Workspace Desktop Edition Deployment Guide

Managing Contacts

5/8/2025

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You can configure Interaction Workspace to restrict the access of agents to the Contact History and the Contact Directory. Access to the contents of these views is restricted by using a custom filter based on the role of the Application, Tenant, Agent Group, or Agent. For example, you can create a contact search filter that is applied to the Team Communicator or the Contact Search for attributes such as department or customer. Interaction Workspace automatically restricts the results that are displayed on the contact list in the following interface view:

- Team Communicator
- Contact Directory list or grid
- Merge-Contact dialog list or grid
- Assign Contact list or grid
- E-mail address selection dialog list or grid

To provision restricted access to the Contact History and the Contact Directory, for each contact attribute that is used to grant permission to access contact records, use the following example as a guide: In the `interaction-workspace` section of the Application, Tenant, Agent Group, or Agent for whom you want to configure permissions, create one or more options like the following option examples:

- `contact.directory-permissions.<ContactAttributeName1>=AttributeValue1,AttributeValue2`
- `contact.directory-permissions.<ContactAttributeName2>=AttributeValue3,AttributeValue4`

The `contact.directory-permissions` option modifies the search logic whenever the Application, Tenant, Agent Group, or Agent makes a contact search request. For the example above, the following logical filtering criteria are added to the search criteria that are specified by the agent in the following way: `AND ((ContactAttributeName1=AttributeValue1) or (ContactAttributeName1=AttributeValue2)) AND ((ContactAttributeName2=AttributeValue3) or (ContactAttributeName2=AttributeValue4)) AND` The logic of the filtering might be slightly different than this depending on which search algorithm is being used. The attributes must be defined in Universal Contact Server (UCS). In the Annex of the custom contact attribute value, the `is-searchable` option in the `settings` section must be set to `true`. You can create Contact History filters that control the logic of the search and also adds the authorized attributes to the **Filter** menu.

- `contact.history.filters-<InteractionAttributeName1>=AttributeValue1,AttributeValue2`

> **Tip**
>
> In environments with a large number of contacts, where contact segmentation is used, Genesys recommends that agents access the Contact Directory List View rather the Grid View. Workspace 8.5.1 has the capability of limiting the Contact Directory access to List View only using the `contact.directory-enabled-modes` option.

Example: Restricting Contact Search by Permissions

You have defined the following attributes in UCS: `IsVIP` and `DepartmentID` You want to restrict members of the Agent Group ABC so that they cannot access to the "VIP" contacts, and you want to restrict them to the following departments: `Sales` and `Pre-Sales`. Configure the following `interaction-workspace` section options in the Annex of the `ABC` Agent Group:

- `contact.directory-permissions.IsVip=FALSE`
- `contact.directory-permissions.DepartmentID=Sales,PreSales`

Example: Restricting Contact History Search by Permissions

You have defined the following attribute in UCS: `DepartmentID` You want to restrict members of the Agent Group `ABC` so that they can filter the Contact History by the `Sales` department. Configure the following `interaction-workspace` section options in the Annex of the `ABC` Agent Group:

- `contact.history.filters-DepartmentID=Sales`

The `Sales` attribute is displayed as an option in the **Filter** menu and as an attribute in the ContactHistory view list or grid.

Contact Management

Interaction Workspace enables agents to manage contacts. The privileges that can be enabled for an agent are the following:

- View Contact Record
- Edit Contact Record
- Delete Contact
- Create Contact
- Merge Contact
- Manually assign an interaction to a Contact
- Undo Merge Contact
- Search the Contact database
- Interaction Threads
- Interaction Ownership
- Populating the Contact History with eServices Interactions
- Resend e-mail interactions from the Contact History

Use the options in the `contact` section to configure the way in which agents can manage contacts.

