Manage your Contact Center in Agent Setup

10/2/2025

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Cannot set a new type for this page; its type has already been set to Manual.

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Get started with Agent Setup

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- Administrator

Learn how Agent Setup enables you to configure a fully-functioning contact center that aligns with your company’s goals and meets your customers’ needs.

Related documentation:

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Contents

Important

Some features described here may not apply to your organization’s setup. If you need features that aren’t available to you, contact your administrator or Genesys representative.

Agent Setup is about controlling your contact center and its resources:

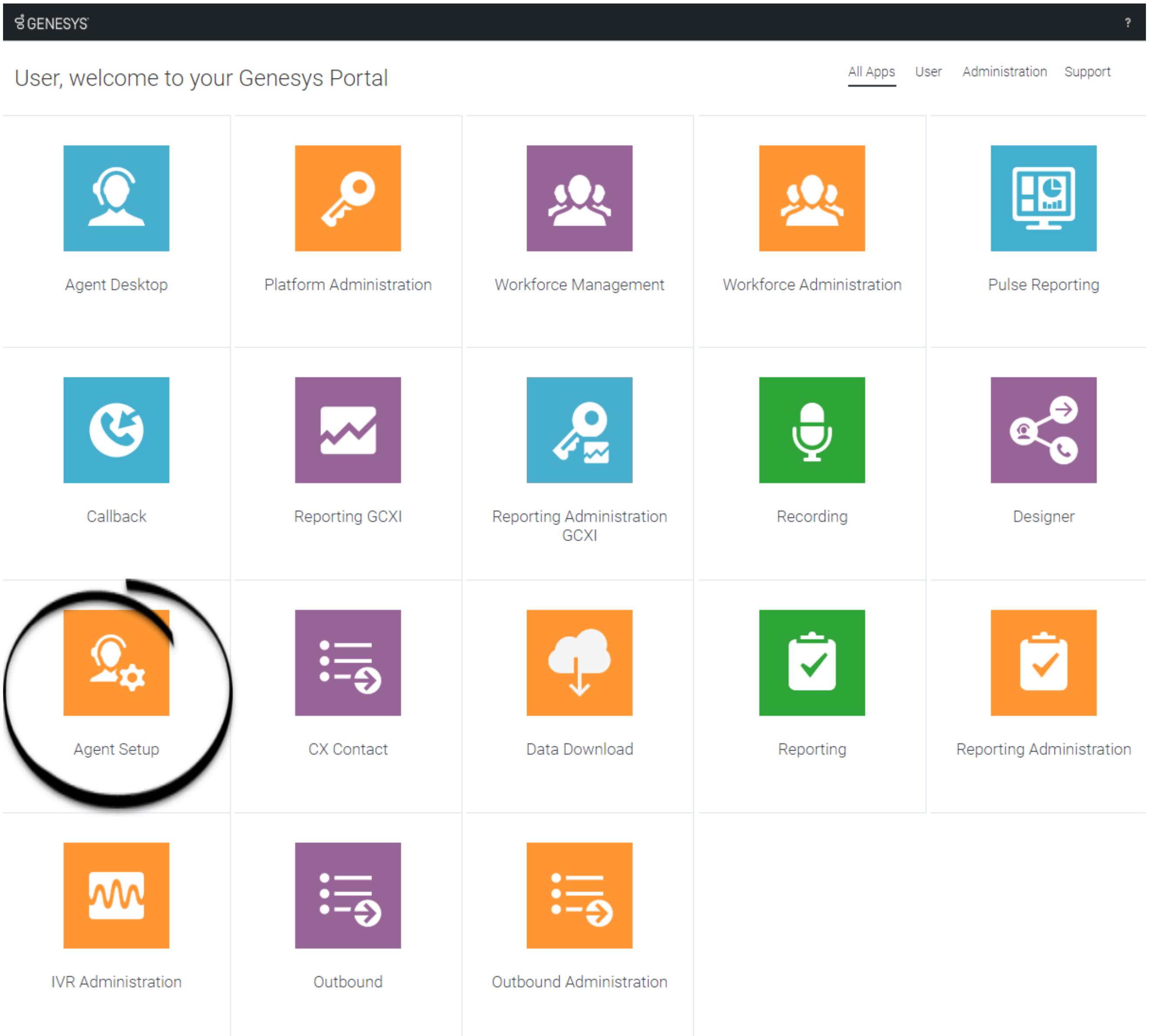
- The **people** who run and operate it – that’s the **administrators** who control the technical ins and outs, the **managers** who run the day-to-day operations and administrative aspects of a contact center, the **supervisors** who oversee agents, and the **agents** who communicate with customers.
- The **systems and programs** that make the day-to-day stuff possible – that’s the telephony, the software, the servers, the routing and dialing strategies, and so on.
- The **features and capabilities** we use to meet our business needs and requirements - those are things like Caller ID capabilities, voicemail, agent transfers and conferencing, and so on.

Link to video

Before you start

You access the Agent Setup interface through one of its supported web browsers. See the **Web browsers support** section in Genesys Multicloud CX system requirements for a list of all supported web browsers.

Access the application



Once your Genesys Multicloud CX environment is up and running and you've checked that you meet the necessary requirements, log in to your Genesys Portal to access Agent Setup. Click the Agent Setup icon and enter your username and password.

If your environment uses single sign-on (SSO) identity authentication, your log in experience might be a little different. After entering your username in the application login screen, you will be taken to your company's authentication provider where you will enter your username and password. After that, you will no have to log in again until your authentication expires which is typically every eight hours. Using SSO means that once you log in to one application, you will not have to log in to any other applications that are also set up for SSO.

Standby Agent Setup

Use the **Standby Agent Setup** tile when Agent Setup in the primary region is down. The Standby Agent Setup tile is always in readonly mode, and only becomes active after the primary region goes down.

Roles and access

Before you log in to the application, you should know the difference between the distinctive roles in Agent Setup:

Start by determining who can do what in your contact center.

- The **Agent Setup administrator** is the person with full control over configuration of your contact center, your users, and your desktop applications. Administrators belong to both the **Administrator** access group and the **Agent Setup Administrator** access group. Generally, each of these access groups are prepended with your company name.
- The next person in line is the **Agent Setup user**. That’s the person with extensive capabilities but with restrictions when it comes to configuration and changes. Users belong to the **Administrator** access group.
- Finally, there's the **supervisor**. This person has very limited capabilities and is usually limited to read-only access.

To assign these roles to new or existing users, see Manage agents and other users.

Logging in and out

> **Important**
>
> All users can log in to Agent Setup however, read and write access depends on your defined role. Also, for Agents, their ability to log in to Agent Setup does first depend upon the Access Groups they are assigned to.

After you log into the Genesys Portal, the Agent Setup displays another login window and you must log in again.

Type your username, click **Next**, type your password, and click **Sign In**.

When you have completed your administration tasks, click the menu in the upper-right corner, and select **Log Out**.

Walk through the application

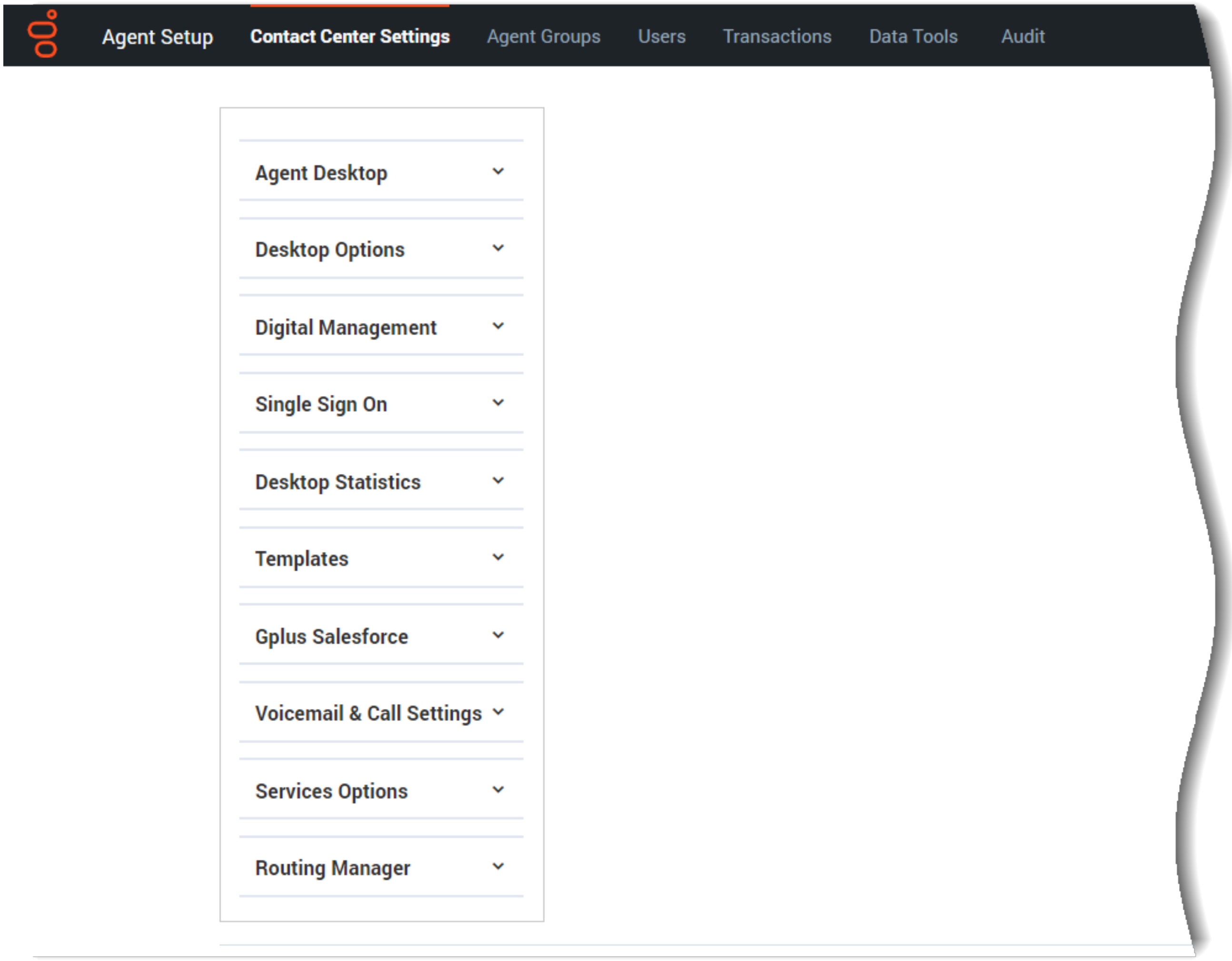
The Agent Setup application is divided into tabs, each containing a set of related tasks and options.

Tip

On the various screens, you select the check boxes next to the options that you want to enable. Each check box has three states:

-  The option is inactive. To activate the option, click the check box once. The option is then set to the default setting as specified in the description in the tool tip.
-  A check mark indicates that the option is enabled. You can click to disable the option.
-  No check mark indicates that the option is disabled. You can click to enable the option.

Contact Center Settings



(Click image to expand)

These are the options and tasks that, once enabled, are applied to the global contact center, meaning all agent groups and users within those groups. Some of these tasks and options, however, can be changed at the agent group or user level, or both. See Agent desktop settings overview.

Agent Groups

(Click image to expand)

These are the options and tasks specific to agent groups. These are applied to the agent groups and the agents within those groups. Many of these tasks and options can be changed at the User level, however.

Users

(Click image to expand)

These are the options and tasks specific to individual users (agents, mainly). Key tasks include:

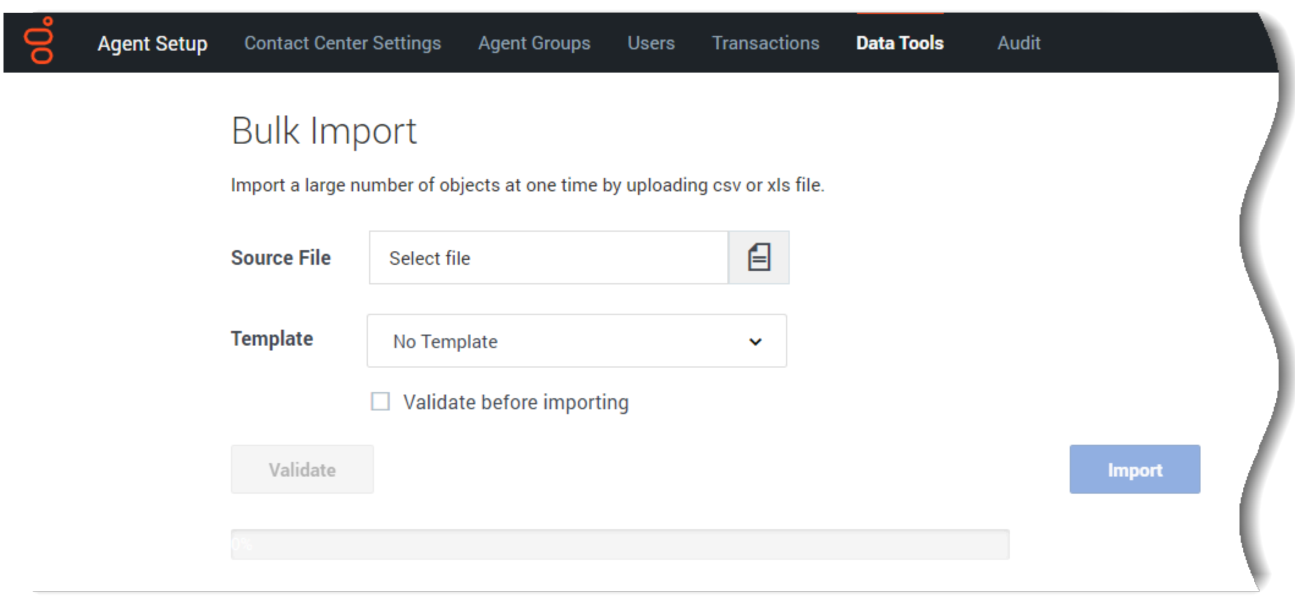
- Manage agents and other users
- Export agent accounts

Transactions

(Click image to expand)

Go to this tab to handle business attribute overrides. See Transactions.

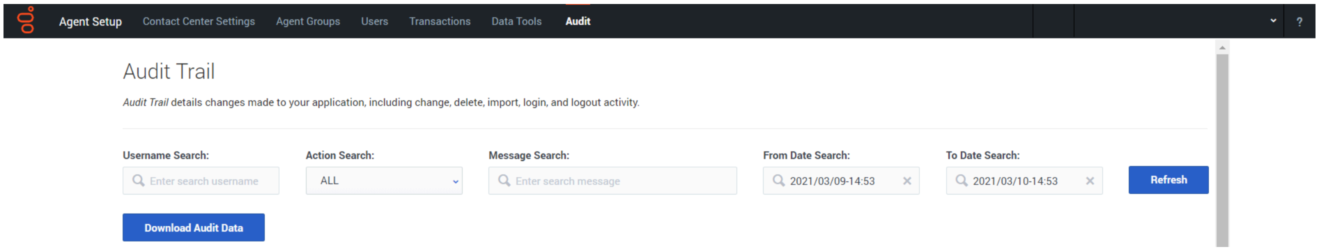
Data Tools



(Click image to expand)

This is where you'll go when you want to use Bulk import to import a file containing a group of agents or contacts.

Audit



(Click image to expand)

This is where you'll go to view and manage logs. See View audit trail.

Templates

Contents

Create templates to enable you to create and provision agents efficiently.

Related documentation:

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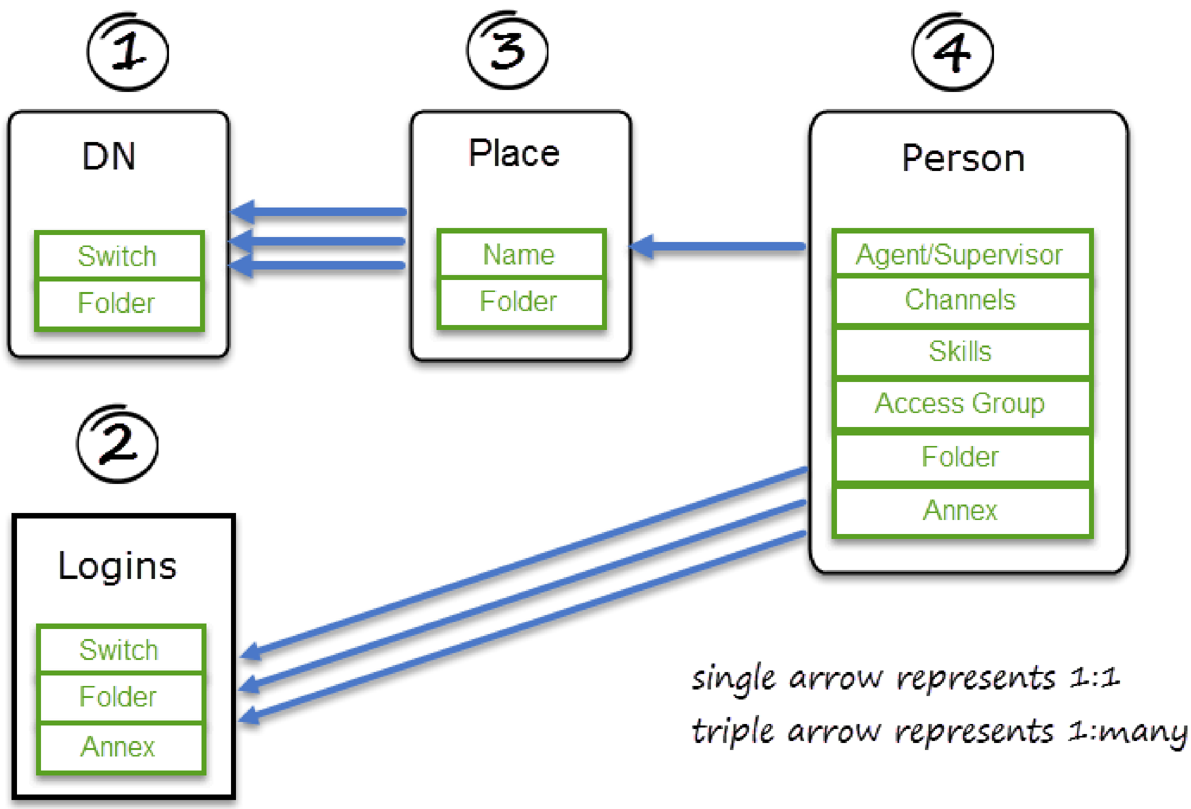
Templates allow you to create a set of configuration options that you can apply to agent accounts when you add an agent. The following diagram shows the relationship between the templates and the sequence in which the templates must be created:

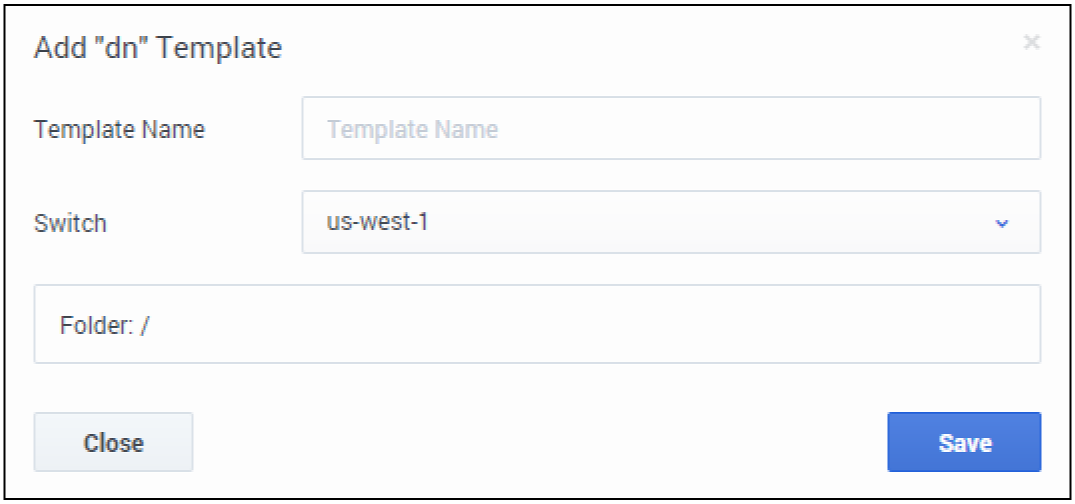


Access the **Templates** tabs on the **Contact Center Settings** page.

To add a template, select a template type, and then click **Add**. For each template you create, ensure that you give the template a unique name.

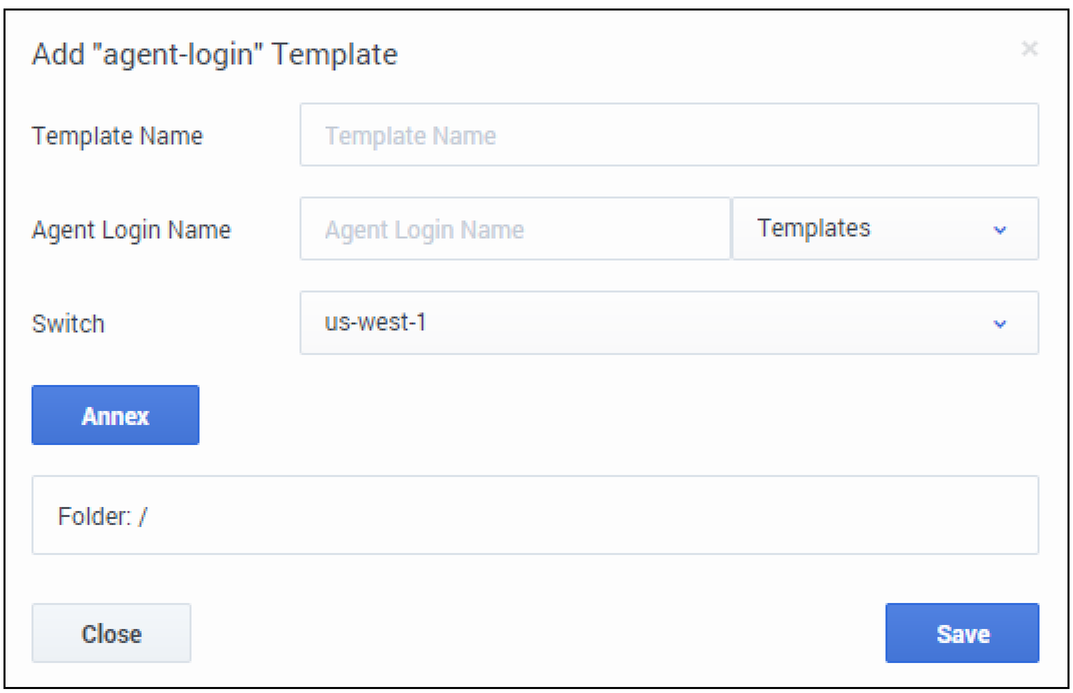
To configure a specific template, click on the **Template Name** and make your intended changes.

DN template



DN Templates specify the switch and folder where the DN needs to be created.

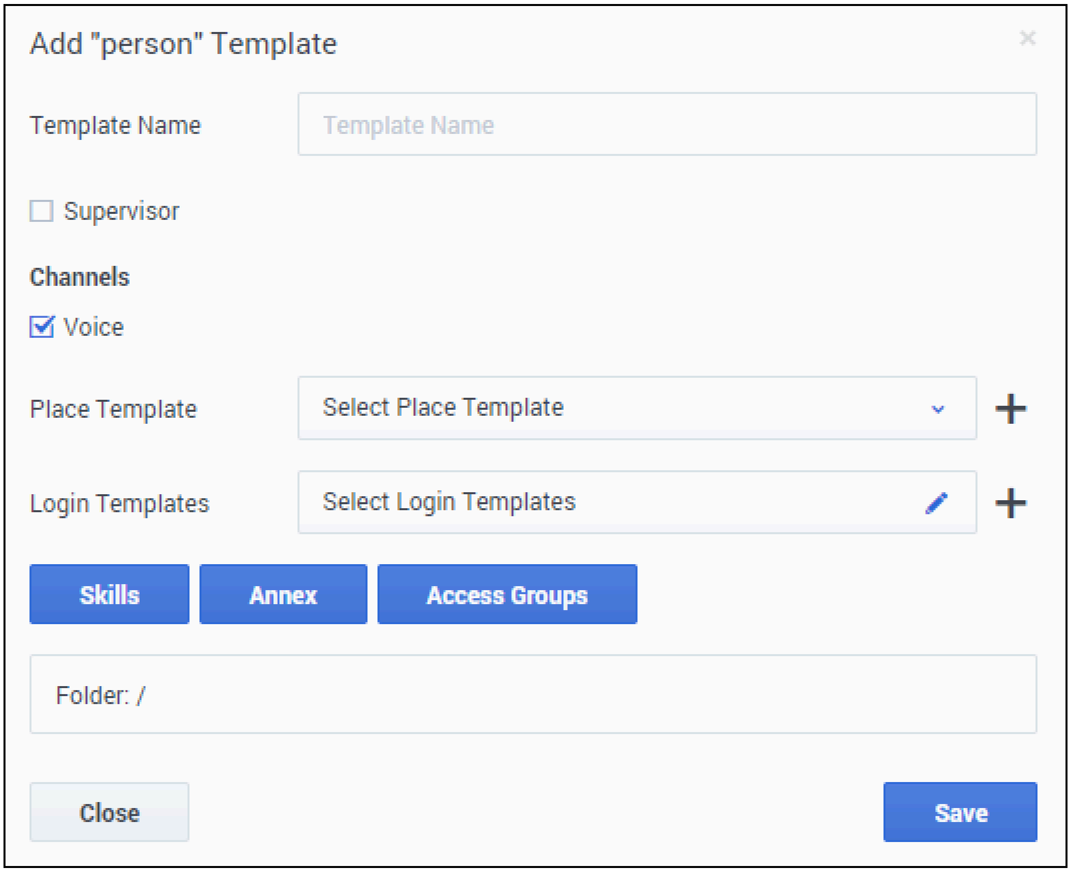
Login template



Agent Login Templates specify the switch, folder, and annex options.

In the **Agent Login Name** field, you can use a variable to specify the contents of the field, for example, {{person.userName}}.

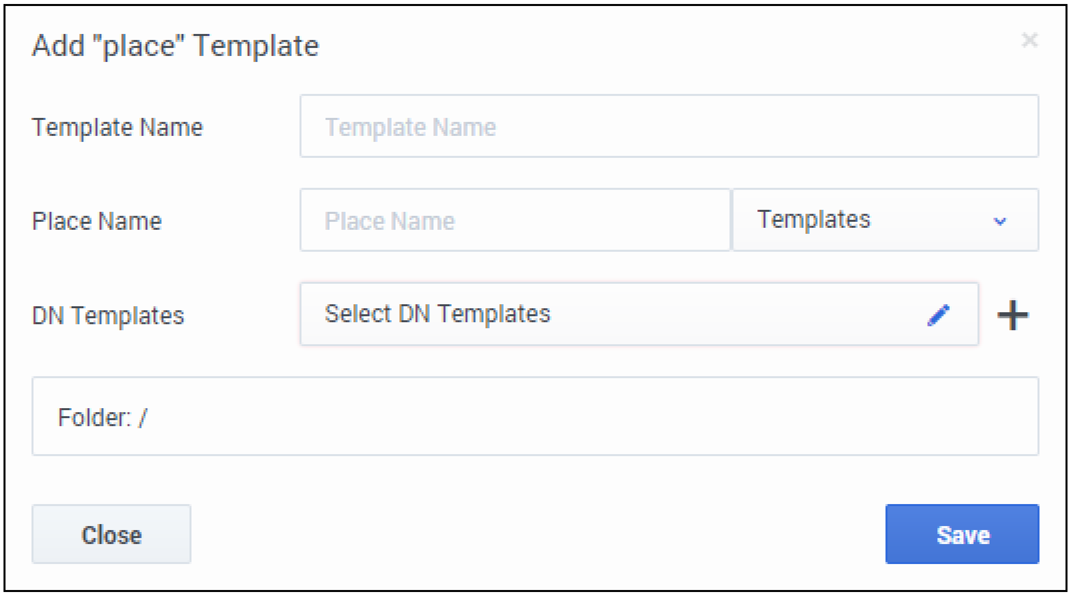
Person Templates



Person Templates define properties such as Channels, Skills, Access Groups, Annex options, folder, and Supervisor role for newly created agents.

