GENESYS™

Workspace Desktop Edition Deployment Guide

Setting Up Agents On The System

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Contents

Refer to *Framework 8.1 Genesys Administrator Help* and *Genesys Security Guide* for detailed information on how to use Genesys Administrator and Management Framework to configure access permissions

Procedure: Creating a Role and allowing an Interaction Workspace privilege and assigning a Role to an agent or agent group

Purpose: To restrict the privileges that are assigned to an agent.

The `security.disable-rbac` configuration option in the `interaction-workspace` section determines whether agents have all privileges granted or whether the Role-Based Access Control (RBAC) control system is used.

> 💡 **Note:** RBAC requires Configuration Server 8.0.2 or higher.

If `security.disable-rbac` is set to `true`, RBAC is disabled and all privileges are assigned to all agents and Agent Groups. If `security.disable-rbac` is set to `false`, RBAC is enabled and you must assign roles to agents and Access Groups. For more information about roles refer to Role-Based Approach of Genesys 8.

Prerequisites

- Genesys Administrator 8.0.200.29 or higher, configured to show Advanced View.
- Configuration Server 8.0.2 or higher.
- A working knowledge of Genesys Administrator 8.
- Interaction Workspace Application Template in the Configuration Layer.

Start

1. Create the Interaction Workspace `Application` object from the Interaction Workspace Application Template.
2. From the Tenant drop-down list, select the Tenant for which you want to create the role.
3. In the Genesys Administrator `Provisioning` view, select `Accounts` in the `Navigation` column.
4. Select the `Roles` view.
5. In the `Roles` view, click `New`.
6. In the `Configuration` tab, specify the following `General` parameters:

- A name for the role.
- A description of the role (optional).
- Whether or not the role is enabled.

- In the `Configuration` tab, specify a list of users or access groups in the `Members` view.
- In the `Role Privileges` tab, click `Interaction Workspace privileges`.

- Initially, all privileges are unassigned. To assign a privilege, click the drop-down list in the `Value` column that is associated with the privilege and select `Allowed`. Refer to Role Privileges for a list of all the privileges.

- To save the new role, click `Save and Close`. The new role is now applied to the specified agents and Agent Groups. For information on privilege conflicts, refer to Resolution for Configuration Options Conflict Resolution for Configuration Options.
  To discard the new role without saving your changes, click `Cancel`.

  End

Procedure: Optimizing the Login Window

Purpose: To control the behavior of the Interaction Workspace Agent Login Window.

Agent login can be configured as either a one-step or a two-step process depending on whether you want to prompt the agent for connection parameters in the secondary login window or specify the parameters for the agent.

For a list of configuration options that are related to login, refer to Login.

Prerequisites

- Genesys Administrator 8.0.2 or higher, configured to show Advanced View.

- A working knowledge of Genesys Administrator 8.

- An Interaction Workspace `Application` object exists in the Configuration Database.

Start

1. Configure the agent for two-step login by setting the options that control Password, Queue, Switch, and Place.

    a. If the agent must enter a phone-set Password, set the `login.prompt-dn-password` option to `true`. The second login window is displayed after the agent is authenticated. A phone-set Password prompt will be displayed in the secondary login window.

    b. If the agent must enter a Queue at login, set the `login.prompt-queue` option to `true`. A Queue prompt will be displayed in the secondary login window.
    If the switch has multiple logins for the agent, the agent will be prompted to enter the particular login that they want to use.

    c. Several options control Place login:

        i. If the agent must enter a Place at each login, set the `login.prompt-place` option to `true`.

        ii. If the agent always logs in to a default Place at each login, do the following:

    - Assign a default Place in the Agent Advanced tab.

    - Set the `login.prompt-place` option to `false`.

    - Set the `login.use-default-place` option to `true`.

- If the agent must specify a Place only the first time that the agent logs in (**Note:** The Place is stored in the local settings of the agent):

    - Set the `login.use-default-place` option to `false`.

- Set the `login.prompt-place` option to `false`.

- Configure the agent for one-step login by using the following configuration-option settings:

  - Set the `login.prompt-dn-password` option to `false`.

