GENESYS™

Web Services and Applications Configuration Guide

Enabling Internal And External Communications

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Enabling Internal And External Communications

The following procedures enable internal and external communication features in Workspace Web Edition.

Configuring Team Communicator

Team Communicator is a universal lookup tool. Agents use the Team Communicator to start phone calls and emails. The following procedures enable features in Team Communicator.

Enabling Team Communicator

You can enable agents to use Team Communicator to call a contact that is stored in the Universal Contact Server (UCS).

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- A `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to Universal Contact Server.
- Enabling Agents To Manage Contacts.
- Provisioning Workspace Web Edition for the Voice channel.

To enable agents to use Team Communicator to call a contact:

1. Grant the privilege.teamcommunicator.can-use privilege.
2. Configure the Team Communicator options in the `interaction-workspace` section of the `WS_Cluster` application object.
3. To restrict which agents can be seen in Team Communicator search results, you can specify which groups an agent can or cannot see by specifying them in these configuration options:
   - teamcommunicator.permissions.agent.restrict-to-agent-groups — Agents who belong to at least one of these agent groups or virtual agent groups will be included in the list.
   - teamcommunicator.permissions.agent.exclude-from-agent-groups — Agents who belong to at least one of these agent groups or virtual agent groups will be excluded from the list.
4. Ensure that the UCS application to which `WS_Cluster` is connected is configured to support index searches in the Contact database:
   - Set the `index\enabled` option to `true`.
   - Set the `index.contact\enabled` option to `true`.

For more details about these settings, refer to the *eServices 8.1 Reference Manual*.

Enabling call routing and voice call, conference, or transfer

You can enable agents to use Team Communicator to call, conference, or transfer to an agent, agent group, skill, or a routing point using a strategy. This procedure is mandatory for agent groups and skill targets.

> **Tip**
>
> No extra configuration is required to transfer an interaction to an agent.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- A working knowledge of Genesys Designer.
- A `WS_Cluster` application object exists in the Configuration Database.
- To transfer to skills, you must have skills defined in the Configuration Database.
- To transfer to agent groups, you must have agent groups defined in the Configuration Database.

To enable agents to use Team Communicator to call, conference, or transfer to an agent, agent group, skill, or a routing point:

1. Set up your system infrastructure:
   a. In the `Configuration` tab of the `WS_Cluster` application, add connections to the following servers:
      - Stat Server
      - Universal Contact Server (Optional)
   b. In the connections, add a reference to the T-Server associated with the switch to which the agent logs in.
   c. Configure the Team Communicator options in the `interaction-workspace` section of the `WS_Cluster` application object.

2. Set up your agents to be able to use the Team Communicator to call or transfer to other agents or other internal targets:
   a. To let your agents make voice calls, set the value of the privilege.voice.can-use option, to `true`.
   b. To ensure that the status of your agents is displayed in the Team Communicator of other agents who might be trying to call them, set the value of the presence.evaluate-presence option to `true`.
   c. To enable your agents to view the number of targets who are in Ready status in an agent group, perform the following steps:
      i. Add the following definition for the VIRTUAL_AGENT_GROUP and AGENT_GROUP object types to

the **statistics.yaml** file: TransferAvailability_CurrentReadyAgents.

ii. Allow the privilege.teamcommunicator.display-agent-groups-availability privilege.

d. For small contact centers, where the number of potential transfer targets is low, you can configure Workspace to display *all* of the possible targets in the Team Communicator search results when an agent initiates a transfer or conference by searching in the Team Communicator.
To enable this functionality, set the value of the teamcommunicator.show-all-internal-targets option to `true`.
This option is limited by the value that is specified for the teamcommunicator.max-size option.

> ## Important
> Genesys strongly recommends that only small contact centers use this option. Agents in large contact centers will experience system performance issues if the `teamcommunicator.show-all-internal-targets` option is enabled.

