GENESYS™

Genesys Security Deployment Guide

Workspace Desktop Edition Support for GDPR

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Workspace Desktop Edition Support for GDPR

This page describes product-specific aspects of Workspace Desktop Edition support for the European Union's General Data Protection Regulation (GDPR) in premise deployments. For general information about Genesys support for GDPR compliance, see General Data Protection Regulation.

> ### Warning
> Disclaimer: The information contained here is not considered final. This document will be updated with additional technical information.

Workspace Desktop Edition is an agent facing User Interface that enables the handling of interactions such as voice calls, chats, emails, SMS, and social media between a contact center and its contacts (customers).

Workspace and Customer Data

Workspace handles customer data through connections to the Genesys back end, including Genesys Universal Contact Server, Salesforce CRM, Key-Value pairs captured by an IVR, web forms, and agent/contact interaction. These data are not owned or stored by Workspace and so will be dealt with through GDPR Forget Me requirements for those services.

However, Workspace might store customer personal information in **Recent** and **Personal Favorites**. Workspace can be configured to store a number of most recent contacts to enable agents to quickly resume interacting with someone they have recently worked with. Workspace can also be configured to enable agents to specify a contact as a **Favorite**. This feature enables the agent to quickly locate that contact's information to facilitate initiating a new interaction.

Recent contacts is considered to be *held less than 30 days* and so does not require explicit processing for GDPR compliance.

Personal Favorite contacts store contact information until an agent unfavorites the contact. This might exceed the limitations specified by the GDPR Forget Me requirements, and therefore is handled by the Workspace GDPR Forget Me tool. Administrators determine where agent Personal Favorites are stored. They might be stored in the Agent Annex in the Genesys Back End, on a shared network directory, or in the Windows Profile of the agent.

Workspace also supports **Corporate Favorites**. Administrators can specify a list of targets for all agents or for groups of agents. Normally Corporate Favorites are internal business targets, not customers or external contacts, but it is possible that an administrator might configure an external contact, including their phone number and email address, as a Corporate Favorite. Since this information is owned by the administrator of the Genesys customer, it will not be covered by the

GDPR Forget Me tool.

GDPR and Personal Favorites

Workspace implements a new command line tool, the Workspace GDPR Forget Me tool, to enable administrators to remove any **Personal Favorite** record that contains a match of any of the phone numbers or email addresses specified in the JSON input file. The file specifies the list of phone numbers and email addresses to *erase*.

> ### Warning
>
> If one or several instances of Workspace are running while you run the Workspace GDPR Forget Me tool, then any agent favorites that are removed by the script might be written back when a Workspace instance that deals with this favorite is stopped. Genesys recommends that you run the Workspace GDPR Forget Me tool in off hours (if possible) and you make the list of favorites to delete incremental so that subsequent runs of the tool can delete occurrences that would have been restored in the meantime.

The Forget Me tool is applied to Personal Favorites in the following storage scenarios:

- Workspace User Settings are stored in the **Person** annex in Genesys Configuration Server. This is the case when the following configuration options are specified as follows:

  - options.record-option-locally-only = `false`

  - options.record-location is blank

- Workspace User Settings are stored in a shared network directory with a path where uniqueness is based on User attributes. This is the case when the following configuration options are specified as follows:

  - options.record-option-locally-only = `false`

  - options.record-location contains `$Agent.UserName$`, `$Agent.FirstName$`, `$Agent.LastName$`, or `$Agent.EmployeeId$`

> ### Warning
>
> If you store your personal favorites in a storage scenario that is not covered by the Forget Me tool, you must migrate to one of the supported storage models.

The Forget Me tool does *not* apply to Personal Favorites in the following storage scenarios:

- Workspace User Settings are stored in the Windows User Profile.

  - This is the case when the following configuration option is specified as follows:

- options.record-option-locally-only = `true`

- Use these migration steps to the supported scenario:

  1. Modify your Workspace configuration to store the Agent profile in a central location: options.record-option-locally-only = `false`.

  2. Design a clean-up script and execute it using Windows Network Administration tools against all user profiles of the workstations where agents are logging in. This script must also delete the following directory: "`%AppData%\Genesys Telecommunication\InteractionWorkspace\ UserData\`"

- Workspace User Settings are stored in a shared network directory with a path that is *not* based on User attributes.