You also need to select a place template and one or more login templates. Then you can select the channels, skills, annex, and access groups that you want to apply to this template. Before you save the **Person** template, select the folder where the user is created.

Place template



Place Templates must contain one or more DN Templates.

If your contact center has a requirement to specify unique place names for different business groups or regions, type a place name variable. For example, the place name might be the same as the agent's phone number or as the agent's user name. Place names can contain the following variables:

- {{person.userName}}
- {{person.emailAddress}}
- {{phone.number}}
- {{phone.description}}
- {{phone.index}}

You can also combine variables. For example: {{person.userName}}-{{phone.index}} creates **JohnAppleseed-1** and **JohnAppleseed-2** if JohnAppleseed has two phone numbers.

Next Steps

Now that you have set up templates, you can proceed to provision your contact center with agents. See Manage agents and other users.

Business attributes

- 
- Administrator

Business attributes can be shared at agent, agent group, and global levels.

Related documentation:

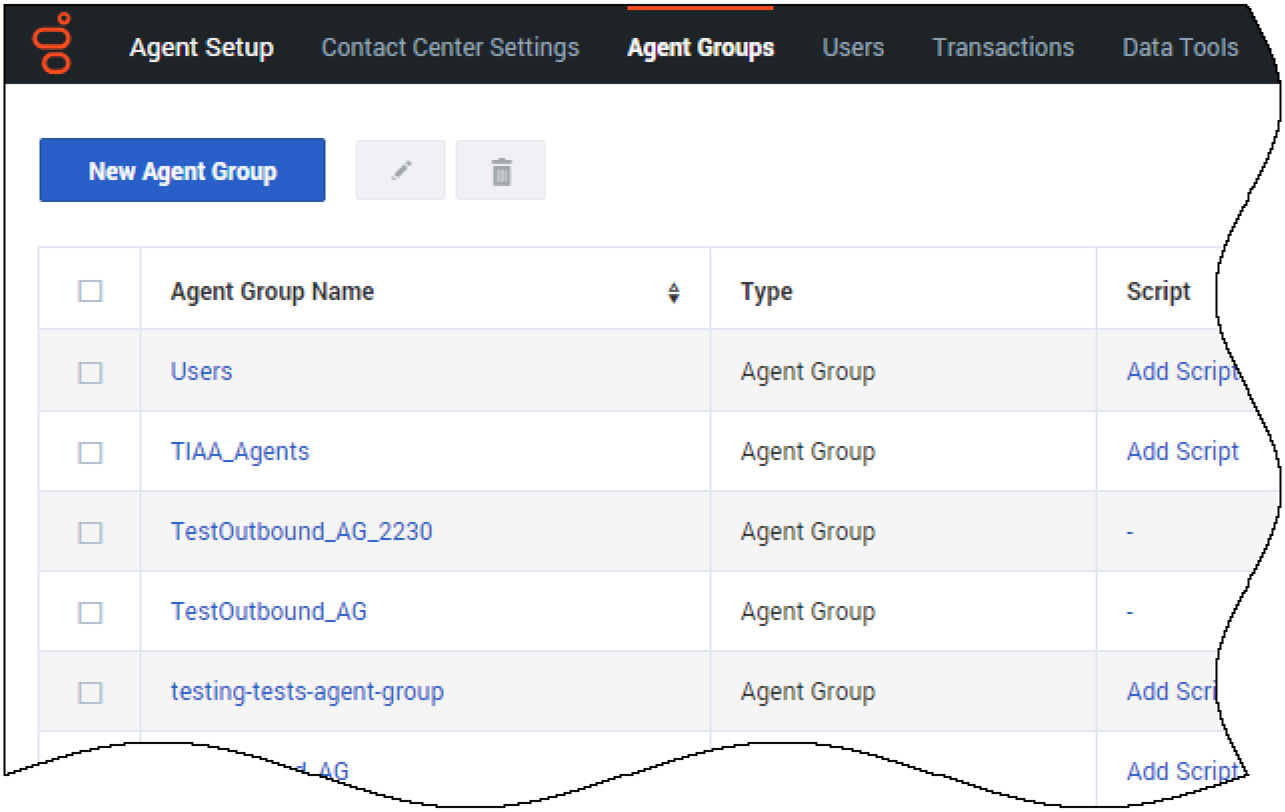
-
-

In Agent Setup, you can define a business attribute to be shared at an agent, agent group, and global level. This means that you only need to create a business attribute once and it automatically populates the Business Attribute lists on the **Agent Group**, **Manage User**, or **Desktop Settings** pages.

You can consider a business attribute to be the container that holds a list of objects that have a common theme. You can define shared business attributes for the following objects:

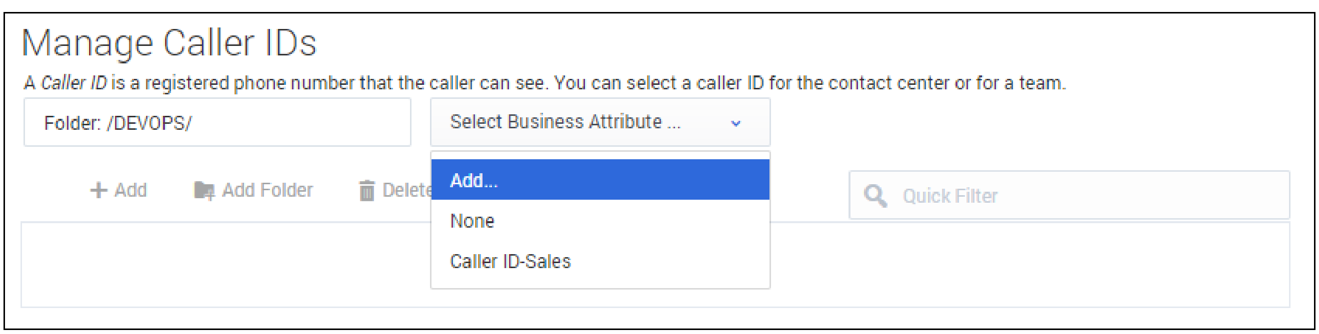
- Caller ID
- Dispositions
- Case and Toast data

Let's take a look at how Henry, a contact center administrator, uses sharable business attributes.



He wants to create a list of Caller IDs for a specific Agent Group that can be shared to other Agent Groups at a later date.

Henry first needs to create a Caller ID business attribute. He needs to go to the right page in the Agent Setup user interface, so he clicks **Agent Groups**, selects the agent group he wants to edit, and then clicks **Caller IDs**.



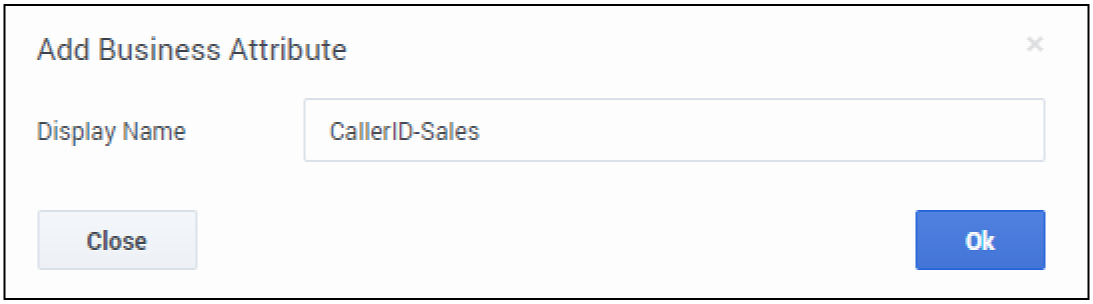
Henry clicks the **Folder** drop-down list box to choose a folder into which the business attribute should go. By default, the tenant home folder is automatically selected.

Then Henry clicks the **Add Business Attribute** drop-down list box and selects

Add.

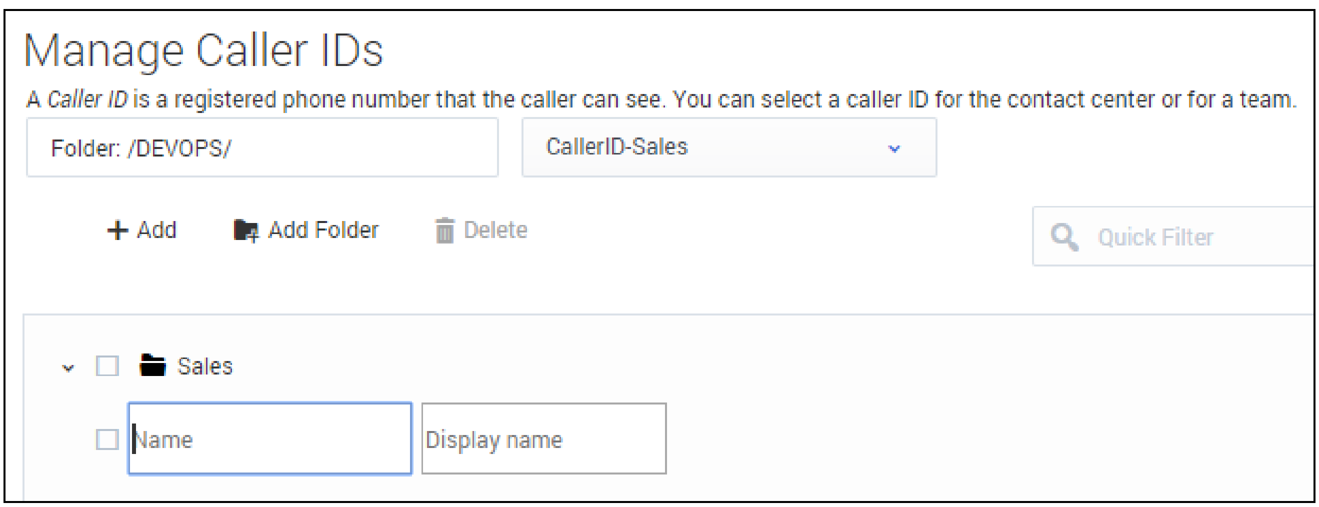
The other options in the list are:

- **None** - This tells the system to not define any business attribute.
- Already configured Caller ID business attributes - These attributes were previously created on this page, or at the agent group level. This is the benefit of shared business attributes. When a business attribute is created once, it populates where needed in other locations.

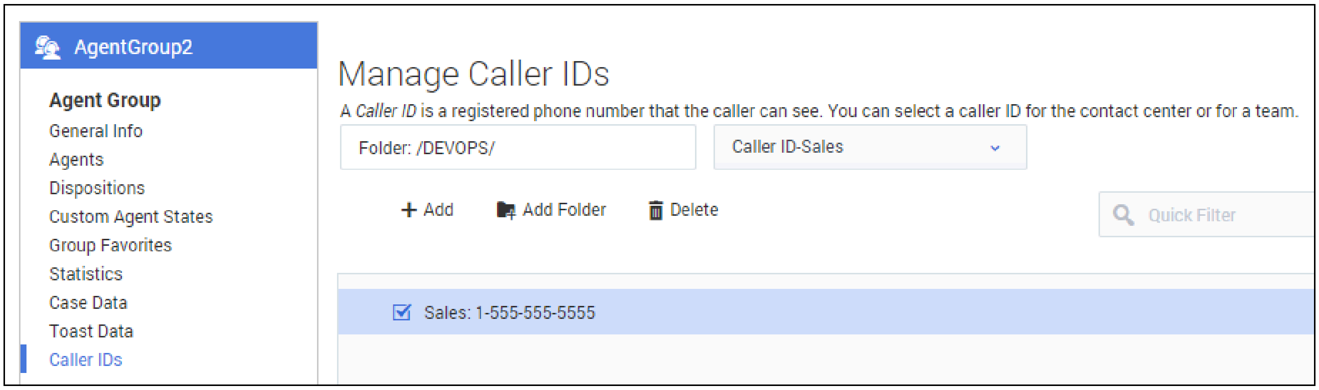


The **Add Business Attribute** window opens and Henry can now type the name of the business attribute. To be able to easily detect the purpose of the attribute, he prefixes the name with `CallerID`, for example, `CallerID-Sales`.

After he clicks **OK**, the new Caller ID business attribute is displayed not only in the list on the Agent Group page, but also in the Caller ID list on the **Desktop Settings** and **Manage Agent** pages. However, at this point the business attribute is empty; it doesn't contain any actual caller IDs.



Now that the business attribute is defined, Henry can populate the business attribute with a list of caller IDs. To do this, for each caller ID he wants to add, he clicks the **Add** icon to define the **Name** and the **Display Name**. He can add more than one caller ID to the business attribute and he can organize the caller IDs into folders.



Two weeks after he created the caller ID list for one agent group, Henry needs to configure another agent group with the same list of caller IDs. All he needs to do is access the agent group (**Agents Groups > Agent Group2**), and then select the sharable business attribute and caller ID. In this scenario, he selects **/DEVOPS/ > Caller ID-Sales > Sales: 1-555-555-5555**.

The benefit of sharable business attributes is that Henry didn't need to create a new list of caller IDs for another Agent Group.

Remember that this scenario demonstrates how to create a Caller ID business attribute, but the steps also apply to Dispositions and Case and Toast data.

Bulk import

Contents

- Administrator

Learn how to import multiple agents or contacts using Agent Setup's Bulk Import feature.

Related documentation:

About bulk import

> **Important**
>
> Some features described here may not apply to your organization’s setup. If you need features that aren’t available to you, contact your administrator or Genesys representative.

As you set up and maintain your call center, you may sometimes need to input a large amount of data into the system. Using Agent Setup, you can import agent accounts and customer contact records in bulk, making the process smoother and more reliable.

To create, modify, or delete large numbers of agents/agent groups, upload a comma-separated value (CSV) file containing new and changed agent information. Create/modify values in the appropriate columns for the agent. When you import the CSV file into Agent Setup, the agents listed in the file are created, modified, or deleted, based on the action to be taken as indicated in the Action column.

> **Important**
>
> You can also use a .xls file for Import. But, the content structure of the .xls file should be in CSV format.

About CSV files

> **Important**

- The .csv file must be a text file in a comma-separated format.
- The first line of the .csv file must contain user properties, and each line thereafter must represent a separate user.

When you import a .csv file, each parameter value is updated according to the following rules:

- If a value is present, the new value replaces the previous value.
- If an empty value is encountered, no change is made.
- If the value includes `/d` , the attribute is deleted.
- If no corresponding record is found, an error message is logged and the update continues to process.

How do I import a file?

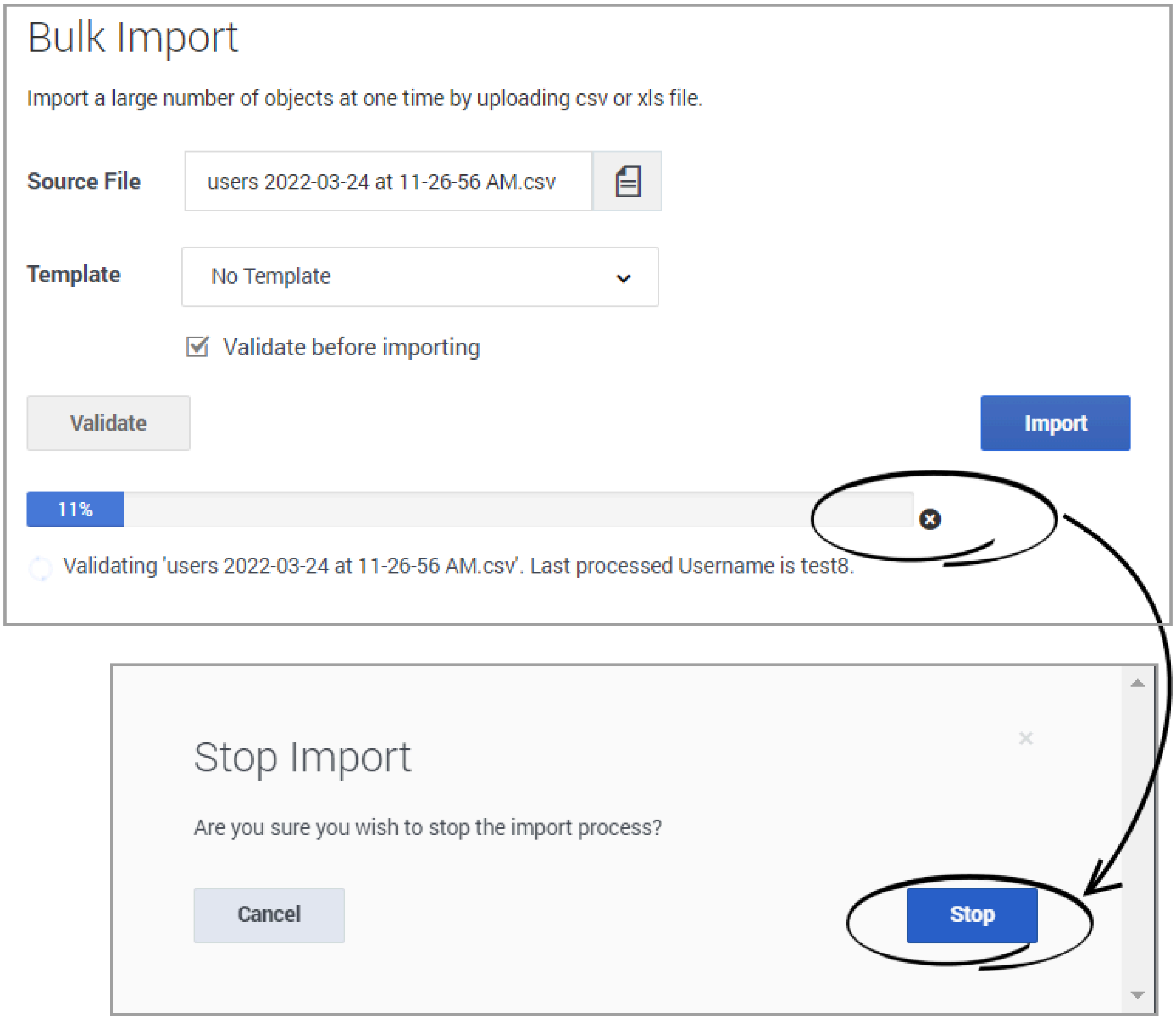
Link to video To import a .csv/.xls file:

1. Go to **Data Tools** > **Bulk Import** in the Agent Setup application menu.
2. Click the icon in the **Source File** field and, using the file browser, select your CSV file.
3. Optional. Select a template from the Template drop-down list, if you have already defined the template. See Templates section on creating templates.
4. Check the **Validate** checkbox if you want to ensure that the CSV file is structured correctly.
5. Click **Import**.
6. Go to **Users** tab to verify if all the agents are imported.

Important

The CSV file is validated for the structure, data type, and availability of mandatory fields. If any errors are thrown during validation, open your CSV file and fix the errors and import again.

How do I stop an import?



When you stop an import, a window asks you to confirm that you really want to stop the import. After you click **Stop**, agent records that were imported before you clicked ⊗ are retained and the import process does not proceed. By clicking **Stop**, you are not cancelling the entire import.

Import agent accounts

By importing a large number of agent accounts at one time, you won't need to add the accounts one at a time and you can apply a template to configure options, such as DN, place, person, and log in options, to all accounts.

CSV file parameters

Property	Type	Mandatory?	Action	Description
Username	String	Yes	ADD, UPDATE, DELETE	The unique username of the agent or user.
First Name	String	Yes	ADD, * needed for UPDATE if First Name change	The first name of the agent or user.
Last Name	String	Yes	ADD, * needed for UPDATE if Last Name change	The last name of the agent or user.
Email	String	No		The agent or user's email address.
Extension	String	No	/d to unassign and delete /r to unassign only	The extension #1 of the agent. A place is also created if the extension is specified.
Extension2	String	No	/d to unassign and delete /r to unassign only	The extension #2 of the agent. A place is also created if the extension is specified.
Extension3	String	No	/d to unassign and delete /r to unassign only	The extension #3 of the agent. A place is also created if the extension is specified.
Folder	String	No		The folder path to root folder (Persons) where new agent or user is created. For example, Company/Department/Team.
Place Name	String	No	/d to unassign and delete /r to unassign only	The place name #1 of the agent. The place name "Extension" is used if not specified.
Place Name2	String	No	/d to unassign and delete /r to unassign only	The place name #2 of the agent. The place name "Extension2" is used if not

Property	Type	Mandatory?	Action	Description
				specified.
Place Name3	String	No	/d to unassign and delete /r to unassign only	The place name #3 of the agent. The place name "Extension3" is used if not specified.
Default Place	String	No		The name of the Default Place.
Person DBID	Numeric	No	UPDATE, DELETE	Person Database Identifier. Used as the primary key when utilizing Bulk Import to update a username or export users.
Employee ID	String	Yes	ADD	The employee identifier of the agent.
Change Password	Boolean	No		Specifies that the user will be prompted to change the password on their next log in.
Enabled	Boolean	No		Y specifies that the agent account is enabled. N specifies that the agent account is disabled.
Is Agent	Boolean	Yes	ADD	• Specifies that this user is an agent. If this field is set to a Y but the Is Supervisor field is not, only the Agent Login, DN, and Places for the agent are created. If the Is Supervisor field is set to a Y, additional supervisor features and permissions are enabled.

Property	Type	Mandatory?	Action	Description
				• If the user is an administrator, this field is not required.
External ID	String	No		Any external ID used to identify the user.
Login ID	String	No		The user's login ID.
Is Supervisor	Boolean	No		Y specifies that this user is a supervisor. If this is the case, the Is Agent field must be set to Y. At that point, all required desktop logins and features are enabled, along with the required supervisor features and permissions.
Is Admin	Boolean	No		Y specifies that this user is an administrator. If this is the case, the Is Agent field (and Is Supervisor field) is not required.
Wrap Up Time	Numeric	No		The number of seconds an agent remains in ACW after call is disconnected. This field applies only to voice calls.
VoiceMail.MailBox	String	No		If specified, populate the following option to the Annex of all associated Agent log ins: AgentLoginAnnex:TServer/gvm_mailbox. Valid values: numerical (12345)
Recording.Hierarchy	String	No		If specified, populate the following option to

Property	Type	Mandatory?	Action	Description
				the Agent's Annex:[recording] agent_hierarchy.
SIP Phone Type	String	No		The type of SIP phone the agent is using as a softphone.
Skill:	Numeric	No		The number that identifies the agent's skill level for the specified skill.
Switch:	Boolean	No		**Y** means that a DN and Agent Login are created for the agent on the specified switch.
AgentG:	Boolean	No		**Y** means that the agent is added to the specified agent group.
Annex	String	No		Any custom Annex value. For example, column name **Annex:htcc/roles** with a value of **Agent**. Important The Annex property column in the .csv file is specified as `Annex:`, if the Annex value remains empty Annex is written as `Annex: `.
Action	String	No		ADD adds a new agent. UPDATE updates an existing agent. DELETE removes an existing agent.

CSV file example

```
First Name,Last Name,Employee Id,Username,Is Agent,Is Supervisor,Is Admin,External
Id,Login ID,Extension,Skill:English,Switch: San Fran,Switch:
London,AgentG:Good,AccessG: Super,Annex,Action,Folder,Wrap Up Time,Enabled
```

```
Sarah,Lee,223344,sarahl@acme.com,N,Y,Y,ADD,Acme/Branch/Team 1,60
John,Doyle,223465,johnd@acme.com,Y,N,N,2233,1,Y,N,ADD,Acme/Branch/Team 2,0
Robert,Cook,244456,bobc@acme.com,Y,Y,Y,johnd@acme.com,5,Y,Y,ADD,Acme/Branch/Team
3,60,Y
```

Important

Bulk imports do **not** include the **Password** field in the imported file. A default password is associated to each user account in the imported file. The format of the default password is: --, where is the three-digit abbreviation for the month. For example, `hjackson-Feb-2017`. The **Reset Password** option is automatically enabled when adding or importing new users, so all users are prompted to reset their password the next time that they log in.

Import multiple contacts

By importing contact records with Bulk Import, you can avoid having agents add contacts manually.

Important

After importing customer contact records, you must log into Agent Workspace and use Contact Directory to view the imported records.

Tip

All properties should be included in the CSV file in the order presented below and all properties are mandatory with only one exception—when using the DELETE action, the phone number property of the CSV file can be left blank.

CSV file parameters

Property	Type	Mandatory?	Action	Description
Action	String	Yes	ADD or A UPDATE or CHANGE or C DELETE or D The default value is ADD and the values are case-insensitive.	ADD adds a new contact. UPDATE updates an existing contact. DELETE removes an existing contact.
First Name	String	Yes	ADD, * needed for UPDATE if First	The first name of the contact.

Property	Type	Mandatory?	Action	Description
			Name change	
Last Name	String	Yes	ADD, * needed for UPDATE if Last Name change	The last name of the contact.
Phone Number	String	Yes		The contact's phone number.

Important

- Contacts are identified by combination of First Name and Last Name fields for DELETE and UPDATE actions.
- UPDATE action replaces the first Phone Number attribute value of a contact.
- ADD action checks if there is an existing contact with the same FirstName, LastName, and PhoneNumber attributes. If it exist, the new contact will not be created.

Import Agent Groups

You can also import a large number of agent groups at one time. Use the following parameters in the CSV file.

Property	Type	Mandatory?	Action	Description
Agent Group Name	String	Yes	ADD, UPDATE, DELETE	The unique name of the Agent Group.
Folder	String	No	ADD, UPDATE	Folder of the Agent Group (by default it will be tenant/ Root).
Skill Expression	String	No	ADD, UPDATE	Specify which agents will belong to virtual Agent Group, using expression. It also specifies if the Agent Group is virtual or not.
Caller ID	String	No	ADD, UPDATE, DELETE	Specifies the Caller ID attribute that is assigned to the Agent Group.
Annex	Annex:	No	ADD, UPDATE,	Any value from

Property	Type	Mandatory?	Action	Description
			DELETE	Annex of Agent Group user would like add/update/ delete.
Origination DN	Origination DN:	No	ADD, UPDATE, DELETE	Specifies the list of DNs from which calls can be routed or diverted.
Agent Group Action	Enum	Yes	-	ADD adds a new Agent Group. UPDATE updates an existing Agent Group. DELETE removes an existing Agent Group.

Routing

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- Administrator

While Designer handles most routing tasks, you manage your routing points and virtual queues in Agent Setup.

