1`
- Valid Values: A positive integer value.
- Changes take effect: When the application is started or restarted
- Description: The interval of time, in seconds, between attempts to communicate with the Interaction Workspace SIP Endpoint during initialization. This option works in conjunction with the `sipendpoint.init-attempt-nb` option.

### `sipendpoint.log.verbose`

- Default Value: `Trace`
- Valid Values: One value from the following list: `All`, `Debug`, `Trace`, `Interaction`, `Standard`, `Alarm`
- Changes take effect: When the application is started or restarted
- Description: Defines the level of logging for the Interaction Workspace SIP Endpoint.

### `sipendpoint.proxies.proxy0.media_encrypted`

**Added:** 8.1.400.xx

---

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted
- Description: Specifies whether the media stream of the SIP conversation of the preferred line is encrypted.

### sipendpoint.proxies.proxy0.reregister\_in\_seconds

- Default Value: 3600
- Valid Values: Any positive integer value.
- Changes take effect: When the application is started or restarted
- Description: Specifies the interval of time, in seconds, before SIP Endpoint tries reregistration of line 1.

### sipendpoint.proxies.proxy1.media\_encrypted

#### **Added:** 8.1.400.xx

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted
- Description: Specifies whether the media stream of the SIP conversation of the peer line is encrypted.

### sipendpoint.proxies.proxy1.reregister\_in\_seconds

- Default Value: 3600
- Valid Values: Any positive integer value.
- Changes take effect: When the application is started or restarted
- Description: Specifies the interval of time, in seconds, before SIP Endpoint tries reregistration of line 2.

### sipendpoint.retain-volume-settings-between-sessions

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the headset and microphone volume settings are restored from the settings at the previous session login when Interaction Workspace SIP Endpoint starts.

### sipendpoint.rtp.2833.enabled

- Default Value: 1
-

- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Enable support for RFC 2833 out-of-band DTMF.
  - Set to true to enable local support for RFC 2833 out-of-band DTMF. The Table **Effects of enabling and disabling RFC 2833 out-of-band DTMF** demonstrates how this option works with `system.dtmf.force_send_in_band` settings.
  - If RFC2833 is set to out-of-band, the application does not encode DTMF signals in the audio stream as regular tones. Typically, DTMF is not sent in-band, and is only used in specific situations. See `sipendpoint.system.dtmf.force_send_in_band` for examples.

**Effects of enabling and disabling RFC 2833 out-of-band DTMF**

<code>rtp.2833.enabled</code>	<code>system.dtmf.force_send_in_band</code>	Result
1 (true)	1 (true)	Send out-of-band 2833; if that is not accepted, default to in-band.
1 (true)	0 (false)	Send out-of-band 2833; if that is not accepted, default to INFO
0 (false)	1 (true)	Send in-band DTMF.
0 (false)	0 (false)	Send out-of-band INFO.

### `sipendpoint.rtp.2833.hold_over_time_in_ms`

- Default Value: 100
- Valid Values: Any positive integer value.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the minimum length of time to send 2833 packets. If `sipendpoint.system.dtmf.force_send_in_band` is set to false and `sipendpoint.rtp.2833.enabled` is set to true, then this option specifies the minimum length of time (in milliseconds) for which to send 2833 packets. This ensures that the packet time is longer than the key press time, which, depending on the agent, might be too short for some systems.

### `sipendpoint.rtp.2833.packet_time_in_ms`

- Default Value: 100
- Valid Values: Any positive integer value.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the time between 2833 packets, if the `sipendpoint.system.dtmf.force_send_in_band` option is set to false, and the `sipendpoint.rtp.2833.enabled` option is set to true, only audio is sent during the time between packets. This setting is useful if your system cannot handle back-to-back 2833 packets.

### sipendpoint.rtp.2833.payload\_number

- Default Value: 101
- Valid Values: Any positive integer value.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the payload number for DTMF if `system.dtmf.force_send_in_band` is set to `false`.

### sipendpoint.rtp.inactivity.timer\_enabled

- Default Value: 0
- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether Interaction Workspace hangs up if it detects that the RTP session is inactive.

### sipendpoint.sbc-register-address

- Default Value: ""
- Valid Values: Any valid host name (either with or without a Fully Qualified Domain Name) or IP Address.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the host name or IP Address of the Session Border Controller where the SIP REGISTER request will be sent by Interaction Workspace SIP Endpoint. If this option is empty, the SIP REGISTER request will be sent to the address specified in the TServer option `sip-address` of the SIP Server that monitors the DN of this agent. In Business Continuity environment this corresponds to the preferred site registration.

### sipendpoint.sbc-register-address.peer

- Default Value: ""
- Valid Values: Any valid host name (either with or without a Fully Qualified Domain Name) or IP Address.
- Changes take effect: When the application is started or restarted.
- Description: In a Business Continuity environment, specifies the host name or IP Address of the Session Border Controller where the peer SIP REGISTER request will be sent by Interaction Workspace SIP Endpoint. If this option is empty, the SIP REGISTER request will be sent to the address specified in the TServer option `sip-address` of the SIP Server that monitors the DN of this agent. In Business Continuity environment this corresponds to the peer site registration.

### sipendpoint.sbc-register-port

- Default Value: ""
  - Valid Values: Any valid port number on the host.
-



- Changes take effect: When the application is started or restarted.
- Description: Specifies the port of the Session Border Controller where the SIP REGISTER request will be sent by Interaction Workspace SIP Endpoint. If this option is empty, the SIP REGISTER request will be sent to the port that is specified in the TServer option sip-port of the SIP Server that monitors the DN of this agent. In Business Continuity environment this corresponds to the preferred site registration.

### sipendpoint.sbc-register-port.peer

- Default Value: ""
- Valid Values: Any valid port number on the host.
- Changes take effect: When the application is started or restarted.
- Description: In a Business Continuity environment, specifies the port of the Session Border Controller where the peer SIP REGISTER request will be sent by Interaction Workspace SIP Endpoint. If this option is empty, the peer SIP REGISTER request will be sent to the port that is specified in the TServer option sip-port of the SIP Server that monitors the DN of this agent. In Business Continuity environment this corresponds to the peer site registration.

### sipendpoint.system.diagnostics.enable\_logging

- Default Value: true
- Valid Values: true, false.
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether logging is enabled for Interaction Workspace SIP Endpoint.

### sipendpoint.system.diagnostics.log\_level

- Default Value: Error
- Valid Values: None, Critical, Error, Warning, Info, Debug, MaxDetails
- Changes take effect: When the application is started or restarted.
- Description: Specifies the log level for Interaction Workspace SIP Endpoint.

### sipendpoint.system.dtmf.force\_send\_in\_band

- Default Value: false
- Valid Values: true, false.
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether DTMF is sent in-band. Set as described in the Table **Effects of enabling and disabling RFC 2833 out-of-band DTMF**. Sending DTMF in-band is recommended in the following scenarios:

1. Gateways are owned by you, and:

- One or more of your gateways does not support 2833 or does not handle it well.
-

- Your gateway is using codecs that reproduce DTMF tones well.  
In this scenario, setting this option to `true` ensures that DTMF tones get through, because the DTMF tones bypass the gateway, and that the DTMF tones are reproduced accurately by the receiver.
2. Gateways are owned by you, and:
- One or more of your gateways does not support 2833 or does not handle it well.
  - Your gateway is using codecs that do not reproduce DTMF tones well because they are designed to handle voice instead of artificial sounds.  
In this scenario, setting this option to `true` does *not* ensure that DTMF tones get through. There is no solution to this particular scenario.

### `sipendpoint.system.dtmf.minimum_rfc2833_play_time`

- Default Value: 40
- Valid Values: Any positive integer value.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the minimum play duration, in milliseconds, for DTMF tones.

### `sipendpoint.system.indialog_notify.enable_indialognotify`

- Default Value: 0
- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether in-dialog Notify is enabled.

### `sipendpoint.system.network.dtx_enabled`

- Default Value: 0
- Valid Values: 1, 0.
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether Discontinuous Transmission (DTX) is enabled. If DTX is enabled, transmission to the remote party is suspended when the application detects that the local user is not speaking. If this option is set to `true`, DTX is enabled; and silence is not transmitted.

### `sipendpoint.system.qos.audio`

- Default Value: ""
- Valid Values: A valid QOS type.
- Changes take effect: When the application is started or restarted.
- Description: Specify the type of quality-of-service (QOS) that is supported for audio, and if supported, whether bandwidth is to be reserved.

## sipendpoint.transport-protocol

### **Added:** 8.1.400.xx

- Default Value: UDP
- Valid Values: UDP, TCP, TLS
- Changes take effect: When the application is started or restarted.
- Description: Specify whether UDP, TCP, or TLS is used for the SIP transport protocol.

## sipendpoint.tuning.mixer.allow\_master\_volume\_change

- Default Value: 0
- Valid Values: 1, 0
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the master volume is set when the speaker volume is set (`true`) or the wave volume is set when the speaker volume is set (`false`).

# SMS Options

## SMS

### sms.agent.text-color

- Default Value: #FF385078
- Valid Values: Valid Hexadecimal color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the text of the messages that are entered by an agent in the SMS interaction view.

### sms.agent.prompt-color

- Default Value: #FF385078
- Valid Values: Valid Hexadecimal color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the prompt for the messages that are entered by an agent in the SMS interaction view.

### sms.auto-answer

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether an SMS 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 [Overriding Options by Using a Routing Strategy](#).

### sms.client.text-color

- Default Value: #FF166FFF
- Valid Values: Valid Hexadecimal color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the text received by a contact in the SMS interaction view.

### sms.client.prompt-color

- Default Value: #FF166FFF
- Valid Values: Valid Hexadecimal color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the prompt for the messages entered by a contact in the SMS interaction view.

### sms.default-queue

- Default Value: ""
- Valid Values: A valid name of a Script of type Interaction Queue.
- Changes take effect: At the next interaction.
- Description: Specifies the Interaction Queue in which a new or reply outbound SMS are placed when an agent clicks Send and before the interaction is placed in an outbound queue.

### sms.from-numbers-business-attribute

- Default Value: ""
- Valid Values: A valid name of a Business Attribute.
- Changes take effect: At the next interaction.
- Description: A character string that specifies the name of the Business Attribute that contains the Attribute Values that are used as *from numbers* of outbound SMS interactions.

### sms.max-message-number

- Default Value: 8
- Valid Values: A positive integer.
- Changes take effect: At the next interaction.
- Description: Specifies the maximum number of SMS allowed per message. 0 means there is no maximum value.

### sms.other-agent.prompt-color

- Default Value: #FFD88000
- Valid Values: Valid Hexadecimal color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the prompt for the messages that are entered by the target agent in the SMS interaction view.

## sms.other-agent.text-color

- Default Value: #FFD88000
- Valid Values: Valid Hexadecimal color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the text entered by another agent in the SMS interaction view.

