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Workspace Desktop Edition Deployment Guide

Exposing History to agents

12/20/2025

Exposing History to agents

[**Modified:** 8.5.117.18, 8.5.126.07, 8.5.136.07, 8.5.142.05, 8.5.143.08, 8.5.144.05]

Important

This topic includes the History Management portion of the former **Managing Contact** topic. The Contact Management content has been moved to [Exposing Contacts to Agents](#) and the Contact Lookup and Contact History Generation content has been moved to [Triggering Contact Look-up and Populating History](#).

Configuring History management

[**Modified:** 8.5.104.15, 8.5.117.18]

Use the Procedure [Enabling agents to manage and search contact and interaction history](#) to enable the Contact History feature and [Enabling Agents to Manage Contacts](#) to set up agents, Workspace, and Universal Contact Server.

privileges

Workspace enables agents to manage contacts. The [privileges](#) that can be enabled for an agent are the following:

- Can Use Contact History
- Manually assign an interaction to a Contact
- Interaction Threads
- Interaction Ownership
- Populating the Contact History with eServices Interactions
- Resend email interactions from the Contact History

Use the options in the [contact](#) section to configure the way in which agents can manage interactions in the History.

Accessing History

Workspace can search for and display a list of Historical Interactions in three different scopes:

- The Contact History search feature returns lists of interactions restricted by the ContactID. You can filter the result list by timeframe and by configured filters, and then search within this list in either quick search or advanced search mode.

- The My History Search feature returns lists of interactions restricted by the ownerID. You can filter the result by timeframe and configured filters, and then search within this list in either quick search or advanced search mode.
- The Interaction Search feature enables an agent to search the historical interactions without knowing the contact name or being restricted to interactions processed by that agent. This view does not return any interaction by default. It allows an agent to search for interactions by using quick search or advanced search mode. You can filter the result by timeframe and configured filters.

For UCS 8.5 environments, in any of these scopes, the search operation searches interactions that are stored in the UCS Lucene index and that correspond to the content of the "Main" UCS database. The interactions that have been pruned from the Main to the Archive UCS database are *not* available for searching.

Configuring History display

[**Modified:** 8.5.126.07, 8.5.142.05, 8.5.143.08]

Use the following configuration options to specify how the contact history is displayed in Interaction Search, My History, and Contact History views:

- `contact.history-displayed-columns`: Specifies the list of Interaction Attributes that are used to display historical interactions in Contact History Flat View.
- `contact.history-displayed-columns-treeview`: Specifies the list of Interaction Attributes that are used to display historical interactions in Contact History Tree View.
- `contact.myhistory-displayed-columns`: Specifies the list of Interaction Attributes that are used to display historical interactions in My History Flat View.
- `contact.myhistory-displayed-columns-treeview`: Specifies the list of Interaction Attributes that are used to display historical interactions in My History Tree View.
- `contact.all-interactions-displayed-columns`: Specifies the list of Interaction Attributes that are used to display historical interactions in Interaction Search.
- `contact.history.media-filters`: Specifies the list of media types that can be used to filter the list of interactions.
- `contact.history.filters-<attribute>`: Specifies a custom interaction attribute that is defined in **Universal Contact Server** that can be used to automatically filter the set of interactions presented to the agent.
- `contact.history-default-time-filter-main`: Specifies the default position of the time filter slider in Contact History.
- `contact.myhistory-default-time-filter-main`: Specifies the default position of the time filter slider in My History.
- `contact.all-interactions-default-time-filter-main`: Specifies the default position of the time filter slider in interaction search list.
- `<media-type>.contact-history.enable-combine-ixn-with-current`: Specifies how an interaction is displayed when opened from the Interaction view **Contact History** tab. [**Added:** 8.5.143.08]

To mask contact information in the Workspace interface from agents, refer to **Masking a contact phone number**. [**Added:** 8.5.144.05]

Formatting a custom history attribute as a date

When a custom attribute is designed to store dates, you can specify how it should be formatted in the History views.

First, create a Business Attribute Value in the Business Attribute **Interaction Attributes** to represent your custom attribute. Then, in the annex of this Business Attribute Value create an interaction-workspace section and add the following options:

- `display-type=date`
- `date.time-format=<date and time format>`
Refer to `date.time-format` for supported formats.

Configuring History Quick Search

- `contact.history-quick-search-attributes`: Specifies which interaction attributes are used to Quick Search interactions within the History of a Contact. Refer to list of interaction attributes available for search.
- `contact.myhistory-quick-search-attributes`: Specifies which interaction attributes are used to Quick Search interactions within My History. Refer to list of interaction attributes available for search.
- `contact.all-interactions-quick-search-attributes`: Specifies which interaction attributes are used to Quick Search interactions within the Interaction Search view. Refer to list of interaction attributes available for search.

Configuring History Advanced Search

The Advanced Search enables agents to specify multiple search criteria by selecting predefined search attributes from drop-down buttons in Interaction Search, Contact History and My History views. The Advanced Search can be constrained by Match All and Match Any filter. Depending on the selected search criteria, various search types are allowed, such as Matches and Equals.

