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Workspace Desktop Edition Deployment Guide

Customizing display names

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[**Modified:** 8.5.109.16, 8.5.120.05, 8.5.143.08, WSEP 8.5.114.05]

[**Added:** 8.5.101.14]

Workspace uses the `display-format.*` configuration options to enable you to customize how different interface elements are displayed to agents. They are also used to customize the display names of Framework objects, such as Routing Points and Queues, in the agent interface.

Tip

This article is a work in progress. Additional use cases and examples will be added in the future.

Customizing display names for configuration objects

The `display-format.*` configuration options enable you to specify the data source for the display names of different objects. For example:

1. System attributes of configuration objects (for example, Routing Point Number or Agent Group Name)
2. Custom Display names defined in custom dictionary files
3. Custom Display names defined in the object Annex
4. If none of the defined sources contain an actual string to display, Workspace displays the mandatory attribute value that is identified as the default for a particular object (for example, 'Number' for a DN).

You can use the `display-format.*` options to define multiple sources, separated by the '|' character, which specifies the precedence order of the sources. Precedence order is from left to right. If nothing is defined for the first source, the next one is checked, and so on.

Configuring object display names using custom dictionary files

[**Added:** 8.5.101.14]

Starting with Workspace 8.5.100x.xx, the list of field codes for these options is extended to take local dictionary entries into account. For example, for the `display-format.routing-point.name` option, the following key is supported: `$RoutingPoint.DictionaryValue$`. This key selects the name for the routing point based on the value specified for it in the language dictionary file.

For the `display-format.action-code.name` option, if the `$ActionCode.DictionaryValue$` key is specified, then the value for the action code will be selected from the dictionary that corresponds to the language that the agent specified at login.

For example, in `custom.en-US.xml`, the action code might be specified as:

```
{code}
<Value Id="ActionCode.Break" Text="Break"/>
{code}
```

And, in `custom.fr-FR.xml`, the same action code might be specified as:

```
{code}
<Value Id="ActionCode.Break" Text="Pause"/>
{code}
```

The following is an example of a custom dictionary that specifies alternate text for configuration objects:

```
<?xml version="1.0" encoding="utf-8" ?>
<Dictionary EnglishName="English" CultureName="English" Culture="en-US">
  <!-- [<Tenant>].<object-type>.<switch>.<object-identifier> (where [<Tenant>] and
  [<switch>] are optional) -->

  <Value Id="defaultTenant.RoutingPoint.LucentG3.122" Text="Routing Point 122" />
  <Value Id="defaultTenant.ACDQueue.LucentG3.80001" Text="ACD Queue 80001" />
  <Value Id="defaultTenant.InteractionQueue.any-queue-to-agent-group-8002" Text="Interaction
  Queue for Agent Group 8002" />
  <Value Id="defaultTenant.InteractionQueue.email-routing-queue-inbound" Text="Interaction
  Queue for inbound emails" />
  <Value Id="defaultTenant.ActionCode.Break" Text="Coffee Break" />
  <Value Id="defaultTenant.Workbin.email-draft-wb" Text="Rough copy Emails" />
  <Value Id="defaultTenant.BusinessAttribute.DispositionCode" Text="Disposal Code" />
  <Value Id="defaultTenant.BusinessAttribute.DispositionCode.DC_Accepted" Text="Taken" />
  <Value Id="defaultTenant.Skill.Email-QualityConfidencePercentageSkill" Text="Email skill" />
  <Value Id="defaultTenant.AgentGroup.Agent Group 80001" Text="Lucent Agent Group 80001" />
</Dictionary>
```

Configuring display names in the Object Annex

[Added: 8.5.109.16] [Modified: 8.5.120.05, WSEP 8.5.114.05]

You can add a display name for certain **configuration layer objects**. This feature enables you to name objects without relying on a local dictionary file. This feature makes localization and centralization more efficient.