## sms.outbound-queue

- Default Value: ""
- Valid Values: Name of a valid Script of type Interaction Queue.
- Changes take effect: At the next interaction.
- Description: Specifies the Interaction Queue in which a new or reply outbound SMS are placed when an agent clicks Send. This option is used only when the Interaction Workflow does not specify the Queue for New Interactions when Inbound SMS are being routed to an agent.

## sms.prompt-for-done

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- 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 [Overriding Options by Using a Routing Strategy](#).

## sms.ringing-bell

- Default Value: Sounds\Ring.mp3|10|-1
- 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: At the next interaction.
- Description: Specify the SMS channel ringing sound configuration string, for example: Sounds\Ring.mp3|10|-1  
The value has three components that are separated by the character '|':
  1. The file name and folder relative to the application folder.
  2. The priority. The higher the integer the higher the priority.
  3. The duration:
    - a. -1 means play and repeat until an explicit message stops it. For example, the established event stops the ringing sound.
    - b. 0 means play the whole sound one time.

- c. An integer  $> 0$  means a time, in milliseconds, to play and repeat the sound.

### sms.subject-max-chars

- Default Value: 25
- Valid Values: A positive integer.
- Changes take effect: At the next interaction.
- Description: Specifies the maximum number of characters from the SMS message that are used to create the message subject in the contact history if the history does not contain subject. A value of 0 means no subject is created.

### sms.system.text-color

- Default Value: #FF8C8C8C
- Valid Values: Valid Hexadecimal color code.
- Changes take effect: Immediately.
- Description: Specifies the color of the text for system messages in the SMS interaction view.

### sms.time-stamp

- Default Value: true
- Valid Values: true, false.
- Changes take effect: Immediately.
- Description: Specifies whether the time stamp is displayed in the SMS transcript area.

### sms.transcript-time-frame

- Default Value: 24
- Valid Values: A positive integer..
- Changes take effect: At the next interaction.
- Description: Specifies the range of time, in hours, in which to search for previous interactions by the same contact to populate the SMS transcript from the contact history. A value of 0 means nothing is added to the contact history.

# Spellchecker Options

## Spellchecker

### spellchecker.corporate-dictionary

- Default Value: ""
- Valid Values: Comma-separated list of words.
- Changes take effect: When the application is started or restarted.
- Description: Specifies a comma-separated list of dictionary words that conform to the limitations of allowable characters in the Configuration Layer. Typically you would use this list to specify common words in your company, such as your company name or product name.

### spellchecker.corporate-dictionary-file

**Modified: 8.1.40x.xx**

- Default Value: ""
- Valid Values: Absolute or relative path to a text file.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the name and the path to your corporate dictionary file. The path can be relative to the Interaction Workspace working directory (for example: Dictionaries\CorporateDictionary.txt) or an absolute path (for example: C:\PathToDictionaries\CorporateDictionary.txt). The text file must consist of a list of words (one word per line). The file must be saved in UTF-8 encoding to avoid internationalization issues.



# Standard Responses Options

## Standard Responses

### standard-response.categories

- Default Value: \$All\$
- Valid Values: \$All\$ or a comma-separated list of one or more category-name Business Attributes
- Changes take effect: At the next interaction.
- Description: Specifies the list of categories that are used to filter the Standard Responses. Agents see only those standard responses that are part of the subtree of those categories. The category corresponds to a Business Attribute that is defined in the Configuration Layer. If the value \$All\$ is specified, then Standard Responses for all the Category objects that are defined in the Configuration Layer are displayed. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### standard-response.default-search-type

- Default Value: AllKeywords
- Valid Values: AnyKeyword, AllKeywords, or ExactText.
- Changes take effect: At the next interaction.
- Description: Specifies the default search type that is used to search for text in Standard Response Library. If empty, the default search type is AnyKeywords.

### standard-response.enable-usage-feedback

- Default Value: true
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether the usage information of the Standard Response Library is populated in the interaction record in Universal Contact Server (UCS) so that it can be read by the Training Server.

### standard-response.languages

- Default Value: \$All\$
- Valid Values: \$All\$ or a comma-separated list of one or more language-name Business Attributes
- Changes take effect: At the next interaction.

- Description: Specifies the list of languages that are used to filter the Standard Responses. Agents see only those standard responses that are part of the subtree of the root categories of the specified languages. The language corresponds to a Business Attribute named Language in the Configuration Layer. If the value \$All\$ is specified, then Standard Responses for all the Language objects that are defined in the Configuration Layer are displayed. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### standard-response.suggested-responses-min-relevancy

- Default Value: 50
- Valid Values: An integer between 0 and 100.
- Changes take effect: At the next interaction.
- Description: Specifies the minimum level of relevancy above which Suggested Responses will be shown from the Standard Response Library.

# Statistics Options

## Statistics

### statistics.displayed-statistics

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

### statistics.queues

- Default Value: ""
- Valid Values: A comma-separated list of queue identifiers in the following format: (<queueNumber>@<switchName>)
- Changes take effect: When the application is started or restarted.
- Description: Specifies the list of queues for which queue statistics are calculated. List of queues can be set through a variable: \$AGENT.LOGINQUEUE\$ (the queue on which the agent logged in), \$AGENTGROUP.ORIGINATIONDNS\$ (the queue that is set as the origination DN in the agent groups to which this agent belongs).

### statistics.refresh-time

- Default Value: 10
- Valid Values: An integer value greater than 0.
- Changes take effect: When the application is started or restarted.
- Description: Defines the frequency of notification, in seconds, for statistics.

### statistics.routing-points

- Default Value: ""
  - Valid Values: A comma-separated list of Routing Point identifiers in the following format: (<routingPointNumber>@<switchName>)
  - Changes take effect: When the application is started or restarted.
-

- Description: Specifies the list of routing points for which routing point statistics are calculated.

# Team Communicator Options

## Team Communicator

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

**Added:** 8.1.30x.xx

- Default Value: true
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: When the value of this option is set to true, Interaction Workspace clears the Team Communicator search text box when an interaction is initiated by pressing Enter or by clicking on one of the media-types that are displayed in the Team Communicator results. When the value of this option is set to false, the Team Communicator search text box is cleared only when an interaction is initiated by pressing Enter.

### teamcommunicator.contact-favorite-fields

- Default Value: Category,FirstName,LastName,PhoneNumber,EmailAddress
- Valid Values: A comma-separated list of values from the following list: Contact, FirstName, LastName, PhoneNumber, EmailAddress.
- Changes take effect: When the application is started or restarted.
- Description: The list of fields that are displayed to an agent when adding or editing a favorite that is created from a Contact.

### teamcommunicator.corporate-favorites

- Default Value: ""
- Valid Values: A comma-separated list of favorite names.
- Changes take effect: When the application is started or restarted.
- Description: The list of corporate favorites (quick dial favorites) that are configured in Configuration Server for an Agent, Agent Group, Skill, Routing Point, Queue, Interaction Queue, or Custom Contact in the same tenant as the agent. See the [Procedure: Creating Corporate Favorites](#) for information about creating Corporate Favorite objects in the configuration layer.

### teamcommunicator.corporate-favorites-file

- Default Value: ""
-

- Valid Values: Absolute or relative path to an XML file that contains a list of corporate favorites.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the name and the path to your corporate favorites definition file. The path can be relative to the Interaction Workspace working directory (for example: Favorites\CorporateFavorites.txt) or an absolute path (for example: C:\PathToFavorites\CorporateFavorites.txt). The file must be in XML format. Overrides the teamcommunicator.corporate-favorites option.

### teamcommunicator.custom-favorite-fields

- Default Value: Category,FirstName,LastName,PhoneNumber,EmailAddress
- Valid Values: A comma-separated list of valid interaction queue names.
- Changes take effect: When the application is started or restarted.
- Description: The list of fields that are displayed to an agent when adding or editing a favorite that is created from a typed phone number or e-mail address.

### teamcommunicator.internal-favorite-fields

- Default Value: Category,DisplayName
- Valid Values: A comma-separated list of values from the following list: Category, DisplayName.
- Changes take effect: When the application is started or restarted.
- Description: The list of fields that are displayed to an agent when adding or editing a favorite that is created from a named resource.

### teamcommunicator.list-filter-showing

- Default Value: Agent,AgentGroup,Skill,RoutingPoint,Queue,InteractionQueue>Contact
- Valid Values: A comma-separated list of values from the following list:
  - Agent, AgentGroup, Skill, RoutingPoint, Queue, InteractionQueue, Contact\* Changes take effect: When the application 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.list-status-reachable

- Default Value: NotReady
- Valid Values: A comma-separated list of agent status from the following list: NotReady, LoggedOff, Busy
- Changes take effect: When the application is started or restarted.
- Description: Specifies the list of statuses, excepting Ready, for which a target agent can be contacted for consultation, transfer, and conference, requests. If the status of the target agent is neither Ready nor in the list of allowed statuses, the target agent will not be listed as available for consultation, transfer, and conference requests. **Note:** The value LoggedOff typically applies to off-line media types

such as Email.

### teamcommunicator.load-at-startup

- Default Value: true
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Provides performance protection if you have a large number of agents that all login at the same time. Specifies whether all the configuration elements (Agents, Agent Groups, Queues, Routing Points, Skills) that are required by the Team Communicator are loaded at login. If this option is set to false, the elements are not loaded at login; instead, they are loaded when the Team Communicator is used for the first time in the session.

### teamcommunicator.max-suggestion-size

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

### teamcommunicator.recent-max-records

- Default Value: 10
- Valid Values: An integer value from 1 through 50.
- Changes take effect: When the application is started or restarted.
- Description: Specifies the maximum number of internal entries (for example, agent and groups) and the maximum number of external entries (customer contacts) to be displayed in the Team Communicator suggestion list while an agent is entering a contact or target name. For example, if 10 is specified, up to 10 internal targets and up to 10 contacts may be displayed.

### teamcommunicator.request-start-timer

- Default Value: 300
- Valid Values: An integer value from 1 through 5000.
- Changes take effect: When the application is started or restarted.
- Description: Request start timer wait interval, in milliseconds, between the last key pressed and the beginning of the search through the contact database.

---

# Toast--Interactive Notification--Options

## Toast (Interactive Notification)

### toast.case-data.content

- Default Value: History, CaseData
- Valid Values: History, CaseData
- Changes take effect: At the next interaction.
- Description: Defines the content of the Case Information area in the 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 of the values defines the order of the Case Data and History information in the Case Information area of the interaction preview. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

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

- Default Value: ""
- Valid Values: A valid name of a Business Attribute.
- Changes take effect: At the next interaction.
- 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 preview. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#). 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 the toast.case-data.order option are put at the bottom of the list.

