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Deployment Guide

Installing the Plug-in for Interaction Workspace

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Installing the Plug-in for Interaction Workspace

The Genesys Web Engagement Plug-in for Interaction Workspace allows you to enable chat and web callback engagement features in Interaction Workspace. See [Genesys Web Engagement Plug-in for Interaction Workspace Help](#) for details.

To install this plug-in, complete the following procedures:

1. [Installing the Plug-in for Interaction Workspace](#)
2. [Importing the Plug-in for Interaction Workspace Template](#)
3. [Adding a Connection to the Backend Server](#) if you are following the [Standalone](#) deployment scenario. If you are following the [Clustering](#) deployment scenario, complete [Adding a Connection to the Load Balancer for the Backend Servers](#).
4. [Configuring Role-Based Access Control](#)
5. Genesys Web Engagement can also work with agents who are Team Leads. For details about how to configure Team Leads, see the following topics in the Interaction Workspace Deployment Guide:
 - [Procedure: Enabling agents to be Team Leads](#)
 - [Monitoring Chat Interactions](#)

Installing the Plug-in for Interaction Workspace

Prerequisites

- Your environment includes Interaction Workspace. See [Genesys environment prerequisites](#) for compliant versions. For more information about installing Interaction Workspace, refer to the [Interaction Workspace Deployment Guide](#).

Start

1. In your installation package, locate and double-click the **setup.exe** file.
2. Click **Next**. The **Select Installed Application** screen appears.
3. Select your Interaction Workspace application.
4. Click **Next**. The **Ready to Install** screen appears.
5. Click **Install**. The Genesys Installation Wizard indicates it is performing the requested operation for the Genesys Web Engagement Plug-in for Interaction Workspace. When through, the **Installation Complete** screen appears.
6. Click **Finish** to complete your installation. As a result of the installation, the following files are copied to the Interaction Workspace installation directory:

- InteractionWorkspace\Genesyslab.Desktop.Modules.WebEngagement.dll
- InteractionWorkspace\Genesyslab.Desktop.Modules.WebEngagement.module-config
- InteractionWorkspace\Newtonsoft.Json.Net35.dll

End

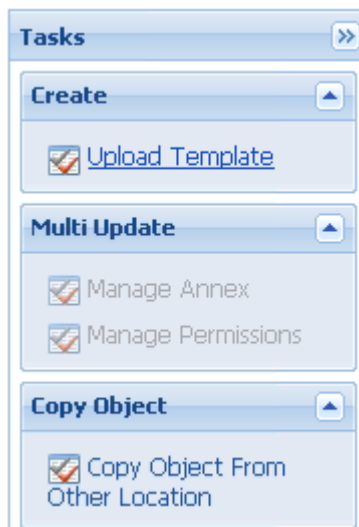
Importing the Plug-in for Interaction Workspace Template

Prerequisites

- You completed [Installing the Plug-in for Interaction Workspace](#)