3. You can choose to set up call routing to direct calls to specific agents based on strategies. To transfer to Skills and Groups, you must also create a routing point by using the intercommunication.voice.routing-points option.

a. First determine which call flow scenarios you want handled by a routing-based mechanism based on targets, such as langauge or product skills, level of training, or availability, and types of calls, such as high priority customers, inquiries, sales, and so on.

b. Use Genesys Designer, to create a routing strategy that uses routing targets (agents, agent groups, skills, and so on) to process routing-based actions by using the following attached data:

- `IW_RoutingBasedOriginalEmployeeId` — The employee ID of the agent who is transferring the interaction.

- `IW_RoutingBasedTargetId` — The ID (employee ID of another agent, AgentGroup name, Skill name, Routing Point name) of the target.

- `IW_RoutingBasedTargetType` — The type of the target (Agent, AgentGroup, Skill, or RoutingPointl)

- `IW_RoutingBasedRequestType` — Informs the strategy of the type of action is to be done (`MakeCall,OneStepConference,InitConference,OneStepTransfer,InitTransfer`)

c. Depending on the type of target for which you want to use routing-based transfer, use Genesys Administrator Extension to set the value of the intercommunication.voice.routing-based-targets options as follows:

- To use T-Server to handle transfers to Agent, Routing Point, and Type Destination, and have all other transfers handled by a strategy, set the value of this option to "" (empty)

- To use routing-based transfer for Agents, add the value `Agent` to this option.

- To use routing-based transfer for Routing Point, add the value `RoutingPoint` to this option.

- To use routing-based transfer for Type Destination (a dialed call), add the value `TypeDestination` to this option.

- For agent groups and skills, it is not mandatory to set the routing-based target option because these target always use routing-based transfer.

d. To specify whether a specific call type is to be handled by the routing-based mechanism, set the value of the intercommunication.voice.routing-based-actions option.

- `MakeCall`: Use the routing-based mechanism for external calls.

- `OneStepTransfer`: Use the routing-based mechanism for single-step transfers.

- `InitTransfer`: Use the routing-based mechanism for two-step transfers.

- `InitConference`: Use the routing-based mechanism for two-step conferences.

- `OneStepConference`: Use the routing-based mechanism for single-step conferences.

    e. Load the routing strategy on the Routing Point that is defined by the intercommunication.voice.routing-points option.

4. Fine-tune the settings for contacting specific targets (`Agent`, `AgentGroup`, `RoutingPoint`, `Contact`, and/or `TypeDestination`) that are using a routing-based mechanism by configuring action-specific options:

- intercommunication.voice.consultation-enabled

- intercommunication.voice.make-call-enabled

- intercommunication.voice.single-step-conference-enabled

- intercommunication.voice.single-step-transfer-enabled

5. To control whether agents can make one-step transfers and conferences while there is an active consultation on a voice call, configure the following options. Setting the options to `true` means that the one-step transfer or one-step conference buttons are available during voice calls with active consultations.

- teamcommunicator.one-step-conference-with-consultation.enabled

- teamcommunicator.one-step-transfer-with-consultation.enabled

Enabling multimedia interaction transfer

You can enable agents to use Team Communicator to transfer a multimedia interaction (Email and Chat) to an agent, agent group, or skill by using a strategy. This procedure is mandatory to transfer to agent groups and skills.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.

- A working knowledge of Genesys Designer.

- A `WS_Cluster` application object exists in the Configuration Database.

- To transfer to skills, you must have skills defined in the Configuration Database.

- To transfer to agent groups, you must have agent groups defined in the Configuration Database.

To enable agents to use Team Communicator to transfer a multimedia interactions:

1. By using Genesys Designer, configure a routed-based transfer workflow by using these steps:

    a. Create an Interaction Queue/Interaction View pair. The Interaction Queue is used as a part of the workflow; however, Interaction Queues are not available as transfer targets in the agent interface.

    b. Create a routing strategy to process routing-based actions. To help you write the appropriate strategy, Workspace Web Edition adds the following attached data to the interaction:

- `IW_RoutingBasedOriginalEmployeeId` — The employee ID of the agent who is transferring the

interaction.