- `contact.directory-displayed-columns` -- The list of contact fields displayed when the results of a contact search is rendered.
- `contact.directory-search-attributes` -- The list of Contact fields that can be used as search parameters.
- `contact.displayed-attributes` -- The list of Contact fields that are displayed when a Contact record is rendered.
- `contact.multiple-value-attributes` -- A list of contact attributes that are allowed for use as contact

field names.

- `contact.directory-search-types` -- The list of search types that are available for the agent to use to search the contact database. Specifying the value `contains` may have a performance impact.
- `contact.default-directory-page-size` -- The default value for the number of rows per page in the contact directory search result grid view. A value must be defined in the `contact.available-page-size` option.
- `contact.available-directory-page-sizes` -- The number of rows per page in the contact directory search result list view.
- `contact.timeout-delay` -- The delay, in seconds, before a UCS request times out.
- `contact.history-displayed-columns` -- Defines the list of Contact History items that are displayed in the interaction view.
- `contact.history-search-attributes` -- Defines the list of Contact History items that an agent can use to search the History database.
- `contact.history.media-filters` -- Specifies the list of media types that can be used to filter the Contact History.
- `contact.history.filters-service` -- Specifies a custom business attribute that is defined in Universal Contact Server that can be used to search the contact history.
- `contact.history.filters-level` -- Specifies a custom business attribute that is defined in Universal Contact Server that can be used to search the contact history.
- `contact.date-search-types` -- The list of search types that are available for the agent to use to search the contact database by date.
- `contact.lookup.enable` -- Specifies that the Universal Contact Server (UCS) identify service is to be used for contact lookup.
- `contact.lookup.enable-create-contact` -- Specifies that the Universal Contact Server (UCS) create a contact service is to be used if the identify service fails to find the contact.
- `contact.ucs-interaction.enable` -- Activates the Interaction Workspace feature that generates the voice interaction history in Universal Contact Server (UCS) based on the inbound and outbound interactions handled by Interaction Workspace.
- `contact.ucs-contact.attributefielddefaultmaxlength` -- The maximum field length for attributes in Universal Contact Server (UCS).

Contact Management: Last Routed Agent

The Last Routed Agent Feature enables you to save in the Contact Profile, information about the last agent who handled interactions from that contact. The agent handling information can then be used during the routing of subsequent interactions from this contact. When an agent actively handles an interaction of a given media type from a contact, the following keys are set in the Contact Profile:

- `LastCalledAgent_EmployeeID`
- `LastCalledAgent_TimeStamp`
- `LCA_EmplID_<MediaType>`
- `LCA_TimeStamp_<MediaType>`

Where <MediaType> corresponds to the media of the interaction. Refer to the eServices and Routing documentation for more information about this feature. You can activate this option globally by setting to true the `contact.last-called-agent.enable` option in the `Contact` section. Or you can activate it by media type by setting to true the contact.last-called-agent.<media-type>.enable option in the `[ContactOptions|Contact]]` section.

Contact Management: Summary of Activity that is Related to the Current Contact

In the interaction windows, Interaction Workspace displays visual indicators that inform the agent who is handling the interaction about the activities that are related to the current contact. To enable these features, allow the following privilege:

- Can Use Contacts

For Interaction Workspace 8.1.2 and later, this feature displays the number of in-progress interactions for a contact in an icon. This indicator measures the number of eServices interactions that are currently in-progress somewhere in the workflow, excluding the current one. You can activate this feature by configuring the `contact.metrics.enable-interactions-in-progress` option in the `Contact` section. If the agent clicks the icon, the interactions are immediately displayed in the History view. For Interaction Workspace 8.1.3 and later, the Recent Interaction Notification is also displayed. This indicator provides the number of interactions that have been exchanged with this contact in the past specified number of days, excluding current interaction. This feature is useful for predicting the level of contact frustration. Configure the `contact.metrics.time-frame-customer-notification` option in the `Contact` section to specify the time interval. If the following privilege is granted, Interaction Workspace displays the list of recent interactions with this contact as a tooltip for the icon:

- Can Use Contact History

You can specify the maximum number of items that are displayed in the tooltip by configuring the `contact.metrics.max-elements-customer-notification` option in the `Contact` section. If the agent clicks the icon, the interactions are immediately displayed in the History view.