This method provides a way to configure the display name centrally instead of locally in a dictionary file by enabling you to specify key-value pairs in object Annex. Key-value pairs can be defined for a default language and for localization in alternative languages.

Important

To store a display name in an object Annex as a string value that does not use the character set that is used by Configuration Server, Configuration Server 8.1.3 or higher must be installed and its multi-language capability must be enabled. For example, using French accented characters in a U.S. English deployment or using Korean characters in a Japanese deployment. Refer to **Deploying Genesys for Key Mixed Language Scenarios** for information about supporting multi-language deployment.

For each object, the default display name is defined by using the `interaction-workspace/display-name = <value>` key-value pair.

For each object, additional language display names are defined by using the `interaction-workspace/display-name.<ISO_language_code>-<ISO_country_code> = <value>` key-value pair (for example, `display-name.fr-CA` for French Canadian).

The following precedence rules are followed for display names:

- If a particular object type is configured to be displayed through the configuration Annex, Workspace tries at runtime to find a key-value pair that matches the locale that selected by the agent at login time.
- If no match is found, Workspace uses the default `display-name=value` key-value pair.
- If no default key-value pair is found, Workspace the value that is defined by the `display-format.*` options.

The following is an example of a display name in two different languages, the default, and French (France), that could be defined in the object Annex of a Routing Point:

- `interaction-workspace/display-name = 'Technical Support Queue'`: Used if there is no matching language specific entry for the locale selected by the agent in the login window.
- `interaction-workspace/display-name.fr-FR = 'File d'Attente du Support Technique'`: Used if the locale selected by the agent in login window is French (France) (fr-FR)

Use the `display-format.folder.name` option to specify the display format of folders that are displayed in the Disposition Code and Case Data views. You can localize the folder name using the `$Folder.Name$` parameter. **[Added: 8.5.120.05, WSEP 8.5.114.05]**

Summary of Display Format options

[Modified: 8.5.109.16]

The table **Summary of Display Format Options** contains descriptions of all of the new and updated display-format configuration options that use the Dictionary Value keys to support this feature.

Summary of Display Format Options

Object Type	Option Name	Field codes to be used in display-format.* options	Dictionary Key Format to be specified in the XML dictionary if the \$DictionaryValue\$ is specified in display-format.* options	Views affected by this option
DN - ACD Queue	display-format.acd-queue.name	\$ACDQueue.DictionaryValues\$.ACDQueue.AnnexValues\$	\$Team\$.ACDQueue.<Switch>.<dn-value>	Team Communicator Login views

Object Type	Option Name	Field codes to be used in display-format.* options	Dictionary Key Format to be specified in the XML dictionary if the \$DictionaryValue\$ is specified in display-format.* options	Views affected by this option
Action Code	display-format.action-code.name	\$ActionCode.DictionaryValue\$, \$ActionCode.AnnexValue\$	[<Tenant>].ActionCode.<action-code-name>	Global Agent Status Control (tool tip on drop down menu) My Channels view
Agent Group	display-format.agent-group.name	\$AgentGroup.DictionaryValue\$, \$AgentGroup.AnnexValue\$	[<Tenant>].AgentGroup.<agent-group-name>	Team Communicator My Statistics Voice Mail (shared voice mail boxes)
Business Attribute	display-format.business-attribute.name	\$BusinessAttribute.DictionaryValue\$, \$BusinessAttribute.AnnexValue\$	[<Tenant>].BusinessAttribute.<business-attribute-name>	Interaction View (Case Information, Disposition Code) Contact Directory Contact Profile Contact History (detail - case data)
Business Attribute	display-format.business-attribute.name	\$BusinessAttribute.DictionaryValue\$, \$BusinessAttribute.AnnexValue\$	[<Tenant>].BusinessAttribute.<business-attribute-name>	Interaction View (Case Information, Disposition Code)
Business Attribute Value			[<Tenant>].BusinessAttribute.<business-attribute-value-name>	Contact Directory Contact Profile Contact History (detail - case data) Media type (login, my channels, agent status, and so on)
Folder	display-format.folder.name	\$Folder.AnnexValue\$, \$Folder.DictionaryValue\$, \$Folder.Name\$		Interaction View (Disposition Code, enum-tree KVP in Case Information and Outbound