### toast.window-title

- Default Value: (\$Contact.FirstName\$ \$Contact.LastName|\$Interaction.MainParty\$) - \$Window.Title\$
- 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: Immediately.
- Description: Defines the title of the Interactive Notification window by specifying a string that contains the following field codes:  
\$Window.Title\$, \$Agent.UserName\$, \$Agent.LastName\$, \$Agent.FirstName\$, \$Agent.EmployeeId\$,



`$Interaction.CaseId$, $Interaction.Id$, $Interaction.MainParty$, $Contact.X$,  
$AttachedData.Y$`

Where 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 codes are used:

`$Window.Title$ - $Interaction.MainParty$`

# View Options

## View

These options control two different types of regions within the various views, sortable and selectable regions, and sortable regions.

## Sortable and Selectable Regions

### views.CaseContactRegion.activate-order

- Default Value: InteractionContactInformationView, InteractionContactHistoryView
- Valid Values: A comma-separated list that contains the following view names: InteractionContactInformationView, InteractionContactHistoryView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **tab order** of the Contact Information view and the Contact History view in the Case information. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default order is used except where an item order is specified.

### views.CaseContactRegion.order

- Default Value: InteractionContactInformationView, InteractionContactHistoryView
- Valid Values: A comma-separated list that contains the following view names: InteractionContactInformationView, InteractionContactHistoryView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **display order** of the Contact Information view and the Contact History view in the Case Information view. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default order is used except where an item order is specified.

### views.ContactInfoHistoryMultiRegion.activate-order

- Default Value: ContactInformationView, ContactHistoryView
- Valid Values: A comma-separated list that contains the following view names: ContactInformationView, ContactHistoryView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **tab order** of the Contact Information view and the Contact History view in the Case Information view.

## views.ContactInfoHistoryMultiRegion.order

- Default Value: ContactInformationView, ContactHistoryView
- Valid Values: A comma-separated list that contains the following view names: ContactInformationView, ContactHistoryView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **display order** of the Contact Information view and the Contact History view in the Contact Information view. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default order is used except where an item order is specified.

## views.ContactTabBottomHistoryMultiRegion.activate-order

- Default Value: ContactDetailView, ContactHistoryNotepadView, ContactHistoryCaseDataView
- Valid Values: A comma-separated list that contains the following view names: ContactDetailView, ContactHistoryNotepadView, ContactHistoryCaseDataView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **tab order** of the Contact Tab in the Contact History. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default order is used except where an item order is specified.

## views.ContactTabBottomHistoryMultiRegion.order

- Default Value: ContactDetailView, ContactHistoryNotepadView, ContactHistoryCaseDataView
- Valid Values: A comma-separated list that contains the following view names: ContactDetailView, ContactHistoryNotepadView, ContactHistoryCaseDataView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **display order** of the Contact Tab in the Contact History. If this option is not configured, then the default ordering 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.activate-order

- Default Value: NotepadVoiceNotepadView, DispositionsView
- Valid Values: A comma-separated list that contains the following view names: NotepadVoiceNotepadView, DispositionsView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **tab order** of the disposition and notepad views in an interaction window. If this option is not configured, then the default ordering 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: DispositionsView,NotepadVoiceNotepadView
- Valid Values: A comma-separated list that contains the following view names: DispositionsView, NotepadVoiceNotepadView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **display order** of the disposition and notepad views in an interaction window. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default order is used except where an item order is specified.

## views.ToolbarWorkplaceRegion.activate-order

- Default Value: MyPlaceStatusView
- Valid Values: A comma-separated list that contains the following view names: MyPlaceStatusView, myCampaignsListView, MyContactHistory, MyStatisticsView, MyCallCenterStatisticsView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **tab order** of the buttons on the toolbar. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default order is used except where an item order is specified.

## views.ToolbarWorkplaceRegion.order

- Default Value: MyPlaceStatusView,myCampaignsListView,MyContactHistory,MyStatisticsView, MyCallCenterStatisticsView
- Valid Values: A comma-separated list that contains the following view names: MyPlaceStatusView, myCampaignsListView, MyContactHistory, MyStatisticsView, MyCallCenterStatisticsView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **display order** of the buttons on the toolbar. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default order is used except where an item order is specified.

## views.WorkbinsTabBottomHistoryMultiRegion.activate-order

- Default Value: ContactDetailView,ContactHistoryNotepadView,ContactHistoryCaseDataView
- Valid Values: A comma-separated list that contains the following view names: ContactDetailView, ContactHistoryNotepadView, ContactHistoryCaseDataView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **tab order** of the workbins in the Contact History view. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default order is used except where an item order is specified.

## views.WorkbinsTabBottomHistoryMultiRegion.order

- Default Value: ContactDetailView, ContactHistoryNotepadView, ContactHistoryCaseDataView
- Valid Values: A comma-separated list that contains the following view names: ContactDetailView, ContactHistoryNotepadView, ContactHistoryCaseDataView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **display order** of the workbins in the Contact History view. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default order is used except where an item order is specified.

## Sortable Regions

### views.CaseViewSideButtonRegion.order

- Default Value: InteractionContainerSideButtonView, SRLSideButtonView
- Valid Values: A comma-separated list that contains the following view names: InteractionContainerSideButtonView, SRLSideButtonView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **display order** of the side button region. If this option is not configured, then the default ordering is used. If you do not specify all the options, then the default order is used except where an item order is specified.

### views.ToolbarWorksheetButtonRegion.order

- Default Value: MyWorkplaceButtonView, MainToolbarWorkbinsContainerButtonView, MainToolbarContainerButtonView, MainToolbarContainerAlertMessageButtonView
- Valid Values: A comma-separated list that contains the following view names: MyWorkplaceButtonView, MainToolbarWorkbinsContainerButtonView, MainToolbarContainerButtonView, MainToolbarContainerAlertMessageButtonView
- Changes take effect: Immediately when the region is displayed.
- Description: Specifies the **display order** of items in the 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 order is used except where an item order is specified.

# Voice Options

## Voice

### voice.auto-answer

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specify whether a voice interaction is automatically answered when a TServer Ringing event is received. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### voice.dtmf-inactivity-typing-timeout

- Default Value: 500
- Valid Values: Any positive integer.
- Changes take effect: At the next interaction.
- Description: Defines the inactivity duration, in milliseconds, after which any buffered digits will be sent. A value of 0 means that each digit will be sent individually.

### voice.enable-init-conference

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether the Initiate Transfer and Initiate Conference functions are displayed as separate actions to the Agent in the Consultation area. When this option is set to false, the single menu item Start Voice Consultation is displayed. This menu item triggers the Initiate Transfer function.

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

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specify if an interaction should be closed automatically if a TServer Release event is

received. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### voice.one-step-trsf-mode

- Default Value: default
- Valid Values: At least one item from the list: default, single-step-transfer, mute-transfer
- Changes take effect: When the application is started or restarted.
- Description: Specifies the type of one-step transfer. If you specify default, the one-step transfer operation is single-step-transfer, if it is supported by your switch, or mute-transfer, if one-step transfer is not supported by your switch.

### voice.prompt-for-end

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether Interaction Workspace displays a confirmation message when the agent clicks End during a phone call. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### voice.ringing-bell

- Default Value: Sounds\Ring.mp3|10|-1
  - 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: At the next interaction.
  - Description: Specify the Voice channel ringing sound configuration string, for example: Sounds\Ring.mp3|10|-1  
The value has three components that are separated by the character '|':
1. The file name and folder relative to the application folder.
  2. The priority. The higher the integer the higher the priority.
  3. The duration:
    - a. -1 means plays and repeats until an explicit message stops it. For example, the established event stops the ringing sound.
    - b. 0 means play the whole sound one time.
    - c. An integer > 0 means a time, in milliseconds, to play and repeat the sound.
-

# Web Callback Options

## Web Callback

### webcallback.auto-answer

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether a Web Callback interaction is automatically accepted when 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](#).

### webcallback.auto-dial

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether Callback Phone Number is automatically dialed when an Interaction Web Callback is accepted. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

### webcallback.complete-queue

- Default Value: ""
- Valid Values: Name of a valid Script of type Interaction Queue
- Changes take effect: Immediately.
- Description: Specifies the Interaction Queue in which Web Callback interactions are placed when an agent marks one as Processed.

### webcallback.park-queue

- Default Value: ""
- Valid Values: Name of a valid Script of type Interaction Queue
- Changes take effect: Immediately.
- Description: Specifies the Interaction Queue in which the parent Web Callback interaction is placed when an agent transfers a voice call that is created from a Web Callback interaction.



## webcallback.reschedule-queue

- Default Value: ""
- Valid Values: Name of a valid Script of type Interaction Queue
- Changes take effect: Immediately.
- Description: Specifies the Interaction Queue in which Web Callback interactions are placed when an agent reschedules one and marks it as Processed.

## webcallback.ringing-bell

- Default Value: Sounds\Ring.mp3|10|-1
- Valid Values: All characters and special characters that comprise a valid Windows file path, '|' separator, and numeric values.
- Changes take effect: At the next interaction.
- Description: Specify the web callback ringing sound configuration string of a web callback is delivered to the agent. For example: Sounds\Ring.mp3|10|-1  
The value has three components that are separated by the character '|':

1. The file name and folder relative to the application folder.
2. The priority. The higher the integer the higher the priority.
3. The duration:
  - a. -1 means plays and repeats until an explicit message stops it. For example, the established event stops the ringing sound.
  - b. 0 means play the whole sound one time.
  - c. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

## webcallback.webcallback-information.content

- Default Value: Subject,PhoneNumber,Type,ScheduledDate,ContactTime,LocalTime,FormerAttempts
- Valid Values: A comma separated list of items from the following list: Subject, PhoneNumber, Type, ScheduledDate, ContactTime, LocalTime, FormerAttempts, and Result
- Changes take effect: At the next interaction.
- Description: Specifies the callback data that is displayed in the Callback Information Area. The callback data entries are displayed in the order in which they appear in the list.

## webcallback.webcallback-information.frame-color

- Default Value: #FFDFE8F6
- Valid Values: Valid Hexadecimal (HTML) color code.
- Changes take effect: At the next interaction.

- Description: Specifies the color of the border of the Callback Information view frame of Web Callback interactions. Examples: #FFFFBA00 for a Gold color, #FF6F7074 for a Silver color, #FFB8400B for a Bronze color. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

## webcallback.webcallback-information.frame-color

- Default Value: #FF15428B
- Valid Values: Valid Hexadecimal (HTML) color code.
- Changes take effect: At the next interaction.
- Description: Specifies the color of the border of the Callback Information view frame of Web Callback interactions. Examples: #FFFFBA00 for a Gold color, #FF6F7074 for a Silver color, #FFB8400B for a Bronze color. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

# Webproxy Options

## Webproxy

### webproxy.address

- Default Value: ""
- Valid Values: An empty address to specify the default proxy configuration of your browser. A valid proxy-server address. None or an invalid address to use no proxy address.
- Changes take effect: At the next interaction.
- Description: Specifies the web-proxy host-address that is used to download from external web sites the images that are contained in the e-mail body or to pushed chat pages.