- `contact.history-search-attributes`: Specifies the list of interaction attributes that are available in advanced search (refer to list of interaction attributes available for search).
- `contact.history-advanced-default`: Specifies the list of interaction attributes that are presented as default search parameters in advanced search.
- `contact.date-search-types`: The list of search types that are available for the agent to search for historical interactions by date.
- Use the `contact.history-custom-attribute-values.<attribute-name>` options to specify the comma separated list of possible values for each custom search attribute that you want to enable. Optionally, in the dictionary, specify the display name of agent groups by adding the following parameter:

```
<Value Id="Contacts.ContactDirectoryView.CustomAttribute.<custom-attribute-name>.<attribute-value-name>" String=" Display Name"/>
```

- **Configuring Groups**: To group the search attributes that can be used in advanced search, specify a comma separated list of search attributes as the value for the `contact.history-search-attribute-group.<group-name>` option.

Optionally, in the dictionary, specify the display name of the attribute groups by adding the following key:

```
<Value Id="Contacts.InteractionSearchView.Group.<GroupName>" String=" Display Name"/>
```

List of interaction system attributes available for search and column display

Quick, Advanced, Contact History, My History, and All Interactions search of Historical Interactions can be configured to operate with a list of search attributes. There are System and Custom attributes. This table defines the scope of configuration for each search type.

Interaction History Search System Attributes

Attribute Name	Advanced Search	Quick Search	Contact/ My History (Grid)	Contact/ My History (Tree)	All Interactions Search (Grid)	All Interactions Search (Tree)	Description
CcAddresses	Yes	Yes	No	No	Yes	Yes	The email Cc address
ContactId	Yes	No	Yes	Yes	Yes	Yes	The Contact of the interaction (it can be searched by using Team Communicator)
EndDate	Yes	No	Yes	Yes	Yes	Yes	The date when the interaction was marked completed in the Genesys system
EstablishedDate	Yes	No	No	No	Yes	Yes	The date when the Chat session was established
FromAddress	Yes	Yes	No	Yes	Yes	Yes	The email From address
FromPersonal	Yes	Yes	No	No	Yes	Yes	The Personal Part of the email From address

Attribute Name	Advanced Search	Quick Search	Contact/ My History (Grid)	Contact/ My History (Tree)	All Interactions Search (Grid)	All Interactions Search (Tree)	Description
Id	Yes	Yes	No	Yes	No	Yes	The unique ID of the Interaction
Mailbox	Yes	Yes	No	No	Yes	Yes	The Mailbox from which the email was received
OwnerId	Yes	No	Yes	Yes	Yes	Yes	The person who processed the interaction (it can be searched by using Team Communicator)
PhoneNumber	Yes	Yes	No	No	No	Yes	The Phone Number from which the contact called or was used to call the contact
ReleasedDate	Yes	No	No	No	Yes	Yes	The date when the Chat session was ended
ReplyToAddress	Yes	Yes	No	No	Yes	Yes	The email Reply-To address
ReviewerId	Yes	No	No	No	Yes	Yes	The person who reviewed the interaction (typically an email — it can be searched by using

Attribute Name	Advanced Search	Quick Search	Contact/ My History (Grid)	Contact/ My History (Tree)	All Interactions Search (Grid)	All Interactions Search (Tree)	Description
							Team Communicator)
SentDate	Yes	No	No	No	Yes	Yes	The date when the outbound email was sent to the destination
StartDate	Yes	No	Yes	Yes	Yes	Yes	The date when the interaction was created in the Genesys system
Status	Yes	No	Yes	Yes	Yes	Yes	The Status of the interaction in UCS (In Progress, Done)
StructuredText	Yes	Yes	No	No	Yes	Yes	The Transcript of the Chat, SMS Session, or Facebook Private Message session, or the E-Mail Rich Text Content
Subject	Yes	Yes	Yes	Yes	Yes	Yes	The Subject of the interaction
SubtypeId	Yes	No	No	Yes	No	Yes	The Sub-Type of the eServices interaction (for example: InboundNew, OutboundReply)
Text	Yes	Yes	No	No	Yes	Yes	The text received from or sent to the contact,

Attribute Name	Advanced Search	Quick Search	Contact/ My History (Grid)	Contact/ My History (Tree)	All Interactions Search (Grid)	All Interactions Search (Tree)	Description
							typically the email plain text content
TheComment	Yes	Yes	No	No	Yes	Yes	The Notes attached to the interaction by the person who handled it
ToAddresses	Yes	Yes	No	No	Yes	Yes	The email To address.
TypeId	Yes	No	No	Yes	No	Yes	The Type of the eServices interaction (for example: Inbound, Outbound)

- System date attributes: "On", "OnOrAfter", "Before", and "Between" search types. This is configured by using the contact.date-search-types option.
- System text attributes: can be searched by using the Matches search type which, for each word typed into the query, returns at least one word that starts with this word. Text search does not support query containing double quotes. Interaction Search enables agents to search for the content of email and chat interactions. Content for these interactions is stored in "Text" and/or "StructuredText" attributes. Text includes the content of the plain-text email interactions. StructuredText includes the content of HTML-formatted email interactions and chat transcripts, as well as SMS interactions handled in "session mode" and Facebook Private Message sessions.