- IW_RoutingBasedTargetId — The ID (employee ID of another agent, AgentGroup name, Skill name) of the target.

- IW_RoutingBasedTargetType — The type of the target (Agent, AgentGroup, or Skill)

- IW_RoutingBasedRequestType — Informs the strategy of the type of action is to be done. This attached data has only one value available for this release: OneStepTransfer

c. Link the above Queue to the strategy.

d. Activate the strategy.

2. By using Genesys Administrator Extension, set the values of the following configuration options to the Queue that you created in Step 1:

- interaction-workspace/ intercommunication.email.queue

- interaction-workspace/intercommunication.chat.queue

3. Depending on the type of target for which you want to use routing-based transfer, use Genesys Administrator Extension to set the values of the intercommunication.chat.routing-based-targets and intercommunication.email.routing-based-targets configuration options as follows:

- To use Interaction Server to handle agent-to-agent transfer and have all other transfers handled by a strategy, set the values of these options to "" (empty)

- To use routing-based transfer for Agents, set the values of these options to Agent.

- For agent groups and skills, it is not mandatory to set the routing-based target options because these target always use routing-based transfer.

4. Log out agents and log them back in again.

Creating Corporate Favorites

You can enable the use of corporate favorites in the Team Communicator. Administrators must create, edit, and remove favorites by using Genesys Administrator Extension. You can configure the system so that each agent is assigned one or more **quick dial** favorites lists. You do not have to assign the same list of favorites to every agent.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.

- An understanding of Configuration options

- A WS_Cluster application object exists in the Configuration Database.

To enable the use of corporate favorites:

1. By using Genesys Administrator Extension, create a new section in the appropriate object (the WS_Cluster application, Tenant, Agent Group, or Agent), and name it with the name of the Corporate Favorite that you want to create.

2. Configure the type option in the new Corporate Favorite section to be one of the following types:

- Agent

- Agent Group

- Skill

- Routing Point

- Custom Contact

- Interaction Queue

Attached Data

You can have multiple instances of the same object type, such as a routing point, in corporate favorites with different attached data for each. For example:

[Fav-English]	[Fav-Spanish]
type: RoutingPoint	type: RoutingPoint
id: 6666@MySwitch **Note:** the following characters are not supported for the id: ?|{}[]()"\,	id: 6666@MySwitch **Note:** the following characters are not supported for the id: ?|{}[]()"\,
display-name: English	display-name: Spanish
attached-data.lang: en	attached-data.lang: es

Corporate Favorite Options by Type

The Table **Corporate Favorite Options by Type** defines the Corporate Favorite types and the mandatory options.

> ## Important
>
> A corporate favorite that has **Custom Contact** specified as the type only appears in a Favorites search and the Recent list if the contact was previously called. **Search All** only searches within targets that specify the following types: **Agent**, **Contact**, **Routing Point**, **Skill**, **Queue**, **Interaction Queue**, and **Agent Group**. For information about using the **capabilities** option, refer to Creating different Corporate Favorites for Transfer, Conference, and Consult targets.

Corporate Favorite Options by Type

Type	Options	Mandatory	Valid values	Example
Agent	type	Yes	Agent	Agent
	id	Yes	<user name of the agent>	User123 **Note:** the following characters are not supported for the id: ?|{}[]()"\,
	capabilities	No	empty, Engage, OneStepTransfer, OneStepConference, TwoStepTransfer, TwoStepConference, Consultation	Refer to Creating different Corporate Favorites for Transfer, and Conference targets.
	category	No	<a semicolon-separated list of category names>	CorporateCategory1;FavoriteAgents
	display-name	No	<display name of the agent>	Jim Brown
Agent Group	type	Yes	AgentGroup	AgentGroup
	id	Yes	<name of the agent group>	Agent Group Meridian **Note:** the following characters are not supported for the id: ?|{}[]()"\,
	capabilities	No	empty, Engage, OneStepTransfer, OneStepConference, TwoStepTransfer, TwoStepConference, Consultation	Refer to Creating different Corporate Favorites for Transfer, and Conference targets.
	category	No	<a semicolon-separated list of category names>	CorporateCategory1;FavoriteAgents
	display-name	No	<display name of the agent group>	Meridian