Object Type	Option Name	Field codes to be used in display-format.* options	Dictionary Key Format to be specified in the XML dictionary if the \$DictionaryValue\$ is specified in display-format.* options	Views affected by this option
				Record)
Script - Interaction Queue	display-format.interaction-queue.name	\$InteractionQueue.DictionaryValue\$, \$InteractionQueue.AnnexValue\$	\$Tenant>].ScriptInteractionQueue.<script-queue>.<dn>	Team Communicator Workbins view (My Interaction Queues)
DN - Routing Point	display-format.routing-point.name	\$RoutingPoint.DictionaryValue\$, \$RoutingPoint.AnnexValue\$	\$Tenant>].RoutingPoint.<switch>.<dn>	Team Communicator Login views
Skill	display-format.skill.name	\$Skill.DictionaryValue\$, \$Skill.AnnexValue\$	\$Tenant>].Skill.<skill>	Team Communicator
DN - Virtual Queues	display-format.virtual-queue.name	\$VirtualQueue.DictionaryValue\$, \$VirtualQueue.AnnexValue\$	\$Tenant>].VirtualQueue.<switch>.<dn>	Login Views
Script - Interaction Workbin	display-format.workbin.name	\$Workbin.DictionaryValue\$, \$Workbin.AnnexValue\$	\$Tenant>].Workbin.<script-workbin>	Workbins view (My Workbin, My Team Workbins)

Masking a contact's phone number on inbound and outbound interaction views

[Added: 8.5.143.08]

Protecting the security and privacy of contacts is an important consideration, especially if you have agents who are working from home. You can use the configuration options in this section to hide the contact's phone number in the Interaction window. You can modify the default values of the configuration options that control the contact information that is displayed in inbound and outbound interactions. Workspace also supports plain text instead of field codes in the values of the following options:

- display-format.caller-name
- display-format.case-name-format
- display-format.customer-name-format
- display-format.interaction-callback-name
- display-format.interaction-outbound-pull-preview-name

- `display-format.interaction-voice-name`
- `display-format.party-name-format`
- `interaction.window-title`

For example, you can modify the default value of `display-format.caller-name` to replace `$Interaction.MainParty$` with plain text such as `XXXXXXXXXXXX` or `Hidden Phone Number`.

For Outbound interactions, use the following configuration options and replace the `$OutboundRecord.PhoneNumber$` value with plain text to modify what your agents see in the Outbound interaction view:

- `display-format.outbound-record-name`: Specifies how an Outbound Record from a Record Chain is displayed when presented to an agent. The content is populated based on record attributes by a string that contains the following field codes: `$OutboundRecord.PhoneType$`, `$OutboundRecord.PhoneNumber$`, `$OutboundRecordField.X$`, where X is the name of the custom outbound field. [**Added:** 8.5.143.08]
- `display-format.caller-name`: Specifies the content of the 'Origin' field of the Case Information area. This option is enabled when the value of the `interaction.case-data.content` option contains the History key. This content is typically used when placing an outbound call where the origin contains a string such as "outbound call to xxx". The content is populated based on attached data keys or contact attributes (if there is a contact) or outbound record fields (if there is an outbound record) that are defined by a string that contains the following field codes: `$Interaction.CaseId$`, `$Interaction.MainParty$`, `$Contact.X$`, `$AttachedData.Y$`, `$OutboundRecord.PhoneType$`, `$OutboundRecord.PhoneNumber$`, `$OutboundRecordField.Z$`, where X is the name of contact attribute, Y is the attached data key name, and Z is the name of custom outbound field. If the values of the default field codes are empty, the following field code is used: `$Interaction.MainParty$`.

[**Modified:** 8.5.143.08]