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# Workspace Desktop Edition Deployment Guide

[Email](#)

# Email

[**Modified:** 8.5.116.10, 8.5.113.11, 8.5.118.10, 8.5.127.06, 8.5.141.04, 8.5.143.08]

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### Features

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

- Reply to inbound emails (with or without the original text).
- Create new outbound emails
- Validate the format of email addresses enter by agents into the To, Cc, and Bcc fields and provide feedback to agents prior to sending an email with an improperly formatted address [**Modified:** 8.5.114.08]
- Check the **spelling** of an outbound email
- Insert, edit, or delete hyperlinks dynamically, by context menu, or by a toolbar button into outgoing email interactions [**Added:** 8.5.118.10]
- Apply a signature to an outbound email
- Store emails in a workbin
- Transfer an email to an internal target such as another agent or an interaction queue
- Forward or forward as an attachment an email to someone outside of the Genesys system
- Set a disposition code
- Mark the interaction as Done
- **Quality Assurance (QA) review of emails**
- View and copy links to non-embedded images in inbound and outbound email interactions
- View and insert Standard Responses
- Paste content from browsers and other applications that display HTML
- Paste formatted text as plain text in HTML emails using Paste Text Only format. [**Added:** 8.5.150.06]
- Paste images from browsers and other applications that display HTML
- Print emails

#### Tip

If you are using Interaction Routing Designer to create a Business Process to route your email interactions, refer to "Multimedia Objects" in the [Universal Routing 8.1 Reference Manual](#).

### Enabling Email

This section describes the privileges and configuration options that you use to enable Workspace

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email.

### Privileges

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

- Can Use E-mail media
- Can Decline
- Can Move to Workbin
- Can Reply
- Can Reply All
- Can Add Attachments
- Can Send
- Can Save
- Can Delete
- Can Transfer
- Can Forward
- Can Forward As An Attachment
- Can Set Interaction Disposition
- Can Interim Send
- Can Print E-mail
- Can Change Format In New E-mail
- Can Change Format In Reply E-mail
- Can Mark Done

### Basic Configuration

You can find all of the email configuration options [here](#). Use the following configuration options for correct email interaction handling:

- `email.default-queue`: Specifies the default queue for email interactions.
- `email.outbound-queue`: Specifies the default queue for email interactions.
- `workbin.email.draft`: Specifies the name of the Workbin to be used to store draft email interactions
- `workbin.email.in-progress`: Specifies the workbin to be used to store email interactions which are in the In Progress state.
- `email.auto-answer`: Specifies whether an email interaction is automatically answered when it is routed to an agent. This option can be [overridden by a routing strategy](#). You can also configure auto-answer to display a timer that enables an agent to view case information before the interaction is automatically answered by using the `email.auto-answer.timer` and `email.auto-answer.enable-reject` options [**Added:** 8.5.105.12].

- Reply to inbound emails (with or without the original text). The behavior of the email.reply-prefix option can be overridden by a routing strategy to conform to locale requirements [**Added:** 8.5.116.10].
- email.resend-prefix: Specifies a prefix to be used for resending an email. Agents who are granted the "Email - Can Reply" privilege to reply to emails can use the Resend feature in the **History (My History, Contact History, and Interaction Search)** to resend an outgoing or reply email. [**Added:** 8.5.141.04].
- accessibility.visual-impairment-profile: Beginning with version 8.5.113.11, Workspace enables agents to enter TABs in the email composition area of outgoing email interactions by pressing the **TAB** key if the value of this option is set to false; to use the **TAB** key to step to the next control or field, agents must first press **Ctrl-TAB** to step out of the text composition area. To disable this feature, set the value of this option to true; agents will not be able to enter TABS in the email composition area, but they can use the **TAB** key to move to the next control in the tab order.
- expression.url: Specify a regular expression that defines a valid URL.
- email.can-change-text-direction: Specifies whether the Right-to-left Text Direction and Left-to-right Text Direction buttons are enabled in the outbound email editor. Agents can use these buttons to change the text field to left-to-right (LTR) script or right-to-left (RTL) script. This means that an email can have a mix of both LTR and RTL scripts. Enabling the option is not mandatory if agents are working exclusively in LTR or RTL scripts.

### Controlling attachment read-only behavior

[**Added:** 8.5.118.10]

By default, all attachments opened by agents in an external program are read-only. This means that agents cannot update them and save the changes to their hard drive.