Type	Options	Mandatory	Valid values	Example
Skill	type	Yes	Skill	Skill
	id	Yes	<name of the skill>	French **Note:** the following characters are not supported for the id: ?|{}[]()"\\,
	capabilities	No	empty, Engage, OneStepTransfer, OneStepConference, TwoStepTransfer, TwoStepConference, Consultation	Refer to Creating different Corporate Favorites for Transfer, and Conference targets.
	category	No	<a semicolon-separated list of category names>	French Speaking Agents;Mandarin Speaking Agents
	display-name	No	<display name of the skill>	French
Routing Point	type	Yes	RoutingPoint	RoutingPoint
	id	Yes	The DN number in the following format: <DN number>@<switch>	123@MySwitch **Note:** the following characters are not supported for the id: ?|{}[]()"\\,
	capabilities	No	empty, Engage, OneStepTransfer, OneStepConference, TwoStepTransfer, TwoStepConference, Consultation	Refer to Creating different Corporate Favorites for Transfer, and Conference targets.
	category	No	<a semicolon-separated list of category names>	CorpRoutingPoint
	display-name	No	<display name of the routing point>	Support
	attached-data.<AttachedDataKey>	No	<an attached data key>	attached-data.lang: en

Type	Options	Mandatory	Valid values	Example
Directly Dialed	type	Yes	CustomContact	CustomContact
	capabilities	No	empty, Engage, OneStepTransfer, OneStepConference, TwoStepTransfer, TwoStepConference, Consultation	Refer to Creating different Corporate Favorites for Transfer, and Conference targets.
	category	No	<a semicolon-separated list of category names>	External Resources
	firstname	No	<any string>	First
	lastname	No	<any string>	External
	phonenumber	Yes (one or both)	<a semicolon-separated list of phone numbers>	+1555234567890;+555123454321
	emailaddress		<a semicolon-separated list of email addresses>	external1@mail.dom;external2@mail.dom
	display-name	No	<display name of the custom contact>	Angie Davis
Interaction Queue	type	Yes	InteractionQueue	InteractionQueue
	id	Yes	<script name of the interaction queue>	123 **Note:** the following characters are not supported for the id: ?|{}[]()"\,
	category	No	<a semicolon-separated list of category names>	CorporateCategory1;FavoriteAgents
	display-name	No	<display name of the interaction queue>	Quality Assurance

3. In the configuration layer, in options of the related section (or Tenant/Agent Group/Agent annexes), configure the following options in the `interaction-workspace` section of agent, agent group, tenant, and/or application annexes:

   - teamcommunicator.corporate-favorites -- The list of corporate favorites (quick dial favorites) that are configured in Configuration Server for an Agent, Agent Group, Skill, Routing Point, or Custom Contact in the same tenant as the agent. Favorites that are configured at the agent level take precedence over those that are configured at the agent group level, which take precedence over the tenant level, which takes precedence over the application level.

   - teamcommunicator.max-size -- The maximum number of favorites to display to the agent in the Team Communicator drop-down view.