### webproxy.password

- Default Value: ""
- Valid Values: The password of the proxy credentials. Leave empty to not use any credentials.
- Changes take effect: At the next interaction.
- Description: Specifies the password to be used to access the web proxy that is used to download from external web sites the images contained in e-mail body or push to chat pages.

### webproxy.username

- Default Value: ""
- Valid Values: The username of the proxy credentials. Leave empty to not use any credentials.
- Changes take effect: At the next interaction.
- Description: Specifies the username to be used to access the web proxy that is used to download from external web sites the images contained in e-mail body or pushed to chat pages.

# Workbin Options

## Workbin

### workbin.email.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 application is started or restarted.
- Description: The name of a valid Script object of type Interaction Workbin, that is owned by Agents.

### workbin.email.draft.displayed-columns

- Default Value: To, Subject, Submitted
- Valid Values: A comma-separated list of Interaction Server interaction properties, for example: From, Subject, Received
- Changes take effect: When the application is started or restarted.
- Description: The list of interaction fields that are displayed as columns of the workbin that stores Draft e-mail interactions.

### workbin.email.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 application is started or restarted.
- Description: The name of the workbin that is to be used to store inbound e-mail for later processing, after an agent explicitly saved the e-mail or submitted an outbound reply.

### 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 application is started or restarted.
  - Description: The list of interaction fields that are displayed as columns of the workbin that stores In-
-

Progress e-mail interactions.

### workbin.<media\_type>.<nickname>

- Default Value: ""
- Valid Values: The name of a valid Script object of type Interaction Workbin.
- Changes take effect: When the application is started or restarted.
- Description: The name of the workbin that is to be used to store interactions of a particular media type. Agents can open interactions from this workbin but not save interactions in it.

### workbin.<media\_type>.<nickname>.displayed-columns

- Default Value: From,To,Subject,Received
- Valid Values: A comma-separated list of Interaction Server interaction properties, for example: From,Subject,Received
- Changes take effect: When the application is started or restarted.
- Description: The list of interaction fields that are displayed as columns of the specified workbin.

### workbin.<media\_type>.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 application is started or restarted.
- Description: The name of the workbin to be used to store In-Progress workitems of the specified media type.

### workbin.<media\_type>.in-progress.displayed-columns

- Default Value: From,To,Subject,Received
- Valid Values: A comma-separated list of Interaction Server interaction properties, for example: From,Subject,Received
- Changes take effect: When the application is started or restarted.
- Description: The list of interaction fields that are displayed as columns of the specified workbin.

# Workitem Options

## Workitem

### <media-type>.auto-answer

- Default Value: false
- Valid Values: true, false
- Changes take effect: At the next interaction.
- Description: Specifies whether a workitem interaction of the specified type is accepted automatically when an 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: At the next interaction.
- 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 [Overriding Options by Using a Routing Strategy](#).

### <media-type>.pull-from-history-isenabled

**Added:** 8.1.30x.xx

- Default Value: false
- Valid Values: true, false
- Changes take effect: Immediately.
- Description: Specifies whether it is possible to pull an interaction of the specified media type from Contact History. This option is applicable only if at least one of the following privileges has been granted to the agent: Contact - Can Pull From Queue, Contact - Can Pull Interactions In Shared Workbins, Contact - Can Pull Interactions In Workbins Not Owned By The User. Before enabling this function for a given workitem media-type, contact your plug-in vendor to ensure that this feature is supported.

### <media-type>.ringing-bell

- Default Value: Sounds\Ring.mp3|10|-1
-

- 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: At the next interaction.
- Description: Specify the <media-type> channel ringing sound configuration string, for example: Sounds\Ring.mp3|10|-1  
The value has three components that are separated by the character '|':
  1. The file name and folder relative to the application folder.
  2. The priority. The higher the integer the higher the priority.
  3. The duration:
    - a. -1 means play and repeat until an explicit message stops it. For example, the established event stops the ringing sound.
    - b. 0 means play the whole sound one time.
    - c. An integer > 0 means a time, in milliseconds, to play and repeat the sound.

### <media-type>.toast-information-key

- Default Value: Subject
- Valid Values: Any valid attached data key name.
- Changes take effect: At the next interaction.
- Description: Specifies whether the Information area is displayed in the specified workitem channel interaction notification. This option can be overridden by a routing strategy, as described in [Overriding Options by Using a Routing Strategy](#).

# Miscellaneous Options

## Miscellaneous

### alert.timeout

- Default Value: 10
- Valid Values: A positive integer value.
- Changes take effect: Specifies the duration, in seconds, of the contextual warning messages that are displayed in the windows of the application. The value 0 means that message notifications are not automatically closed and must be closed manually.

### application.available-layouts

- Default Value: main-window, gadget
- Valid Values: main-window, gadget
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the Main Window and/or the Gadget views are available on launch. If this option is left blank, neither view is accessible at launch time. The user will have to open the application from the system tray. The first item in the list defines the default view at the initial start up.

### case-data.float-separator

- Default Value: ""
- Valid Values: A valid float separator. Typical float separators are: '.' (period), ',' (comma), and '\' (backslash).
- Changes take effect: Immediately.
- 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 workstation is different from the one in the attached data.

### channel-information.window-title

- Default Value: \$Window.Title\$
- Valid Values: \$Window.Title\$, \$Application.Title\$, \$Application.Name\$, \$Agent.UserName\$, \$Agent.LastName\$, \$Agent.FirstName\$, \$Agent.EmployeeId\$
- Changes take effect: Immediately.
- Description: Defines the title of the window that prompts for place and media login data that appears in



the Windows Task Bar by specifying a string that contains the following field codes:  
\$Window.Title\$, \$Application.Title\$, \$Application.Name\$, \$Agent.UserName\$,  
\$Agent.LastName\$, \$Agent.FirstName\$, \$Agent.EmployeeId\$  
If all field codes are empty, the following field codes are used:  
\$Window.Title\$

## editor.font-size-units

### **Added:** 8.1.40x.xx

- Default Value: point
- Valid Values: A valid font size unit. The following units are supported: pixel, point
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether points or pixels are used for the units of font size in the Rich Editor view for e-mail and other rich text based interactions.

### Important

Font size is always stored in pixels in the configuration layer. This option defines how font size is displayed.

## interaction-bar.detail-tooltip.max-height

- Default Value: 164
- Valid Values: An integer value greater than or equal to 0.
- Changes take effect: Immediately.
- Description: Sets the maximum height, in pixels, of the tooltip for interaction details of Interaction Bar items. The tooltip can contain the chat transcript, the body of an e-mail and so on.

## license.lrm-enabled

- Default Value: false
- Valid Values: true, false
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the Interaction Workspace signature is recognized by Genesys License Reporting Manager.

## logout.enable-exit-on-logout-error

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

- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the agent can log out from the application even if one of the voice channel log offs resulted in an error. The value `prompt` allows the agent to log out of the application if a log off channel error occurs. The agent is first prompted for confirmation before logging out the application.

### `options.record-option-locally-only`

- Default Value: `false`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specifies whether the display settings for the agent are stored locally or in the agent annex.

### `presence.evaluate-presence`

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: When the application is started or restarted.
- Description: Specify whether to evaluate presence or not. Set this option to `true` if presence has to be evaluated for agents, agent groups, T-Server queues, routing points, and interaction queues.

### `printing.use-print-preview`

- Default Value: `true`
- Valid Values: `true`, `false`
- Changes take effect: Immediately.
- Description: Specifies whether a print preview is shown when the user request to print a document. If set to `true` the Print Preview window is displayed when an agent clicks **Print**. If set to `false` the standard system print dialog box is displayed.

### `sounds.preloadfiles`

#### **Added:** 8.1.40x.xx

- Default Value: `Sounds\Ring.mp3`
  - Valid Values: A comma-separated list of valid Windows directory paths and file names.
  - Changes take effect: At the next interaction.
  - Description: Specifies the name and location in the application folder of audio files that are to be pre-loaded when an agent logs in. For Example: `"Sounds\Ring.mp3,Sounds\bell.mp3,Sounds\chord.mp3,Sounds\warning.mp3"`. The audio files are defined by the options that control sounds, such as [voice.ringing-bell](#) and [chat.new-message-bell](#). Files that are not specified by this option are loaded whenever they are needed.
-

## system-tray.tooltip

- Default Value: `$Application.Title$`
- Valid Values: `$Window.Title$`, `$Application.Title$`, `$Application.Name$`, `$Agent.UserName$`, `$Agent.LastName$`, `$Agent.FirstName$`, `$Agent.EmployeeId$`
- Changes take effect: When the application is started or restarted.
- Description: Defines the tooltip of the Interaction Workspace system tray icon by specifying a string that contains the following field codes:  
`$Window.Title$`, `$Application.Title$`, `$Application.Name$`, `$Agent.UserName$`, `$Agent.LastName$`, `$Agent.FirstName$`, `$Agent.EmployeeId$`  
If all field codes are empty, the following field codes are used:  
`$Window.Title$`

## teamlead.monitoring-scope

### **Added:** 8.1.30x.xx

- Default Value: `call`
- Valid Values: `agent`, `call`
- Changes take effect: Immediately.
- Description: Specifies the scope of monitoring that is to be used for voice interactions in environments that use SIP Server. 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.

# Section interaction-queue-presence

## error-level

- Default Value: 10
- Valid Values: A positive integer or a double value.
- Changes take effect: When the application is started or restarted.
- Description: The value at which a statistic is considered to beat the upper threshold level.

## statistic-name

- Default Value: CurrNumberWaitingCalls
- Valid Values: A valid name of a statistic server statistic queue.
- Changes take effect: When the application is started or restarted.
- Description: The name of the statistic that is used to evaluate presence for Routing Points.

## statistic-text

- Default Values: interaction(s) waiting
- Valid Value: Letters A to Z and a to z. Numbers 0 through 9. The underscore and space characters.
- Changes take effect: When the application is started or restarted.
- Description: The text that is displayed beside the statistic value.

## warning-level

- Default Value: 5
- Valid Values: A positive integer or a double value.
- Changes take effect: When the application is started or restarted.
- Description: The value at which a statistic is considered to be at the warning level.

# Section queue-presence

## error-level

- Default Value: 10
- Valid Values: A positive integer or a double value.
- Changes take effect: When the application is started or restarted.
- Description: The `queuePresenceErrorLevel` value. The value at which a statistic is considered to be at the upper threshold level.

## statistic-name

- Default Value: `CurrNumberWaitingCalls`
- Valid Values: The name of a statistic server statistic queue.
- Changes take effect: When the application is started or restarted.
- Description: The `queuePresenceStatisticName` value. The name of the statistic that is used to evaluate presence for queues.