Related documentation:

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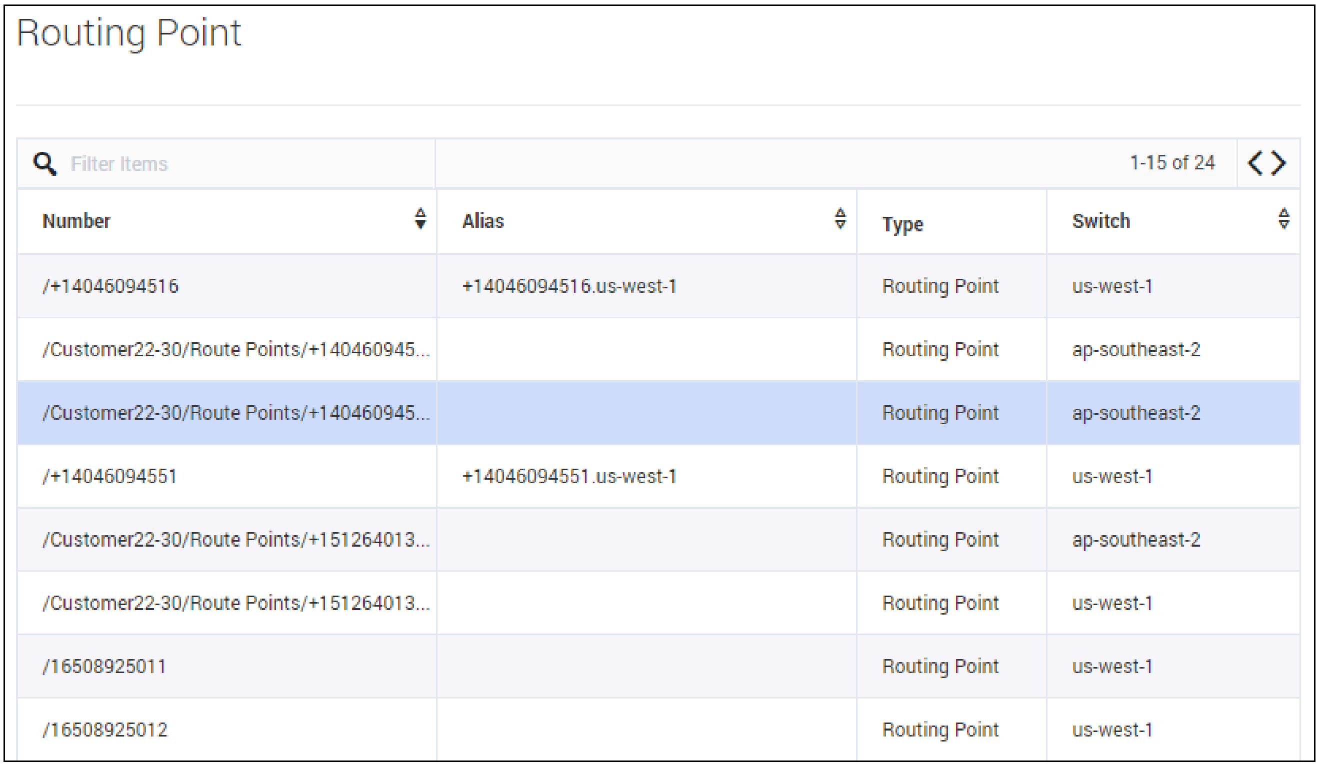


Routing Point

Filter Items — 1-15 of 24

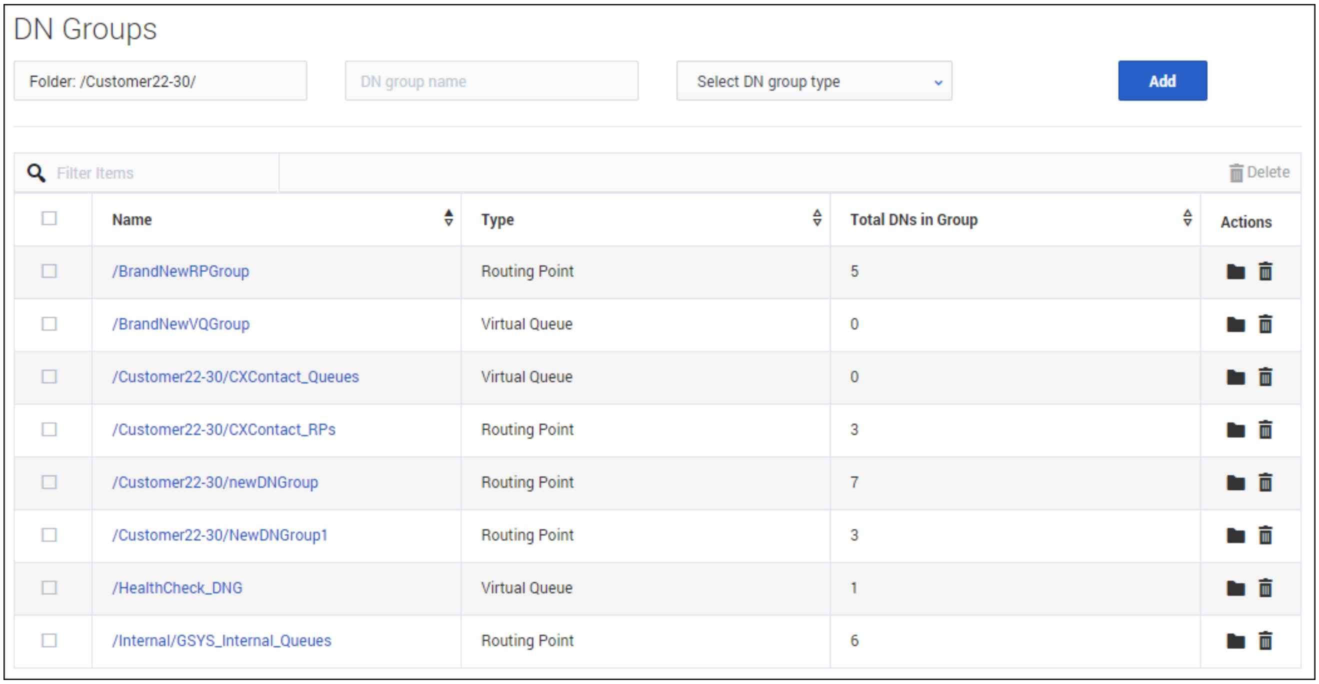
Number	Alias	Type	Switch
/+14046094516	+14046094516.us-west-1	Routing Point	us-west-1
/Customer22-30/Route Points/+140460945...		Routing Point	ap-southeast-2
/Customer22-30/Route Points/+140460945...		Routing Point	ap-southeast-2
/+14046094551	+14046094551.us-west-1	Routing Point	us-west-1
/Customer22-30/Route Points/+151264013...		Routing Point	ap-southeast-2
/Customer22-30/Route Points/+151264013...		Routing Point	us-west-1
/16508925011		Routing Point	us-west-1
/16508925012		Routing Point	us-west-1

The **Routing Manager** section on the **Contact Center Settings** allows you to view your **Routing Points** and your **Virtual Queues**, as well as create **DN Groups** for both.

In the **Routing Point** and **Virtual Queue** sections, the **Alias** name for each line is editable; however all other fields are read only.

You can also filter both lists by **Number**, **Alias**, or **Switch**.

DN Groups



	Name	Type	Total DNs in Group	Actions
	/BrandNewRPGroup	Routing Point	5	
	/BrandNewVQGroup	Virtual Queue	0	
	/Customer22-30/CXContact_Queues	Virtual Queue	0	
	/Customer22-30/CXContact_RPs	Routing Point	3	
	/Customer22-30/newDNGroup	Routing Point	7	
	/Customer22-30/NewDNGroup1	Routing Point	3	
	/HealthCheck_DNG	Virtual Queue	1	
	/Internal/GSYS_Internal_Queues	Routing Point	6	

In the **DN Groups** section, you can group your Routing Points and Virtual Queues for display in Real-time Reporting with Genesys Pulse and to simplify the on-boarding of new agent and business groups.

To create a new DN group, select an existing Folder or create a new one, enter the DN group name, and select the group type before clicking **Add**.

Once you have created a new DN group, select it from the list and begin adding DNs (directory numbers) to the group. You can add DNs by dragging and dropping, selecting one or more and clicking **Add**, or by clicking on the arrow that pops up when you hover over an available DN. You can remove a DN from a group by clicking the **X** that pops up when you hover over that DN.

Settings and configuration overview

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- Administrator

This page explains the distinction between contact center settings, agent group settings, and user settings within Agent Setup.

Related documentation:

-
-

Overview

Agent Setup contains a series of options that enable you to manage the contact center and the users within it. There's a hierarchy that defines the level at which these options can be configured:

- Contact Center Settings (global settings)
    - Agent Groups
        - Users

Typically, when you enable something on the Contact Center Settings screen in the application, those settings are applied globally, meaning they're applied to all agent groups and users within the contact center. Some, but not all, options can be edited at either the agent group level or user level, or both. For example, the channels you configure on the Contact Center Settings screen will be inherited by all agent groups and users within the contact center, but you can edit these channels for either or both.

Settings by group

When you click **Contact Center Settings**, **Agent Groups > New Agent Group**, or **Users > New User** in the Agent Setup application, you'll see a panel in the left margin of the screen containing categories of options that allow you or other users to handle a series of related tasks. This table summarizes the categories of options and identifies (via Yes or No) the level at which those options can be enabled or updated.

Category	Contact Center	Agent Group	User	Description	Sample options
Agent Workspace	Yes	No	No	Contains Agent Workspace configuration options that	Skills, dispositions, agent states, toast data,

				are applied globally.	case data Caller ID, global favorites, external URLs
Agent Group	No	Yes	No	Contains agent group information configured in Agent Workspace settings at the Contact Center Settings/global level.	Agents, dispositions, agent states, statistics, toast data, case data Caller ID, global favorites, external URLs
User	No	No	Yes	Contains user specific information configured in Agent Workspace settings at the Contact Center Settings/global level.	Skills, Caller ID, agent groups, access groups, annex, favorites, switches, external URLs
Desktop Options	Yes	Yes	Yes	Options that dictate what level of control an agent has when interacting with customers.	Channel configuration, standard responses, global login, recording, interaction search
Digital Management	Yes	Yes	Yes	Options related to email management.	Email mailboxes, email address management
Single Sign On	Yes	No	No	Single Sign-On configuration.	SAML
Desktop Statistics	Yes	No	No	Configuration of agent statistics, contact center statistics, and statistical definitions.	Warning levels, error levels, statistics types
Templates	Yes	No	No	Configuration of templates that contain global-level agent and contact center properties	DN, login, person, and place templates

CRM Adapter	Yes	Yes	Yes	Options related to the CRM/ Gplus Adapter.	Screen pops, custom Salesforce templates.
Routing Manager	Yes	No	No	Presents read-only lists of routing points, virtual queues, and DNs for the contact center.	Create DN groups.
Recording	No	Yes	No	Recording hierarchy configuration.	Enable recording hierarchy

Agent desktop settings overview

- Administrator

Get to know some of the key features and tasks involved in setting up your contact center for Agent Workspace.

Related documentation:

Contents

When it comes to enabling all the features and controls that get your contact center up and running, or that allow you to maintain its current structure, you should think about the customer journey and all the processes and steps a user must go through to help a customer complete the journey.

Let's take a quick look at how you might configure Agent Setup to benefit both the customers and the contact center users.

Agent desktop

Configuring your Agent Workspace settings involves customizing the available options to meet the specific needs of your contact center.

- Create and manage agent skills
- Dispositions
- Create and manage custom agent states
- Global favorites
- Enable external URLs
- Case and toast data
- Add and manage Caller ID

Enabling the interaction channels

When customers decide to contact a contact center, they investigate the contact methods available to them. Typically, the options are telephone, email, chat, text, Facebook, Twitter, and so on. You'll need to configure the channels to make any of those types of interactions possible.

- My Channels options
- Voice options
- Email options
- Chat options
- Facebook options
- Twitter options
- Outbound
- Workitem options
- Configure Email mailboxes
- Team Communicator settings

Defining routing parameters

Customers will indeed opt to call your contact center to either speak to a live agent and/or go through an IVR flow. For this part of the journey, you'll of course need agents with the required skills to handle the interactions, which you set up in the previous step, and you'll need to define certain routing parameters.

While most of the routing strategy is done in Designer, you'll still have some control over routing decisions in Agent Setup.

- View and manage routing parameters.
- Use Voice options to define skill-based routing and other routing-based actions and targets.

Enabling agent call control and other interaction settings

The moment the system transfers the customer to an agent is the moment all the features and controls you set for your agents and contact center become visible. These features and controls are what define what the agent can and cannot do for the customer. That's why this part of the overall process takes up most of your time and effort.

Key options include:

- Auto-answer capabilities
- Conferencing, forwarding, and transferring capabilities
- Hold functionality
- Caller ID functionality for multiple scenarios
- Ringtone and ringtone priority options
- Call rescheduling options (for Outbound)
- Call and screen recording options
- Disposition options

Agent settings overview

Configuring wrap-up options

When an interaction ends, the agent ends the call but then handles a number of wrap-up tasks related to both the customer and the interaction. These tasks can include any of the following, all of which must be configured in Agent Setup.

- Dispositions
- Scheduled followups
- Update contact information

Monitoring the contact center

Running a contact center requires constant monitoring of reports and vital statistics. Without that, you can't make intelligent business decisions that impact the success of your organization.

In Agent Setup, you can enable statistics for multiple users and scenarios, and you can access logs to view change history.

- Enable and select agent statistics
- View change history for the contact center

Scenario: Onboarding agents and supervisors

Contents

- Administrator

This article walks you through the tasks required to set up new agents.

Related documentation:

Overview

Scenario: You're an administrator for a contact center that just hired 12 new users: 11 agents and 1 supervisor. You need to go through the process of setting them up and getting them ready to handle calls. This article walks you through the process.

Here's a quick glance at what you'll do and what you'll use to get through this process:

- You'll import the new users using the bulk import tool.
- You'll apply a pre-configured Person template.
- You'll assign a supervisor role to one of the new users.
- You'll add a new agent group for the agents.
- You have business attributes you'll use when you configure user options.

Before you begin

Before you jump in, take a look at what you already have in your contact center and how those assets will aid in the setup process. You're looking for entities that hold information that can be applied over and over again.

Templates

Templates and business attributes should come to mind. Both of these entities store information, such as DNs, switches, channels, agent skills, dispositions, and Caller ID.

You'll find your templates at **Contact Center Settings > Templates**. For our example, let's say you found a template called Billing Agents Template. The information stored in this template--such as the agent skills, the channels they'll use, and all the Place information--matches to the agents you're onboarding. This means you won't need to assign this information to each individual agent. For more information about templates, see Templates.

Business Attributes

Business attributes are basically containers that store information about the following contact center objects:

- Caller ID
- Case Data
- Toast Data
- Dispositions

For more information, see Business attributes.

Using existing templates and business attributes will save you time and effort in the steps that follow.

Create the users with bulk import

Now you need to get the new users into the system. That basically means you need to create a new profile for each one of them.

Since you have a large number of agents, you should use bulk import. This a simplified alternative to creating agents manually, one at a time.

Before you start the bulk import process, ensure that your agent information is contained in a CSV file and follows the formatting and layout standards outlined in Import agent acounts.

When your file is ready, go to **Data Tools > Bulk Import**. This is where you'll upload your CSV file and choose a template that contains the information that can be applied to the agents being imported. Note that if your CSV file contains a value (for example, a skill value) that doesn't match to that object's value specified in the Person template, the value contained in the CSV file overrules. For more detailed information about bulk operations, see Bulk import.

When the import is complete, go to the Users tab to see the agents you just imported. Now that the agents are in the system, you can view and edit their information as you see fit.

Add a supervisor

Let's say that one of the new 12 new users recently hired has been assigned a supervisory role. The process of setting up a supervisor is not that different from the agent setup process. After you import the agents using the Bulk import process:

1. Go to the **Users** tab.
2. Find the agent who will have the supervisory role.
3. In the General Information section of the agent's profile, tick the Supervisor check box.

On the options panel, notice the Supervisor options. Those options will apply to this user.

Add agents to the agent group

Now that you've created the agents, you'll need to place them in an agent groups, which is a logical grouping of agents who share the same agent profile, such as skills, access rights, and so on. If you're creating a brand new agent group for them, here are the instructions:

1. Click the **Agent Group** tab (located on the menu bar at the top of the page)
2. Click **New Agent Group**.
3. Give the agent group a unique name.

Now, you'll notice that the name of your agent group appears at the top of options panel, in the left-hand margin of the screen. This lets you know that you're enabling options for this entire agent group, not just the agents within it. We'll cover the most important options in the sections that follow.

To assign the agents to an agent group:

1. Click the **Agent Group** tab (located on the menu bar at the top of the page).
2. Click **Agents**. You'll see a list of all agents.
3. Drag and drop the names of the 12 new agents.

If you create a new agent group, you'll need to go through each of the options listed in the options pane and configure them accordingly. Some of those options will automatically apply to the agents within the group, but other options can only be configured at the agent group level or the user level.

For more information, Settings and configuration overview lists options available in Agent Setup and the level at which those options can be controlled (distinguishes between contact center, agent group, and user).

Configure agent controls and settings

At this point, you've added your users, assigned them skills (via the template or CSV file), and assigned them to an agent group.

Now, what you need to do is configure all the options that help them carry out interactions with customers. This includes everything from call controls, dispositions, Caller ID, and so on. See Agent settings overview.

View audit trail

-
- Administrator

The Audit Trail, located in the **Audit** section, details the actions taken in your Agent Setup application, including update, delete, import, login, and logout activities.

Related documentation:

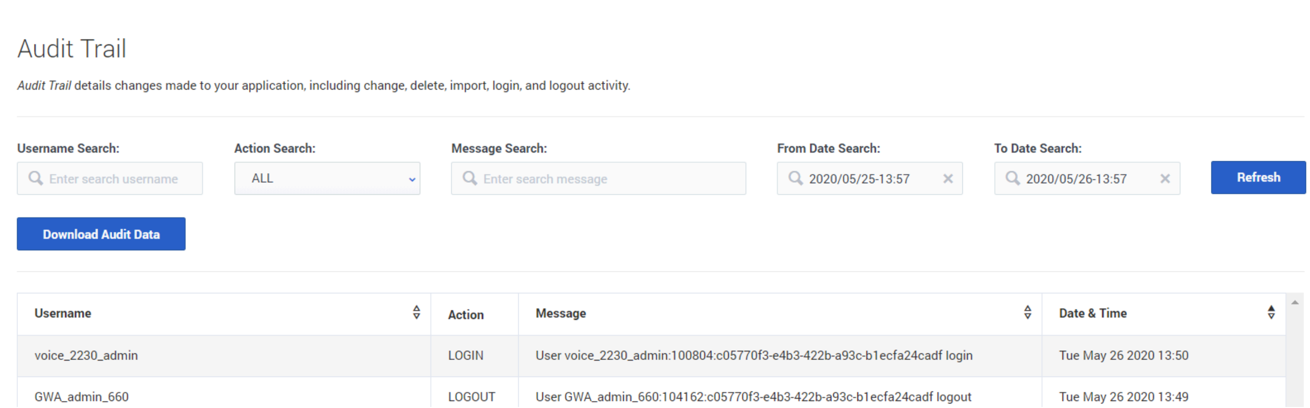
-
-

Tip

All Users who have the required roles and permissions set in Access Groups can perform these tasks.

Important

There are currently no limits placed on the number of audit logs or how long they are kept in the Audit Trail.



The summary table on the Audit tab contains an entry for every action taken in the application. The table lists the following details:

- Username - Of the user who made the change.
- Action - The type of action made. See a description of each action in the table below.
- Message - Specific details about the action. This could be the exact file name of an imported file or the name of a skill that was updated or created.
- Date & Time - The date and time that the action took place.
- Refresh - Updates/refreshes the audit search results.
- Download Audit Data - Exports the audit logs to .xlsx files.

If you click on any entry within this summary table, a new **Audit complete information** window appears. It lists the details outlined above and includes the **Audit Record** ID.

Each action type is documented in the table below. Note that an 'object' can mean an agent, an agent group, a skill, or a transaction.

Action	Description
LOGIN	A user (identified by a username) has logged in. The Message field specifies the following information about the user who logged in: • Username • User ID • Contact Center ID • The action (login), including any applicable reason or error.
LOGOUT	A user (identified by a username) has logged out. The Message field specifies the following information about the user who logged out: • Username • User ID • Contact Center ID • The action (login), including any applicable reason or error.
CREATED	An object was created (for example, a new agent).
DELETED	An object was deleted (for example, an agent).
UPDATED	An object was updated. If, for example, an agent was added to an agent group, this entry identifies the user who made the update and the name of the user added to the group.

Action	Description
IMPORT	A file was imported. The Message field specifies the name of the file that was imported.
FAILED	A file failed to import.

Transactions

Contents

- 
- Administrator

Manage business attribute overrides that are applied at a transactional level, such as a call or a chat.

Related documentation:

-
-

> **Important**
> Agent Setup only supports Transaction List objects.

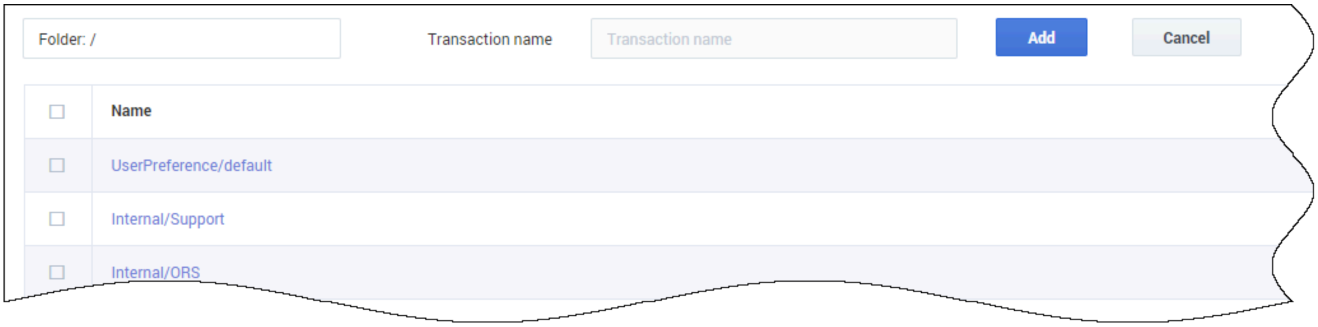
You can configure the following business attributes at the transaction level:

- Dispositions
- Case Data
- Toast Data
- Caller IDs
- Favorites

Select **Transactions** in the navigation menu to access the **Transactions** page. The **Transactions** main view lists the transactions only by name. Click the link for the transaction to view the details.

Use the following procedures to create and configure transactions.

Adding a new transaction

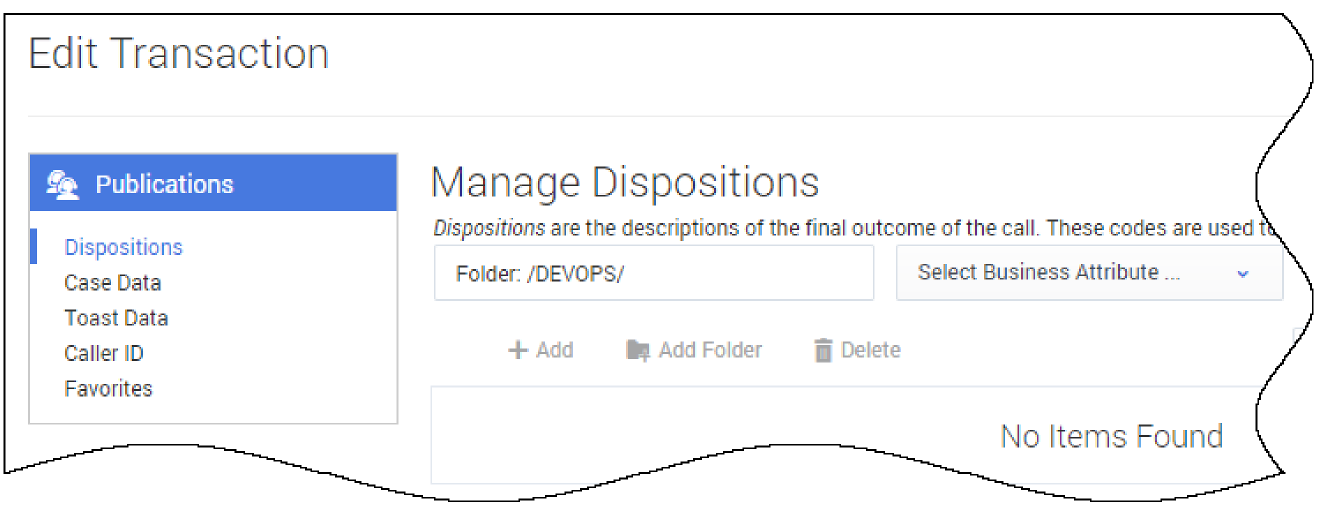


Click the **New Transaction** button, type a unique name in the **Transaction name** field, select a folder to store the transaction configuration, and then click **Add**. If you do not select a folder, the transaction is stored in the `/default` directory.

The name of the transaction is prefixed with the name of the folder. For example, `UserPreference/`. At this point, configuration is not complete. You need to add business attributes to the transaction.

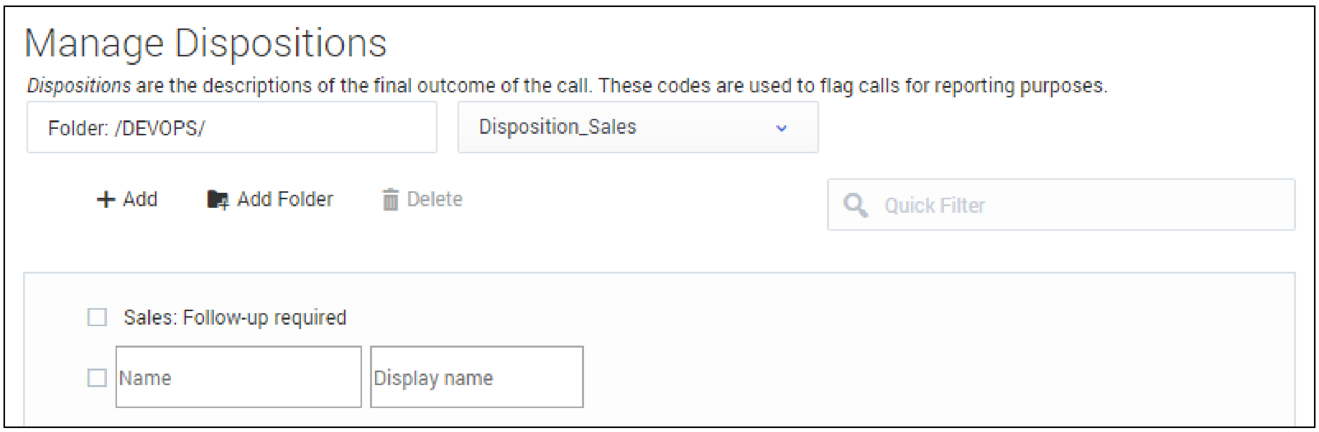
> ### Tip
> You can manage folders from this page. When you select the **Folder** option, a drop-down list box is displayed where you can select a folder or click the add folder icon  to create a new folder.

Adding business attributes to a transaction



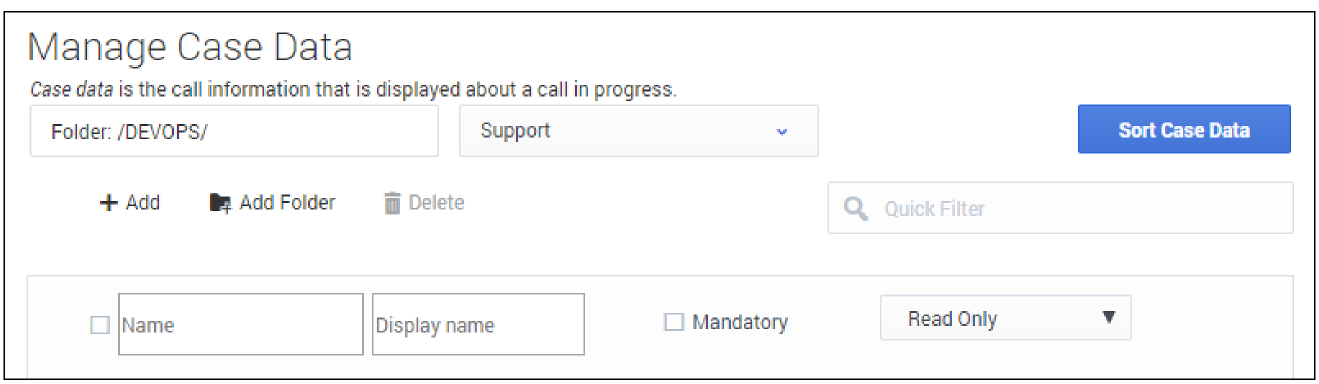
To edit a transaction, click the link in the **Name** column. If the transaction has no configured business attributes, as is the case when you add a new transaction, you are prompted to complete the configuration. Follow the prompts to add **Dispositions**, **Case Data**, **Toast Data**, **Caller ID**, and **Favorites** business attributes. After you add the business attributes, you can define them.