Assignment of Favorites

When you create corporate favorites, you assign to them a type that is based on the scope to which it is applied: agent, agent group, tenant, or application. You can create multiple favorites and assign them in a hierarchy. For example, you create four favorites: `fav1`, `fav2`, `fav3`, and `fav4`. You then make the following assignments:

1. application—teamcommunicator.corporate-favorites="fav1,fav2"

2. tenant—teamcommunicator.corporate-favorites="fav4"

3. agent—teamcommunicator.corporate-favorites="fav1,fav3"

The final list of favorites that are assigned to the agent are: "fav1,fav3"

Creating different Corporate Favorites for Transfer, and Conference targets

You can specify different Corporate Favorites to be displayed in Team Communicator for the following call actions by using the **capabilities** option in the section for a given Corporate Favorite: Main Window Team Communicator, Transfer, and Conference, and Consult.

The teamcommunicator.corporate-favorites option specifies which Corporate Favorites are displayed in Team Communicator. This option can be configured at the **Agent**, **Agent Group**, and **Application** level and can be overridden by a Routing Strategy. The value of this option is a list of sections that contain options that describe the Corporate Favorite.

The following values are supported for the **capabilities** option:

- If the **capabilities** option is set to a specific list of values, then the use of corporate favorites is possible only for these capabilities.
   - **Engage**: The corporate favorite is enabled in the Main Window Team Communicator to create a new outbound interaction (voice or email).
   - **OneStepTransfer**: The Corporate Favorite can be used for one-step call transfers.
   - **OneStepConference**: The Corporate Favorite can be used for one-step call conferences.
   - **TwoStepTransfer**: The Corporate Favorite can be used for a consultation call which can be completed as a call transfer.
   - **TwoStepConference**: The Corporate Favorite can be used for a consultation call which can be

completed as a call conference.

- **Consultation**: The Corporate Favorite can be used for consultation calls that cannot be completed as a call transfer or call conference.

- If the **capabilities** option is not set, then the Corporate Favorite can be used for any call operation.

- If the **capabilities** option is set with no value specified (empty), then the Corporate Favorite cannot be used for any call operation.

Here are some example Corporate Favorites with different values set for the **capabilities** option.

Corporate Favorite	Value of capabilities	Functionality
CorpFav1	Engage,OneStepConference,Consultation	This Corporate Favorite is available for new outbound interaction creation. It is displayed in the **Instant Conference** and **Consultation** button Team Communicators.
CorpFav2	Engage,OneStepTransfer,TwoStepTransfer	This Corporate Favorite is available for new outbound interaction creation. It is displayed in the **Instant Transfer** and **Consultation with Transfer option** button Team Communicators.
CorpFav3	Engage,TwoStepTransfer,TwoStepConference	This Corporate Favorite is available for new outbound interaction creation. It is displayed in the **Consultation with Transfer option** and **Consultation with Conference option** button Main Window Team Communicator.

For an **Agent** object assigned the three Corporate Favorites, the Corporate Favorites are available in the following buttons:

- **Main Team Communicator**: CorpFav1, CorpFav2, and CorpFav3 are all displayed.
- **One-Step Transfer**: CorpFav2 is displayed.
- **One-Step Conference**: CorpFav1 is displayed.
- **Consultation**: CorpFav1, CorpFav2, and CorpFav3 are all displayed.
     Once the consultation is established:

  - **Complete Transfer**: CorpFav2 and CorpFav3 are displayed.
  - **Complete Conference**: CorpFav3 is displayed.

Enabling the Email channel

You can enable agents to use Email to correspond with a contact that is stored in Universal Contact

Server (UCS).

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The WS_Cluster application object exists in the Configuration Database.
- The WS_Cluster application has a connection to Universal Contact Server and Interaction Server.
- Procedure: Enabling agents to manage contacts.
- A capacity rule that allows Agents to receive email interactions.