## statistic-text

- Default Values: `interaction(s) waiting`
- Valid Value: Letters A to Z and a to z. Numbers 0 through 9. The underscore and space characters.
- Changes take effect: When the application is started or restarted.
- Description: The `queuePresenceStatisticText` value. The text that is displayed next to the statistic value.

## warning-level

- Default Value: 5
- Valid Values: A positive integer or a double value.
- Changes take effect: When the application is started or restarted.
- Description: The `queuePresenceWarningLevel` value. The value at which a statistic is considered to be at the warning level.

# Section routing-point-presence

## error-level

- Default Value: 10
- Valid Values: A positive integer or a double value.
- Changes take effect: When the application is started or restarted.
- Description: The `routingPointPresenceErrorLevel` value. The value at which the statistic is considered to be at the error level.

## statistic-name

- Default Value: `CurrNumberWaitingCalls`
- Valid Values: The name of a statistic server statistic queue.
- Changes take effect: When the application is started or restarted.
- Description: The `routingPointPresenceStatisticName` value. The name of the statistic that is used to evaluate presence for queues.

## statistic-text


- Default Value: `interaction(s) waiting`
- Valid Values: Letters A to Z and a to z. Numbers 0 through 9. The underscore and space characters.
- Changes take effect: When the application is started or restarted.
- Description: The `routingPointPresenceStatisticText` value. The text that is displayed next to the statistic value.

## warning-level

- Default Value: 5
- Valid Values: A positive integer or a double value.
- Changes take effect: When the application is started or restarted.
- Description: The `routingPointPresenceWarningLevel` value. The value at which a statistic is considered to be at the warning level.

## Section KPI Name

Each KPI that you want to define and use must have its own section defined in the Interaction Workspace Application object in the Configuration Database.

 **Note:** KPIs are not part of the XML metadata file because they are not composed of fixed section names.

### Defining a KPI Section

Use Genesys Administrator to define a new section at the level at which you want the KPI to be displayed. Use the KPI name as the name of the section. Define the values that are to be displayed for the KPI as the Options and Values of the Section. For example, for the TotalTalkStatusTime KPI, define a section that is named TalkTime, and then define a set of Options and specify values for those options. The Table - **Sample Options and Values for the KPI Section** provides a sample of Option names and values that you might define for this KPI.

**Sample Options and Values for the KPI Section**

Option	Value
statistic-name	TotalTalkStatusTime
period	OneMinute
target-value	40
warning-level-low (optional)	
warning-level-high (optional)	
error-level-low (optional)	
error-level-high (optional)	
worst-value-low (optional)	0
worst-value-high (optional)	
description	Total talk time for the agent
evaluation-display	Evaluation

### Displaying KPIs

Interaction Workspace enables you to display the KPIs that you have defined on the Application object at one or more of the following levels:

- **Application level** -- Display KPI to all agents.
- **Tenant level** -- Display KPI to all the agents of the Tenant.
- **Agent Group level** -- Display KPI to all the agents of the Agent Group.

- **Agent level** -- Display KPI to the agent.

To display a KPI at a specific level, define and configure the `kpi.displayed-KPIs` option in the `interaction-workspace` section of the level. The value of this option is a comma-separated list of KPI sections that are to be displayed.

## Setting the Warning, Error, and Worst Levels

Interaction 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:  $\text{Agent Performance} = (\text{Agent Result} - \text{worst-value-low}) / (\text{Target Value} - \text{worst-value-low}) \times 100$  or: If the statistic value is higher than the target value, the following evaluation is applied:  $\text{Agent Performance} = (\text{worst-value-high} - \text{Agent Result}) / (\text{worst-value-high} - \text{Target Value}) \times 100$



# Section Object Statistic Name

Each Object Statistic (contact-center statistic) that you want to define and use must have its own section defined in the Interaction Workspace Application object in the Configuration Database.

	 <b>Note:</b> Object Statistics are not part of the XML metadata file because they are not composed of fixed section names.
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## Defining a Object Statistic Section

Use Genesys Administrator to define a new section at the level at which you want the Object Statistic to be displayed. Use the Object Statistic name as the name of the section. Define the values that are to be displayed for the Object Statistic as the Options and Values of the section. Refer to the Table - **Mandatory and Optional Options for Object Statistics Section** for a list of the mandatory and optional options that you can define for each Object Statistic.

**Mandatory and Optional Options for Object Statistics Section**

Option	Value description	Mandatory
description	The value must be the display name for the statistic. It is displayed in the Interaction Workspace statistics list. If this option is not defined (empty), the value of the statistic-name option is displayed instead.	No
error-level-high	Values above this value result in an error state for the statistic.	No
error-level-low	Values below this value result in an error state for the statistic.	No
filter	The value must be the filter for the statistic calculation. This should correspond to an option name that is defined by the Filters section of Statistics Server.	No
long-description	The value must be a complete description of the statistic. It is displayed as a tooltip in the Interaction Workspace interface.	No
object-id	The value must be the ID of the object that requests this statistic. The format of a queue object - id is: <QueueName>@<SwitchName>The format of a routing point object -	No

Option	Value description	Mandatory
	id is:<RPName>@<SwitchName>	
period	The value must be the period for the statistic calculation. This should correspond to an option name that is defined by the TimeProfiles section of Statistics Server.	No
refresh-time	The value must be the length of time, in seconds, between each update request from Statistics Server.	No
statistic-name	The value must be the name of the Statistic as defined in the Statistics Server options.	Yes
statistic-type	The value must be the type of the object"such as Queue, RoutePoint, or GroupQueues"as defined for the Object Statistic in Statistics Server.	Yes
time-range	The value must be the time range for the statistic calculation. This should correspond to an option name that is defined by the TimeRanges section of Statistics Server. Time ranges are used to calculate certain statistics such as those that specify a percentage.	No
time-range2	The value must be the secondary time range for the statistic calculation. This should correspond to an option name that is defined by the TimeRanges section of Statistics Server. Time ranges are used to calculate certain statistics such as those specify a percentage.	No
warning-level-high	Values above this value result in an error state for the statistic.	No
warning-level-low	Values below this value result in an error state for the statistic.	No

## Setting the Warning and Error Levels

Interaction Workspace provides four non-mandatory options that you can use to define low and/or high levels of warning and error. 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 result in an error state for the statistic.
- `error-level-high`--Values above this value result 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 result in an error state for the statistic.
- `warning-level-high`--Values above this value result in an error state for the statistic.

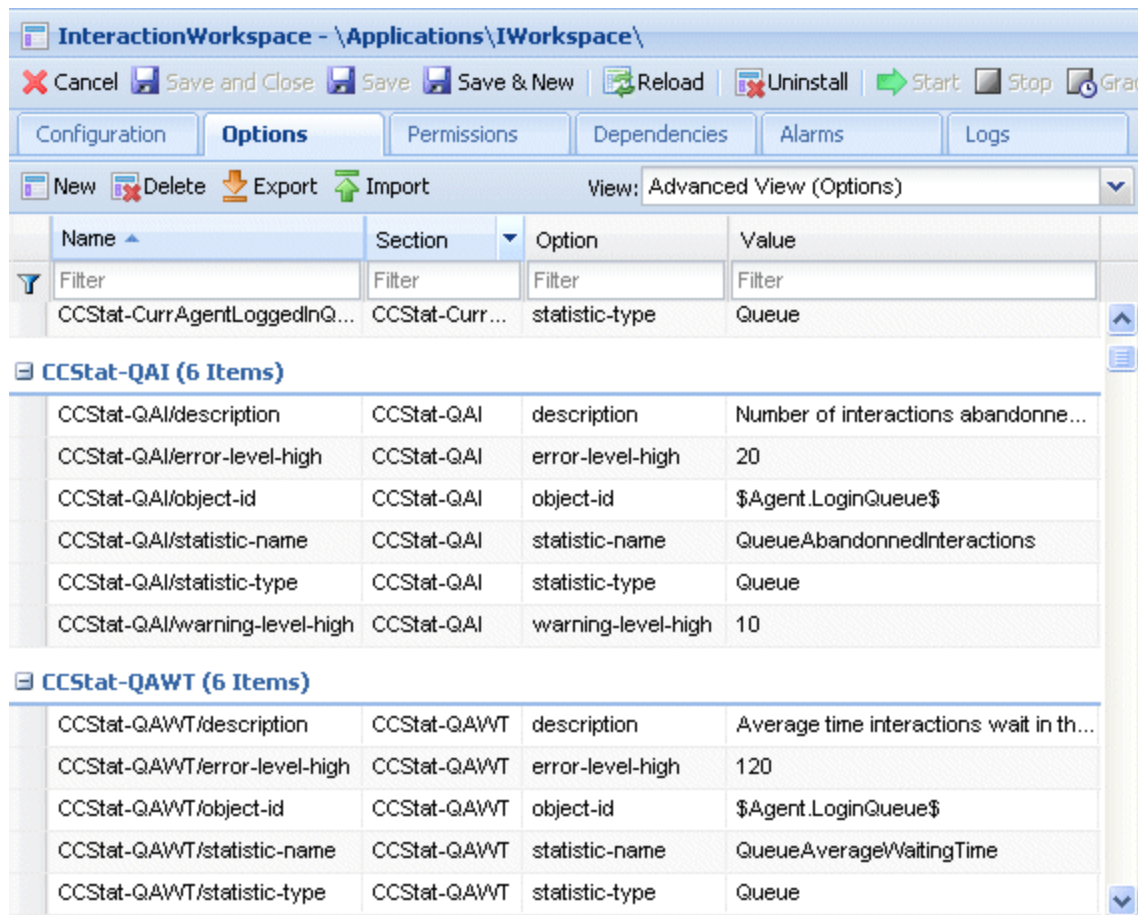
Use the error and warning options to specify ranges that are most suitable for the statistic.

## Displaying Object Statistics

Interaction Workspace enables you to display the Object Statistics that you have defined on the Application object at one or more of the following levels:

- **Application level** -- Display Object Statistic to all agents
- **Tenant level** -- Display Object Statistic to all the agents of the Tenant
- **Agent Group level** -- Display Object Statistic to all the agents of the Agent Group
- **Agent level** -- Display Object Statistic to the agent

To display an Object Statistic at a specific level, define and configure the `statistics.displayed-statistics` option in the `interaction-workspace` section of the level. The value of this option is a comma-separated list of Object Statistic sections that are to be displayed. The Figure - **Sample section defined in Genesys Administrator for the Interaction Workspace Application object** provides an example of a statistic section that is defined on the Interaction Workspace Application object.



Sample section defined in Genesys Administrator for the Interaction Workspace Application object

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# Not Ready Reason Codes

Interaction Workspace provides "reasons" with which agents can specify details about their NotReady status; these are configured by creating as many 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, and then defining and configuring options in that section to customize the way that not-ready reasons are sent to your T-Server. Define the following options in the `interaction-workspace` section that you create:

## workmode

- Default Value: ""
- Valid Values: "", aux-work
- Changes take effect: At next login.
- Description: Refines and extends the customized NotReady status monitoring, when it is supported by the switch.

