Workspace Desktop Edition Deployment Guide

Team Leads and Supervisors

5/9/2025

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[**Modified:** 8.5.126.07]

For details on the capabilities of Team Leads and Supervisors in Workspace, refer to these topics:

- Team Lead Help
- Team Lead Functionality

Enabling agents to be Team Leads and Supervisors

Procedure

Enabling agents to be Team Leads and Supervisors

Purpose:

To enable an agent who is configured to be a supervisor (Team Lead) 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, or Genesys Administrator Extension.
- A working knowledge of Genesys Administrator Extension.
- A Workspace `Application` object exists in the Configuration Database.
- The Procedure: Creating a Role and allowing a 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
2. 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)

3. Configure the Team Lead options.
4. Create or select an agent group to be used to specify the list of Agents that a Team Lead will monitor.
5. Add the agents to be monitored by that team lead to that agent group.
6. In Genesys Administrator Extension `Configuration` tab for the agent group, open the `Advanced` view.
7. In the `Supervisor` field, add the name of the user that will be acting as Team Lead for that agent group.
8. Save the changes to the Agent Group object.

End

Enabling Team Leads and Supervisors to log off or change agent state

[**Added:** 8.5.126.07]

You can enable your supervisors/team leads to manually change an agent's state or log off an agent by using the Team Communicator. If a supervisor discovers that an agent is in the wrong state, he or she can use Team Communicator to select the agent, and then use the **Action** menu to set an agent to **Ready** or **Not Ready** (Not Ready Reasons options are not supported) on all channels or on specific channels. If a supervisor discovers that an agent has left their account logged on after their shift, he or she can use Team Communicator to select the agent, and then use the **Action** menu to log off the agent on all channels; this ability benefits the company in two ways: it ensures that seat licenses are not unnecessarily consumed, and interactions are prevented from being routed to an agent who is not present but is configured for auto-answer!

To enable the agent state control feature, grant the 'Team Lead - Agent Status Enabled Remote Actions' privilege, then configure the following Application option in the `interaction-workspace` section of a Tenant, Group, or User object:

- teamlead.agent-status.enabled-remote-actions

Important

When you are setting up supervisors/team leads with the remote actions, the following behaviors occur with this feature:

- If an agent has set their status to **After Call Work**, **Not Ready <with the reason>**, or **Do Not Disturb**, these are displayed in Team Communicator as **Not Ready**.
- Since Team Communicator does not support these statuses, you cannot set an agent status from **Ready** to **After Call Work**, **Not Ready <with the reason>**, or **Do Not Disturb**; you can only set the status to **Not Ready** from **Ready**.

Warning

Team leads might experience unexpected behavior if they change the state of a particular eService channel from **Do Not Disturb**, to **Ready** for an agent who is assigned two or more eServices channels. Setting **Ready** on one eServices channel restores all other eServices channels to the status prior to **Do Not Disturb**.