To enable agents to email contacts:

1. Configure the Email options in the interaction-workspace section of the WS_Cluster application object.
2. Configure the email queue options in the email section that are mandatory for basic email processing: email.default-queue and email.outbound-queue.
3. Configure the Workbin options in the interaction-workspace section of the WS_Cluster application object, them), in particular: workbin.email.in-progress and workbin.email.draft.
4. To control the size of an attachment that agents are allowed to attach to an external email interaction, configure the email.max-attachment-size option in the interaction-workspace section of the WS_Cluster application object.
5. To control the total size of attachments that agents are allowed to attach to an external email interaction, configure the email.max-attachments-size option in the interaction-workspace section of the WS_Cluster application object.

Enabling the Chat channel

You can enable agents to use the Chat channel to handle inbound chat interactions from a contact that is stored in Universal Contact Server (UCS).

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The WS_Cluster application object exists in the Configuration Database.
- The WS_Cluster application has a connection to Universal Contact Server and Interaction Server.
- Enabling Agents To Manage Contacts.
- A capacity rule that allows Agents to receive chat interactions.

To enable the Chat channel:

1. Configure the Chat options in the interaction-workspace section of the WS_Cluster application object.
2. To enable Chat transfer *without* a strategy, in the Chat Media Type Object, set the value of the delivering-timeout option to 20 seconds or less.

Enabling agents to join an Outbound Campaign functionality to a contact

You can enable agents to join an Outbound Campaign call to a contact that is stored in Outbound Contact Server (OCS).

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The `Application` object exists in the Configuration Database.

To enable agents to join an Outbound Campaign call to a contact:

1. Allow the Outbound privileges (see [Outbound|Outbound Campaign configuration options]) for the role to which the agent is assigned.
    - Can Use
    - Can Reject Record
    - Can Cancel Record
    - Can Dial Alternative Chained Record
    - Can Get Next Preview Record
    - Can Mark Do Not Call
    - Can Set Call Result
    - Can Reschedule
    - Can Reschedule On New Number
2. Configure the Outbound options in the `interaction-workspace` section of the Workspace Application object (refer to the Outbound configuration option reference for a list of Outbound options and a description of how to configure them).

Enabling the Facebook channel

You can enable agents to use the Facebook channel to handle inbound Facebook interactions from a contact that is stored in Universal Contact Server (UCS).

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to Universal Contact Server and Interaction Server.
- Enabling Agents To Manage Contacts.
- A capacity rule that allows Agents to receive Facebook interactions.

To enable the Facebook channel:

1. Configure the Facebook options in the `interaction-workspace` section of the `WS_Cluster` application object.

2. Configure the Facebook queue options in the `interaction-workspace` section that are mandatory for basic Facebook processing: facebook.default-queue and facebook.outbound-queue.

3. Configure the Workbin options in the `interaction-workspace` section of the `WS_Cluster` application object, them), in particular: workbin.facebook.in-progress and workbin.facebook.draft.

Enabling the Twitter channel

You can enable agents to use the Twitter channel to handle inbound Twitter interactions from a contact that is stored in Universal Contact Server (UCS).

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to Universal Contact Server and Interaction Server.
- Enabling Agents To Manage Contacts.
- A capacity rule that allows Agents to receive Twitter interactions.

To enable the Twitter channel:

1. Configure the Twitter options in the `interaction-workspace` section of the `WS_Cluster` application object. To enable the Twitter channel, configure the privilege.twitter.can-use configuration option.

Enabling Agent Workbins

You can enable agents to use Agent Workbins to receive and/or store contact interactions for future processing.

- A working knowledge of Genesys Administrator Extension.
- The `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to Universal Contact Server and Interaction Server.
- Enabling Agents To Manage Contacts.

To enable Agent Workbins:

1. Use Genesys Composer to create a Workbin.

2. In Genesys Administrator Extension, declare the Workbin in the `interaction-workspace` section of the `Options` tab of the `WS_Cluster` application object, following the generic rule:

```
workbin.<media_type>.<workbin-nick-name>=<workbin-script-name>.
```

3. Configure the following Workbin configuration options

   - intercommunication.<media-type>.queue
   - intercommunication.<media-type>.routing-based-actions
   - intercommunication.<media-type>.routing-based-targets

Enabling contact history management

You can enable an agent to view and update the email and chat interaction history of a contact.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The WS_Cluster application object exists in the Configuration Database.
- The WS_Cluster application has a connection to Universal Contact Server.