## extensions

- Default Value: false
- Valid Values: true, false
- Changes take effect: At next login.
- Description: Available only if the `workmode` option is not defined or if it is set to none. If your switch does not support the `aux-work` value, this option creates and enters extensions as the option name, and either false (as the default value) or true (as a valid value).

## reason-extension-key

- Default Value: ReasonCode
- Valid Values: ReasonCode, <any string>
- Changes take effect: At next login.
- Description: The name that is set as the key of the key-value pair added to the Not Ready Reason or Extensions map. The corresponding value is set according to the Action Code that is defined in the Configuration Layer and the value of the `reason-extension-value` option.  
If the value of this option is empty, the key of the key-value pair is the Name attribute of the selected Action Code.

## reason-extension-request-attribute

- Default Value: ""
- Valid Values: "", reasons, extensions

- Changes take effect: At next login.
- Description: Specifies whether the reason code is published in the reason attribute or in the extension attribute. Empty means that the legacy behavior is preserved, where the reason code is published in the 'reasons' or 'extensions' attribute, depending on the selected workmode.

## reason-extension-value

- Default Value: code
- Valid Values: name, code
- Changes take effect: At next login.
- Description: The type of content that is set as the value of the key-value pair added to the Not Ready Reason or Extensions map.
  - If the option is empty or not correct, the default value is: code.
  - The corresponding key is set according to the value of the option reason-extension-key.
  - When set to code the key is the Code attribute of the selected Action Code.
  - When set to name the key is the Name attribute of the selected Action Code.

---

# Role Privileges

In the privilege-based model that is implemented by Interaction Workspace, an agent is assigned privileges based on the role of the agent. Privileges are enabled or disabled depending on the role that is assigned to the agent. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role, allowing an Interaction Workspace privilege, and assigning a Role to an agent or agent group](#)). Refer to *Framework 8.1 Genesys Administrator Help* and *Genesys Security Guide* for detailed information on how to use Genesys Administrator and Management Framework to configure access permissions. The following tables list and describe the privileges that you can set for Interaction Workspace agent roles:

- **Active Recording Privileges** lists the voice privileges in the Interaction Workspace Active Recording Privileges section of the Role Privileges tab that can be enabled for a role.
- **Broadcast Message Privileges** lists the Broadcast Message privileges in the Interaction Workspace Broadcast Message Privileges section of the Role Privileges tab that can be enabled for a role.
- **Case Information Privileges** lists the Case Information privilege in the Interaction Workspace Case Information Tasks section of the Role Privileges tab that can be enabled for a role.
- **Chat Privileges** lists the Chat privileges in the Interaction Workspace Chat Access section of the Role Privileges tab that can be enabled for a role.
- **Contact Management Privileges** lists the Contact Management privileges in the Interaction Workspace Contact Privileges section of the Role Privileges tab that can be enabled for a role.
- **E-Mail Privileges** lists the E-Mail privileges in the Interaction Workspace E-Mail Privileges section of the Role Privileges tab that can be enabled for a role.
- **IM Privileges** lists the internal IM privileges in the Interaction Workspace Instant Messaging Privileges section of the Role Privileges tab that can be enabled for a role.
- **Interaction Bar Privileges** lists the interaction bar privilege in the Interaction Workspace Interaction Bar Privileges section of the Role Privileges tab that can be enabled for a role.
- **Interaction Workspace SIP Endpoint Privileges** lists the Interaction Workspace SIP Endpoint privileges in the Interaction Workspace SIP Tasks section of the Role Privileges tab that can be enabled for a role.
- **Outbound Campaign Privileges** lists the outbound campaign privileges in the Interaction Workspace Outbound Privileges section of the Role Privileges tab that can be enabled for a role.
- **Security Privileges** lists the Security privileges in the Interaction Workspace Security Privileges section of the Role Privileges tab that can be enabled for a role.
- **SMS Privileges** lists the SMS privileges in the Interaction Workspace SMS Access section of the Role Privileges tab that can be enabled for a role.
- **Standard Response Privileges** lists the Standard Resource Library (SRL) privileges in the Interaction Workspace Standard Response Privileges section of the Role Privileges tab that can be enabled for a role.
- **Statistics Privileges** lists the Statistics privileges in the Interaction Workspace Statistics Privileges section of the Role Privileges tab that can be enabled for a role.
- **Team Communicator Privileges** lists the Team Communicator privileges in the Interaction Workspace Team Communicator Privileges section of the Role Privileges tab that can be enabled

for a role.

- **Team Lead Privileges** lists the Team Lead privileges in the Interaction Workspace Team Lead Privileges section of the Role Privileges tab that can be enabled for a role.
- **Voice Privileges** lists the voice privileges in the Interaction Workspace Voice Privileges section of the Role Privileges tab that can be enabled for a role.
- **Web Callback Privileges** lists the Web Callback privileges in the Interaction Workspace Web Callback Access section of the Role Privileges tab that can be enabled for a role.
- **Workbins Privileges** lists the Workbin privileges in the Interaction Workspace Workbin Privileges section of the Role Privileges tab that can be enabled for a role.
- **Workitem Privileges** lists the Workitem privileges in the Interaction Workspace Workitem Privileges section of the Role Privileges tab that can be enabled for a role.



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## Active Recording Privileges

The following table lists the voice privileges in the Interaction Workspace Active Recording Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Active Recording Privileges**

Role privilege	Description
Active Recording - Can Use	The agent is permitted to use the Active Recording functionality. This privilege is required to control and monitor call recording in MSML mode
Active Recording - Can Monitor Voice Recording	The agent is permitted to see the voice recording state indicator change dynamically.

---

## Broadcast Message Privileges

The following table lists the Broadcast Message privileges in the Interaction Workspace Broadcast Message Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Broadcast Message Privileges**

Role privilege	Description
Broadcast - Can Use	The agent is permitted to receive and view broadcast messages.

---

## Case Information Privileges

The following table lists the Case Information privilege in the Interaction Workspace Case Information Tasks section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Case Information Privileges**

Role privilege	Description
Case Information - Can Edit	Enables agents to edit case information that is configured to be editable.
Case Information - Can Add	Enable agents, agent groups, or roles to edit case information.

## Chat Privileges

The following table lists the Chat privileges in the Interaction Workspace Chat Access section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Chat Privileges**

Role privilege	Description
Chat - Can Use Chat Channel	The agent is permitted to use the chat media channel.
Chat - Can Decline	The agent is permitted to reject chat interactions that are directed to the agent.
Chat - Can Release	The agent is permitted to end chat interactions.
Chat - Can One Step Transfer	The agent is permitted to use the instant-transfer functionality.
Chat - Can One Step Conference	The agent is permitted to use the instant-conference functionality.
Chat - Can Push Url	The agent is permitted to send URLs to contacts during chat interactions.
Chat - Can Set Interaction Disposition	The agent is permitted to set the disposition code of a chat interaction.
Chat - Show Silent Monitoring	The agent is permitted to know when a supervisor is monitoring the agent during a chat interaction.

## Contact Management Privileges

The following table lists the Contact Management privileges in the Interaction Workspace Contact Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Contact Management Privileges**

Role privilege	Description
Contact - Can Create Contact	The agent is permitted to create a new contact in the Universal Contact Server database.
Contact - Can Delete Contact	The agent is permitted to delete an existing contact from the Universal Contact Server database.
Contact - Can Edit Contact	The agent is permitted to edit contact information in the Universal Contact Server database. <b>Note:</b> Agents can save new contacts when the Contact - Can Create privilege is assigned even if the Contact - Can Edit Contact privilege is not assigned. Previously in this scenario, if the Contact - Can Create privilege was granted to agents and the Contact - Can Edit Contact privilege was not, agents could not save a new contact.
Contact - Can Mark Done Voice Interaction	The agent is permitted to mark an interaction as done.
Contact - Can Merge Contact	The agent is permitted to merge two contacts in the Universal Contact Server database.
Contact - Can Assign Contact	The agent is permitted to assign an interaction to an existing contact if the interaction has an unknown contact or is incorrectly assigned to a different contact.
Contact - Can Use Interaction Notepad	The agent is permitted to use the Notepad to view and edit notes that are included in the interaction.
Contact - Can Merge Interaction To Contact	The agent is permitted to merge interactions to an existing contact in the Universal Contact Server database.
Contact - Can Undo Merge Contact	The agent is permitted to unmerge a previously merged contact in the Universal Contact Server database.
Contact - Can Use Contact Directory	The agent is permitted to use the Contact Directory to view and manage contact information in the Universal Contact Server database.
Contact - Can Use Contact History	The agent is permitted to view and manage contact history.
Contact - Can Use Contact History CaseData	The agent is permitted to view and manage contact

Role privilege	Description
	history case data.
Contact - Can Use Contact History Detail	The agent is permitted to view and manage contact history details.
Contact - Can Use Contact History Notepad	The agent is permitted to view and manage contact history notepad information.
Contact - Can Use Contact Information	The agent is permitted to view and manage contact information.
Contact - Can Use My Contact History	The agent is permitted to view and manage contact information for interactions that they have handled.
Contact - Can Use	The agent is permitted to perform contact management privileges. The other contact management privileges cannot be configured if the value is Not Assigned.
Contact - Can Pull From Queue	From the Contact History view, the agent is permitted to pull interactions from a queue.
Contact - Can Pull Interactions In Shared Workbins	From the Contact History view, the agent is permitted to pull interactions from shared workbins which are not explicitly accessible to the user.
Contact - Can Pull Interactions In Workbins Not Owned By The User	From the Contact History view, the agent is permitted to pull interactions from personal workbins which are not owned by the user.

## E-Mail Privileges

The following table lists the E-Mail privileges in the Interaction Workspace E-Mail Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role, allowing an Interaction Workspace privilege, and assigning a Role to an agent or agent group](#)).