Managing dispositions



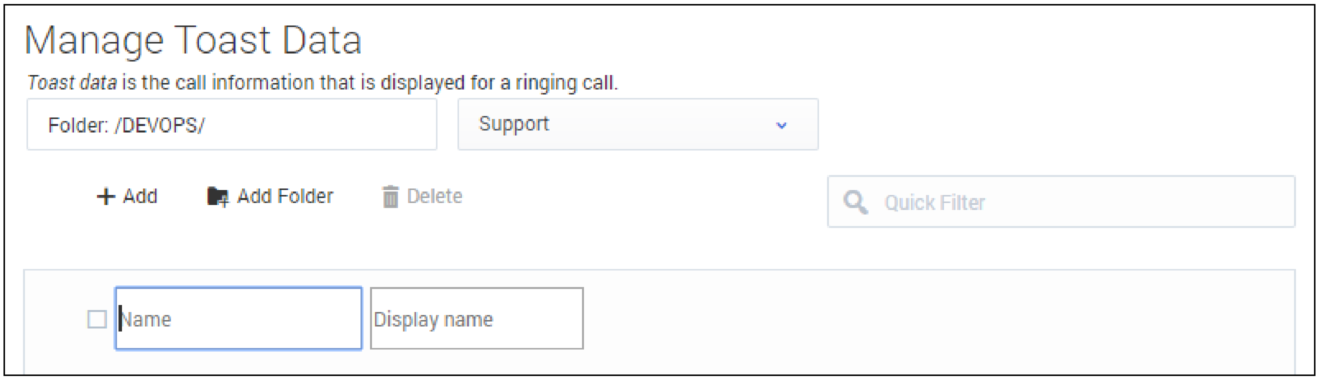
Dispositions are the descriptions of the final outcome of the call. These codes are used to flag calls for reporting purposes. To learn more about how to manage dispositions, see Dispositions.

Managing case data



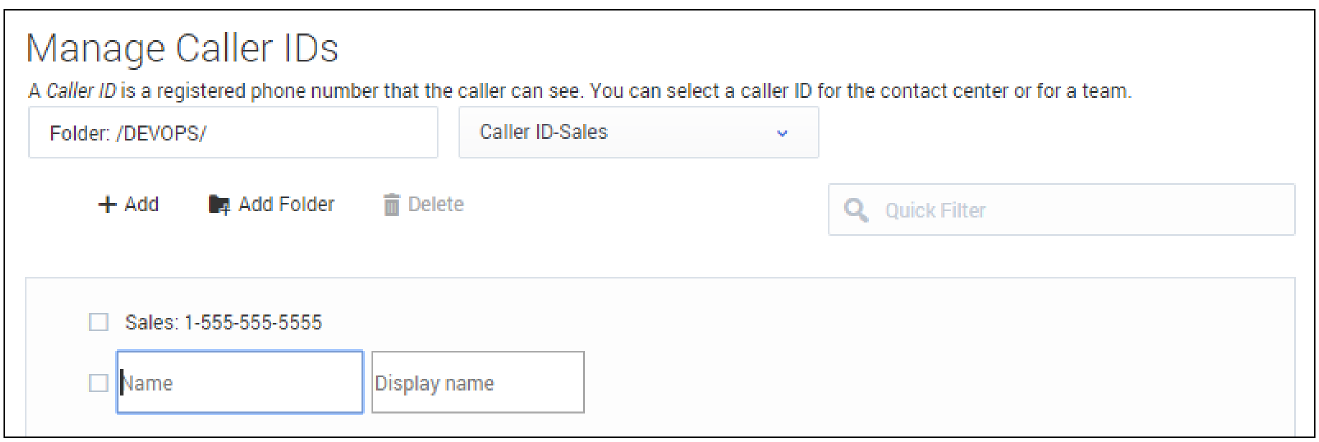
On the Manage Case Data screen, you can specify the information to be displayed to the agent when an interaction is transferred to them. To learn more about how to manage case data, see Case and toast data.

Managing toast data



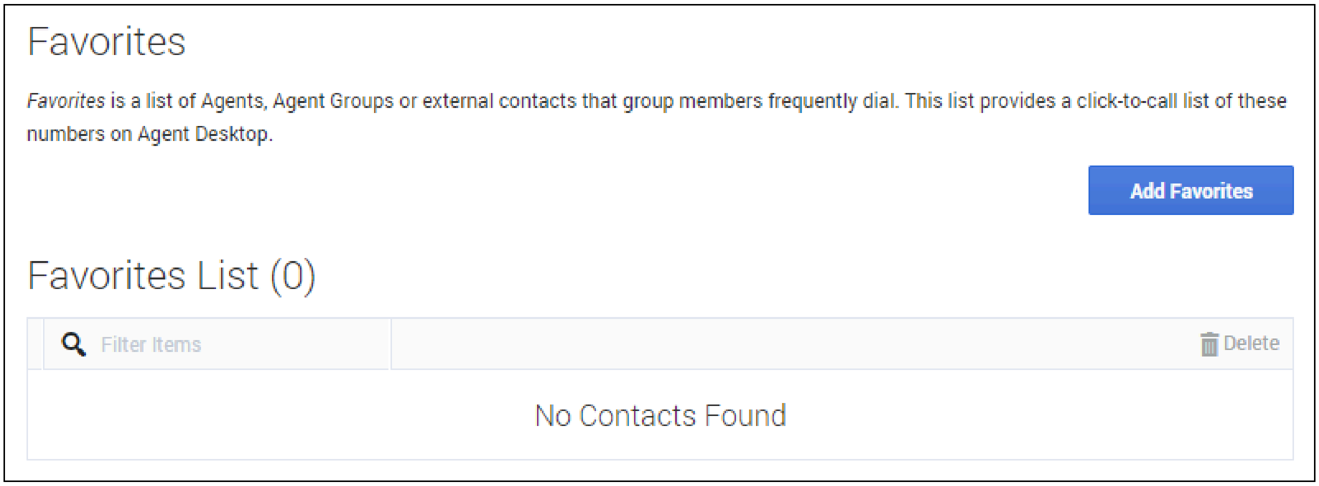
On the Manage Toast Data screen, you can specify the information to be displayed to the agent when they receive a call, chat, or other interaction. To learn more about how to manage toast data, see Case and toast data.

Managing caller IDs



You can allow agents to select from a predefined list of caller IDs. The selected caller ID is then displayed to the person receiving the call when the agent consults, conferences, or transfers a call. To learn more about how to manage caller IDs, see Add and manage Caller ID.

Managing favorites



On the **Favorites** screen, you can create a list of agents, agent groups, or external contacts that agent group members frequently dial. This list provides a click-to-call list of these numbers on Agent Workspace. To learn more about how to manage favorites, see Global Favorites.

What should a configured transaction look like?

In this example, the transaction includes the following business attributes:

Dispositions:

- Transaction complete
- Needs follow-up

Case Data

- First name
- Last name
- Subject

Caller IDs

- ABC Customer Support
- ABC Shipping

Use Case

In Agent Workspace, you have the ability to override desktop options by setting the value of a KVP to the name of a transaction list object. The desktop option is `interaction.override-option-key`. In the inbound or outbound routing application, you set the value of the identified key to the name of the transaction list object and the desktop options in the transaction list object are used instead of the Agent Workspace application or agent group objects.

Configure a multi-channel contact center

Contents

Learn how to configure a multi-channel contact center and how to enable multiple channels for a single agent.

Related documentation:

-
-

What are interaction channels?

An interaction channel is simply a medium of interaction between you and your customer, such as telephone (voice), email, and Facebook.

In Agent Setup, the available channels are as follows:

- Voice
- Email
- Chat
- Facebook
- Twitter
- Outbound
- Workitem
- Genesys Predictive Engagement for chat (available in the new Agent Workspace only)

Configure a multi-channel contact center

If your contact center interacts with customers on many different channels, such as voice (telephone), email, chat, and Facebook, you'll need to configure your contact center and your agents accordingly. This requires completing main tasks:

- Specify the channels that apply to your contact center.
- Specify the channels that apply to an individual agent.

> **Important**
> The only exception applies to the Genesys Predictive Engagement for Chat channel. See the Enable Genesys Predictive for Chat section below for details.

Enable channels for the global contact center

This is the first step in the process. If you don't complete this action first, you won't be able to assign interaction channels to individual agents.

To enable the channels that your contact center will use on any given day:

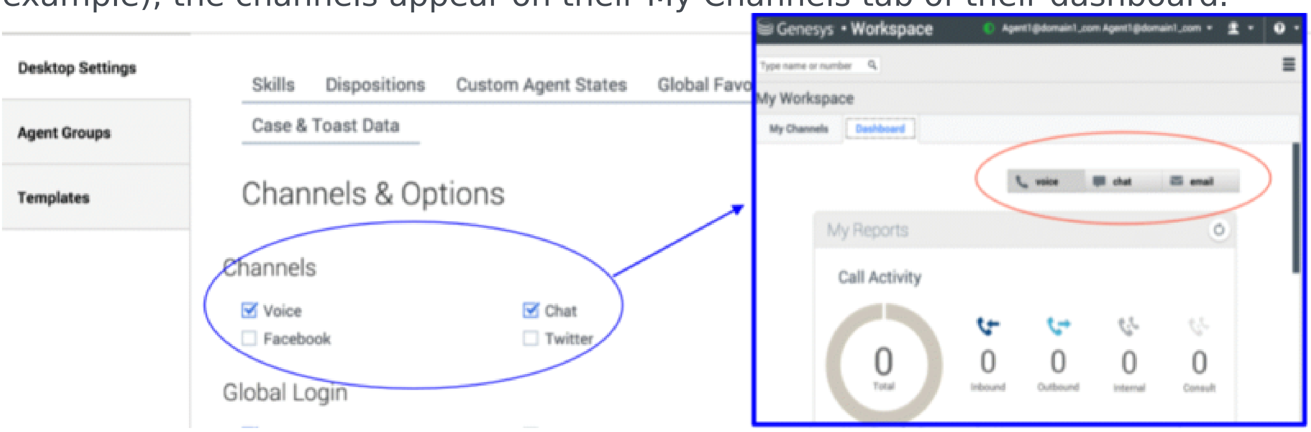
1. Go to **Contact Center Settings > Desktop Options > Channels and options**.
2. Click the channels that apply to your contact center.
3. Go to each channel option to apply individual channel settings.

Assign channels to a single agent

Once you specify the channels that your contact center will use, you'll need to assign channels to the agents every time you create a new agent.

On the **User > New User** page, the list of channels you configured for your global contact center appear in the Channels menu. Select the channels that apply to the agent you're creating.

Now, when that agent logs in to their desktop application (Agent Workspace, for example), the channels appear on their My Channels tab of their dashboard.



Enable Genesys Predictive Engagement for Chat

If you have the newest version of Agent Workspace with Predictive Engagement capabilities, you can enable the Genesys Predictive Engagement for Chat channel in Agent Setup.

Unlike all other channels, this channel can not be enabled at the global contact center level; you must enable it when you create a new agent on the **User > New User** page in the Agent Setup application. For more information, see Predictive Engagement Chat Interaction.

Configure Capacity Rules

Capacity rules control how many interactions and what type of interactions an agent can receive at one time. If you have a multi-channel contact center.

Enable multi-media agents

A multimedia agent handles non-voice calls only. If you have these agents in your contact center, you must enable the Multimedia Agent option when you create the new user.

To do this, create or edit the new user and then enable the Multimedia Agents option.

Capacity rules

Contents

Define an agent’s ability to handle multiple interactions concurrently for different channels.

Related documentation:

-
-

Capacity rules allow you to define an agent’s ability to handle multiple interactions concurrently for different channels. When the limits for a channel are reached, the agent stops receiving interactions for that channel.

When you create a capacity rule, you define rules for every enabled channel, except for workbins and outbound channels. For each channel, you first need to set the maximum number of interactions an agent can handle, and then you can optionally define rules that also set limits for that channel based on the number of interactions being handled on other channels.

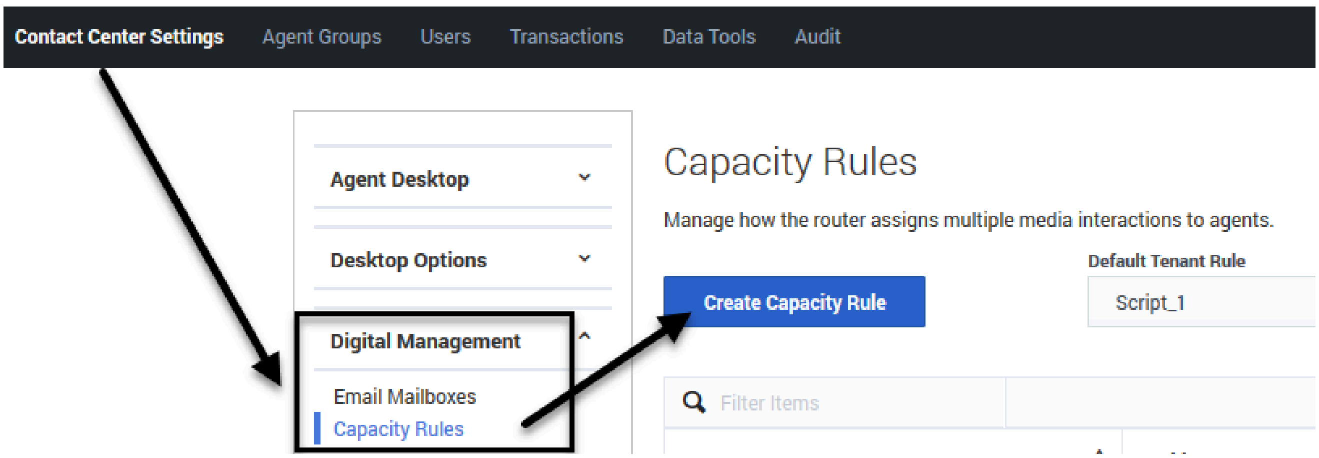
Example	Result
You could define the following for an agent using a chat channel: • Allow a maximum of 3 chat interactions.	This rule means that the system will not route new chat interactions to an agent under the following conditions: • If the agent is handling 3 or more chat interactions.

You could define the following for an agent using a chat channel:
• Allow a maximum of 3 chat interactions.
• Do not send new chat interactions when the agent is busy with either:
  • 1 email
  • 1 voice
	This rule means that the system will not route new chat interactions to an agent under the following conditions:
	• If the agent is handling 3 or more chat interactions.
	• If the agent is handling 1 or more email interactions.
	• If the agent is handling 1 or more voice calls.

You could define the following for an agent using a chat channel:
• Allow a maximum of 3 chat interactions.
• Do not send new chat interactions when the agent is busy with either:
  • 1 emailand 1 chat concurrently
  • 1 voice
	This rule means that the system will not route new chat interactions to an agent under the following conditions:
	• If the agent is handling 3 or more chat interactions.
	• If the agent is already handling *at the same time* 1 or more email interactions *and* 1 or more chat interactions.
	• If the agent is handling 1 or more voice calls.

Example	Result
Important This is considered advanced functionality and is used in rare circumstances.	

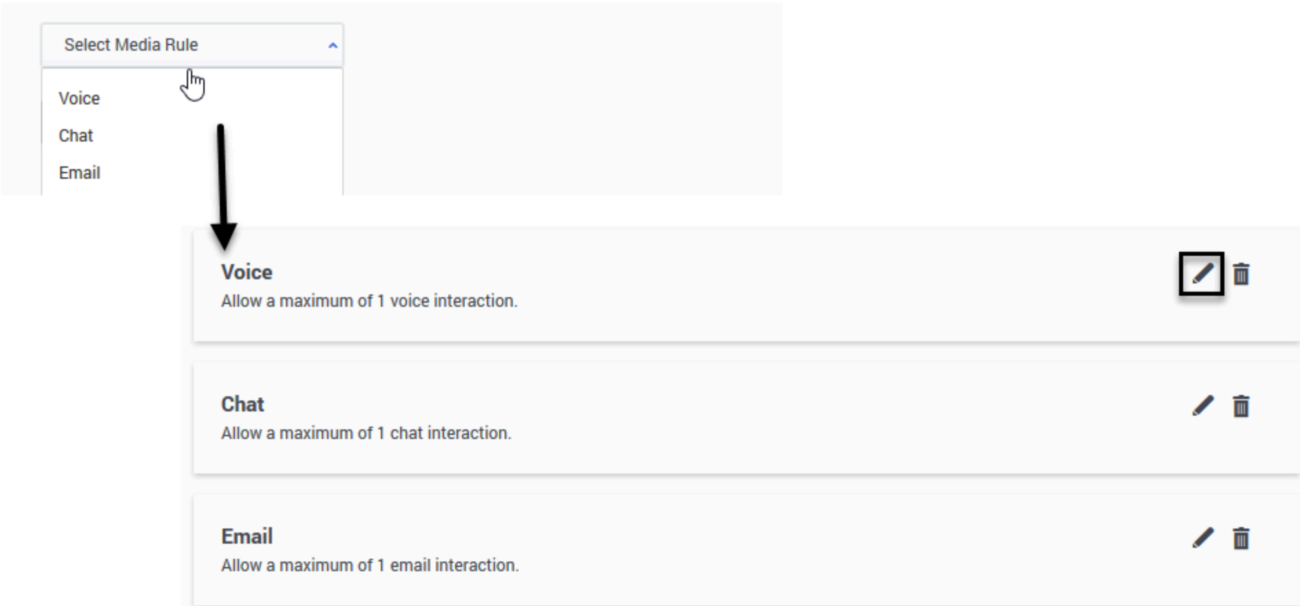
Create a capacity rule



To create a capacity rule:

1. Go to **Contact Center Settings** -> **Digital Management** -> **Capacity Rules** screen in Agent Setup.
2. Click **Create Capacity Rule**.

Select media channels



On the **Create a Capacity Rule** screen, enter a name for the capacity rule and specify the rule folder.

Next, from the **Select Media Rule** menu, select all channels that apply to your contact center.

When you select a channel, a default media rule for that channel appears onscreen. To open and edit the rule, click the pencil icon.

Now, you'll create the media rules by specifying the following:

- the maximum allowable interactions an agent can handle for a media channel.
- (optional) add limit conditions for that channel, based on interactions being handled on other channels.

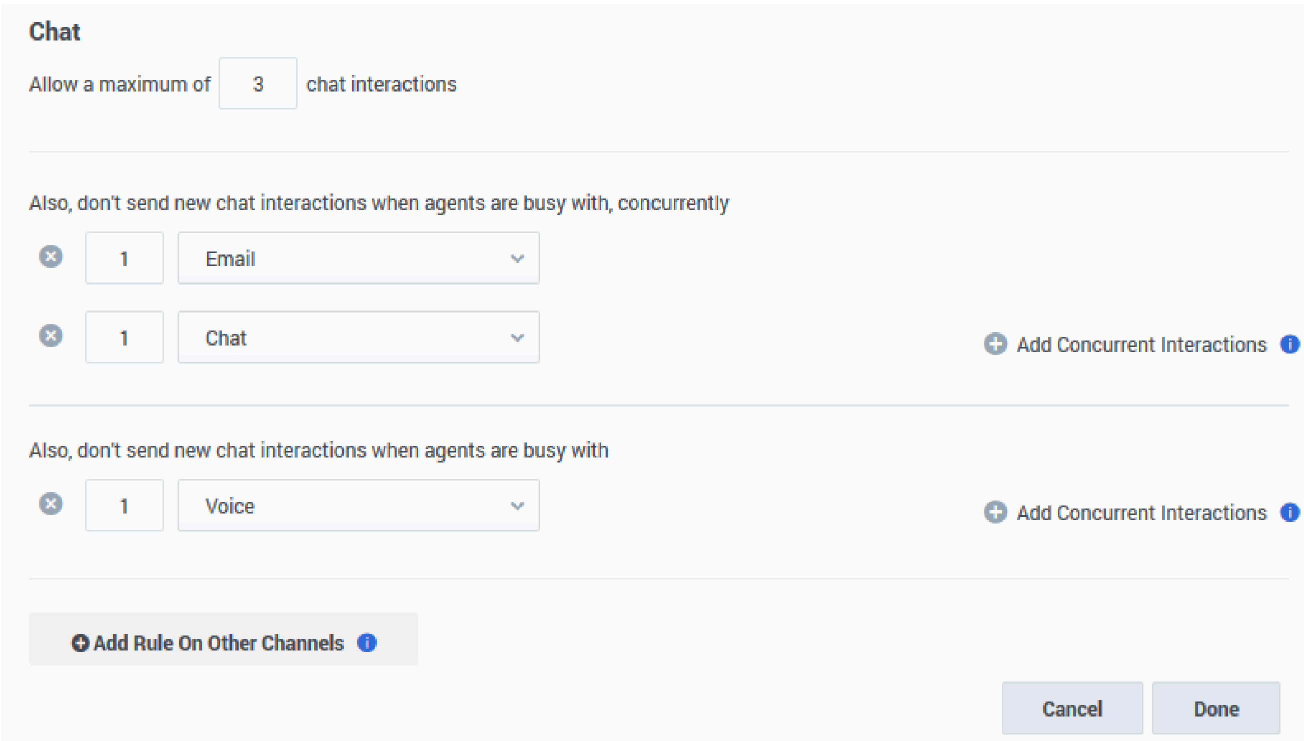
Define maximum number of interactions

To define the maximum allowable number of interactions an agent can handle for a media channel, click the pencil icon to open and edit the media rule for the respective channel.

Next, in the **Allow a maximum of interactions** section, simply enter an integer in the text box to define the maximum allowable number of agent can handle for that media channel.

You can click **Done** or continue on to define additional rules that depend on other channels.

Specify limits that depend on other channels



To specify rules that depend on the number of interactions of other channels being handled: Click **Add Rule on Other Channels**. Next, enter the number of interactions and select the channel that you want to depend on.

You can repeat and click **Add Rule on Other Channels** button to add more limit conditions on other channels.

Advanced, rarely used: Sometimes, you may need to define a more complex rule, that sets a limit based on interactions of several channels being handled at the same time by the agent. For that case, click **Add concurrent Interactions** to build composite rules.

To illustrate how this works, let's look at the last example from above:

Example	Instructions

• Allow a maximum of 3 chat interactions.
• Also, don't send new chat interactions when the agent is busy with:
  • 1 email and 1 chat concurrently
  • 1 voice
	To enable:
	1. Because the rule will contain chat, email, and voice interactions, you must have already selected all three channels from the **Select Media Rule** menu. That means you should see three separate sections on your screen - one for each channel.
	2. Click the pencil icon in the chat section to define the chat media rules.
	3. In the **Allow a maximum of chat interactions** field, enter **3** in the text box.
	4. In the next section, for the **Also, don't send new chat interactions when agents are busy with:** option, specify an integer of **1** in the text box and then select **Email** from the **Select Channel** menu.
	5. Click **Add Concurrent interactions**.
	6. In the **Also, don't send new chat interactions when agents are busy with, concurrently:** section, specify an integer of **1** in the text box and then select **Chat** from the **Select Channel** menu.
	7. Click **Add Rule on Other Channels**.
	8. In the next section, for the **Also, don't send new chat interactions when agents are busy with:** option, specify an integer of **1** in the text box and then select **Voice** from the **Select Channel** menu.

Edit a capacity rule

To edit a capacity rule that has already been created, go to **Contact Center Settings** -> **Digital Management** -> **Capacity Rules** screen in Agent Setup. Locate the capacity rule from the menu and click the corresponding pencil icon. The Edit Capacity Rule window opens. Edit any or all of its properties.

Assign a default capacity rule

When you create a new capacity rule, it appears in the **Default Tenant Rule** menu on the main **Contact Center Settings** -> **Digital Management** -> **Capacity Rules** screen. Select any Capacity Rule from this menu to make it the default Capacity Rule for a tenant.

Assign a capacity rule to an agent

You can assign a capacity rule to a user in Agent Setup, as follows:

1. From the Users tab, locate the user/agent or add a new one.
2. From the Capacity Rules menu, find the capacity rule you want to apply.

You can also assign a capacity rule to a user in a CSV for XLS file that will be imported via Bulk Import:

- For CSV files - In the CapacityRule column, enter the capacity rule name.
- For XLS files - In the CapacityRule column, specify the capacity rule DBID.

Channel options

Contents

- Administrator

Learn how to enable channel options in the Agent Setup application.

Related documentation:

Channels are different methods used to communicate with customers and team members in your contact center.

Each channel allows for communication with contacts in different ways, such as making and receiving phone calls (known as the Voice channel), receiving and replying to emails, and interacting in live chats.

Enable Channels

In the **Channels** section under **Desktop Options**, select the channels you want to enable in your contact center.

The choices that you make in the **Channels** section are not automatically applied to all agents and users. Your selection provides a set of channels that you choose from when you add an agent. For example, you can select **Voice**, **Chat**, **Email**, **Workbins**, **Outbound**, **Workitem**, **Facebook**, or **Twitter** for the contact center. Then, when you add an agent or edit an agent, you can configure the individual agent to only have access to certain channels.

You can also enable **Genesys Predictive Engagement** for **Chat** channel users working with the new Agent Workspace. When editing or creating a user in Agent Setup, you can select **Altocloud** under **Channels** from the **Desktop Options** in the **Users** section. This option is not available in the **Contact Center Settings** or **Agent Groups** sections. For more information, see Genesys Predictive Engagement Chat Interaction.

My Channels options

In the **My Channels** section, you can enable the following options:

- **My Channels** allows an agent to access the My Channels tab.
- **My Channels Pending State** allows an agent to have a pending state in My Channels.

Chat channel options

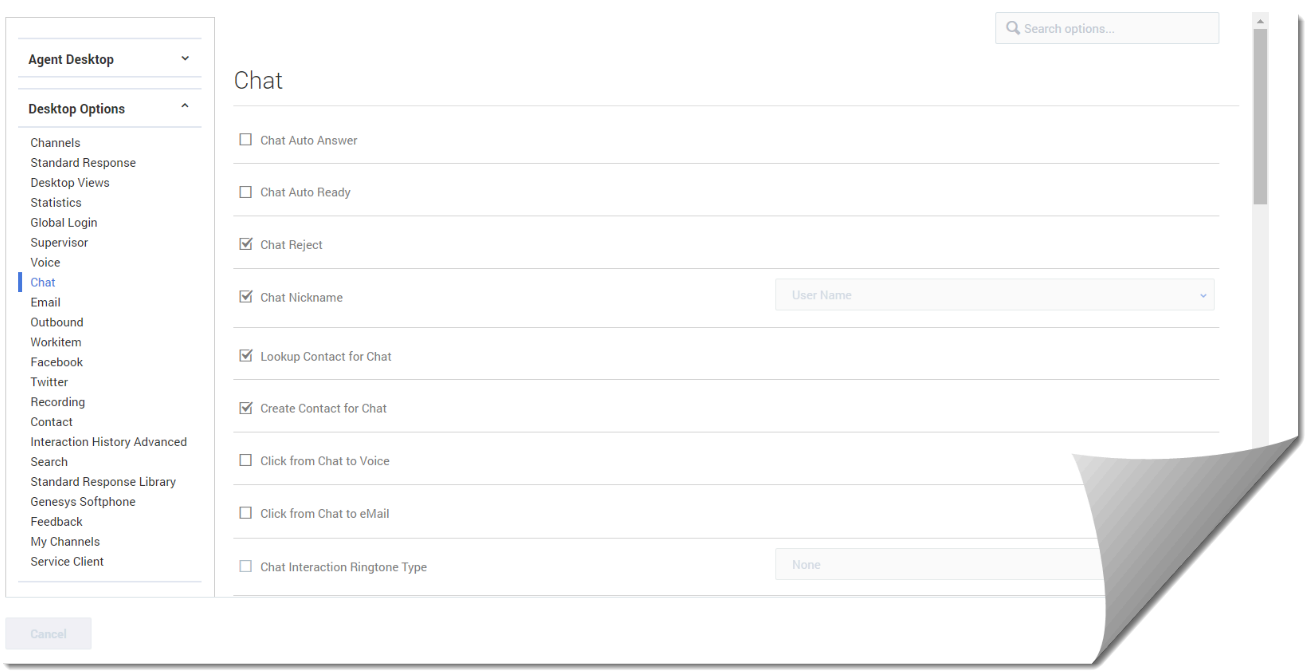
- 
- Administrator

Learn about the chat channel options available in Agent Setup.