To enable contact history management

1. Configure the Contact options in the interaction-workspace section of the WS_Cluster application object.
2. Enable an index search on contacts to enable searches on contact interactions. For more information about enabling index searches, refer to the *eServices 8.1 User's Guide*.

Enabling disposition codes

You can enable agents to specify the outcome (disposition) of an interaction.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- A WS_Cluster application object exists in the Configuration Database.
- The agent object is configured to use one or more of the following media channels:
   - Voice
   - Email
   - Chat
   - Facebook
   - Twitter

To enable disposition codes:

1. In Genesys Administrator Extension, create or update a Business Attribute in the tenant that contain(s) your agents.

    -   The Type of the Business Attribute is `Interaction Operation Attributes`.

    -   The Attribute values are the codes that are available for the agent:

        -   `name`—Used in attached data.

        -   `display name`—Used in the Agent interface.

2. In the `interaction-workspace` section, set the value of the `interaction.disposition.value-business-attribute` option to the name of the Business Attribute that you previously configured.

3. Configure the following Interaction options in the `interaction-workspace` section of the `WS_Cluster` object:

-   `interaction.disposition.is-mandatory`

-   `interaction.disposition.is-read-only-on-idle`

-   `interaction.disposition.key-name`

-   `interaction.disposition.use-attached-data`

-   `interaction.disposition.value-business-attribute`

Enabling case information editing

You can enable an agent to edit the contents of case information.

Before you begin, ensure that the following prerequisites are met:

-   A working knowledge of Genesys Administrator Extension.
-   A `WS_Cluster` object exists in the Configuration Database.
-   One or more custom Case Information Business Attributes in the Configuration Layer.

To enable case information editing:

1. In Genesys Administrator Extension, open a Case Information Business Attribute.

2. In the Attributes Values tab, open the attribute value that you want to enable Agent to edit.

3. Select the Options tab.

4. Add a new section named `interaction-workspace`.

5. Configure the option according to the values in the Editing Case Information table.

6. Save your updates.

Enabling caller ID selection

You can enable agents to select a caller ID from pre-defined list of caller IDs.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- A WS_Cluster object exists in the Configuration Database.

To enable caller ID selection:

1. In Genesys Administrator Extension, create a Business Attribute that contains the possible caller ID values you want agents to be able to select. In its Business Attribute Values, the name is used to specify the actual phone number Workspace dials. If the Display Name is specified, this is the information Workspace presents to the agent (in alphabetical order).

   ### Important

   If the Business Attribute doesn't contain any Business Attribute Values, then the feature isn't enabled. Also, if the attribute contains only one value, then the adapter automatically uses that caller ID so the agent doesn't see a popup when making a call.

2. Set the intercommunication.voice.make-call-caller-id-business-attribute option to the name of your Business Attribute. For example, if you create a Business Attribute named **CallerID**, then you would set **intercommunication.voice.make-call-caller-id-business-attribute** to CallerID.

Enabling the Instant Messaging (IM) channel

You can enable agents to use the Instant Messaging channel for internal communication and interaction consultation.

Before you begin, ensure that the following prerequisites are met:

- A working knowledge of Genesys Administrator Extension.
- The WS_Cluster application object exists in the Configuration Database.
- The WS_Cluster application has a connection to SIP Server.

To enable the Instant Messaging channel:

1. Configure the IM options in the interaction-workspace section of the WS_Cluster application object.
2. Ensure that the SIP DN of the Place used for Instant Messaging has the following options defined in the TServer section:
   - multimedia = true

- voice = `true`

- sip-signaling-chat = `none`

> ### Important
> Workspace does not support a Place that uses one DN for voice and one DN for IM.