  - This is the case when the following configuration options are specified as follows:

    - options.record-option-locally-only = `false`

    - options.record-location specified with a value where uniqueness is not guaranteed by `$Agent.UserName$` or `$Agent.EmployeeId$`

  - Use these migration steps to the supported scenario:

    1. Change the value of the options.record-location option to specify the new path based on Agent unique attributes.

    2. The next time the agent logs in, the agent's profile information is merged to the new location.

Implementing the Workspace GDPR Forget Me tool

The **Workspace GDPR Forget Me tool** is a command line executable (`wde_gdpr_compliance.exe`) that uses a JSON file as input to clean out user data from a network directory or the agent annex.

To use the tool, create your JSON file (see below) then go to the Workspace Desktop Edition CD (8.5.125.01) and launch the executable. The path to the tool is here:

`WorkspaceDesktopEditionGDPRTools/Windows/`

JSON input file structure

The JSON input file must contain a list of target contacts/customers that are to be removed. The supported Request Type is 'forget'.

The following common consumer identifications types are considered attributes of a 'consumer':

- "phone":<value>: A valid phone number. Phone numbers can have separators or '+' in front to indicate an international number and can be a subset of contact phone number to be deleted. For example: (555)-123-456 or 123-456 are valid to delete +1 (555)123.456. The script automatically ignores all separators.

- "email":<value> A valid email address with or without Personal information ex: "john@company.com" or "John Doe <john@company.com>".

The structure of the JSON list of consumers should be as follows:

```
{"consumers":[{"consumer":{{"phone":<value>}{ "email":<value>} ...}]}
```

Here is an example of a JSON input file:

```
{
    "request":"forget",
    "consumers":[
        {"consumer":
            [
                {"name":"Jane Deer"},
                {"name": "Jane Q. Deer"},
                {"phone":"555551212"}
            ]
        },
        {"consumer":
            [
                {"name":"Dan Man"},
                {"phone":"555551212"},
                {"phone":"555551234"},
                {"email":"danny@mail.com"},
                {"email":"DM@mail.org"},
                {"fbid":"Dan Man"}
            ]
        }],
    ]}
 }
```

> ## Important
>
> - Only Consumers with an email address or phone number are considered in the executable.
>
> - If at least one 'email' or 'phone' parameter is matched, the consumer information is deleted.

Command Line arguments

Use the following command line arguments when running the tool:

- -host: Host of Configuration Server (mandatory).

- -port: Port Configuration Server (mandatory).

- -user: Username of a Configuration Server administrator who has full access on the Person objects representing agents (mandatory).

- -password: Password of the Configuration Server administrator specified in -user argument.

- -jsonfile: The name of the JSON input file containing a list of customers with personal information to be erased (mandatory).

- -rfolder : Network directory path containing the agent profiles to be cleaned up. The directory path must have the same value as the `options.record-location` option. If this argument is not specified, the tool is cleaning up the profile stored in the Annex of Person object in Configuration Server.

- -logfolder: The folder name for the output log file.

The following is a command line example to cleanup agents profiles that are stored in a shared network directory:

```
wde_gdpr_compliance.exe -host <hostname> -port <portnumber> -user <username> -password
<password> -jsonfile <jsonFilePath> -rfolder <networkDirectoryPath> -logfolder
<logDirectoryPath>
```

The following is a command line example to cleanup profiles stored in agent annexes:

```
wde_gdpr_compliance.exe -host <hostname> -port <portnumber> -user <username> -password
<password> -jsonfile <jsonFilePath> -logfolder <logDirectoryPath>
```

Phone number and Email addresses matching rules

Any separators or + in front of phone numbers are removed before phone number matching, then the specified phone number is searched.

For example, if you search for a contact phone number such as "567890", the following phone numbers will be matched and the contact information will be deleted:

- "1234567890"
- "+1 (234).567.890"
- "567.890"

When searching for email addresses, the tool only looks for the address part. For example, "test@email.com" and "Name <test@email.com>" are equal.

Log file output

The following information is output to the log after the executable is run:

```
wde_gdpr_compliance-<DDMMYYYY_HHMMSS>-execution-log (execution results, success/fail with
error information)
```