Related documentation:

-
-

> **Important**
> Some features described here may not apply to your organization's setup. If you need features that aren't available to you, contact your administrator or Genesys representative.



In the **Chat** section of the **Contact Center Settings** page, configure the following options:

- **Chat Auto Answer** specifies that chat interactions are automatically answered when an agent receives the invitation.
- **Chat Auto Ready** specifies that chat interactions are automatically set to ready state during login.
- **Chat Reject** enables agents to reject incoming chats.
- **Chat Nickname** specifies the nickname that is displayed on the chat window in interactions. Type one the following syntax options:
    - `$Agent.UserName$` to display the agent's full username.
    - `$Agent.LastName$` to display only the agent's last name.
    - `$Agent.FirstNameLastInitial$` to display only the agent's first name and last initial.
    - `$Agent.FirstName$` to display only the agent's first name.
    - `$Agent.FullName$` to display the agent's full name.
    - `$Agent.EmployeeId$` to display the agent's employee ID.
- **Lookup Contact for Chat** activates Agent Workspace for contact lookup when an interaction is presented to an agent.
- **Create Contact for Chat** will create a contact if the initial contact lookup fails to find an existing contact.
- **Click from Chat to Voice** enables users to initiate a voice interaction by clicking a phone number in a chat transcript.
- **Click from Chat to eMail** enables users to initiate an email by clicking an email address in a chat transcript.
- **Chat Interaction Ringtone Type** specifies the chat ringtone type. Enable the option and then select the ringtone type from the drop-down list box.
- **Chat Interaction Ringtone Priority** specifies the priority level of the chat ringtone within the channels. Enable the option and then type the number for the priority level.
- **Chat Interaction Ringtone Duration** specifies how long the ringtone rings. Use the following values:
    - `-1` specifies to repeat the ringtone until the chat is answered.
    - `0` specifies to play the ringtone only one time.
    - 1 or more specifies to play the ringtone for the specified duration (in milliseconds) and then repeat until the chat is answered.
- **Chat Interaction Ringtone Volume** enables users to set the volume for the chat interaction ringtone.
- **Chat Message Ringtone Type** specifies the chat message ringtone type. Enable the option and then select the ringtone type from the drop-down list box.
- **Chat Message Sound Priority** specifies the priority level of the chat message sound within the channels. Enable the option and then type the number for the priority level.
- **Chat Message Sound Duration** specifies the length of the sound. Use the following values:
    - `-1` specifies to repeat the sound until the chat message is read.
    - `0` specifies to play the sound only one time.

    - 1 or more specifies to play the sound for the specified duration (in milliseconds) and then repeat until the chat message is read.

- **Chat Message Sound Volume** enables users to set the volume for the chat message sound.
- **Can Two Step Transfer** enables two-step transfer of a chat, beginning with a chat consultation.
- **Can Two Step Conference** enables two-step conference of a chat, beginning with a chat consultation.
- **Can One Step Transfer** enables instant chat transfer.
- **Auto-disconnect** automatically disconnects a chat session when the agent is the last remaining party.
- **On-hold Queue** specifies the Interaction Queue where a chat interaction is placed when an agent places it on hold. This option can be overridden by a routing strategy.
- **Warning time** specifies the time in seconds that a warning alarm alerts an agent of a customer awaiting a chat response.
- **Maximum time** specifies the time in seconds
- **Prompt for end** displays a confirmation prompt to an agent when they select End. This option can be overridden by a routing strategy.
- **URL push max records** specifies the maximum size of the pushed URL list.
- **Timestamp** specifies whether the timestamp is displayed in the Chat transcript area.
- **Typing** specifies whether a typing notification is sent to customers during a chat interaction.
- **Typing timeout** specifies the duration in seconds of when the typing notification is displayed after the last keystroke.
- **Decline** allows an agent to decline incoming chat interactions.
- **URL push** allows an agent to push URLs to customers during chat sessions.
- **Interaction Disposition** allows an agent to set a disposition code for chat interactions.

Email channel options

- 
- Administrator

Learn about the Email channel options available in Agent Setup.

Related documentation:

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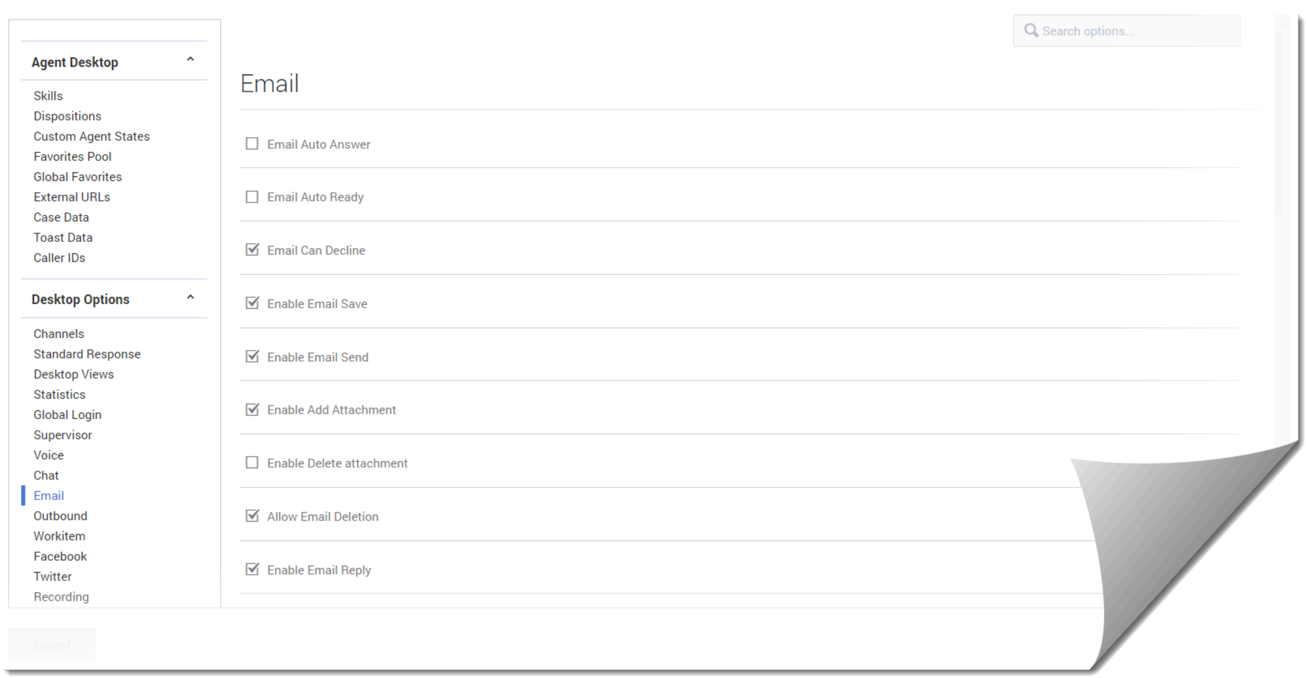

In the **Email** section under **Desktop Options**, configure the following options:

- **Email Auto Answer** specifies that email interactions are automatically answered when an agent receives the invitation.
- **Email Auto Ready** specifies that email interactions are automatically set to ready state during login.
- **Email Can Decline** enables agents to decline an incoming email.

- **Enable Email Save** enables agents to save in-progress outgoing email.
- **Enable Email Send** enables agents to send outgoing email.
- **Enable Add Attachment** enables agents to add attachments to outgoing email.
- **Enable Delete attachment** enables agent to delete an attachment from an inbound email.
- **Allow Email Deletion** enables agents to delete an email.
- **Enable Email Reply** enables agents to reply to an email.
- **Enable Email Reply All** enables agents to reply all to an email.
- **Allow Email Resend from History** enables agents to re-send an email from the interaction history. This option is dependent on the Contact option also being set in Desktop Options.
- **Email Forward** enables agents to forward emails to another agent.
- **Email Address Regular Expression** specifies the regular expression used to recognize an email address of a target entered in Team Communicator.
- **Forward email inline** enables agents to forward an email as part of the body of an email. This option only works when **Email Forward** is set to `true`.
- **Forward prefix** specifies the prefix added to an email that includes an inline email. For example, "Fwd:".
- **Lookup Contact for Email** activates Agent Workspace for contact lookup when an interaction is presented to an agent.
- **Create Contact for Email** will create a contact if the initial contact lookup fails to find an existing contact.
- **Email Interaction Ringtone Type** specifies the email ringtone type. Enable the option and then select the ringtone type from the drop-down list box.
- **Email Interaction Ringtone Priority** specifies the priority level of the email message ringtone within the channels. Enable the option and then type the number for the priority level.
- **Email Interaction Ringtone Duration** specifies how long the ringtone rings. Use the following values:
  - `-1` specifies to repeat the ringtone until the email message is read.
  - `0` specifies to play the ringtone only one time.
  - `1` or more specifies to play the ringtone for the specified duration (in milliseconds) and then repeat until the email message is read.
- **Email Interaction Ringtone Volume** enables agent to set the volume for the email interaction ringtone.
- **Enable CC Addresses** enables the ability to select CC addresses.
- **Enable Instructions** enables an instruction field in the email message being forwarded.
- **Enable Multiple to Addresses** enables the ability to select more than one address in the To line.
- **From Addresses**
- **Email Max Attachments Size** specifies the maximum size in megabytes allowed for files attached to an external email interaction. Files larger than this maximum size will be refused by the system and an error message will be displayed to the user.
- **Can One Step Transfer** enables one-step transfer for emails.

- **Enable Interim Send** enables agents to send an interim email before a final reply.
- **Enable Click to Dial from Email** enables agents to dial a phone number while handling an email.
- **Allow Moving Email to Workbin** enables agents to move an email to Workbin.
- **Allow Email Format Toggle** enables agents to toggle between HTML and text formats.
- **Allow Email HTML Format** enables agents to use HTML formatting.

Facebook channel options

- 
- Administrator

Learn about the Facebook channel options available in Agent Setup.

Related documentation:

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In the **Facebook** section under **Desktop Options**, configure the following options:

- **Facebook Auto Answer** automatically accepts a Facebook interaction when an Invite event if received.
- **Prompt for Done** prompts a confirmation message when the agent clicks **Done**.
- **Facebook Ringing Bell** specifies the sound played when a Facebook interaction is ringing.
- **Decline** allows the agent to decline an incoming interaction. This option depends on the Channels option for Facebook.

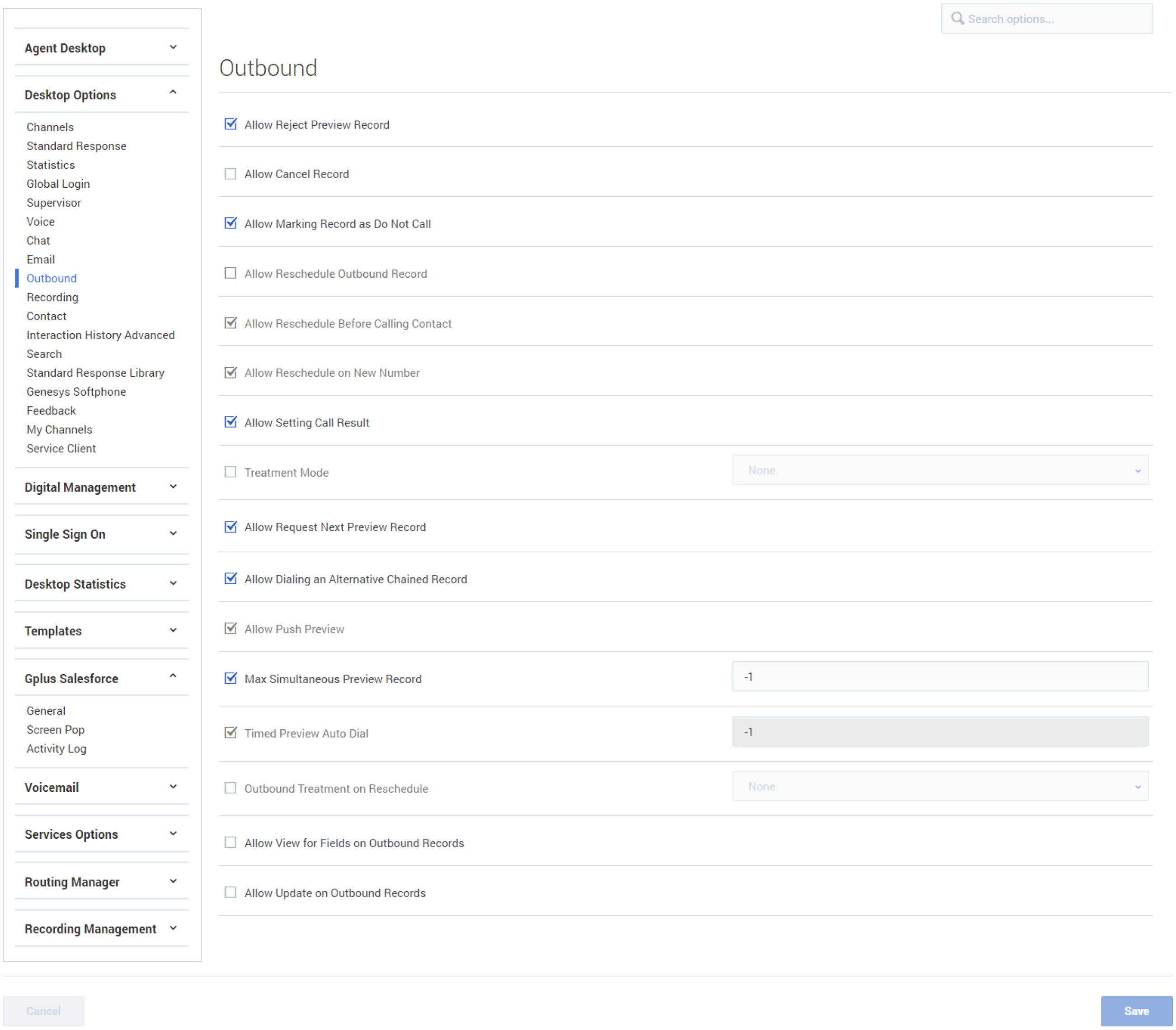
- **Mark Done** allows the agent to mark an interaction as **Done** with further processing. This option depends on the Channels option for Facebook.
- **One-step transfer** allows the agent to use one-step transfer.
- **Set Interaction Disposition** allows the agent to set a disposition code before marking an interaction as **Done**. This option depends on the Channels option for Facebook.

Outbound channel options

- Administrator

Learn about Outbound options available in Agent Setup.

Related documentation:



In the **Outbound** section under **Desktop Options**, configure the following options:

- **Allow Reject Preview Record** enables agents to reject a preview record. If an agent declines a preview record, it can be processed by another agent in the campaign.
- **Allow Cancel Record** enables agents to cancel a preview record. If an agent cancels a preview record, it is not processed again during the current campaign.
- **Allow Marking Record as Do Not Call** enables agents to mark a contact as *Do Not Call*.
- **Allow Reschedule Outbound Record** enables agents to reschedule an outbound record.
- **Allow Reschedule Before Calling Contact** enables agents to reschedule a call before calling the contact on the record.
- **Allow Reschedule on New Number** enables agents to add a new record to the chain by rescheduling with a new number.

- **Allow Setting Call Result** enables agents to set call results for outbound interactions.
- **Treatment Mode** specifies the type of treatment to be applied for the outbound record after it is marked as processed. If not set or set to none, no treatment is applied.
- **Allow Request Next Preview Record** enables agents to request a new preview record while processing of the previous preview record terminates.
- **Allow Dialing an Alternative Chained Record** enables agents to dial a number from the preview record chain that is different than the number selected by the system.
- **Allow Push Preview** enables agents to use outbound push preview.
- **Push Preview Mode** specifies whether Outbound Push Preview campaigns are running in regular or direct mode. In direct mode, OCS communicates directly with Workspace instead of utilizing Interaction Server to handle interactions. This means that there is no automatic agent state control.
- **Max Simultaneous Preview Record** specifies the maximum number of simultaneous Outbound Preview records an agent can view in the interaction window.
- **Timed Preview Auto Dial** specifies the method in which calls are dialed for agents in Preview, Push Preview, or Reschedule campaigns. The options are as follows:
    - The agent can manually dial a record.
    - The record is auto-dialed as soon as the record is accepted.
    - The record is auto-dialed after a specified number of seconds.
- **Outbound Treatment on Reschedule** specifies the list of disposition codes that can be set for an outbound interaction, enabling the Outbound Contact Server to receive outbound treatment for campaign records marked as *Done*, after a reschedule.
- **Allow View for Fields on Outbound Records** specifies if the agent can view the fields of the Outbound record in the interaction.
- **Allow Update on Outbound Records** specifies if the agent can update the fields of an Outbound record that are configured as editable.

Twitter channel options

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- Administrator

Learn about the Twitter channel options available in Agent Setup.

Related documentation:

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In the **Twitter** section under **Desktop Options**, configure the following options:

- **Twitter Auto Answer** automatically accepts a Twitter interaction when an Invite event if received.
- **Prompt for Done** prompts a confirmation message when the agent clicks **Done**.
- **Twitter Ringing Bell** specifies the sound played when a Twitter interaction is ringing.
- **Decline** allows the agent to decline an incoming interaction. This option depends on the Channels option for Twitter.
- **Mark Done** allows the agent to mark an interaction as **Done** with further processing. This option

depends on the Channels option for Twitter.

- **One-step transfer** allows the agent to use one-step transfer.
- **Set Interaction Disposition** allows the agent to set a disposition code before marking an interaction as **Done**. This option depends on the Channels option for Twitter.

Voice channel options

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- Administrator

Learn about the Voice channel options available in Agent Setup.

Related documentation:

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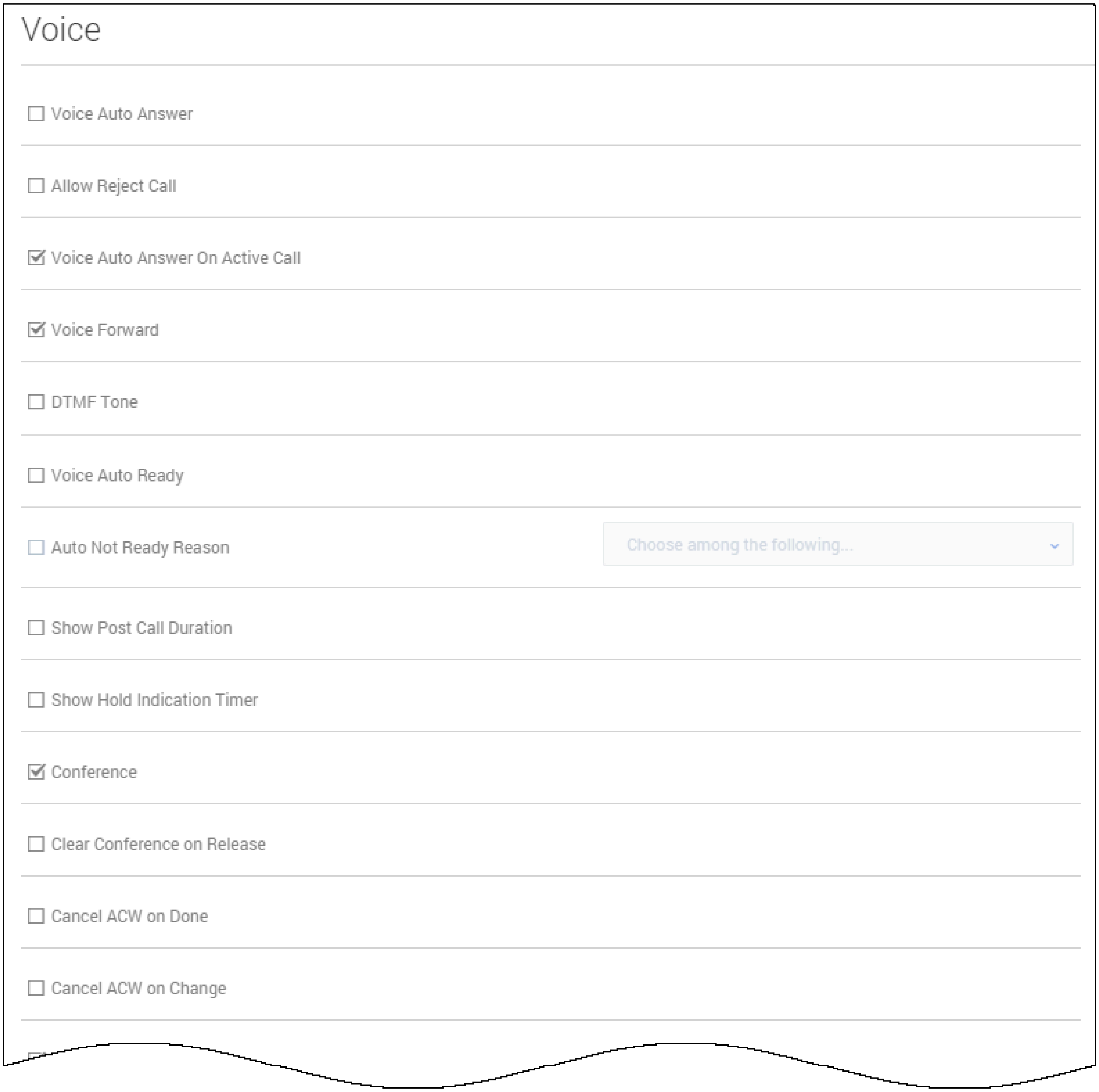

In the **Voice** section of the **Contact Center Settings** page, configure the following options:

- **Voice Auto Answer** specifies that voice interactions are automatically answered when an agent receives the invitation.
- **Voice Auto Answer On Active Call** specifies that a voice interaction is not automatically answered if the agent has another active call.
- **Voice Forward** enables agents to forward voice calls.
- **DTMF Tone** specifies to play a tone when the agent selects a DTMF key.

- **Voice Auto Ready** places the agent in the Ready state as soon as they log in.
- **Auto Not Ready Reason** places the agent in Not Ready state as soon as they log in. When you select this option, define the default Not Ready reason code.
- **Show Post Call Duration** allows the post-call duration for a voice call to be shown in the interaction bar's tool tip area.
- **Show Hold Indication Timer** allows the hold duration to be shown to the agent in the interaction bar.
- **Release Voice Calls while on Hold** enables agents to manually end voice calls that are on hold.
- **Redirect / Release calls in Hunt Group** enables agents to redirect/release calls in the Hunt group.
- **Conference** enables one-step voice conferencing.
- **Two-Step Voice Conference** enables two-step voice conferencing.
- **Clear Conference on Release** clears a conference call of all parties when the last agent leaves the conference call.
- **Cancel ACW on Done** specifies that the voice channel is to be returned to the agent's former availability status when the agent marks the voice interaction as Done while in After Call Work status.
- **Cancel ACW on Change** specifies that After Call Work status should be cancelled when an agent switches from After Call Work to Ready or Not Ready during a call.
- **Lookup Contact for Voice** activates Agent Workspace for contact lookup when an interaction is presented to an agent.
- **Create Contact for Voice** will create a contact if the initial contact lookup fails to find an existing contact.
- **Enable History Record Creation for voice interaction without contact** enables the voice interaction record to be created in My History and Interaction search screens when there is no associated contact.
- **Caller ID Anonymous** specifies whether the anonymous Caller ID is enabled. This option applies to only outbound calls.
- **Caller ID for Consultations** enables agents to use a Caller ID for consultations.
- **Caller ID for Conferences** enables agents to use a Caller ID for single-step conferences.
- **Caller ID for Transfers** enables agents to use a Caller ID for single-step transfers.
- **Routing Point for Skill Based Transfers** specifies the call number used by the Routing Point feature.
- **Routing Based Actions** defines the list of routing-based actions that an agent can perform. Options include:
    - **Make Call**
    - **One Step Conference**
    - **Initiate Conference**
    - **One step Transfer**
    - **Initiate Transfer**
- **Routing Based Targets** defines the list of contact types to which an agent can route calls through the actions defined in the **Routing Based Actions** option. Options include Agent, Routing Point, Type Destination, Outbound Record, and Contact. Note that Agent Groups and Skills targets are not listed here, because they are configured through a routing strategy.

- Options to exclude a range of numbers from the Team Communicator. For each option, if you enable it, you must type a regular expression (RegEx) to match against the following items:
    - Entered phone number
    - Selected agent or routing point

      For example, to exclude extensions that are 7 digits and start with the numbers 7 or 8, type `^(7|8)\d{6}$`
    - **Make Call Exclude Number** specifies the format for a phone number to exclude from Team Communicator when making a call.
    - **Single Step Conference Exclude Number** specifies the format for a phone number to exclude from Team Communicator on a single step conference.
    - **Single Step Transfer Exclude Number** specifies the format for a phone number to exclude from Team Communicator on a single-step transfer.
    - **Consultations Exclude Number** specifies the format for a phone number to exclude from Team Communicator on consultation.

      These options are not applicable to global or personal favorites.
- **Voice Ringtone Type** specifies the voice ringtone type. Enable the option and then select the ringtone type from the drop-down list box.
- **Voice Ringtone Priority** specifies the priority level of the voice ringtone within the channels. Enable the option and then type the number for the priority level.
- **Voice Ringtone Duration** specifies how long the ringtone rings. Use the following values:
    - `-1` specifies to repeat the ringtone until the call is answered.
    - `0` specifies to play the ringtone only one time.
    - 1 or more specifies to play the ringtone for the specified duration (in milliseconds) and then repeat until the call is answered.
- **Voice Ringtone Volume** specifies the default volume for the voice ringtone.
- **Can One Step Transfer** enables instant conferencing of a voice call.
- **Can Two Step Transfer** enables two-step transfer of a voice call.
- **Can Extend After Call Work** enables the extension of After Call Work indefinitely, until the user's status is changed manually.
- **Can Use WebRTC** enables WebRTC in Agent Workspace. Note: The **Can Use Voice Channel** option must be enabled.
- **WebRTC Polling Timeout** specifies, in seconds, a period of time during which WebRTC library waits for the response for a polling request.
- **Expression to capture groups in GWS url** specifies that Workspace should extract some part of its URL to capture some groups containing shared information among services, like the tenant or the region.
- **WebRTC Server URN** specifies the URN that should be based on the following pattern: `WEBRTCGATEWAY_SERVER:WEBRTCGATEWAY_PORT?sip-proxy-address=SIPPROXY_SERVER:SIPPROXY_PORT.`
- **Can change speaker volume** allows an agent to change speaker volume. Note: The **Can Use Voice Channel** option must be enabled.

- **Can mute microphone** allows an agent to mute and unmute the microphone. Note: The **Can Use Voice Channel** option must be enabled.
- **Can mute speaker** allows an agent to mute and unmute the speaker. Note: The **Can Use Voice Channel** option must be enabled.
- **Can send DTMF** specifies if DTMF is available for WebRTC calls. Note: The **Can Use Voice Channel** option must be enabled.
- **WebRTC Ringtone Type** specifies the voice channel ringing sound -
- **WebRTC Ringtone Priority** is the priority of ringtone. The higher the integer, the higher the priority.
- **WebRTC Ringtone Duration:**
    - -1 plays means to play and repeat until an explicit message stops it with an established event.
    - 0 means to play the entire sound one time.
    - An integer greater than 0 means a time in milliseconds to play and repeat the sound.
- **WebRTC Ringtone Volume** specifies the default volume for WebRTC ringtone.
- **Voice SIP Preview Ringtone Type** allows the selection of a ringtone type from the default tone types.
- **Voice SIP Preview Ringtone Priority** specifies Voice SIP ringing priority between different channels.
- **Voice SIP Preview Ringtone Duration** specifies the Voice SIP preview duration.
- **Voice SIP Preview Ringtone Volume** specifies the default volume for the voice SIP preview ringtone.
- **Allow Alert for Opt-out Recording** alerts the agent that the current call is not being recorded by a supervisor.