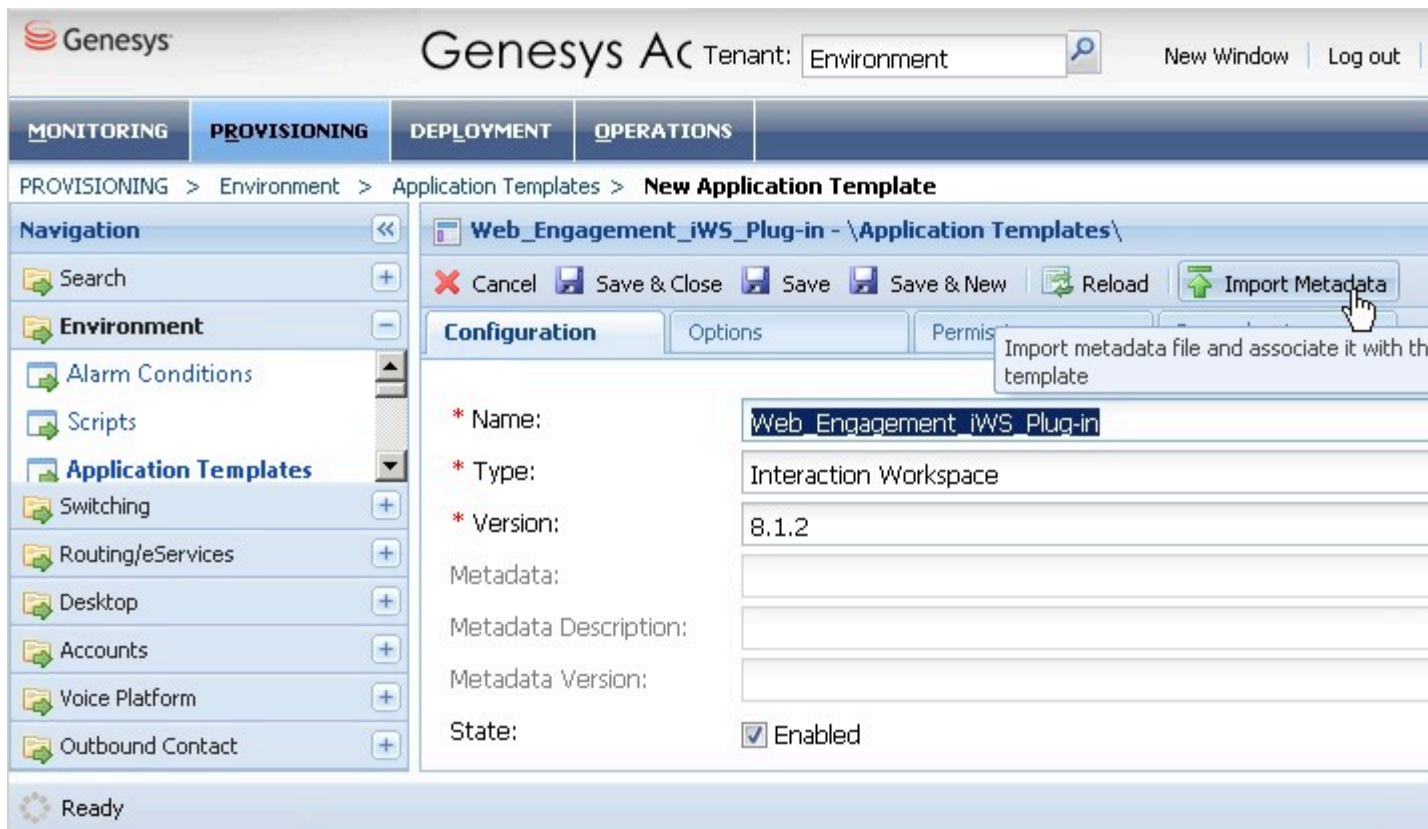
Start

1. In Genesys Administrator, navigate to **Provisioning > Environment > Application Templates**.
2. In the **Tasks** panel, click '**Upload Template**'.



Upload Template link in the **Tasks** panel

3. In the **Click 'Add' and choose application template (APD) file to import** window, click **Add**.
4. Browse to the **Web_Engagement_iWS_Plug-in.apd** file. The **Configuration** tab for the new template opens.
5. Click **Import Metadata**.



Click **Import Metadata**.

6. Select the **Web_Engagement_iWS_Plug-in.xml** metadata file and click **Open**. The metadata fields in the **Configuration** tab are now filled.
7. Click **Save & Close**.

End

Adding a Connection to the Backend Server

Prerequisites

- You completed [Importing the Plug-in for Interaction Workspace Template](#)
- You are following the [Standalone](#) deployment scenario and need to add a connection to a single Backend Server.

