Workspace Desktop Edition Deployment Guide

Triggering contact look-up and populating History

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[**Modified:** 8.5.117.18]

> ## Important
>
> This topic includes the Contact Look-up portion of the former **Managing Contact** topic. The Contact Management content has been moved to Exposing Contacts to Agents and the Contact History content has been moved to Exposing History to Agents.

Interactions can be assigned to a contact in the contact database automatically or manually. Automatic assignment is handled by contact look-up when an inbound interaction is received.

Use the following configurations to specify how automatic contact assignment and creation is handled.

Automatic contact look-up and interaction storage

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Workspace can be configured to automatically assign a new inbound interaction to an existing contact in the contact database, or to create a new contact if the contact is not found. This behavior can be specified for all channels or for individual channels. To enable this capability, you must configure the following options:

- 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) creates a contact service to be used if the identify service fails to find the contact.

- contact.lookup.auto-assign-mode: When there are multiple contact matches, specify whether the first found contact is assigned automatically (default behavior) or the agent is presented with a list of matches that he or she can manually choose the contact.

- contact.lookup.<media-type>.enable: Activates the Workspace features that rely on the Universal Contact Server (UCS) IdentifyService for contact lookup when an interaction is presented to the Agent.

- contact.lookup.<media-type>.auto-assign-mode: For the specified media type, when there are multiple contact matches, specify whether the first found contact is assigned automatically (default behavior) or the agent is presented with a list of matches that he or she can manually choose the contact.

- contact.lookup.<media-type>.enable-create-contact: Activates the Workspace features that rely on Universal Contact Server (UCS) for contact lookup when an interaction of the given media type is

presented to the agent.

- contact.ucs-interaction.<media-type>.enable-create: Activates the Workspace feature that generates the interaction history in Universal Contact Server (UCS) based on the inbound and outbound interactions of type <media-type> that are handled by Workspace. Enable agents to create interactions of type <media-type>.

- contact.ucs-interaction.<media-type>.enable-lookup: Activates the Workspace feature that looks up the history of existing interactions of the given <media-type> in Universal Contact Server (UCS) to update their content and status according to live interaction lifecycle.

- contact.ucs-interaction.<media-type>.use-server-date: For the specified <media-type>, it specifies whether Workspace sets the start and end dates of interactions by using the time of the local agent workstation, or uses the date and time specified by Universal Contact Server (UCS) when it creates or updates an interaction record in UCS. Use this option as a template and modify its name by replacing the <media-type> by an actual media type that is defined in Management Framework.

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

Directly dialed calls

If you want to record calls directly dialed by agents in your Contact Database so that it can be tracked in their history, ensure that the following two options are set to `true`:

- contact.lookup.<media-type>.enable-create-contact

- contact.ucs-interaction.<media-type>.enable-create

To enable agents to manually create a contact when they have an active interaction, set the value of the contact.lookup.enable-create-contact option to `true`

Improving automatic contact assignment

[**Added:** 8.5.117.18]

If you implement the default contact look-up configuration, Workspace selects the first contact from the list of matching contacts returned by UCS based on interaction attributes. If more than one contact matches the information available for a new inbound interaction, subsequent matches are not considered. To improve automatic contact assignment when multiple matches are found, use the following configuration options to enable agents to choose a contact from the list of matches returned by UCS:

- contact.lookup.auto-assign-mode: When there are multiple contact matches, specify whether the first found contact is assigned automatically (default behavior) or the agent is presented with a list of matches that he or she can manually choose the contact.

- contact.lookup.<media-type>.auto-assign-mode: For the specified media type, when there are multiple contact matches, specify whether the first found contact is assigned automatically (default behavior) or the agent is presented with a list of matches that he or she can manually choose the contact.

Example: Preventing automatic contact creation in case of no UCS match and automatic

contact assignment in case of multiple UCS matches

This example is for the voice channel, but it can be applied to all channels or to other specific channels. Normally, if there is a single contact in the Universal Contact Server (UCS) database, Workspace automatically assigns the contact. In these scenarios:

- If you want to enable your agents to assign a contact to an interaction based on a look-up in the UCS database in scenarios where no match is found for the inbound interaction, but you do not want a new contact to be created automatically without your agent searching the contact database first,

- If you want to enable an agent to review the possible contact matches and choose the appropriate one in scenarios where there are multiple contacts that match an incoming interaction,

  Use the following configuration:

    - Contact - Can Assign is allowed

    - `contact.lookup.voice.enable = true`

    - `contact.lookup.voice.enable-create-contact = false`

    - `contact.lookup.voice.auto-assign-mode = false`

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 Contact section.

Interaction threads

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 email might result in an outbound email, or or more outbound voice calls, and an SMS session. All of these related interactions can be associated as a single thread.

In the 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 Workspace feature that associates interactions that are submitted during multi-channel contact communication, such as `smssession`, in threads in Universal Contact Server history.

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.

Important

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 contact.ucs-interaction.<media-type>.enable-lookup option is set to `true`.