Workitem channel options

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- Administrator

Configure the Agent Workspace Workitem channel options.

Related documentation:

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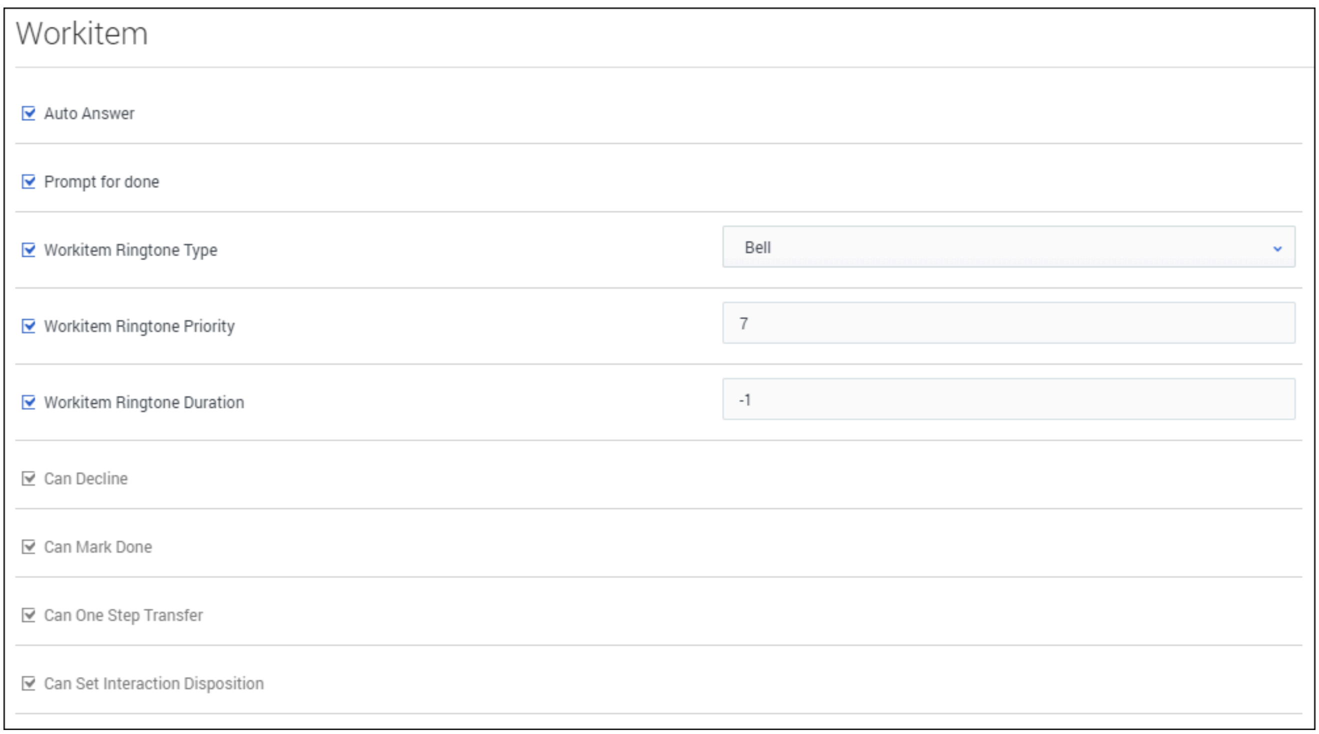

Workitems, called Open Media by Genesys Digital channels, are documents that might be directed to an agent for handling.

In the **Workitem** section under **Desktop Options**, configure the following options:

- **Auto answer** automatically accept an interaction when an invite event is received.
- **Prompt for done** presents a confirmation message to the user when they press the **Done** button. This option is only available for Open Media interactions.
- **Workitem ringtone type** specifies the sound that is played when a Workitem interaction is ringing.
- **Workitem ringtone priority** specifies the priority of a Workitem ringtone. The higher the integer, the higher the priority.
- **Workitem ringtone duration** specifies the duration of a Workitem ringtone (-1 plays and repeats the sound until an action is taken, 0 play the whole sound one time, and an integer > 0 sets a time in milliseconds to play and repeat the sound).
- **Decline** enables the agent to decline incoming Workitem interactions.
- **Mark Done** enables the agents to mark done a Workitem interaction without further processing.
- **One-step transfer** enables the agent to use instant Workitem transfer.
- **Interaction Disposition** enables the agent to set the disposition codes for Workitem interactions.

My Channels options

-
- Administrator

Learn about the My Channels options (for agents) available in Agent Setup.

Related documentation:

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In the **My Channels** section, you can enable the following options:

- **My Channels** allows an agent to access the My Channels tab.
- **My Channels Pending State** allows an agent to have a pending state in My Channels.

Agent settings overview

-
- Administrator

Learn about the features and controls that enable an agent to handle interactions and other key tasks.

Related documentation:

-
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Contents

When it's time to enable all the features and controls that make your agent’s job possible and manageable, you should think of the agent’s workday as a series of stages. In each stage, there’s a myriad of options and controls that enable the agent to complete that stage before moving on to the next. Let’s look at the stages and the configurable options that apply to each.

Logging in

The first thing an agent does is log in. This can include login to Agent Workspace, Team Communicator email, the intranet, and other internal resource sites.

- Global login
- Single Sign-On
- Auto login

Receiving a call or message

When an agent receives a call or message, the information the agent receives about the incoming call or message and the actions the agent takes from that point on is determined by the options you configure.

- Screen Pop options
- Case and toast data
- Accepting and rejecting a call - Auto answer and decline options:
  - Voice
  - Email
  - Chat
  - Facebook
  - Twitter
- Caller ID options (See also Add and manage Caller ID)
- Outbound options

Call handling and control

This stage includes everything from how the agents answer, make, or schedule a call, forward a call or email, switch between channels, handle call conferencing, how they place a call on hold, and so on.

- Forwarding a voice call
- Hold options for the Voice channel
- Conferencing options for the Voice channel
- Transferring options
- Call and screen recording options for Voice
- Microphone and speaker options for Genesys Softphone

Finding answers

There are going to be times when agents will need to obtain information from an internal or external source in the middle of the a customer interaction. The agent might obtain this information from an internal source, such as another agent, supervisor, or department, or the agent might look to external sources, such as websites, for the answers.

Internal:

- Standard response library
- Interaction history search options

External

- External URLs

Working with contacts

Agents also deal with contact records – this is stored information about each and every contact they interact with. You'll need to determine how the agents will find these records and interaction history and whether they can create contact records.

Contacts and contact management.

- Contacts and contact management options
- About Global Favorites

Configurable options by channel:

- Voice
- Chat
- Email

Post-interaction tasks

When an interaction with a customer ends, the agent will always have wrap-up work to do. This can include dispositioning the interaction, making notes about the interaction, scheduling a followup call, etc. Here are the related tasks:

Dispositions: General information about dispositions

Disposition options are available for all channels:

- Voice
- Email
- Chat
- Facebook
- Twitter
- Workitem

Options related to post call duration and marking records after an interaction has ended are available for the Voice channel.

Activity reports and statistics:

- My Channels options
- Agent Workspace statistics

Manage agents and other users

Contents

- 
- Administrator

Learn how to add, import, and manage agents and other users.

Related documentation:

-
-

> ### Tip
> All Users who have the required roles and permissions set in Access Groups can perform these tasks.

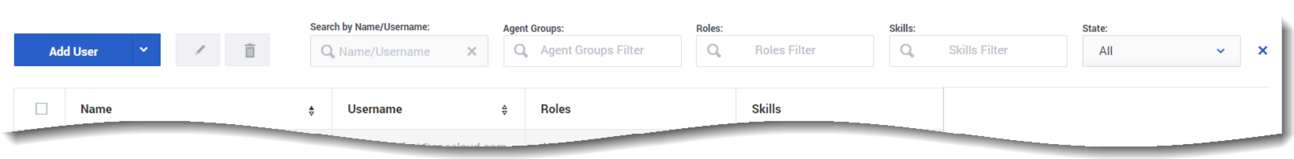
On the **Users** tab, you can manage agent, administrator, and supervisor accounts, including adding new accounts, importing agent accounts from an external file, and exporting agents.

> ### Important
> To add administrator accounts to your contact center, you add a user and assign the user to an administrators access group or import the administrator accounts.

After you log in to the Agent Setup interface, the first screen that you will see is the **Users** tab. If your contact center already has agents assigned to it, you see a list of configured agents. In a fresh installation, you might see an empty list. Regardless, as part of your regular maintenance on your contact center, you need to add agents.

View agent accounts

What you see in the Agent Setup interface is determined by your permission settings.



> ### Important
> If you see a red check box next to an agent account, this means that the agent's account is not valid due to some missing information. Hover your mouse over the check box to see what information is missing. For example, if a voice agent does not have a configured default **Place Name** field and your contact center is not configured to prompt the agent to enter place when he or she logs in, the agent's account is considered invalid until you update the agent account to supply the missing information.

Note the following options that you can use to locate specific agents on the list:

- **Search by Name/Username**: Use this field to type an agent name or username, or part of an agent's name, to filter the list to display only agents that match your search words.
- **Agent Groups**: Use this field to type the name of an agent group. All agents that are assigned the specified agent group will be listed.
- **Roles**: Use this drop-down list box to filter the list to display only agents that are assigned a specific role.

  > ### Important
  > As of 9.0.000.80, the following User Role names have changed. Only the names themselves have changed; their meanings and functions did not change.
  >
  > - The "Agent" Role name is changed to "Agent Workspace Agent"
  > - The "Supervisor" Role name is changed to "Agent Workspace Supervisor"
  > - The "Admin" Role name is changed to "Agent Setup Admin"

- **Skills**: Use this drop-down list box to filter the list to display only agents that are assigned a specific skill.
- **State**: Use this drop-down list box to filter the list to display either All, Enabled, or Disabled.
- **Page navigation**: To scroll through the list pages, use the back and next arrow next to the page number at the bottom of the page.

Add agents manually

Link to video

Click the **Add User** link. You can select a template from the **Template** drop-down list box if you have configured one or more templates. A template automatically selects some of the options on the **Add User** screen.

Complete all the required (*) fields on the screen. If you make an error, a message is displayed to tell you the correct format for a field. Most fields are self-explanatory, such as the name and email fields.

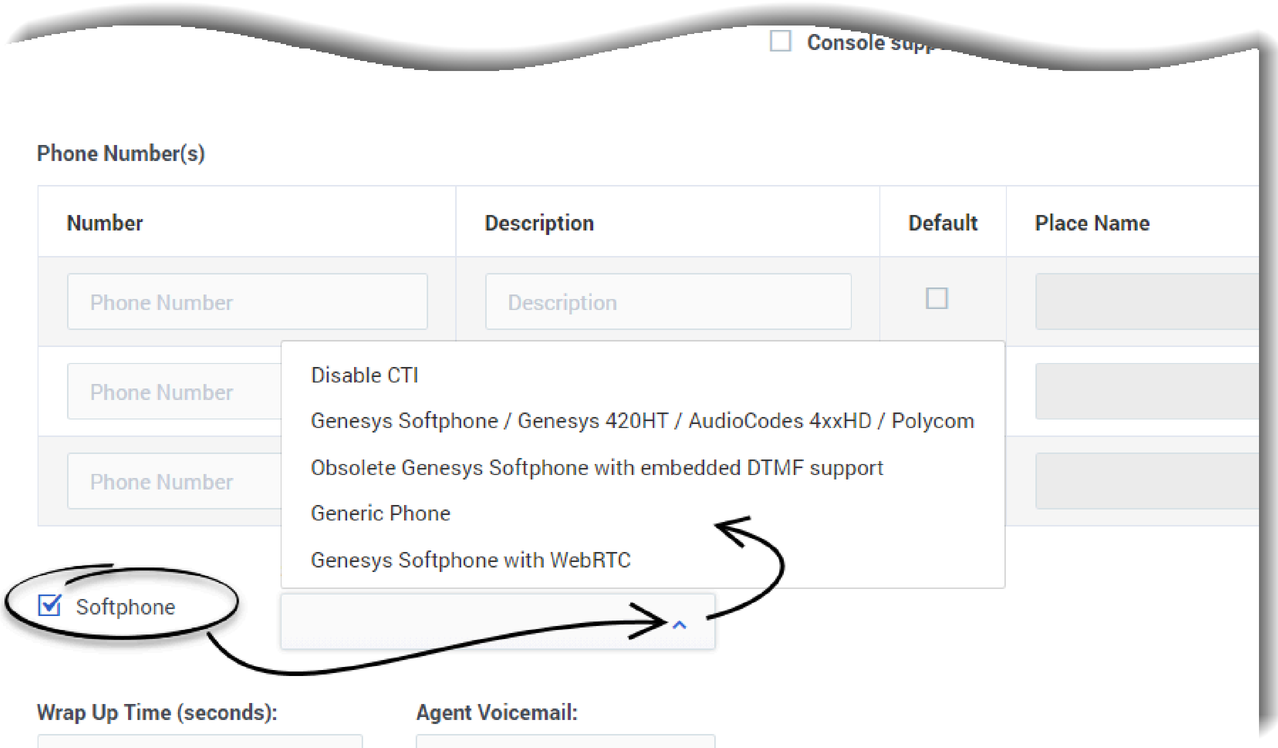
Use the following table for advice on how to fill in the fields:

Option	Description
Folder	From the drop-down list box, select the business group to which you want to assign the user.
First Name	Type the first name of the user.
Last Name	Type the last name of the user.
Username	Type the username for the user.
Login Code	Optional. Type a login code for the user. An example of a login code is the user's employee ID. Important The **Login Code** option is hidden by default, therefore, it might not be displayed on your screen. If you require the **Login Code** option, contact Genesys Professional Services to request that they enable the Agent Login Code option.
Email	Optional. Type the user's email address.
Reset Password	When selected, this option specifies that when the next time the user logs in, he or she will be prompted to change the password. This option only applies to agent user accounts.
Password	Type a default password for the user.
Password confirm	Type the password again.
Employee ID	Optional. Type the user's employee ID.
External ID	Optional. Type the user's external ID.
Capacity Rule	Optional. Choose an existing Capacity Rule from the drop down.
State enabled	Enables or disables the user account.
Multimedia Agent	Specifies that this agent is only enabled for multimedia (non-voice).
Supervisor	Select this option if this agent has a supervisory role.
Phone Number(s)	In addition to the default phone number, you can assign additional phone numbers to the agent. The agent has the opportunity to select the number when they log in to accept calls. For example, if you type `hjackson` in the **Username** field, when you type a phone number in the **Number** field of the first row, the **Place Name** field displays `hjackson`. If you type a number in the second row, the associated `Place Name` field displays `hjackson2` and the place name in the first row changes to `hjackson1`. If your contact center has a requirement to specify unique place names for different business groups or regions, you can overwrite the default place name.

Option	Description
Place Name	The value that you type in the **Username** field automatically populates the **Place Name** column. If you don't want to use the username as a place name, clear the **Use** check box.
Use	The **Use** option specifies that the username is to be used for the associated phone number. This option is selected by default. When you clear the **Use** check box, the phone number is used as a place name.
Wrap Up Time	You can configure wrap up time for an agent. Wrap up time is the amount of time the agent is allotted to complete after-call tasks, such as typing notes or selecting a disposition. The wrap-up time is measured in seconds. To disable wrap up time, type 0.
Agent Voice Mail	Type the voice mail box extension number for the agent to use.
Softphone	Select this check box if this user will use a softphone.
SIP Phone Type	When you enable Softphone, you must select a Softphone Type. Softphone types include: • Disable CTI • Genesys Softphone / Genesys 420HT / AudioCodes 4xxHD / Polycom • Obsolete Genesys Softphone with embedded DTMF support • Generic phone • Genesys SoftPhone with WebRTC
Skills	Select the skills that you want to assign to the agent, assign a skill level, and click **Add**. With many skills to choose from, you can filter the list of skills by using the search box.
Caller IDs	Click Caller ID and add at least one identifier to be displayed on a receiver's call display. If you add more than one, the agent has the option to choose which caller ID they want to display. You can also enable the agent to use an anonymous caller ID.
Agent Groups	Assign this agent to an agent group, which is a logical grouping of agents that provide particular sets of contact center services. For more information about agent groups, see Agent groups.
Access Group	Assign this agent to an access group, which is a logical grouping of agents that are provided specific access permissions.
Favorites	Personal Favorites is a list of Agents, Agent Groups or external contacts that group members

Option	Description
	frequently dial. This list provides a click-to-call list of these numbers on Agent Workspace. Personal favorites are configured the same way as Global Favorites. See Global favorites.
Switches	Select the switches where DNs and Agent Logins should be provisioned.
External URLs	Integrate internal and external websites into your agent's main view. See Enable external URLs.
Filter	For each agent group, you can control what information that group can see from other agent groups in the Team Communicator, Favorites, and Statistics. After you select an agent group on the Agent Groups window, select the Filter option on the menu bar. In the list of agents groups, you can choose to restrict or exclude agent groups by selecting the appropriate check boxes. You can also manage filters on the **Desktop Options** page.
Desktop Options	Assign channels and other options to the agent by clicking **Desktop Options** and then selecting from the listed options. You can select more than one option. For a detailed look at what options you can configure for an agent, see the Agent settings overview.
CRM Adapter	**CRM Adapter**: Use the **CRM Adapter** tab to configure the Gplus Adapter option settings for the agent group. For information, see Gplus Adapter for Salesforce options.
Recording Hierarchy	The recording hierarchy for an agent specifies the access control applied to recordings of calls handled by that agent. Select the Recording Hierarchy check box, and then type the hierarchy string. See Access control for Recording users for more information about Recording agent hierarchy, access groups, and partitioning.

SIP Phone Types



When you enable Softphone, you must select a softphone type from the **SIP Phone Type** list.

SIP Phone Types include:

- Disable CTI
- Genesys Softphone / Genesys 420HT / AudioCodes 4xxHD / Polycom
- Obsolete Genesys Softphone with embedded DTMF support
- Generic phone
- Genesys SoftPhone with WebRTC

- If an Extension DN for an agent's phone is provisioned in the environment in such a manner that it matches the standard configuration of a Generic SIP phone that *does not* support any BroadSoft extensions (the phone does not allow even the "answer" action via Desktop session), the UI displays the **Disable CTI** type.
- If an Extension DN for an agent's phone is provisioned in the environment in such a manner that it matches the standard configuration of **Genesys Softphone / Genesys 420HT / AudioCodes 4xxHD / Polycom** , the UI displays this phone type.
- If an Extension DN for an agent's phone is provisioned in the environment in such a manner that it matches the standard configuration of Genesys Softphone with embedded dtmf support, the UI displays **Obsolete Genesys Softphone with embedded DTMF support type**.

> ## Important
> There are occasional scenarios and/or PSTN Carriers where dtmf does not work well for agents using phones with such a configuration. In these instances, Genesys recommends re-provisioning this phone as **Genesys Softphone / Genesys 420HT / AudioCodes 4xxHD / Polycom**, and removing the embedded dtmf support.

- If an Extension DN for an agent's phone is provisioned in the environment in such a manner that it matches the standard configuration of a Generic SIP phone that supports only the "talk" BroadSoft extension (Desktop control over the "answer" action), the UI displays the **Generic SIP phone** type.
- If an Extension DN for an agent's phone is provisioned in the environment in such a manner that it matches the standard configuration of **Genesys Softphone with WebRTC**, the UI displays this phone type
- If an Extension DN for an agent's phone is provisioned in the environment in such a manner that it *does not* match the standard configuration, it is reflected as the **Custom** type.

> ## Important
> There is no way to provision a new phone of **Custom** type, as Genesys Multicloud CX supports only standard phones. If you need help, contact your Genesys representative.

Genesys recommendations

- If the agent actually uses Genesys Softphone or Genesys 420HT phone or AudioCodes 4xxHD or Polycom, it is recommended to re-provision this phone as **Genesys Softphone / Genesys 420HT / AudioCodes 4xxHD / Polycom**
- If the agent uses a custom phone (not **Genesys Softphone / Genesys 420HT / AudioCodes 4xxHD / Polycom**), keep the phone configuration as **Custom**. Alternatively, re-provision the phone as **Generic SIP Phone** or **Disable CTI** phone type, whichever is applicable, for the phone to obtain the standard settings.

> ## Tip
> For historical reasons, if a phone has been provisioned according to any older standards, the phone might experience various issues due to misaligned settings. If you need help, contact your Genesys representative.

Use bulk import to add multiple agents

You can use the Bulk Import feature to import multiple agents at a single time. Refer to the Bulk import page for detailed information and instructions.

Edit agents

Link to video

You can edit a single agent or a group of agents. When you edit a single agent, you can edit any of the agent's details. For a group edit, the two options you can edit are Annex and Skills.

When you edit one agent, click the agent's name in the Name column. In the **Manage User** window, you can make your updates.

Clicking **Save** means you'll stay in the **Edit User** screen after saving, while clicking **Save and close** saves your changes and returns you to the users list.

Clicking **Delete User** opens a confirmation window where you can also delete the user's places.

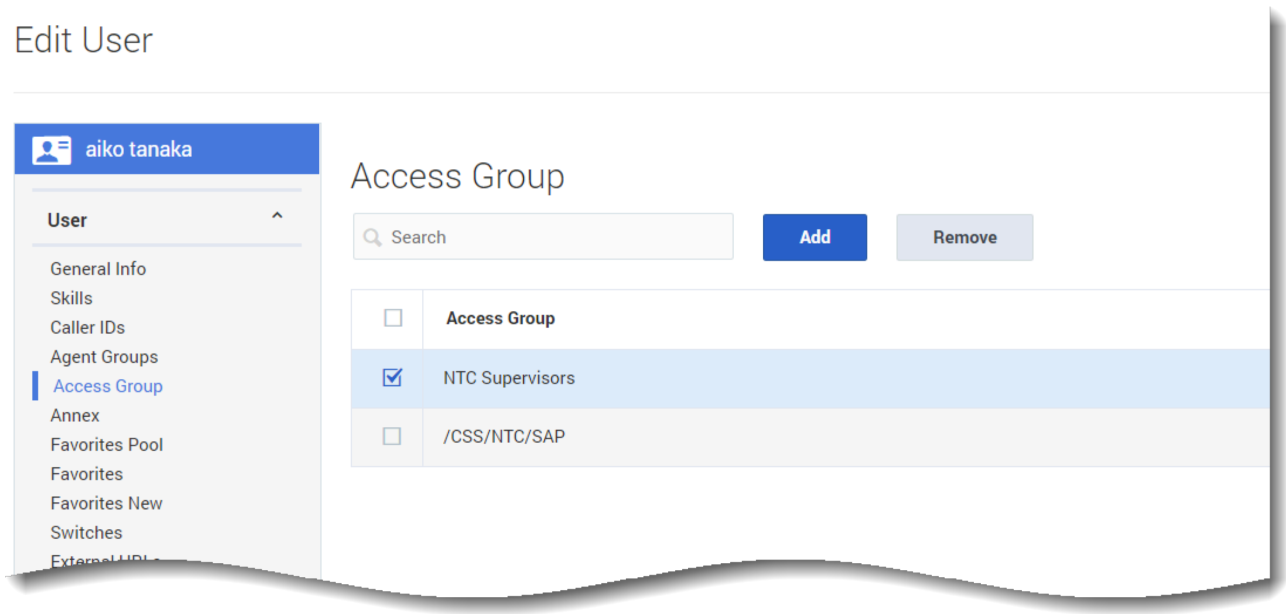
To edit multiple users at once, select the agents that you want to edit, click **Edit Users**, and then make your changes in the **Edit Users** window. When you edit multiple users, consider the following:

- You can add Annex options or modify existing options. You can only delete Annex options that are identical for all selected agents.
- Only values that are common for the selected users are shown for Skills and Annex. For example, if:
  - Agent 1 has Russian skill level of 10 and English skill level of 5
  - Agent 2 has Russian skill level of 10 and English skill level of 7. You will see the Russian skill level of 10 and English skill level is blank on the **Edit Users** screen under **Skills**.

Important

Currently, you can select upto 100 users when editing multiple users.

Edit an agent's Access Groups



To remove an agent from an Access Group, from the **Users** tab click the agent's **Name**. From the left-hand navigation menu, click **User > Access Group**. From here you can check the checkbox next to each Access Group you wish to remove from the agent's list, and click **Remove**.

Note: Clicking **Remove** only removes the user from that Access Group, it does not delete the Access Group.

Export agent accounts

Contents

- 
- Administrator

Learn how to export agent accounts using the Agent Setup application.

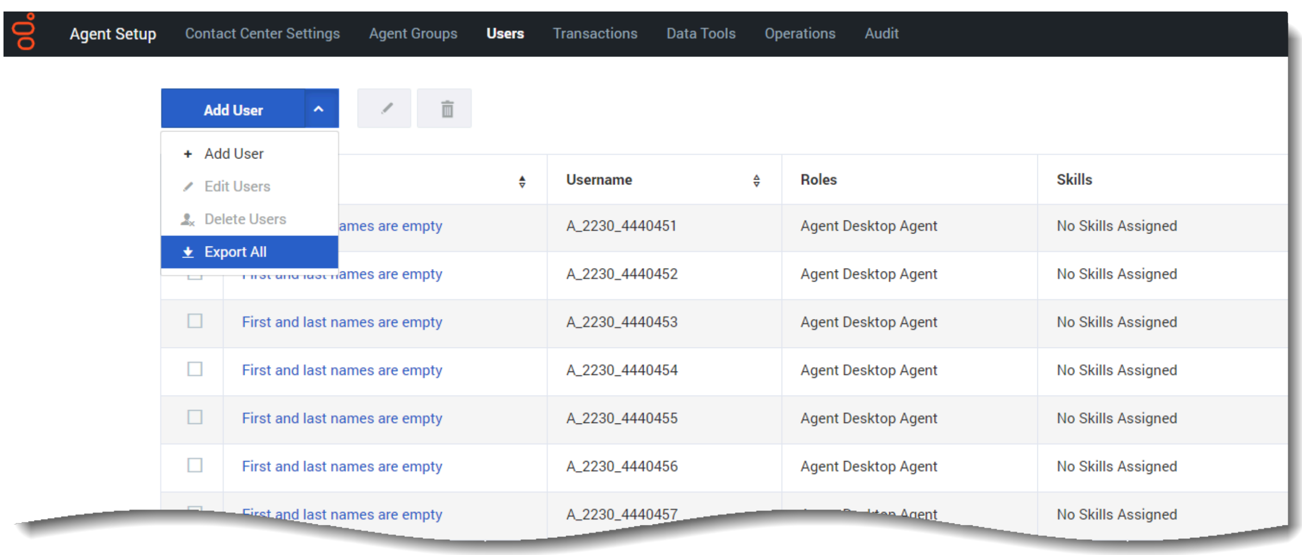
Related documentation:

-
-

Tip

All Users who have the required roles and permissions set in Access Groups can perform these tasks.