Use the general.writable-downloaded-attachment-file-types option to override this behavior for specific file types. Allowing agents to edit only certain file types preserves the data integrity of files that you do not want agents to modify. For example, you might allow agents to modify .jpg and .png files so that the orientation can be changed, but restrict the modification of .docx, .xlsx, and other file types. Or, you might want to ensure that only .xlsx files can be updated by agents.

### Linked images

Workspace handles linked images in the HTML content of inbound and outbound email interactions. Images are loaded from their respective web servers in the background so that display of the email interaction 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.

### Provisioning the Email channel

[**Modified:** 8.5.115.17]

## 1. Enabling an agent to use Email to correspond with a contact

### Purpose:

To enable an agent to use Email 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, or Genesys Administrator Extension.
- A working knowledge of Genesys Administrator Extension.
- Workspace Application object exists in the Configuration Database.
- Workspace has a connection to [Universal Contact Server](#) and Interaction Server.
- The Procedure: [Enabling agents to manage contacts](#).

### Start

1. Allow the Email privileges (see [Email Privileges](#)) for the role to which the agent is assigned (refer to the Procedure: [Creating a Role and allowing a 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
2. Configure the Email options in the interaction-workspace section of the Workspace Application object (refer to the [Email](#) configuration option reference for a list of Email options and a description of how to configure them).
3. Configure the email queue options in the email section that are mandatory for basic email processing: email.default-queue and email.outbound-queue.
4. (Optional for transfer or email to queues) Configure the queue options in the interaction-queue-presence, queue-presence, routing-point-presence sections of the 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).
5. Configure the workbins options in the interaction-workspace section of the 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.
6. To add an email signature, configure the email.signature template option in the interaction-workspace section to enable automatic insertion of a signature in all new and reply outbound emails.
7. To limit the 'From' addresses that are available to agents to select in the outbound Email Interaction view to an address or addresses that are based on the inbound service used, or to specify a default address for each service rather than a fixed list, configure the email.from-addresses option. [**Added:** 8.5.115.17]

If you use a Business Attribute with a value containing the 'From' address that you want agents to use by default, you can use the `email.from-addresses.force-default-on-reply` option to specify whether the 'From' address of a reply email interaction is the value configured in the Business Attribute (`true`) or the target inbound mailbox of the parent inbound email interaction (`false`). [Added: 8.5.143.08]

8. To have editable case data copied back to the original inbound email from an outgoing reply email interaction when it is sent, set the value of the `email.outbound.copy-editable-case-data-in-inbound` option to `true`.

### Tip

For information about configuring Load Balancing and Business Continuity, refer to [Runtime Connection Logic](#) in the [eServices Load Balancing Business Continuity](#) section of the *Business Continuity and Disaster Recovery* topic. **Added:** 8.5.109.16

## End

## 2. Configuring filtered email From Address functionality

### Purpose:

To enable an agent to access a configured list of Contact Center "From" email addresses.

### Prerequisites

- Genesys Administrator 8.0.2 or higher, configured to show Advanced View, or Genesys Administrator Extension.
- A working knowledge of Genesys Administrator Extension.
- A Workspace Application object exists in the Configuration Database.
- Workspace can handle email interactions.

### Start

The list of "From" email addresses that can be used in outbound emails can be populated from two mutually exclusive sources, based on options that you configure:

- Email 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

## Displaying Suggested Responses

Suggested responses are relevant standard responses to an email interaction that the agents can use. These responses are associated with an email interaction as part of the routing process before the email is displayed to the agent. Workspace supports the following **Classification Server** services to detect suggested responses:

- Analyze (starting with 8.5.149.03) - Refer to the Analyze Block documentation based on the routing application you use, for more information on screening rules.
- Screen and Classify - Refer to the topic **Screening Rules** in eServices Digital Administration for more information on these services.

Workspace automatically detects the type of suggested response delivered to it.

### Important

If you are designing a business process that leverages the Analyze service, ensure that the nested KVPair structure that is returned by the Analyze service is preserved once it is attached to the user data of the email interaction.

## Restricting the editing of addresses in outgoing email

You can prevent your agents from adding or editing the To, Cc, and Bcc fields of outgoing email interactions. This feature enhances email security and other business strategies. Use the following configuration options to implement this email control feature:

- `email.outbound.editable-to-addresses`
- `email.outbound.editable-cc-addresses`
- `email.outbound.editable-bcc-addresses`

By default, these options are set to `true`, meaning that, by default, there are no email address editing restrictions applied. The behavior of these options can be overridden by a routing strategy, as described in **Overriding Options by Using a Routing Strategy**.