Role privilege	Description
E-Mail - Can Add Attachments	The agent is permitted to include attached files in e-mail interactions.
E-Mail - Can Change Format New Email	The agent is permitted to switch the format of a new outbound e-mail interaction between HTML and plain text. <b>Added:</b> 8.1.40x.xx
E-Mail - Can Change Format Reply Email	The agent is permitted to switch the format of a reply outbound e-mail interaction between HTML and plain text. <b>Added:</b> 8.1.40x.xx
E-Mail - Can Decline	The agent is permitted to reject e-mail interactions that are directed to the agent.
E-Mail - Can Delete	The agent is permitted to delete e-mail interactions from the contact database.
E-Mail - Can Forward To External Resource	The agent is permitted to configure an external e-mail address to which e-mail interactions can be forwarded.
E-Mail - Can Interim Send	The agent is permitted to send interim e-mail interactions to a target.
E-Mail - Can Mark Done	The agent is permitted to mark e-mail interactions as Done.
E-Mail - Can Move to Workbin	The agent is permitted to move e-mail interactions to a workbin for later handling or handling by another agent or agent group.
E-Mail - Can Print	The agent is permitted to print a hard copy of an e-mail interaction.
E-Mail - Can Reply	The agent is permitted to reply to the sender of an inbound e-mail interaction.
E-Mail - Can Reply All	The agent is permitted to reply to the sender and all other addressees of inbound e-mail interaction.
E-Mail - Can Save	The agent is permitted to save e-mail interactions in the in-progress workbin.
E-Mail - Can Send	The agent is permitted to send e-mail interactions to a target.
E-Mail - Can Set Interaction Disposition	The agent is permitted to set the disposition code of an e-mail interaction.
E-Mail - Can Transfer	The agent is permitted to use the instant-transfer

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Role privilege	Description
E-Mail - Can Use E-Mail Channel	functionality. The agent is permitted to use the e-mail media channel.



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## IM Privileges

The following table lists the internal IM privileges in the Interaction Workspace Instant Messaging Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

### IM Privileges

Role privilege	Description
Instant Messaging - Can Release	The agent is permitted to end Instant Messaging sessions.
Instant Messaging - Can Make	The agent is permitted to initiate Instant Messaging sessions.
Instant Messaging - Can Use	The agent is permitted to use the Instant Messaging media. The other IM privileges cannot be configured if the value is Not Assigned.

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## Interaction Bar Privileges

The following table lists the interaction bar privilege in the Interaction Workspace Interaction Bar Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Interaction Bar Privileges**

Role privilege	Description
Interaction Bar - Can Use	Enables the use of the Interaction bar in the Main Window.

# Interaction Management

## Added: 8.1.40x.xx

The following table lists the Interaction Management privileges in the Interaction Workspace Interaction Management Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role, allowing an Interaction Workspace privilege, and assigning a Role to an agent or agent group](#)).

**Interaction Management Privileges**

Role privilege	Description
Interaction Management - Can Use	The agent is permitted to access the interaction queue management functions.
Interaction Management - Can Move to Queue	The agent is permitted to move an interaction from a workbin or from a queue to a queue. Requires 'Workbins - Can Use My Workbins' or 'Workbins - Can Use My Team Workbins' or 'Interaction Queue Management - Can Use'.
Interaction Management - Can Move to Workbin	The agent is permitted to move an interaction from a workbin or from a queue to a workbin. Requires 'Workbins - Can Use My Workbins' or 'Workbins - Can Use My Team Workbins' or 'Interaction Queue Management - Can Use'.
Interaction Management - Can Edit Case Data	The agent is permitted to edit the case information of an interaction in a queue or a workbin. Requires 'Workbins - Can Use My Workbins' or 'Workbins - Can Use My Team Workbins' or 'Interaction Queue Management - Can Use'.

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# Interaction Workspace SIP Endpoint Privileges

The following table lists the Interaction Workspace SIP Endpoint privileges in the Interaction Workspace SIP Tasks section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Interaction Workspace SIP Endpoint Privileges**

Role privilege	Description
SIP Endpoint - Can Use	The agent is permitted to use the Interaction Workspace SIP Endpoint to connect to a SIP Switch or SIP Server.
SIP Endpoint - Can Use Embedded SIP Endpoint	Indicates if Interaction Workspace will start automatically an embedded SIP Endpoint for the SIP Agent. If set to false, you will require an external SIP Endpoint application.

# Outbound Campaign Privileges

The following table lists the outbound campaign privileges in the Interaction Workspace Outbound Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Outbound Campaign Privileges**

Role privilege	Description
Outbound - Can Use	The agent is permitted to use the Outbound Campaign functions.
Outbound - Can Reject Record	The agent is permitted to decline a preview record so that it can be processed by somebody else in the campaign.
Outbound - Can Cancel Record	The agent is permitted to decline a preview record so that it is not processed at all during the current campaign.
Outbound - Can Dial Alternative Chained Record	The agent is permitted to dial a number from the preview record chain that is different than the number selected by the system.
Outbound - Can Get Next Preview Record	The agent is permitted to request a new preview record while the processing of the previous one terminates.
Outbound - Can Use Push Preview	The agent is permitted to actively take part in Outbound Push Preview campaigns.
Outbound - Push Preview Can Decline	The agent is permitted to decline Outbound Push Preview interactions.
Outbound - Can Mark Do Not Call	The agent is permitted to mark a contact as Do Not Call.
Outbound - Can Set Call Result	The agent is permitted to set a call result to the outbound record.
Outbound - Can Reschedule	The agent is permitted to reschedule an outbound record for an active call. Use the Outbound - Can Reschedule Before Call privilege to allow rescheduling before the call is dialed. Depends on Outbound - Can Use. <b>Modified:</b> 8.1.40x.xx.
Outbound - Can Reschedule Before Call	The agent is permitted to reschedule an outbound record before calling the contact (in Pull and Push Preview Mode). Requires privilege Outbound - Can Reschedule. <b>Added:</b> 8.1.40x.xx
Outbound - Can Reschedule On New Number	The agent is permitted to reschedule an outbound record on a new number (which results in a new record added to the chain).
Outbound - Can Edit Record Data	The agent is permitted to edit the outbound record

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Role privilege	Description
	fields configured as editable.

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# Security Privileges

**Added:** 8.1.40x.xx

The following table lists the Security privileges in the Interaction Workspace Security Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role, allowing an Interaction Workspace privilege, and assigning a Role to an agent or agent group](#)).

**Security Privileges**

Role privilege	Description
Security - Can Manually Change Password	The agent is permitted to change their own password. This can be done by using a menu action, or it can be a requirement.

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# SMS Privileges

The following table lists the SMS privileges in the Interaction Workspace SMS Access section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**SMS Privileges**

Role privilege	Description
SMS - Can Use SMS Channel	The agent is permitted to use the SMS media channel.
SMS - Can Decline	The agent is permitted to reject SMS interactions that are directed to the agent.
SMS - Can One Step Transfer	The agent is permitted to use the instant-transfer functionality.
SMS - Can Set Interaction Disposition	The agent is permitted to set the disposition code of a SMS interaction.
SMS - Can Create	The agent is permitted to create SMS interactions from the Team Communicator and the Contact Directory.



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## Standard Response Privileges

The following table lists the Standard Resource Library (SRL) privileges in the Interaction Workspace Standard Response Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Standard Response Privileges**

Role privilege	Description
Standard Response Library - Can Use	The agent is permitted to access the Standard Response Library.

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# Statistics Privileges

The following table lists the Statistics privileges in the Interaction Workspace Statistics Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Statistics Privileges**

Role privilege	Description
Statistics - Can Use My Statistics	The agent is permitted to use the My Statistics tab to view Key Performance Indicators.
Statistics - Can Use Contact Center Statistics	The agent is permitted to use the Contact Center Statistics tab to view Object Metrics (Contact Center Statistics).
Statistics - Can Use Gadget Statistics	The agent is permitted to use the Statistics Gadget to view Key Performance Indicator and Contact Center Statistics.

## Team Communicator Privileges

The following table lists the Team Communicator privileges in the Interaction Workspace Team Communicator Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Team Communicator Privileges**

Role privilege	Description
Team Communicator - Can Use	The agent is permitted to use the Team Communicator. The other Team Communicator privileges cannot be configured if the value is Not Assigned.
Team Communicator - Can Manage Favorites	The agent is permitted to save favorite internal targets and contacts in the Team Communicator. This privilege is dependent on Team Communicator - Can Use.
Team Communicator - Can View Favorites	The agent is permitted to see and use the favorite internal targets and contacts that they have saved in the Team Communicator. This privilege is dependent on Team Communicator - Can Use.
Team Communicator - Can View Recent Calls	The agent is permitted to see and use the recent call list of internal targets and contacts that they have saved in the Team Communicator. This privilege is dependent on Team Communicator - Can Use.
Team Communicator - Can Search All	The agent is permitted to search within all internal targets and contacts in the Team Communicator. This privilege is dependent on Team Communicator - Can Use. <b>Added:</b> 8.1.40x.xx

## Team Lead Privileges

The following table lists the Team Lead privileges in the Interaction Workspace Team Lead Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)). Also, refer to the [Procedure: Enabling agents to be Team Leads](#).

**Team Lead Privileges**

Role privilege	Description
Team Lead - Can Use	Allows the agent to use Team Lead functionality.
Team Lead - Can Auto Coach Voice Interactions	Permits a Team Lead to automatically coach all the voice interactions of a selected agent. <b>Added:</b> 8.1.40x.xx
Team Lead - Can Auto Coach Chat Interactions	Permits a Team Lead to automatically coach all the chat interactions of a selected agent. <b>Added:</b> 8.1.40x.xx
Team Lead - Can Auto Monitor Chat Interactions	Allows the automatic monitoring of all the chat interactions of a selected agent.
Team Lead - Can Auto Monitor Voice Interactions	Allows the automatic monitoring of all the voice interactions of a selected agent.
Team Lead - Can Barge-in Chat	Allows the team lead to Barge in to Chat interactions.
Team Lead - Can Barge-in Voice	Allows the team lead to barge in to voice interactions.
Team Lead - Can Coach Chat Via Chat	Allows the team lead to coach an agent via the chat channel for a monitored chat interaction.
Team Lead - Can Coach Chat Via Voice	Allows the team lead to coach an agent via the voice channel during a monitored chat interaction.
Team Lead - Can Coach Chat and Voice Via IM	Allows the team lead to coach an agent via the instant messaging channel during a monitored chat or voice interaction.
Team Lead - Can Coach Current Voice Interactions	Permits a Team Lead to coach the current voice interactions of a selected agent. <b>Added:</b> 8.1.40x.xx
Team Lead - Can Coach Current Chat interactions	Permits a Team Lead to coach the current chat interactions of a selected agent. <b>Added:</b> 8.1.40x.xx
Team Lead - Can Monitor Current Monitor Chat Interactions	Allows the monitoring of a selected active chat interaction of a selected agent.
Team Lead - Can Monitor Current Voice Interactions	Allows the monitoring of the currently active voice interaction of a selected agent.
Team Lead - Can Stop Supervising Chat	Allows the team lead to stop supervising chat interactions for the selected agent.

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Role privilege	Description
Team Lead - Can Stop Supervising Voice	Allows the team lead to stop supervising voice interactions for the selected agent.