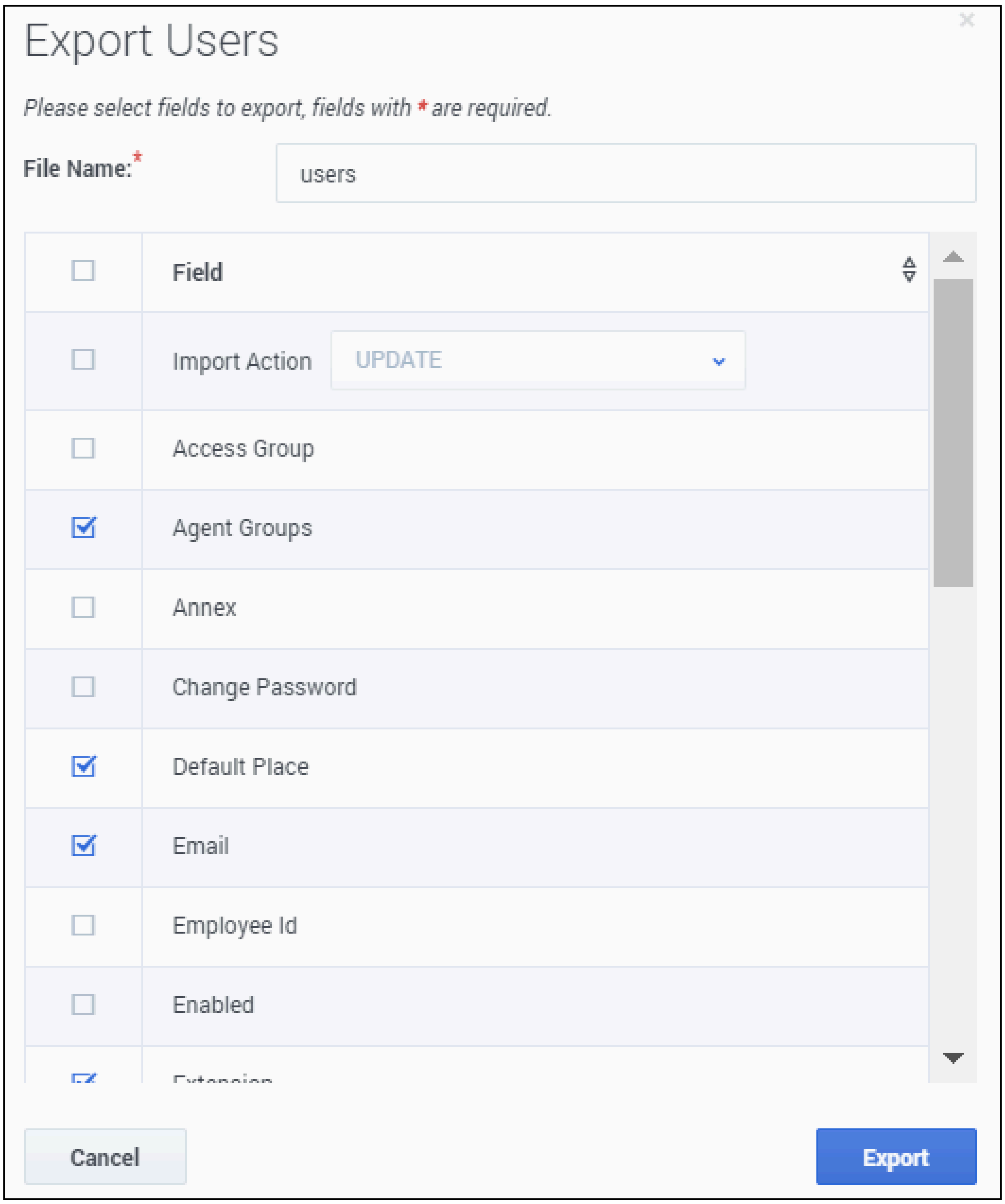
There may be circumstances where you need to create a backup file of all your agent accounts or you might want to export agent accounts to update them using another application and then import them back in. When you export agent records, a spreadsheet document is downloaded to your local computer.



On the **Users** page, you can export all users or a subset of users.

- **Export All**: Click the down arrow on the **User Actions** menu and select **Export All**.
- **Export Selected**: To select a subset of users, select the users and then select **Export Selected** from the **User Actions** menu. You can select the users by:
    - Click the check boxes next to the users you want to export.
    - Filter the list of users by using the search boxes at the top of the **Users** list and then click **Select All** or individually select the users you want to export.

How do I select the fields that I want to export?

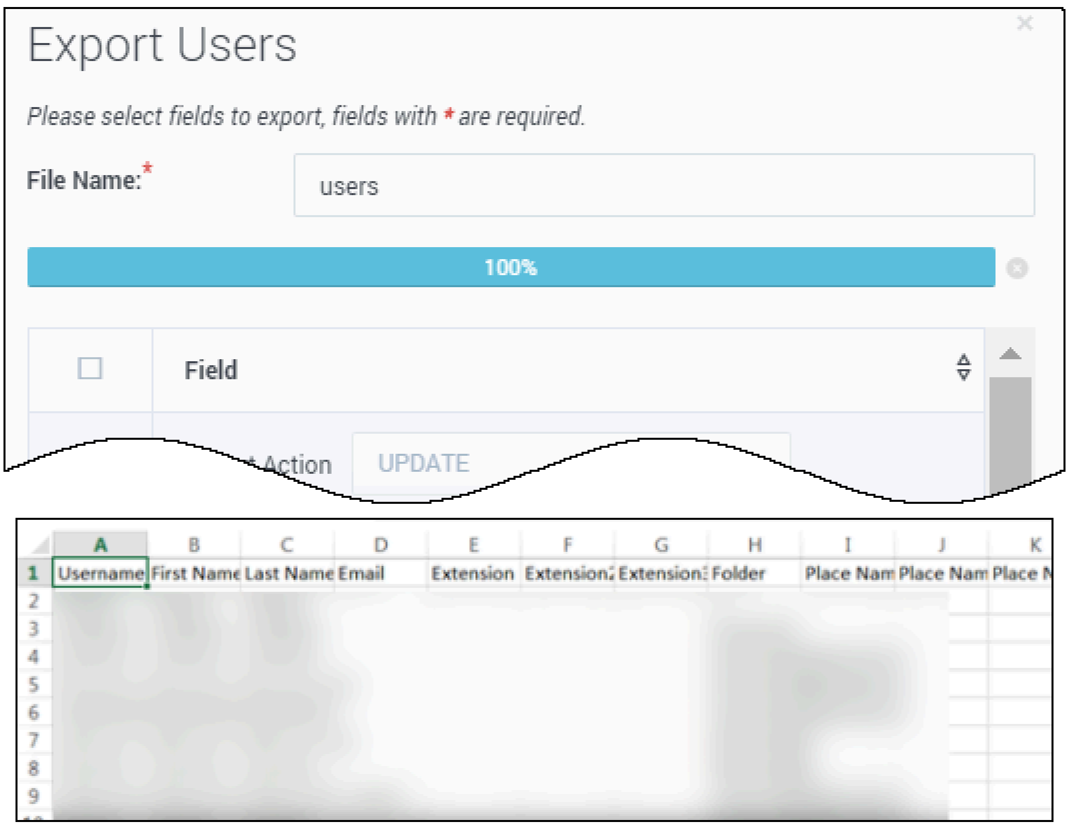


On the **Export Users** window, you can give your exported file a custom name. This makes it easier for you to locate on your local system after you export. You can either accept the default selections or customize the list. If you want to export all fields, select the check box at the top of the list, next to the **Field** label.

Important

- If you are exporting your user accounts as a means to modify the records and then import them back in, select the **Import Action** field. If you don't select this field, the .CSV file will not import correctly.
- If you are including Skills in your export, the skill level must be zero or greater for it to be listed in the export files.

Where did my export go?



When the progress bar at the top of the **Export Users** window reaches 100 per cent, the document is completely downloaded to your local computer. How you access your downloaded files varies by operating system. In general, you can open your **Downloads** folder, and look for the **.csv** file that corresponds to the file name you specified.

You can then double-click the file to open it and view the exported data.

Important

If you use Microsoft Excel, the program automatically truncates all leading zeros from numbers in CSV files when you open the file by double-clicking on its name. You need to change at least the columns where the leading zeros occur to text format. For more information on how to resolve this issue, see this FAQ.

Agent groups

Contents

- 
- Administrator

Organize your agents into groups so they're easier to manage.

Related documentation:

-
-

Prerequisites

Before you can configure Agent Groups:

- You need to configure skills that will assign to the Agent Groups. If you haven't done so already, go to the skills tab and set up the skills you want to use.
- If you plan on creating Agent Groups by selecting specific agent accounts to the group, you first need to add the agent accounts. If you want to set up Virtual Agent Groups, it is not necessary to add the agent accounts first.

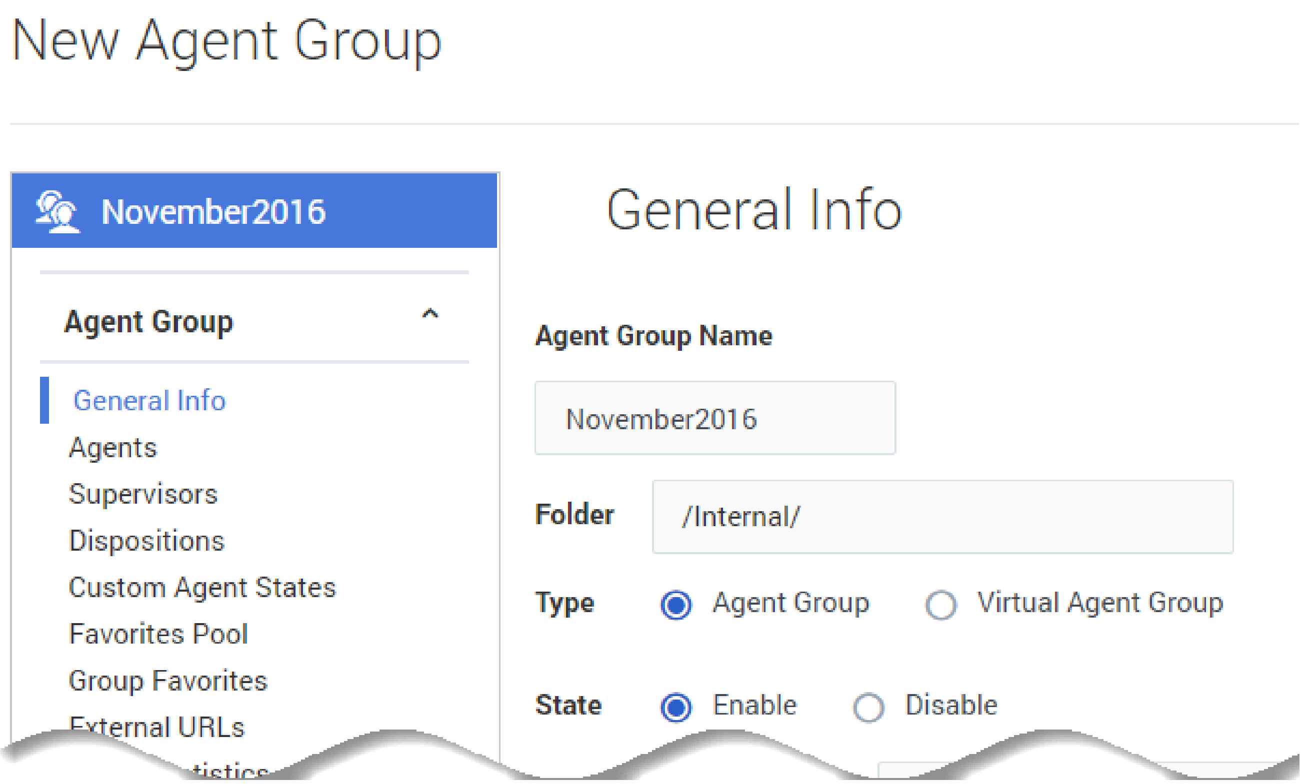
Configuring Agent Groups

You have two options for creating Agent Groups:

- Create an **Agent Group** and then manually add agents to the group. For example, if you want to create an Agent Group for a group of new hires, you create the Agent Group, and then manually add each of the new hire's agent accounts to the group.
- Create a **Virtual Agent Group** to automatically group agents, according to their skills. You create an Agent Group object and define a script to identify the skills that you want the agents in the group to share. For example, you can create a virtual Agent Group for all agents that can speak Russian.

Both types of Agent Groups are configurable on the **Agent Groups** page. Use the following procedures to create and configure your Agent Groups:

Creating an Agent Group

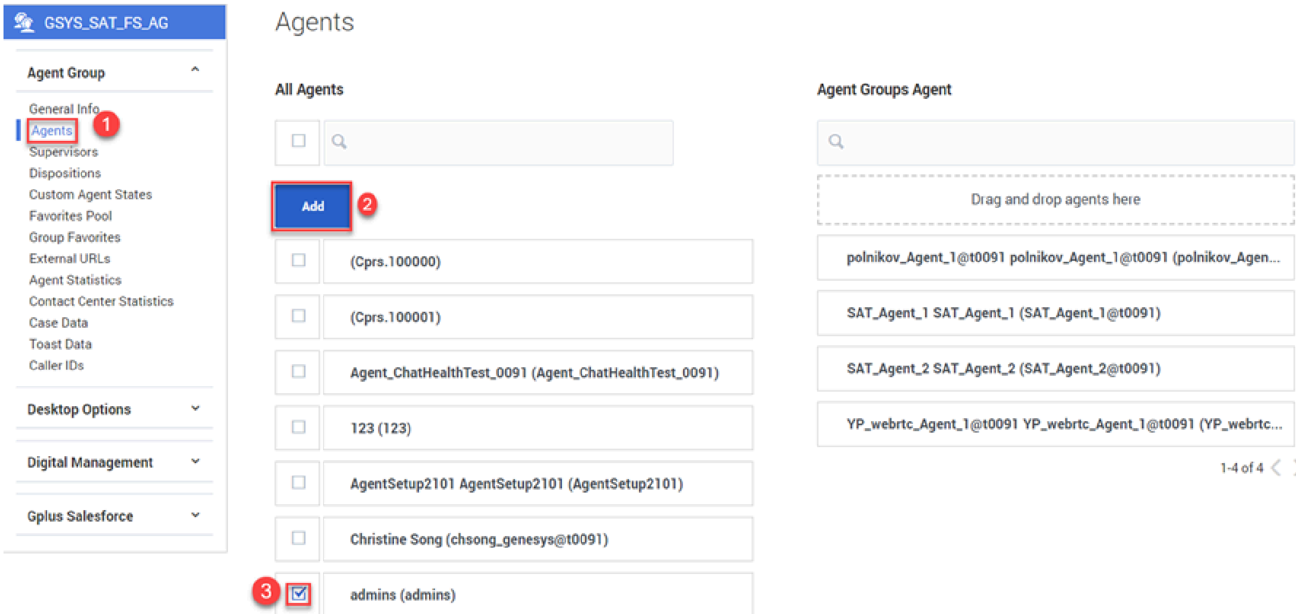


In the **New Agent Group** window, type the name you want to assign to the Agent Group and click **Save**. In our example, the new Agent Group is a group of new hires, so let's name the Agent Group `November2016 New Agents`.

You can put the new Agent Group into a folder. This is useful for organizing your Agent Groups to make them easy to locate in the future. For example, you can place our new group into the **Training Groups** folder. When you select the **Folder** option, a drop-down list box is displayed where you can select a folder or click the add folder icon to create a new folder.

By default the **State** of a new Agent Group is automatically enabled. By clicking **Disable** you can disable any Agent Group.

Adding agents to an Agent Group



When you create an Agent Group, you can go to the Agents tab and add agents to the group.

You can either drag the agent over to the Agent Groups Agent column, or you can click the box next to the agent's name in the All Agents list and then click Add. This automatically drops the agent into the Agent Groups Agent list.

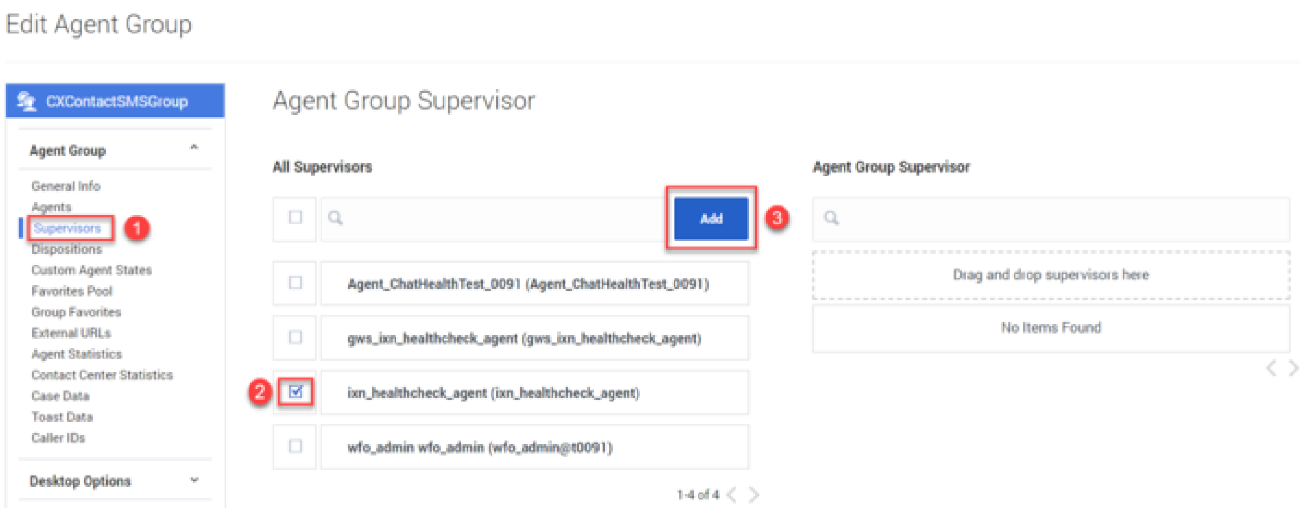
> **Tip**
>
> On your Agent Groups list, you might see Agent Groups that have an **Add script** link in the script column. If you see this, it means that you or someone else created an Agent Group and no agents have been assigned to it. In other words, it's an empty group. You have the option to edit the group to manually add agents or click **Add script** to create a virtual Agent Group.

You can assign a designated supervisor for an agent group. A supervisor monitors the performance of the agents in the agent group. Use the **Agent Group Supervisor** page to select a supervisor. Tasks varies for the supervisor to manage and support the agent group depending on the role assigned. See Supervisor options for the various supervisor options.

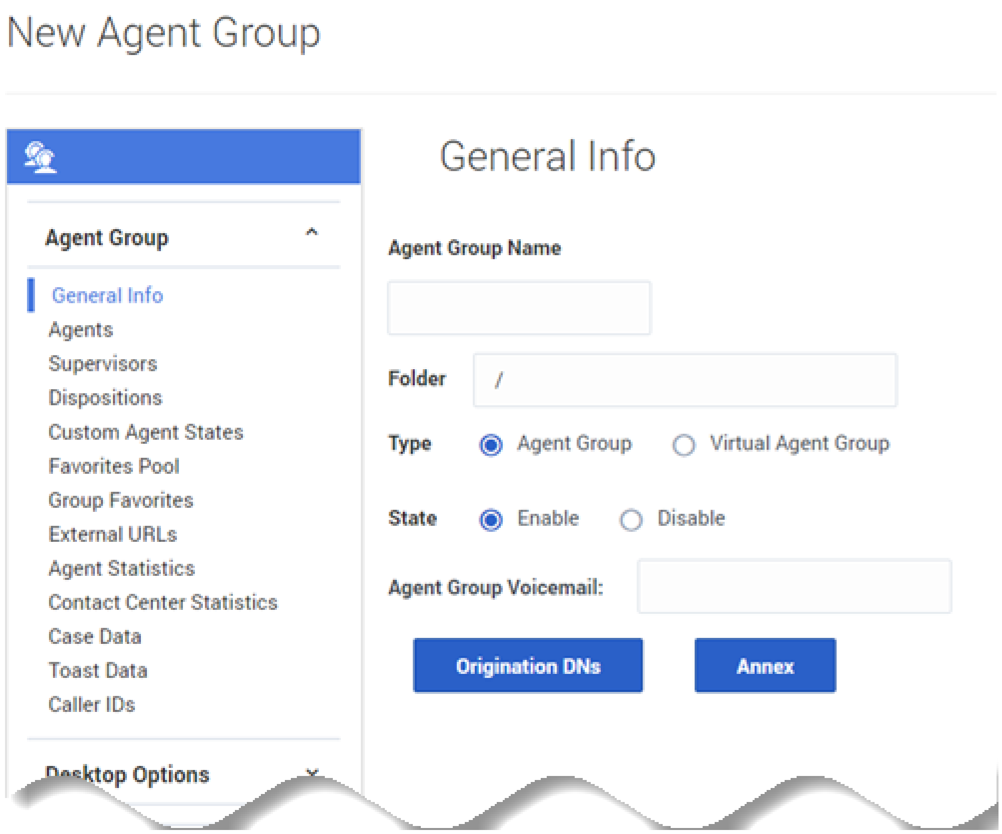
Adding Supervisor to an Agent Group

Use the following procedure to assign a Supervisor for an Agent Group:

1. Go to the **Supervisors** section in the **Agent Group** tab.
2. Click the check box next to the supervisor's name in the **All Supervisors** list and then click **Add**. This automatically drops the supervisor into the **Agent Groups Supervisor** list.



Creating a virtual Agent Group

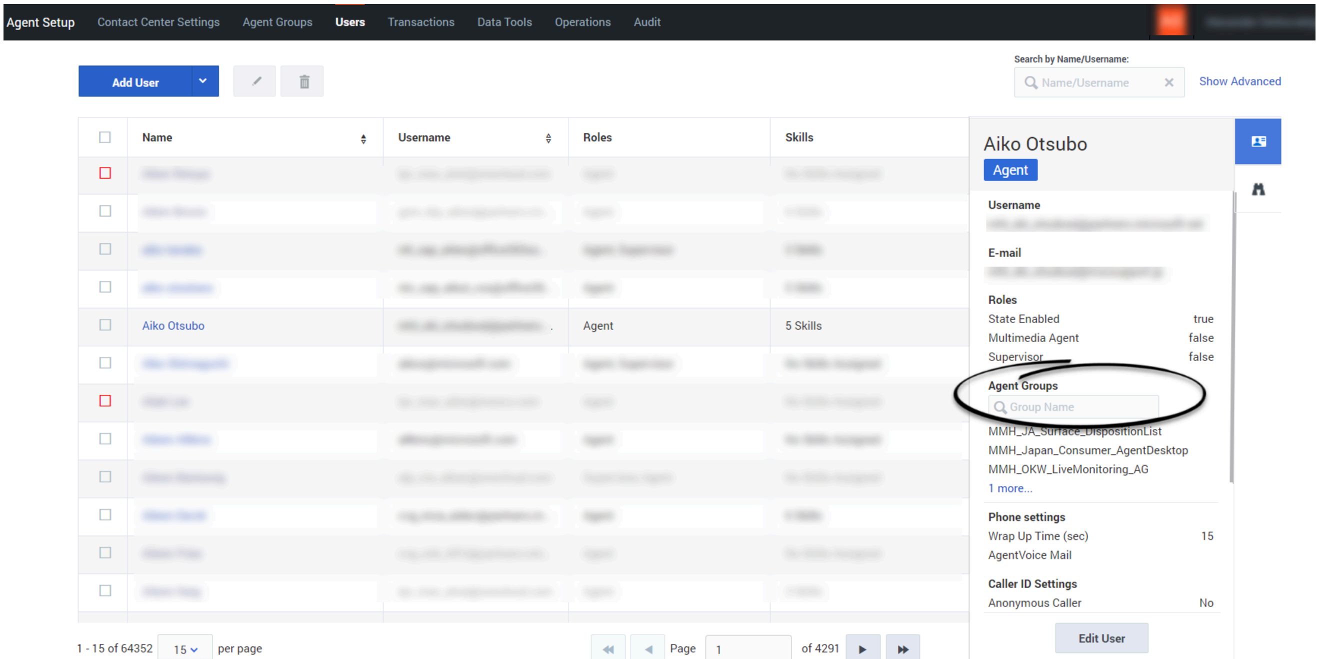


You can create a virtual Agent Group by specifying a script when you add an Agent Group.

As opposed to a regular Agent Group, you can't manually add agents to a virtual Agent Group. Agents are automatically included in the group if the agent is assigned the skill that is specified in the script.

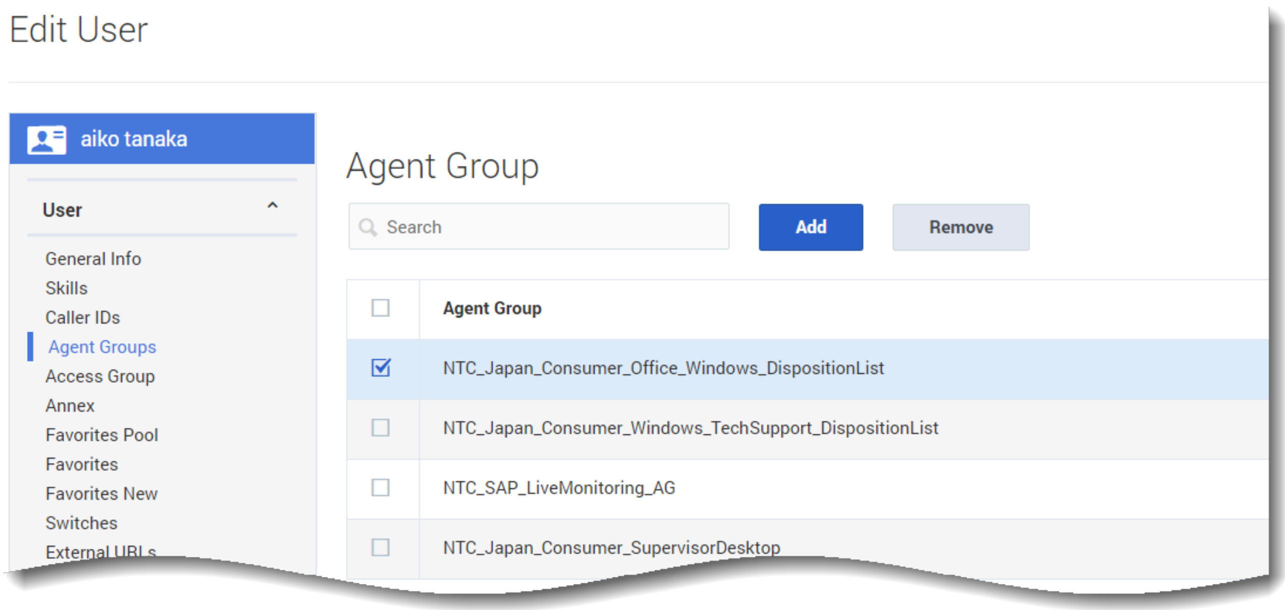
After you add the script, you will see a link in the **Script** column on the **Agent Groups** page. The script identifies the common skills shared by all agents that belong to the group. You can edit the script by double-clicking the script text and then updating the script in the dialog box that is displayed.

Viewing an agent's Agent Groups



To view which agent groups an agent belongs to, from the **Users** tab, click either the agent's **Username**, **Roles**, or **Skills**. From the sidebar which opens on the right of the screen, scroll to the **Agent Groups** section. Here you can either expand the list to view all the agent's groups, or you can use the search field to search for a specific group name.

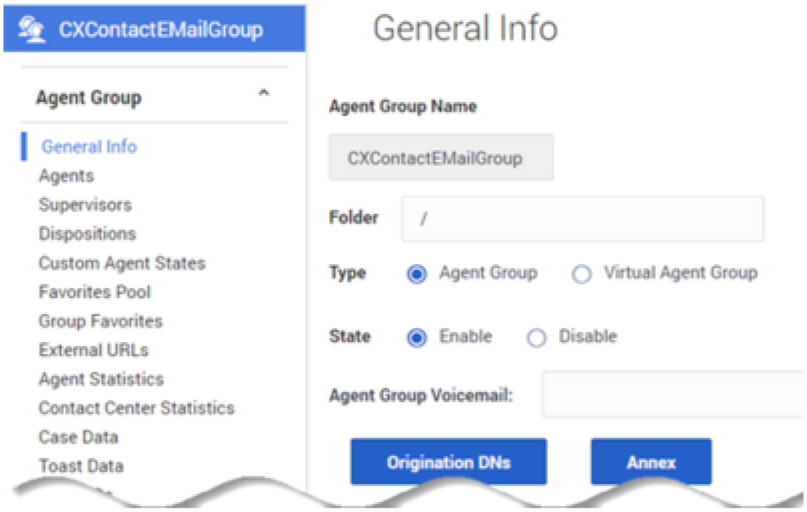
Editing an agent's Agent Groups



To remove an agent from an Agent Group, from the **Users** tab, click the agent's **Name**. From the left-hand navigation menu, click **User > Agent Groups**. From here you can check the checkbox next to each Agent Group you wish to remove from the agent's list, then click **Remove**.