Interaction Threads

Interaction Workspace enables you to manage interaction threading in the Universal Contact Server (UCS) database. E-mail threading is set according to reply actions that are made by agents, automatic response, and contacts. Voice threading is set according to the transfer record of a call; each agent that handles the interaction generates an interaction in the UCS database. The `contact.threading-ucs-interaction.enable` option controls how multi-channel threading that results from the outbound interactions that are created during the handling of an original inbound or outbound contact interaction. For example, an inbound e-mail might result in an outbound e-mail, or or more outbound voice calls, and an SMS session. All of these related interactions can be associated as a single thread. In the Interaction Workspace Contact Directory and My History views, agents can view the interaction history as threads. Threads are sorted in reverse chronological order, with the most recent first, but within threads, interactions are sorted chronologically, from first to most recent. To use interaction threading, enable the following privilege:

- Can Use Contacts

Then, configure the following configuration option to `true`:

- `contact.threading-ucs-interaction.enable` -- Enables the Interaction Workspace feature that associates interactions that are submitted during multi-channel contact communication, such as `smssession`, in threads in Universal Contact Server history.

Interaction Ownership

Interaction Workspace enables you to display the interaction owner that is defined in the UCS data base to the agents that can view the Contact History.

Display of interaction ownership is controlled by the following options:

- `display-format.agent-name` -- Specifies the format of the agent name in the Contact History view. Interaction Workspace uses this information to convert the owner ID from UCS to a label that is displayed in the Contact History view. If there is no owner ID associated with an interaction, then this field is blank.
- `contact.history-displayed-columns` -- Specifies which interaction attributes are displayed in the Contact History view. Add the value `OwnerId` to display the Interaction "Processed by" column.

Populating the Contact History with eServices Interactions

eServices interactions differ by type in the way that they are submitted to the Contact History:

- `email` -- E-mail interactions are automatically submitted to the Contact History by Email Server and Interaction Workspace. They are completed by Interaction Workspace or by a Business Workflow.
- `chat` -- Chat interactions are automatically submitted to the Contact History by Chat Server. They are completed by Interaction Workspace or by a Business Workflow.
- `SMS Session` -- SMS Session interactions are automatically submitted to the Contact History by Chat Server. They are completed by Interaction Workspace or by a Business Workflow.
- `SMS Page` -- SMS Page interactions are submitted to the Contact History by a Business Workflow only. This is applicable to both inbound and outbound workflows.
- `workitem` -- Custom workitem interactions are submitted to the Contact History by a Business Workflow only. This is applicable to both inbound and outbound workflows.

Notes:

- If the Contact History is created by a Business Workflow, the integrator is responsible for using the appropriate building blocks in the *ad-hoc* strategy.
- Interaction Workspace can submit interactions to the contact history if the `contact.ucs-interaction.<media-type>.enable-create` option is set to `true` for any media.
- Interaction Workspace can look for a matching contact for any media-type if the `optioncontact.ucs-interaction.<media-`

	`type>.enable-lookup` option is set to `true`.

Media Filtering

The `Filter` menu of the Contact History view and My History view can be configured to display specific media types in a specific order by using the `contact.history.media-filters` option in the `interaction-workspace` section of the Interaction Workspace application object. You can use this option to add the media types of the workitems that are supported by 3rd party plug-ins.

Custom Filtering

You can create custom business attributes in Universal Contact Server for contacts. For example, you might want to create a set of service areas from your business and use these as custom contact attributes, or you might want to create a set of contact levels, such as silver, gold, and platinum, and use these as custom attributes. When you define your custom business attribute, you must define the valid values. Use the following configuration option to enable filtering on your custom business attribute values:

- contact.history.filters-<custom attribute>