## Voice Privileges

The following table lists the voice privileges in the Interaction Workspace Voice Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Voice Privileges**

Role privilege	Description
Voice - Can Answer Call	The agent can choose to answer a voice interaction that is routed to their desktop. Auto-answer is disabled.
Voice - Can Delete From Conference	The agent can remove a party from a voice conference.
Voice - Can Forward Call	The agent is permitted to configure a call forward to a different number for voice interactions.
Voice - Can Hold/Retrieve Call	The agent is permitted to put voice interactions on hold and retrieve voice interactions that are on hold.
Voice - Can Make Call	The agent is permitted to call both internal targets and contacts.
Voice - Can Control Call Recording	The agent is permitted to perform an emergency recording of the call (this functionality is not available for all supported switches). Depends on setting the Interaction Workspace Voice privilege to Can Use. The type of recording depends on the <a href="#">active-recording.voice.recording-type</a> option which can be set to one of the following values: NETANN (default) for emergency recording, or MSML for active recording.
Voice - Can One Step Conference	The agent is permitted to start conferences without speaking with the target first (Instant Conference).
Voice - Can One Step Transfer	The agent is permitted to transfer calls without speaking with the target first (Instant Transfer).
Voice - Voice - Can Deny or Authorize Listening for a Conference Party	Enables the initiator of a conference to prevent a party in the conference from listening to the call. Once listening is denied, the initiator can then reallocate the party to listen to the conference.
Voice - Can Reject Call	The agent can choose to reject a voice interaction that is routed to their desktop.
Voice - Can Release Call	The agent is permitted to manually end calls.
Voice - Can Send DTMF	The agent is permitted to attach DTMF to the call data.
Voice - Can Set Interaction Disposition	The agent is permitted to specify the call outcome

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Role privilege	Description
	by setting the disposition code.
Voice - Can Two Step Conference	The agent is permitted to contact and speak (consultation) prior to starting a conference.
Voice - Can Two Step Transfer	The agent is permitted to contact and speak (consultation) prior to transferring the voice interaction to the target.
Voice - Show Silent Monitoring	The agent is permitted to know when they are being silently monitored by a supervisor.
Voice - Voice Channel	The agent is permitted to use the voice channel. The other voice privileges cannot be configured if the value is Not Assigned.

## Web Callback Privileges

The following table lists the Web Callback privileges in the Interaction Workspace Web Callback Access section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

Role privilege	Description
Web Callback - Can Cancel	Permits an agent to decline a Web Callback so that it is not processed. Depends on 'Web Callback - Can Use Web Callback Channel'. <b>Added:</b> 8.1.40x.xx
Web Callback - Can Use Callback Channel	The agent is permitted to use the Web Callback media channel.
Web Callback - Can Decline	The agent is permitted to reject Web Callback interactions that are directed to the agent.
Web Callback - Can Reject	Permits an agent to decline a Web Callback so that it can be processed by a different agent. Depends on 'Web Callback - Can Use Web Callback Channel'. <b>Added:</b> 8.1.40x.xx
Web Callback - Can Reschedule	The agent is permitted to reschedule a Web Callback interaction. Use the Web Callback - Can Reschedule Before Call privilege to allow rescheduling before the call is dialed. Depends on Web Callback - Can Use Web Callback Channel. <b>Modified:</b> 8.1.40x.xx
Can Reschedule Before Call	The agent is permitted to reschedule a Web Callback Preview at a different date and/or time. The Can Reschedule privilege must be enabled for this privilege to be active. If Can Reschedule is enabled but Can Reschedule Before Call is disabled, agents can still reschedule the Web Callback Preview after they have connected and disconnected the call. Depends on 'Web Callback - Can Reschedule'. <b>Added:</b> 8.1.40x.xx
Web Callback - Can Reschedule On New Number	The agent is permitted to reschedule a Web Callback interaction by using a new phone number.
Web Callback - Can Set Interaction Disposition	The agent is permitted to set the disposition code of a Web Callback interaction.
Web Callback - Can Mark Done	The agent is permitted to mark inbound Web Callback interactions as Done without processing them further.



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## Workbins Privileges

The following table lists the Workbin privileges in the Interaction Workspace Workbin Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

**Workbin Privileges**

Role privilege	Description
Workbins - Can Use My Workbins	The agent is permitted to access the My Workbins functions. <b>Modified:</b> 8.1.40x.xx
Workbins - Can Use My Team Workbins	The agent is permitted to access the My Team Workbin functions. <b>Added:</b> 8.1.40x.xx

# Workitem Privileges

The following table lists the Workitem privileges in the Interaction Workspace Workitem Privileges section of the Role Privileges tab that can be enabled for a role. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator (refer to the [Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group](#)).

## Workitem Privileges

Role privilege	Description
Workitem - Can Use WorkItem Channel	The agent is permitted to use the workitem media channel.
Workitem - Can Decline	The agent is permitted to decline incoming workitem interactions.
Workitem - Can One Step Transfer	The agent is permitted to use the instant-transfer functionality.
Workitem - Can Set Interaction Disposition	The agent is permitted to set the disposition code of a workitem interaction.
Workitem - Can Mark Done	The agent is permitted to mark workitem interactions as Done.
Workitem - Can Move To Workbin	The agent is permitted to move workitem interactions to a workbin for later handling or handling by another agent or agent group.

# Change History

The following pages contain a list of topics that are new or that have changed significantly since the previous release of Interaction Workspace and the supporting documentation:

- [New In Interaction Workspace Deployment Guide 8.1.401.00](#)
- [New In Interaction Workspace Deployment Guide 8.1.402.00](#)

# New In Interaction Workspace Deployment Guide 8.1.401.00

The following topics have been added or changed significantly since the 8.1.3 release:

- The **Tables of Support Systems** have been updated. The **Operating System** table now includes Microsoft Windows 8. A new table, **Virtualized Platform**, has been added to provide a list of supported virtual environments, including Citrix XenDesktop 5.6, Citrix XenApp 6.x, Citrix Presentation Server 4.5, VMWare View 5.x, and VMWare ThinApp 4.6. Refer to the *Supported Operating Environments Reference* and the *Interaction Workspace Release Note* for details.
  - The **Chat conference with a skill or an agent group feature** has been added.
    - The `intercommunication.chat.conference.invite-timeout` option has been added to support this feature.
    - The `intercommunication.chat.queue` and `intercommunication.chat.routing-based-targets` options have been modified to support this feature.
    - The `Chat.canOneStepConference` privilege has been modified to support this feature.
  - Information about Chat Preview has been added to the **Chat Interactions** topic. Placing your mouse pointer over any flashing element displays a preview of the latest message from a contact.
  - The **Workbin and Queue Management** and **Creating Interaction Filters for Team Leads** features have been added to the **Workbins** feature.
    - The **Interaction Management** and **Workbins** privileges have been added to enable this feature.
    - The `interaction-management.available-interaction-page-sizes` option has been added to support this feature.
    - The `interaction-management.filters` option has been added to support this feature.
    - The `interaction-management.interactions-filter.displayed-columns` option has been added to support this feature.
  - The ability to open in-progress workitems has been added to the **Workitems** feature.
  - The ability for agents to **change their own password** has been added to Interaction Workspace.
    - The **Security Privileges** have been added to enable this feature.
  - Information about **Transport Layer Security (TLS)** has been updated.
  - The **Editing Case Information** feature has been added.
  - The reschedule Outbound preview feature has been added. The following topics have been updated to support this feature:
    - **Outbound Campaign Interactions**
    - **Outbound Campaign Privileges**
  - The reschedule Web Callback preview feature has been added. The Can Reschedule Before Call privilege has been added. The following topics have been updated to support this feature:
    - **Web Callback Interactions**
-

- [Web Callback Privileges](#)
- The following new features are available for e-mail interactions:
  - The [email.max-attachments-size](#) option has been added to specify the maximum number of megabytes that are permitted for attachments to e-mail interactions.
  - The Can Change Format New Email and Can Change Format Reply Email [e-mail privileges](#) have been added to enable agents to change the type of outbound e-mail interactions between HTML and plain text.
- The description of the [active-recording.voice.recording-type](#) option has been clarified.
- The description of the [chat.pending-response-to-customer](#) option has been modified to include information about the flashing of user interface elements.
- The [interaction.window.show-case-interaction-panel-button](#) option has been added to control the display of the interaction view collapse/expand button.
- The valid values of the [intercommunication.email.routing-based-targets](#) and [intercommunication.<media-type>.routing-based-targets](#) options have been modified.
- The [login.enable-login-without-channel](#) has been added to specify whether agents can login to Interaction Workspace without being logged in to any channels.
- Information about configuring dictionaries has been added to the [Spelling Check](#) topic. The [spellchecker.corporate-dictionary-file](#) option description has been clarified.
- The [editor.font-size-units](#) option has been added to the [Miscellaneous options](#) to enable you to specify whether points or pixels are the units used for fonts in the Rich Editor view for e-mail, chat, SMS, and other text based interactions.
- The [sounds.preloadfiles](#) option has been added to the [Miscellaneous options](#) to enable you to specify the names and locations of sound files that you want pre-loaded into Interaction Workspace when an agent logs in.
- The [Team Communicator - Can View All](#) privilege has been added to enable agents to see and use all internal targets and contacts in the Team Communicator view.
- The following privileges have been added to enable Team Leads to automatically coach all the voice and chat interactions of a selected agent:
  - [Team Lead - Can Auto Coach Chat Interactions](#)
  - [Team Lead - Can Auto Coach Voice Interactions](#)
- The following privileges have been added to enable Team Leads to coach the voice and chat interactions of a selected agent:
  - [Team Lead - Can Coach Current Chat Interactions](#)
  - [Team Lead - Can Coach Current Voice Interactions](#)
- New recommendations for [Business Continuity switchover](#) have been added.

# New In Interaction Workspace Deployment Guide 8.1.402.00

The following topics have been added or changed significantly since the 8.1.3 release:

- Information about [Dialing an alternate number in Outbound Preview Mode](#) was added to the Outbound Campaign Interactions topic.
- The [Security](#) topic was updated to include new information for TLS, FIPS, and configuring security for Interaction Workspace SIP Endpoint.
- Information about passing login information through the command line interface when logging in to the Interaction Workspace application was added to the [Agent Login and Authentication](#) topic.
- The [Procedure: Adding a new language dictionary to Interaction Workspace](#) was added to the information about the Spelling Check feature.
- The following options were added to the Contact options:
  - [contact.history-default-time-filter-main](#)
  - [contact.myhistory-default-time-filter-main](#)
  - [contact.ucs-interaction.<media-type>.use-server-date](#)
- The [email.move-inbound-to-in-progress-workbin-on-reply](#) option was added to the E-Mail options.
- The following options were added to the Interaction Workspace SIP Endpoint options:
  - [sipendpoint.exit-on-voice-logoff](#)
  - [sipendpoint.proxies.proxy0.media\\_encrypted](#)
  - [sipendpoint.proxies.proxy1.media\\_encrypted](#)
  - [sipendpoint.transport-protocol](#)
- The [outbound.call-result-automatically-selected](#) option was added to the Outbound options.
- Information about the [Contact - Can Edit Contact](#) privilege has been updated.