Start

1. In Genesys Administrator, navigate to **Provisioning > Environment > Applications**, select the Interaction Workspace application, and click **Edit...**
2. In the Connections section, click **Add**. The **Browse Applications** window opens.
3. Select the Web Engagement Backend Server application and click **OK**. The Backend Server is added to

the list of Connections.

4. Click **Save & Close**.

End

Adding a Connection to the Load Balancer for the Backend Servers

Prerequisites

- You completed [Importing the Plug-in for Interaction Workspace Template](#)
- You are following the [Clustering](#) deployment scenario and need to add a connection to the load balancer for the Backend Servers.

Start

1. In Genesys Administrator, navigate to **Provisioning > Environment > Applications**, select the Interaction Workspace application, and click **Edit...**
2. Select the **Options** tab and click **New**.
3. Set the following values:
 - **Location:** Options
 - **Section:** settings
 - **Name:** loadbalancer
 - **Value:** The address of your load balancer for the Backend Servers — for example, <http://198.51.100.12:8000>.
4. Click **OK**. The option is added to the **[settings]** section.
5. Click **Save & Close**.

End

Configuring Role-Based Access Control

Complete this procedure to allow specific users or groups to manage Web Engagement in Interaction Workspace.

Prerequisites

- You completed [Importing the Plug-in for Interaction Workspace Template](#)

Start

1. In Genesys Administrator, navigate to **Provisioning > Accounts > Roles**.
2. Edit or create a Role responsible for managing Web Engagement in Interaction Workspace. For instance, create the Agent can Monitor Web Engagement role by clicking the **New** button.
3. Select the **Role Privileges** tab.
4. In the **Add/Remove Products** top panel, enable Interaction Workspace and expand the Interaction Workspace Web Engagement Privileges section.
5. Set the Allowed value for the **Agent - Can Monitor Web Activity** option.

The screenshot shows the 'Role Privileges' configuration window for the role 'Agent can monitor Web Engagemen...' under the path '\Roles\'. The window has tabs for 'Configuration', 'Role Privileges' (selected), and 'Permissions'. Below the tabs are buttons for 'Allow All', 'Export', and 'Import', and a 'View' dropdown set to 'All'. The 'Add/Remove Products' section shows a list of products with checkboxes: 'Interaction Workspace (Agent Desktop)' is unchecked, 'Interaction Workspace' is checked, and 'Genesys Administrator Extension' is unchecked. Below this is a table with columns 'Name' and 'Value'. The table contains several rows, including 'Outbound - Can Use Push Preview' and 'Outbound - Push Preview Can Decline'. A section titled 'Interaction Workspace Standard Response Privileges (1 Item)' contains one row: 'Standard Response Library - Can Use'. Another section titled 'Interaction Workspace Team Communicator Privileges (4 Items)' contains four rows: 'Team Communicator - Can Manage Favorites', 'Team Communicator - Can Use', 'Team Communicator - Can View Favorites', and 'Team Communicator - Can View Recent Calls'. A section titled 'Interaction Workspace Web Engagement Privileges (1 Item)' contains one row: 'Agent - Can monitor Web Activity'. The 'Value' column for this row is currently '[Unassigned]' and is highlighted with a blue selection bar. Below the table, there is a 'Select Allowed' button.

Name	Value
Filter	Filter
Outbound - Can Use Push Preview	
Outbound - Push Preview Can Decline	
Interaction Workspace Standard Response Privileges (1 Item)	
Standard Response Library - Can Use	
Interaction Workspace Team Communicator Privileges (4 Items)	
Team Communicator - Can Manage Favorites	
Team Communicator - Can Use	
Team Communicator - Can View Favorites	
Team Communicator - Can View Recent Calls	
Interaction Workspace Web Engagement Privileges (1 Item)	
Agent - Can monitor Web Activity	[Unassigned]

Select Allowed

6. In the Members section of the **Configuration** tab, add the users or groups who should get this role.
7. Click **Save & close**.

End

Next Steps

- [Installing the Plug-in for Genesys Administrator Extension](#)