## Signatures

Workspace enables you to assign default signature templates to outbound email 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, email address, and so on. Refer to "Using UCS Data in Standard Responses: System Variables" in the "Genesys Knowledge Management: Basics" chapter of the **eServices User's Guide** for more information about the tagged data field. Signatures also support

linked image(s) and hyperlinks.

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

### Tip

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

## Attaching files to outgoing emails

You can enable agents to attach files to outgoing email interactions by allowing the **Can Add Attachments** privilege. Control the behavior of this feature by using the following configuration options:

- email.attachment-download-timeout
- email.max-attachments-size
- email.restricted-attachment-file-types

## Inserting images into outgoing emails

**[Added: 8.5.113.11]**

Beginning with Workspace 8.5.113.11, embedded in-line images are supported for both inbound and outgoing email interactions. If a contact inserts an image in an HTML formatted email interactions, agents see the image displayed where the contact inserted it.

You can enable agents to paste copied images at the insertion point in an outgoing email interaction or to click the **Insert Image** button and browse to find an image to insert by granting the **Can Add Embedded Image In Outbound Email** privilege. If this privilege is not granted, agents can only include images as attachments.

In Workspace 8.5.112.12 and lower, inserted images were handled as attachments; this did not allow images to be inserted next to the text that provided context for the image.

### Important

Embedded in-line images are only supported by Genesys Email Server Java version 8.5.102.02 or Higher

## Inbound email forwarding

[**Modified:** 8.5.113.11, 8.5.104.15]

Workspace supports two different email forwarding modes:

1. Forward [**Added:** 8.5.113.11]
2. Forward as an Attachment (Formerly: *Inbound Email Forward to External Resource*)

## Forward

[**Added:** 8.5.113.11]

Agents can send a commented copy of an email interaction to an external resource (someone in your company directory that is outside of the control of the Genesys environment — for example, your back office). This is sometimes referred to as in-line forwarding. A forwarded inbound email interaction is copied into a new email interaction with a note indicating the date and contact name of the inbound email interaction, and the contents of the original email at the bottom of the email body. Agents remain responsible for responding to the original inbound email interaction. Agents may or may not wait for an answer to this forward, depending upon your corporate policies and processes.

When an agent selects **Forward**, a new outbound email is created as a child of the original email. The email subject is initialized to the subject of the parent email, and, if configured, a forward prefix (email.inline-forward-prefix). The body contains the agent's signature, if configured, and a quote header followed by the content of the parent email content. Attachments and attached data of the parent email, if any, are copied to the new email. The interaction is assigned to the same contact, if any, as the parent email. Agents can edit the body before completing the forward. The new outbound email is then placed in the email.inline-forward-queue. The agent **EmployeeId** is attached to that new outbound email to enable business processes to distribute the possible reply back to the same agent. The original inbound email is placed in the in-progress workbin of the agent while it is being forwarded, and then removed from the in-progress workbin when the forward is completed.

The typical use case is that agents use the answer received from the person to whom they forward email interactions to elaborate their responses.

Agents can use Forward to forward emails from the following locations:

- Active inbound email interaction
- Inbound and outbound email interactions in the Contact History
- Inbound and outbound email interactions in My History
- Inbound and outbound email interactions in the Interaction Search

Use the following privilege to enable Forwarding:

- E-Mail - Can Forward

If only this privilege is granted, then the **Forward** () button has no drop-down menu. Clicking it

launches the forward process described above. If the E-Mail - Can Forward As An Attachment privilege is also granted, then the button activates a drop-down menu that enables agents to choose between forwarding (in-line) or **forwarding as an attachment**.

Use the following configuration options to control the behavior of the Forward feature:

- `email.inline-forward-prefix`—Specifies the prefix that is added at the beginning of the subject of the original email when it is forwarded to an external resource.
- `email.inline-forward-queue`—Specifies the Interaction Queue in which outbound emails created for in-line forwarding are placed when agents click 'Complete Forward'.
- `keyboard.shortcut.interaction.email.inline-forward`—Specifies the combination of keys that can be used as a keyboard shortcut to forward an active inbound email to an external resource.

