GENESYS™

Workspace Desktop Edition Deployment Guide

Provisioning Functionality

4/3/2025

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	- Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group - Procedure: Optimizing the Login Window - Procedure: Provisioning Interaction Workspace for the Voice channel - Procedure: Declaring and using new Not-Ready Reason codes
Enable internal and external communications	- Procedure: Enabling an agent to use the Interaction Workspace SIP Endpoint - Procedure: Enabling an agent to use the SIP Preview feature - Procedure: Enabling an agent to use Team Communicator to call/transfer to an agent group or a skill - Procedure: Enabling an agent to use Team Communicator to call a contact - Procedure: Enabling an agent to use Outbound Campaign functionality call to a contact - Procedure: Enabling an agent to use E-Mail to correspond with a contact - Procedure: Enabling an agent to use Chat to chat with a contact - Procedure: Enabling an agent to use SMS to

Objective	Related Procedure and Actions
	exchange SMS with a contact • Procedure: Enabling an agent to use Workitems to handle open media types • Procedure: Enabling an agent to use agent, place, agent group, or place group Workbins • Procedure: Enabling agents to use Instant Messaging • Procedure: Enabling an agent to use disposition codes • Procedure: Enabling agents to manage contact history • Procedure: Configuring the Interaction Workspace application to enable an agent to edit case information • Procedure: Enabling agents to use the Standard Responses Library (SRL) • Procedure: Enabling agents to view Broadcast Messages • Procedure: Enabling agents to be Team Leads
Enable agents to view KPIs and contact center statistics	• Procedure: Enabling an agent to view My Statistics (KPIs) • Procedure: Enabling an agent to view Contact Center Statistics (Object Metrics) • Procedure: Enabling an agent to view My Statistics (KPIs) and Contact Center Statistics in the Statistics Gadget
Enable agents to manage contacts	• Procedure: Enabling agents to manage contacts • Procedure: Configuring the Interaction Workspace application and Universal Contact Server to enable custom contact attributes
Modify a routing strategy to override Interaction Workspace options, based on attached data	• Procedure: Modifying a Routing Strategy to override an Interaction Workspace option, based on attached data