  - Set the `login.prompt-queue` option to `false`.

  - Set the `login.prompt-place` option to `false`.

Note: If the default Place in the Agent Advanced tab is blank, the agent will have to perform a two-step login the first time that the agent logs in to a particular workstation.

End

Procedure: Provisioning Interaction Workspace for the Voice channel

Purpose: To enable an agent to log in to the Voice channel.

Prerequisites

- Genesys Administrator 8.0.2 or higher, configured to show Advanced View.

- A working knowledge of Genesys Administrator 8.

- An Interaction Workspace `Application` object exists in the Configuration Database.

- T-Server with associated switch and switching office.

- A Switch that is configured with DNs that correspond to agent devices in the switch.

- Agent logins that are configured in the Switch that can be referred by agents.

- A Place that contains one or more DNs from the Switch.

Start

For each agent that you want to configure to use the Voice channel, do the following:

1. Reference at least one `AgentLogin` from the Switch.

2. Check the `isAgent` flag.

3. Set a default Place. (Optional)

4. Allow the voice media privilege (see Voice Privileges) for the role to which the agent is assigned (refer to the Procedure: Creating a Role, allowing an Interaction Workspace privilege, and assigning a Role to an agent or agent group).

5. Allow the voice media privileges that you want the agent to use (see Voice Privileges).

6. Configure the voice options in the `interaction-workspace` section of the Interaction Workspace `Application` object (refer to the Voice configuration option reference for a list of Voice options and a description of how to configure them).

End

Procedure: Declaring and using new Not-Ready Reason codes

Purpose: To enable an agent to use custom Not-Ready Reason codes and to support the `aux work` mode.

The only Not-Ready Reasons that Interaction Workspace supports by default are Unknown and `After Call Work`. Custom Not-Ready Reason codes are defined in the `Action Codes` folder of the `Desktop` folder in the `Provisioning` view of Genesys Administrator.

Prerequisites

- Genesys Administrator 8.0.2 or higher, configured to show Advanced View.
- A working knowledge of Genesys Administrator 8.
- An Interaction Workspace `Application` object exists in the Configuration Database.

Start

1. Create a new Action Code in the following Genesys Administrator view: `Provisioning > Desktop > Action Code`.
2. Enable the new Action Code so that it can be used in the Configuration Layer.
3. To enable the Action Code to display in the Agent Interface, configure the `agent-status.enabled-actions-global` option in the `interaction-workspace` section of the Interaction Workspace `Application` object (refer to the Agent status configuration option reference for a list of agent status options and a description of how to configure them).
4. Configure the Interaction Workspace `agent-status.not-ready-reasons` option to include the value that is specified in the Action Code (refer to the Agent status configuration option reference). Not-Ready Reasons are displayed in the order that is defined by the value of the `agent-status.not-ready-reasons` option. If no value is specified for the `agent-status.not-ready-reasons` option, the default behavior is to display all Not-Ready Reasons that are defined and enabled in the Action Code folder.

End

Procedure: Enabling Accessibility Features

Purpose: To enable agents to use the Accessibility features of Interaction Workspace.

Prerequisites

- Genesys Administrator 8.0.2 or higher, configured to show Advanced View.
- A working knowledge of Genesys Administrator 8.
- An Interaction Workspace `Application` object exists in the Configuration Database.

Start

1. In Genesys Administrator, open the Interaction Workspace Application.
2. Select the Options tab.
3. In the `interaction-workspace` section, configure the following option value:

- `accessibility.visual-impairment-profile` -- Set to `true` to optimize the Interaction Workspace for keyboard navigation and screen reader applications.

4. In the `interaction-workspace` section, configure the following option values to add sounds to specific interface events:

- `accessibility.agent-state-change-bell` -- Specify the name of the sound file that you want to play to the agent when the agent changes state.

- `accessibility.interaction-state-change-bell` -- Specify the name of the sound file that you want to play when an interaction changes state.

- `accessibility.warning-message-bell` -- Specify the name of the sound file that you want to play when a warning message is displayed to the agent.

