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Workspace Desktop Edition Deployment Guide

Configuring the appearance and content of the user interface

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Many of the Workspace views can be configured to display certain elements depending on the context—for example:

- Case data key-value pairs
- The values that are displayed for a Case History
- The title of the Main Toolbar
- The party identifier in Voice Media view
- The information that is displayed in the Preview window

There are three ways to specify the appearance and functionality of Workspace: Administration, Personalization, and Customization.

Administration

Administration is configuration that is performed by system administrators. It is managed through Genesys Administrator Extension by setting configuration options on the Workspace Application object. Administration settings are stored in the Genesys Configuration Layer.

Views

The **View** options enable you to configure the sorting order and the default tab selection of tabbed views within each window.

The sort order can be customized by using the `views.<RegionName>.order` options.

The default tab selection can be configured by using the `views.<RegionName>.activate-order` options. The first in the list, if present, is selected by default. If the first in the list is absent, the second in the list is presented by default, and so on. Both options support out-of-the-box view names and names of custom views added to tab areas.

For custom views, use the `ViewName` string in the option; this is the string that is passed as the `ViewName` in the view activator. For the details about how to do this, refer to the [Workspace Developer's Guide](#).

Personalization

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Workspace is personalized at the user level by the setting of Personal Preferences. Personalization data are stored in the agent annex, in the personal-data directory on the local workstation (as specified by the `options.record-option-locally-only` option), or on a **common working directory** (as specified by the `options.record-location` option).

For more information on setting preferences, see [Workspace User's Guide](#) and [Workspace Context-Sensitive Help](#) (which is available by clicking the Help icon in the Workspace Main Window, or, with the Workspace Main Window open, by pressing F1 on your keyboard).

Agents have control over the display location of various Workspace Windows, as well as the arrangement and appearance of text and fields within the display.

Keyboard shortcuts

You can configure keyboard shortcuts that control many different features of Workspace. Refer to the [keyboard shortcut](#) configuration option reference for a complete list of all configurable keyboard shortcuts.

Important

Whenever the rich text editor is used, for example to edit an outbound email interaction, it is possible that there will be a conflict between shortcuts that you have configured by using the Workspace configuration options and the shortcuts of the Rich Text Editor interface. A list of the default shortcuts of the Rich Text Editor are available [on this Microsoft Web Page](#). Scroll down to the table in the **Remarks** section. Genesys recommends that you do not use any of the keyboard shortcuts that are already in use by the Rich Text Editor.

Workspace also supports [accessibility](#) through keyboard navigation.

Customization

Customization is accomplished through development. Workspace features an open framework that enables developers to add value and extend the capabilities of the application. Workspace employs a modular design that enables you to expand and integrate your application by using multiple data sources and systems. Workspace enables you to customize views and create or customize extensions. For more information on extending Workspace, see the [Workspace Developer's Guide and .NET API Reference](#) and the [Workspace 8.5 Extension Examples](#).