Custom History Search Attributes: A custom interaction search attribute is an interaction attribute that is not part of the default Genesys UCS data design. A custom interaction search attribute is typically defined during the Business Process design and is implemented by the addition of key-value pair to the attached data of the interactions that are then stored in UCS.

You can configure Workspace to use custom interaction search attributes as search criteria that are used in quick search or displayed in the advanced search mode of Interaction Search, Contact History, and My History views, by using the contact.history-quick-search-attributes, contact.myhistory-quick-search-attributes, contact.all-interactions-quick-search-attributes, contact.history-search-attributes configuration options.

Limitation: JOINT searches of the interaction list with the contact list are not possible unless you create a business process that copies attributes from the contact records into the corresponding interaction records.

Custom interaction properties

[**Modified:** 8.5.136.07]

You can create custom attributes and make them searchable. In **UCS 9.1 environments**, the interaction properties are searchable when you add them to a custom attribute. In **UCS 8.5 environments**, you must configure the attribute first to make it searchable— for more information, refer to *Making an Attribute Searchable from the Desktop* in the **eServices** documentation.

In UCS 9.1 environments, use the `contact.history-custom-attributes-search-types` option to specify whether the custom attribute is can be found as an exact match (`is`) or by a "starts-with" (`begins-with`) search. In UCS 8.5 environments, the only supported value is `is`; it is not necessary to configure this option in UCS 8.5 environments.

Warning

The following limitations **must** be taken into account before enabling an interaction custom attribute as an advanced search criteria:

- For **UCS 8.5 environments**, custom interaction search attribute support **only** an *exact match* search; for **UCS 9.1 environments**, *begins-with* searches are also supported. Genesys *strongly* recommends that you use the `contact.history-custom-attribute-values.<attribute-name>` option to configure a list of predefined values that enable the agent to select the search value from a list. You can control the search behavior by using the `contact.history-custom-attributes-search-types` option. The custom attributes used in the interaction history search must be defined as a Business Attribute Value of the **Interaction Attributes** Business Attribute in the Configuration Layer. In the Annex of the Business Attribute Value, the `is-searchable` option in the settings section *must* be set to `true`.
- For **UCS 8.5 environments**, when you assign custom interaction search attribute key names, you **must** avoid key names that are sub-strings of other key names that are also stored as business attached data of the same or other interactions. Failure to heed this warning will result in misleading search results.

For example, if the term `Priority` is defined as a custom interaction search attribute and the following attributes might also be part of the interactions that stored in UCS: `Priority`, `GEMX-Priority`, `_Priority`, and `GEMX-MSMail-Priority`. If these alternate `*Priority` attributes can be assigned with a value set that is partially shared with the `Priority` attribute, the wrong matching logic and extended result set might be returned.

Contact Management: Summary of activity that is related to the current contact

In the interaction windows, 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 and Workspace Desktop Edition 8.5.0 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 and Workspace Desktop Edition 8.5.0 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, Workspace displays the list of recent interactions with this contact as a tooltip for the icon:

- Can Use Contact History

Restricting Contact History access

You can configure Workspace to restrict the access of agents to the Contact History. 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.

Restricting Interaction History views and Search by permissions

Workspace automatically restricts the results that are displayed in the interaction list in the following interface views:

- Contact History
- My History
- Global Interaction Search

The `contact.history.filters-<attribute>` option modifies the search logic and presentation whenever the Agent accesses or searches an interaction list.

To provision restricted access to the interaction lists, 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.history.filters-<attribute> where <InteractionAttributeName>=AttributeValue1, AttributeValue2`

The custom attributes used in the interaction history search must be defined as a Business Attribute Value of the **Interaction Attributes** Business Attribute in the Configuration Layer. In the Annex of

the Business Attribute Value, the `is-searchable` option in the settings section *must* be set to `true` and the value of the `is-sortable` option should also be set to `true` when you enable this feature.

Example

The following interaction custom attribute is attached to interactions stored in UCS: `DepartmentID`

You want to restrict members of the Agent Group ABC so that they can see the Contact History only through filters that give them access to interactions related to the Sales or Support departments.

Configure the following interaction-workspace section options in the Annex of the ABC Agent Group:

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

The Sales attribute is displayed as an option in the **Filter** menu and as an attribute in the ContactHistory view list or grid. Agents can alternatively access the Sales or the Support interactions, but cannot see any other interactions.

Note: If you define only one possible value, for example, `contact.history.filters-DepartmentID=Sales`, the related filter will not show up in the Contact History form, but this filter is applied automatically to all agent requests to access the history.

Enabling History filtering

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-<attribute>`

Managing interaction ownership

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. 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.