- `<media-type>.ringing-bell` -- Specify the name of the sound file that you want to play to the agent when an interaction of <media-type> is received.

- `chat.new-message-bell` -- Specify the name of the sound file that you want to play to the agent when a new chat message is received.

- `im.new-message-bell` -- Specify the name of the sound file that you want to play to the agent when a new IM message is received.

End

Procedure: Enabling Security Features

Purpose: To enable the security features of Interaction Workspace.

Prerequisites

- Genesys Administrator 8.0.2 or higher, configured to show Advanced View.
- A working knowledge of Genesys Administrator 8.
- An Interaction Workspace `Application` object exists in the Configuration Database.

Start

1. In Genesys Administrator, open the Interaction Workspace Application.
2. Select the Options tab.
3. Configure any of the following options in the `Security` section:

- `security.disable-rbac` -- Specify whether Role Based Access is applied to agents to control access to Interaction Workspace features and functionality.

- `security.inactivity-timeout` -- Specify whether the agent workstation locks after a certain period of inactivity.

- `security.inactivity-set-agent-not-ready` -- Specify whether the agent is automatically set to Not Ready when agent inactivity is detected.

- `security.inactivity-not-ready-reason` -- Specify the default Not Ready Reason if the agent's workstation times out.

4. Configure any of the following options in the `sipendpoint` section:

- `sipendpoint.genesyslab.system.log_level_Security` -- Specify the log level to be used for

        security.

5. Configure any of the following options in the `log` section:

    -   `log.default-filter-type` -- Specify the default filter type for logging.

    -   `log.filter-data.<key_name>` -- Specify the treatment of log data. Enables you to filter for specific attached data keys, by specifying the key name in the option name.

End

Procedure: Creating Corporate Favorites

Purpose: To enable the use of corporate favorites in the Team Communicator.

Prerequisites

-   Genesys Administrator 8.0.2 or higher, configured to show Advanced View.

-   A working knowledge of Genesys Administrator 8.

-   An Interaction Workspace `Application` object exists in the Configuration Database.

Start

1. In Genesys Administrator, open the Interaction Workspace Application.

2. Select the Options tab.

3. Create a new section and name it with the name of the Corporate Favorite that you want to create.

4. Configure the new Corporate Favorite section to be one of the following types:

    -   `Agent`
    -   `Agent Group`
    -   `Skill`
    -   `Queue`
    -   `Interaction Queue`
    -   `Routing Point`
    -   `Custom Contact`

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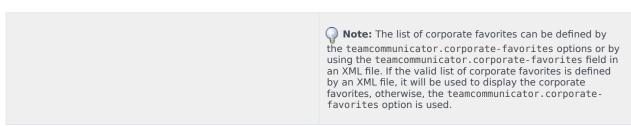
Corporate Favorite Options by Type

Type	Options	Mandatory	Valid values	Example
Agent	type	Yes	Agent	Agent
	id	Yes	<user name of the agent>	User123
	category	Yes	<a semicolon-separated list of	CorporateCategory1;FavoriteAger

Type	Options	Mandatory	Valid values	Example
			category names>	
Agent Group	type	Yes	AgentGroup	AgentGroup
	id	Yes	<name of the agent group>	Agent Group Meridian
	category	Yes	<a semicolon-separated list of category names>	CorporateCategory1;FavoriteAgen
Skill	type	Yes	Skill	Skill
	id	Yes	<name of the skill>	French
	category	Yes	<a semicolon-separated list of category names>	French Speaking Agents; Mandarin Speaking Agents
Queue	type	Yes	Queue	Queue
	id	Yes	DN number in the following format <DN>@<SwitchName>	123@MySwitch
	category	Yes	<a semicolon-separated list of category names>	CorporateCategory1;FavoriteAgen
Interaction Queue	type	Yes	InteractionQueue	InteractionQueue
	id	Yes	<script name of the interaction queue>	123@MySwitch
	category	Yes	<a semicolon-separated list of category names>	CorporateCategory1;FavoriteAgen
Routing Point	type	Yes	RoutingPoint	RoutingPoint
	id	Yes	DN number in the following format <DN>@<SwitchName>	123@MySwitch
	category	Yes	<a semicolon-separated list of category names>	CorpRoutingPoint
Custom Contact	type	Yes	CustomContact	CustomContact
	category	Yes	<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;+5551234543
	emailaddress		<a semicolon-	external1@mail.dom;