## Forward as an attachment

[**Modified:** 8.5.113.11]

(Formerly: *Inbound Email Forward to External Resource*)

Workspace enables agents to forward active inbound email interactions to an external resource (someone in your company directory that is outside of the control of the Genesys environment — for example, your back office) by selecting a valid email address in Team Communicator, either by manually entering the address or by selecting it from a searched Contact or a Corporate or Personal Favorite. Forward as an Attachment supports both **To** and **CC** (carbon copy) addressing and multiple recipient targets. You can configure agents to be able to add additional information about the forwarded interaction in a dedicated text box.

The typical use case is that agents delegate the writing of an answer to the external resource.

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

- `GD_ExternalAgentAddress`—The same content as `IW_ExternalAgentAddress`. This is added only if the `general.gad.attached-data` option is set to `true`.
- `GD_OriginalAgentEmployeeId`—The same content as `IW_OriginalAgentEmployeeId`. This is added only if the `general.gad.attached-data` option is set to `true`.
- `GD_TransferrerUserName`—The same content as `IW_TransferrerUserName`. This is added only if the `general.gad.attached-data` option is set to `true`.
- `IW_OriginalAgentEmployeeId`—The Employee Id of the agent.
- `IW_TransferrerUserName`—The Username of the agent.
- `IW_EmailNotepad`—The current notepad text of the email view.
- `IW_ExternalAgentAddress`—The **To** email address destination. If the value of the `email.forward.enable-multiple-to-addresses` option is set to `true`, the value of `IW_ExternalAgentAddress` is a comma separated list of **To** addresses. This list has to be parsed in the Business Process. For each extracted address, the Business Process has to do the following:
  1. Assign the extracted address to a variable.
  2. Use this variable in the Forward Email block.

- `IW_ExternalAgentCcAddress`—The **CC** email address destination. This is added only if the value of the `email.forward.enable-cc-addresses` option is set to `true` (Enable the CC address field where agents can specify one or several CC addresses). The value is a comma separated list of **CC** addresses. With this list, the Business Process has to do the following:
  1. Assign the list to a variable.
  2. Use this variable in the Forward Email block.
- `IW_ExternalAgentInstructions`—The text provided by the agent who is forwarding the email interaction. This is added only if the value of the `email.forward.enable-instructions` option is set to `true` (Enable the forward instructions field). This value can be used as a Field Code in the Standard Response that is contained in the Forward Email block to give forward instructions to an external resource.

Refer to [EServices](#) email workflow samples for more information about forwarding email interactions to external resources.

The following privilege controls the use of the forwarding feature:

- E-Mail - Can Forward to External Resource

Use the following configuration options in the `interaction-workspace` section to configure this feature:

- `email.forward-queue`: Specifies the Interaction Queue in which the inbound email is placed when an agent forwards it to an external resource.
- `email.forward.enable-multiple-to-addresses`: Enable agents to specify more than one target in the **To** address field.
- `email.forward.enable-cc-addresses`: Enable agents to specify one or more target in the **CC** address field.
- `email.forward.enable-instructions`: Enable the forward instructions field.
- `keyboard.shortcut.interaction.email.forward`: Specifies the shortcut that forwards an active inbound email.

## Email Can Mark Done privilege

The Can Mark Done privilege controls how emails are marked as done.

When this privilege is allowed, the Done button is displayed in the toolbar when an inbound email is presented. If an agent clicks Done, the inbound email 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 email is displayed. The agent must handle the email by replying to it, transferring it, or placing it in a workbin.

## Email interaction history

An agent can take ownership of email interactions that are in-progress if you grant the permissions that are listed in the table **Agent Privileges that Control Email 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 email enables agents to find and process inbound email 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 Email Interaction History Functionality**

Privilege	Agent Functionality
Workbin - Can Use	Agents can open any email 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 email that is currently in the workbin of another agent.
Contact - Can Pull From unassigned shared workbin	Agents can select an email 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.
Contact - Can Pull Queued Emails	Agents can select an email that is in a queue or that is currently being delivered.

## Printing

**[Modified: 8.5.101.14]**

From the following views, agents can display and use the Print Preview window:

- Email Interaction window
- My History
- Contact History
- Draft workbin

The Print Preview window provides the following functionality:

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

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- Page numbers

Enable the following privilege to allow agents to print email interactions:

- Can Print Email

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

- `printing.use-print-preview`