Type	Options	Mandatory	Valid values	Example
			separated list of e-mail addresses>	external2@mail.dom

5. 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, Queue, Interaction Queue, 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.corporate-favorites-file` -- The name and the path to an XML file that contains a list and definition each corporate favorite. The path can be relative to the Interaction Workspace working directory (for example: Favorites\CorporateFavorites.xml) or an absolute path (for example: C:\PathToFavorites\CorporateFavorites.xml).

   > 💡 **Note:** The list of corporate favorites can be defined by the `teamcommunicator.corporate-favorites` options or by using the `teamcommunicator.corporate-favorites` field in an XML file. If the valid list of corporate favorites is defined by an XML file, it will be used to display the corporate favorites, otherwise, the `teamcommunicator.corporate-favorites` option is used.

6. To enable each interaction to have an independent list of corporate favorites that are dynamically loaded into the corporate favorites in the team communicator view of the current interaction, configure the following options:

   a. Configure a Transaction object of type `list`. For example, you could configure a Transaction object that is named: IW_CorporateFavoritesOverrideOptions.

   b. In the `interaction-workspace` section configure the `teamcommunicator.corporate-favorites` option to a value such as fav1 as described in the previous steps.

   c. To the `interaction.override-option-key` option in the `interaction-workspace` section, set a valid key name, for example IW_OverrideOptions.

   d. Add the Transaction object name to the `AttachedData` in your strategy. In this example, set the value of IW_OverrideOptions to IW_CorporateFavoritesOverrideOptions.

   Refer to the Modifying a Routing Strategy to Override Interaction Workspace Options, Based on Attached Data section for a general description of this mechanism.

   > 💡 **Note:** The list of corporate favorites by interaction can be defined by the `teamcommunicator.corporate-favorites` options or by using an XML file. If the valid list of corporate favorites is defined by an XML file, it will be used to display the corporate favorites, otherwise, the `teamcommunicator.corporate-favorites` option is used.

End

Corporate Favorites Sample XML

The following is a example of an XML file that is used to define corporate favorites:

```xml
<?xml version="1.0" encoding="utf-8"?>
  <options>
  <interaction-workspace>
    <teamcommunicator.corporate-favorites>fav2;fav3</teamcommunicator.corporate-favorites>
  </interaction-workspace>
  <fav3>
    <category>Partners</category>
    <type>Agent</type>
    <id>Jim</id>
  </fav3>
  <fav2>
    <category>CorporatePartners;Partners2</category>
    <type>Agent</type>
    <id>John</id>
  </fav2>
  <fav4CustomContact>
    <category>CorporatePartners</category>
    <type>CustomContact</type>
    <firstname>Bob</firstname>
    <lastname>Davis</lastname>
    <phonenumber>+12121231234;+18001231234</phonenumber>
    <emailaddress>bob@genesyslab.com;sales@genesys.ca</emailaddress>
  </fav4CustomContact>
  <fav5RoutingPt>
    <type>RoutingPoint</type>
    <category>RoutingPoint</category>
    <id>122@LucentG3</id>
  </fav5RoutingPt>
  <fav6AgentGroup>
    <category>CorpAgentGroup</category>
    <type>AgentGroup</type>
    <id>Agent Group Meridian</id>
  </fav6AgentGroup>
  <fav7Skill>
    <category>CorpSkill</category>
    <type>Skill</type>
    <id>Email-QualityConfidencePercentageSkill</id>
  </fav7Skill>
  <fav8ACDQueue>
    <category>CorpACDQueue</category>
    <type>Queue</type>
    <id>8000@1LucentG3</id>
  </fav8ACDQueue>
  <fav9IxnQueue>
    <category>CorpIxnQueues</category>
    <type>InteractionQueue</type>
    <id>route-to-agent-group-8002</id>
  </fav9IxnQueue>
  </options>
```