Note: Clicking **Remove** only removes the user from that Agent Group, it does not delete the Agent Group.

Configuring the desktop for an Agent Group



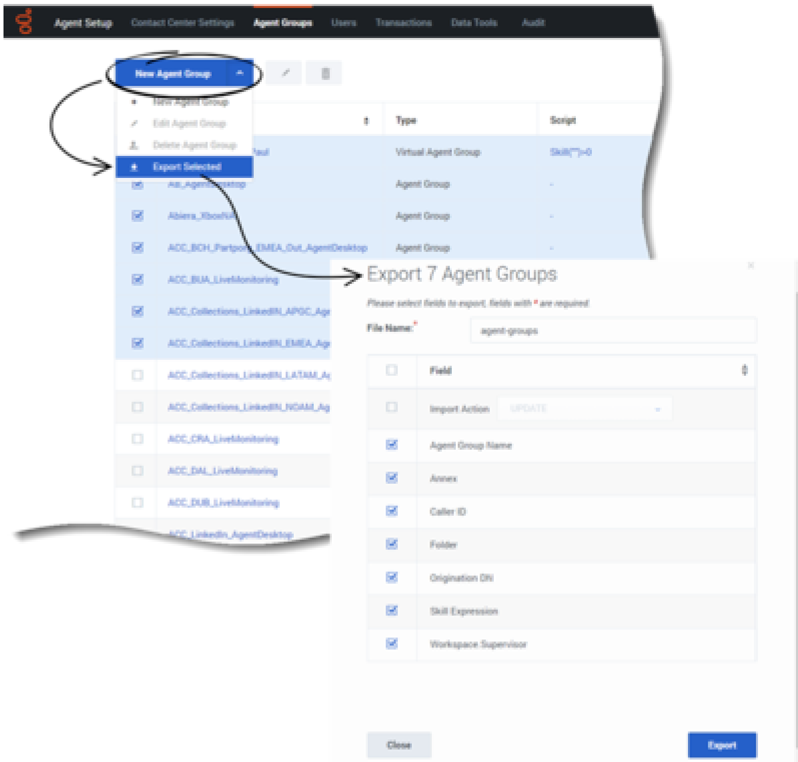
After you populate your Agent Group with agents, you can assign objects to the group. Under each of the following tabs, make your selections:

- Dispositions
- Custom agent states: Custom Agent States only displays existing **Not Ready** codes created under the Contact Center Settings.
- Group favorites: Group favorites are configured the same way as Global Favorites.
- External URLs
- Statistics options
- Case and toast data
- Caller ID
- Gplus Adapter for Salesforce options: Use the **Gplus Salesforce** tabs to configure the Gplus Adapter settings for the Agent Group.

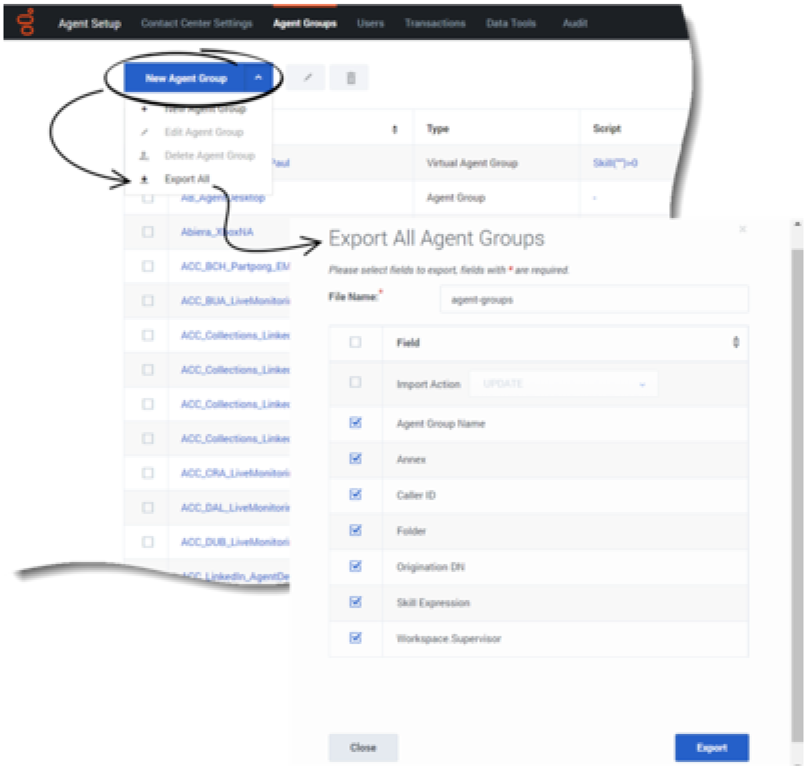
Exporting Agent Groups

You can export Agent Groups two ways. From the **Agent Groups** tab, you can export *selected* Agent Groups from the list, or you can export *all* Agent Groups.

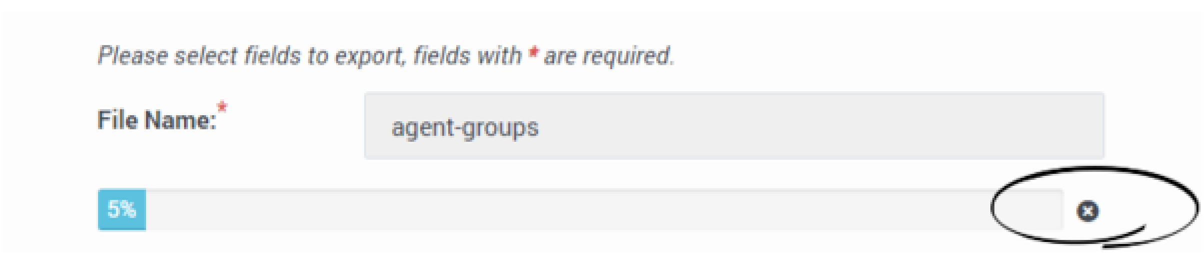
To export only selected Agent Groups, check the checkbox next to the **Agent Group Names** you wish to export. Click the drop-down arrow next to **New Agent Group**, and select **Export Selected**. The export window opens and, from here, you can choose the **File Name**, as well as which fields to export. Once you click **Export** a .csv file is saved to your local machine.



To export all Agent Groups, click the drop-down arrow next to **New Agent Group**, and select **Export All**. The export window opens and, from here, you can choose the **File Name**, as well as which fields to export. Once you click **Export** a .csv file is saved to your local machine.



If you wish to stop the export, click the "x" at the end of the percentage bar and the confirmation window will open. Click **OK** or **Cancel**.



Next Steps

After you have configured Agent Groups, you can proceed to configure:

- Business attribute overrides (Transactions)
- Templates

Create and manage agent skills

Contents

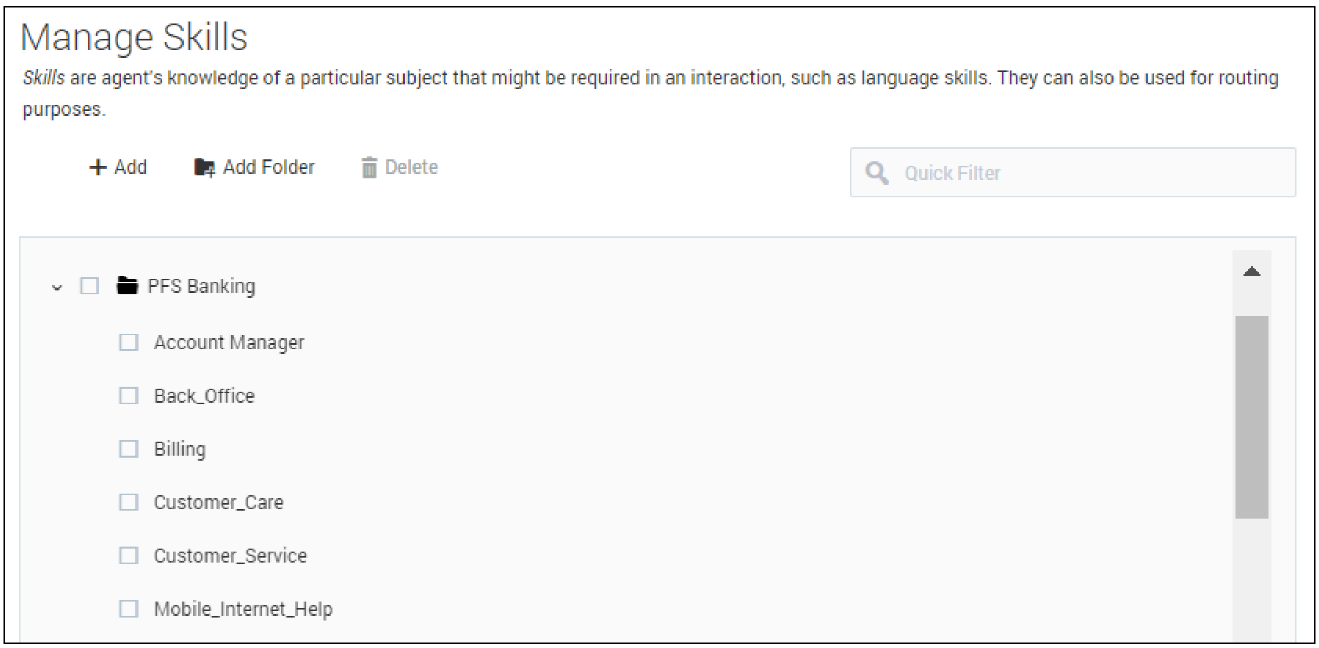
- 

- Administrator

Create, organize, and assign skills to agents.

Related documentation:

-
-



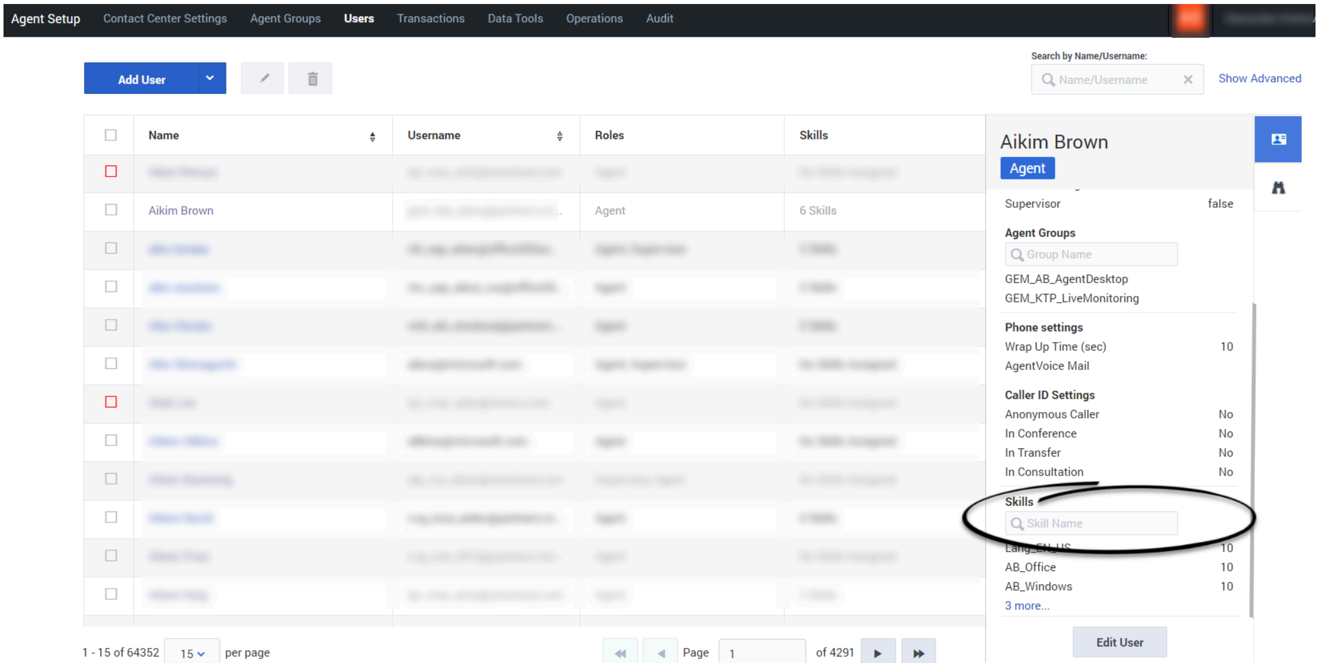
Skills are an agent's knowledge of a particular subject that might be required in an interaction, such as language skills. They can also be used for routing purposes.

To add a skill:

1. Click **Add**.
2. Type a name in the **Name** field.

You can also organize skills into folders. If needed, select  **Add Folder** to create a new folder.

Viewing an agent's Skills



To view which skills an agent has been assigned, from the **Users** tab, click either the agent's **Username**, **Roles**, or **Skills**. From the sidebar which opens on the right of the screen, scroll to the **Skills** section. Here you can either expand the list to view all the agent's skills, or you can use the **Search** field to search for a specific skill name.

Create and manage custom agent states

- 
- Administrator

Custom agent states enable you to tailor agent states to fit your business needs.

Related documentation:

-
-

Link to video

On the **Custom Agent States** tab, you can add custom agent states that an agent can select for After Call Work and Not Ready reasons.

> ### Important
> Custom Agent States only displays existing **Not Ready** codes created under the Contact Center Settings.

You can organize custom agent states into folders. When you select the **Folder** option, a drop-down list box is displayed where you can select a folder or click the add folder icon to create a new folder.

Once you have selected the folder, enter an appropriate **Display Name** (example: *Lunch Break*) and a relevant **Code** that is unique.

Agent and Agent Group Annex

Contents

-
- Administrator

Use the Annex to configure advanced features for single agents or groups of agents rather than for your entire contact center.

Related documentation:

-
-

Important

Some features described here may not apply to your organization's setup. If you need features that aren't available to you, contact your administrator or Genesys representative.

You might want to set up a single agent or a group of agents for a specific purpose. For example, you might want to create a test agent that you can use to troubleshoot issues or experiment with different settings prior to making changes to all the agents in your contact center.

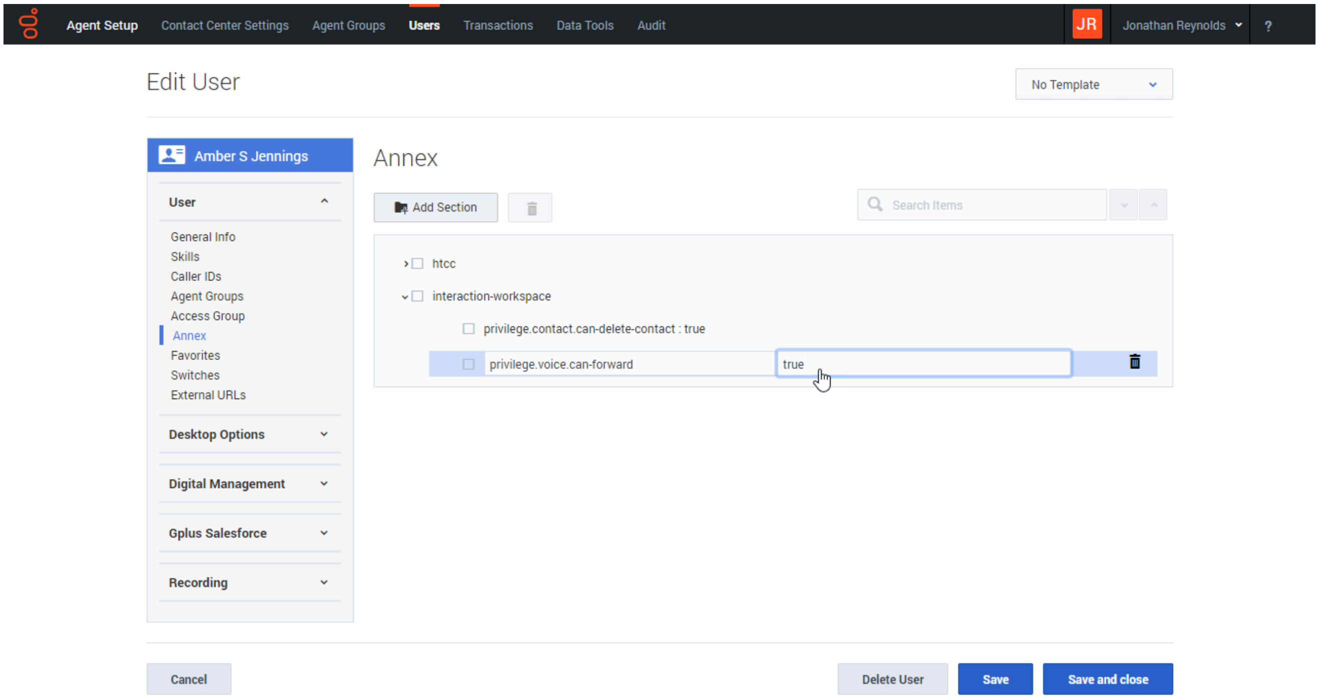
The Users tab enables you to create and customize agents.

The Agent Groups tab enables you to create agent groups and customize settings for the agents that you have assigned to a group.

Genesys Multicloud CX includes advanced features and functionality that can be enabled for agents or agents groups. Advanced features are configured in the Annex of either an agent or an agent group. This article provides examples of configuring a troubleshooting option for Gplus Adapter for Salesforce.

To configure advanced options you must know the **Section** where the option is configured, the **Name** (or **Key**) of the option, and the **Value** of the option. This information is obtained from product specific documentation or directly from Genesys.

Configuring the Agent Annex

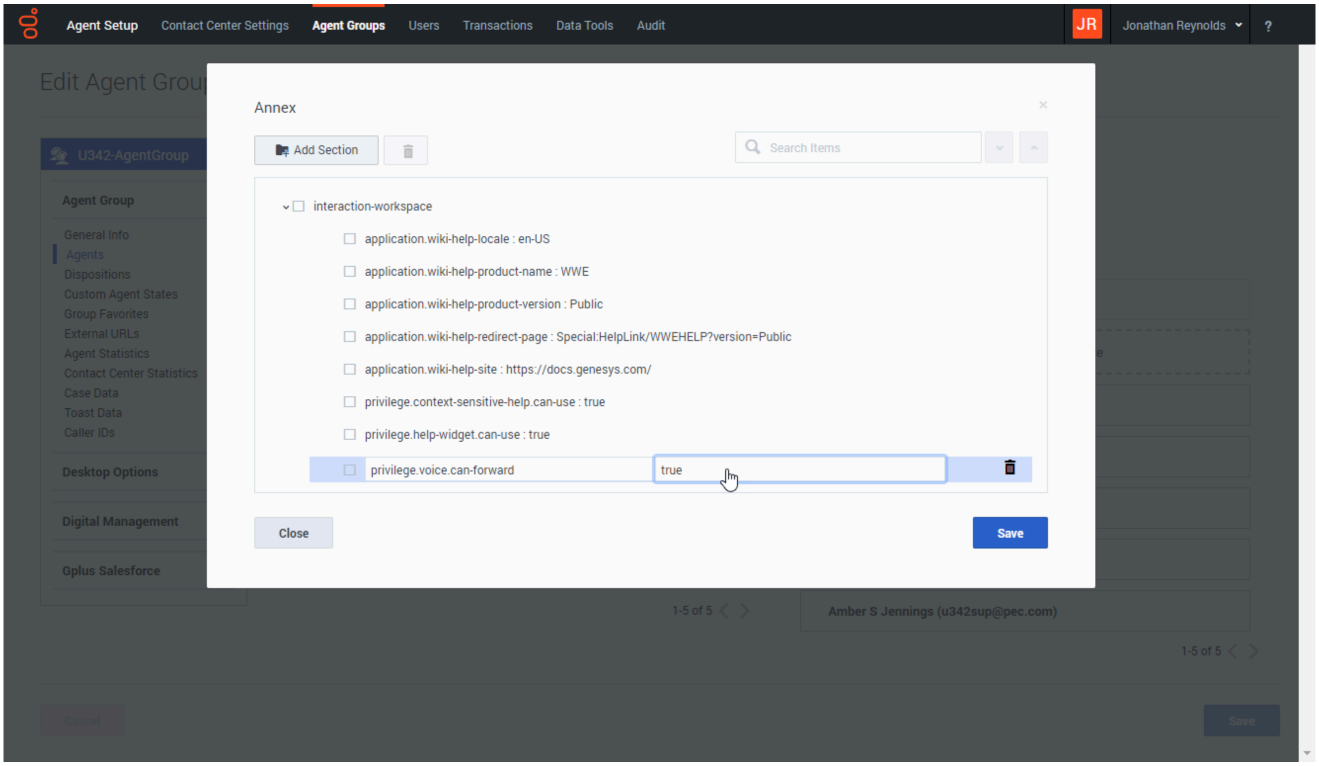


To configure notifications in the Agent Annex, in Agent Setup select an agent from the **Users** tab.

In this example, the **privilege.voice.can-forward** option is enabled so that an agent can forward their phone to a different number. Here are the steps to add a new option to an agent:

1. Open the **Users** tab.
2. Click an agent (for debugging purposes, choose a test agent).
3. Click **User** to open the **User** menu.
4. Open the **Annex** view.
5. If the **interaction-workspace** section does not exist, click **Add Section** and create it; otherwise, click the **interaction-workspace** section.
6. In the **interaction-workspace** section, click **+** to create the **privilege.voice.can-forward** key.
7. Assign **true** as the value.
8. Save the changes.

Configuring the Agent Group Annex



To configure notifications in the Agent Group Annex, in Agent Setup select an agent group from the **Agent Groups** tab.

In this example, the **privilege.voice.can-forward** option is enabled so that agents can forward their phones to a different number. Here are the steps to add a new option to an agent group:

1. Open the **Agent Groups** tab.
2. Click an agent group to open the **Edit Agent Group** view.
3. Click **Agent Group** to open the **Agent Group** menu.
4. Click **Agents** to open the **Agents** view.
5. Click **Annex** to open the **Annex** dialog box.
6. If the **interaction-workspace** section does not exist, click **Add Section** and create it; otherwise, click the **interaction-workspace** section.
7. In the **interaction-workspace** section, click **+** to create the **privilege.voice.can-forward** key.
8. Assign **true** as the value.
9. Save the changes.

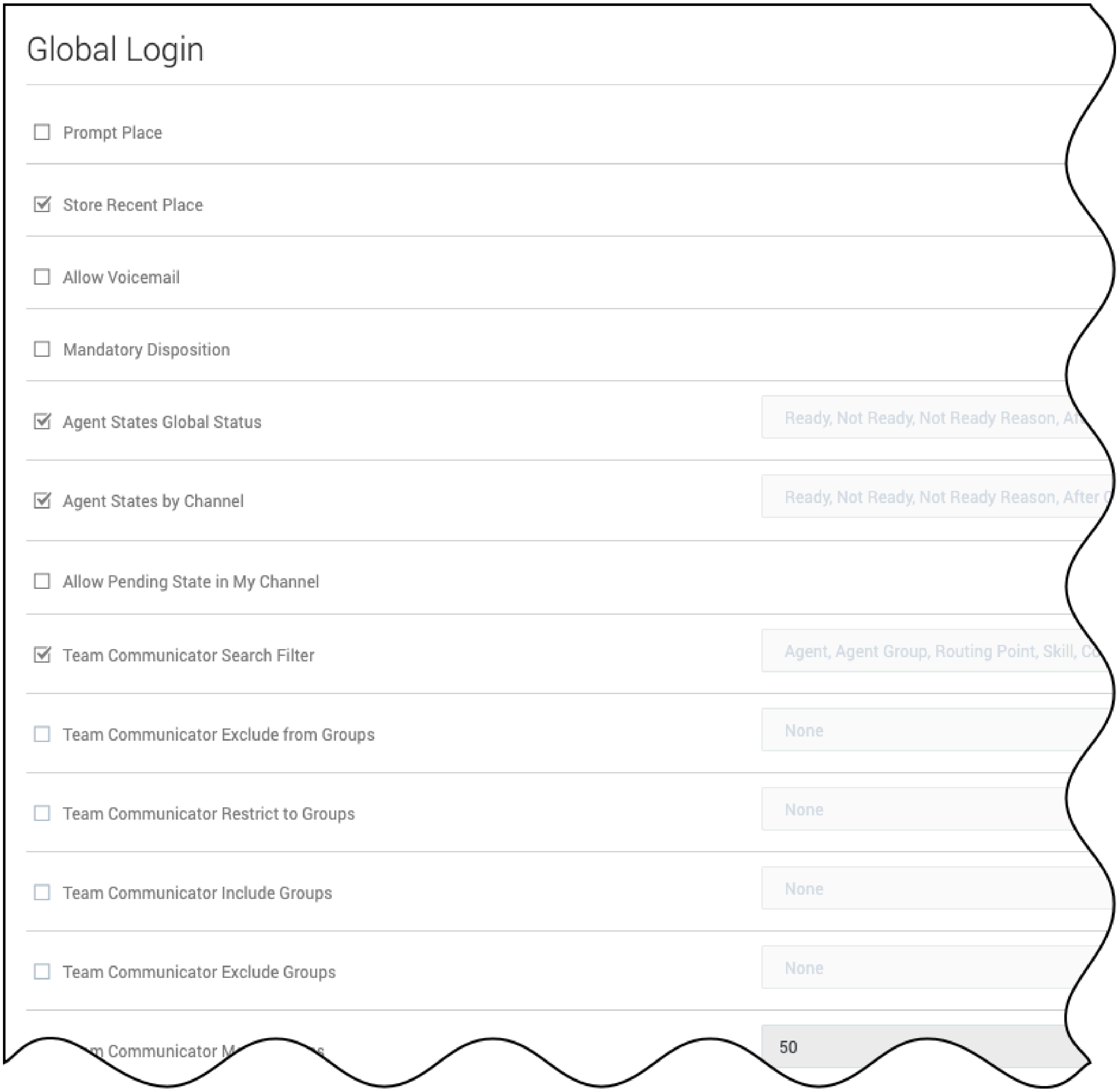
Configure global login

- 
- Administrator

Global login options determine what happens when an agent logs in.

Related documentation:

-
-



In the **Global Login** section under **Desktop Options** on the **Contact Center Settings** page, configure the following options:

- **Prompt Place** requires the agent to specify a place when they log in.
- **Store Recent Place** specifies whether the most recently used Place is stored. This option is applicable when Prompt Place option is set to true.
- **Voicemail** enables the Voicemail menu.
- **Mandatory Disposition** specifies whether it is mandatory for the agent to select a disposition before

marking an interaction as done.

- **Agent States Global Status** defines the available agent states in the global Status menu.
- **Agent States by Channel** defines the available agent state actions in the My Channels contextual menu.
- **Allow Pending State in My Channel** allows an agent to have a pending state in the My Channel tab.
- **Team Communicator Search Filter** specifies the list of filters that an agent can use to search for contacts and internal targets in the Team Communicator. When you select this option, all filters are enabled by default. To customize the filters, click the drop-down list box and deselect the filters that you don't want to include.
- **Team Communicator Exclude from Groups** makes agents from excluded groups not visible in Team Communicator, Favorites, and Statistics.
- **Team Communicator Exclude Groups** specifies the list of agent groups to be excluded from searches and statistics. Virtual agent groups are not supported. This option is overridden by the Team Communicator Restrict to Groups option.
- **Team Communicator Include Groups** specifies the list of agent groups that are returned for searches and statistics. Overrides the **Team Communicator Exclude Groups** option. Virtual agent groups are not supported.
- **Team Communicator Restrict to Groups** makes agents only from restricted groups visible in Team Communicator, Favorites, and Statistics.
- **Team Communicator Max Favorites** specifies the maximum size of the favorites list displayed in the Team Communicator.
- **Transaction Override Attached Data Key** allows you to override desktop options in Agent Workspace by setting a key value to the name of a transaction list object. When you set the value of the identified key to the name of the transaction list object, desktop options in the transaction list object are used instead of the Agent Workspace application or agent group objects.
- **Inactivity Timeout (min)** specifies the number of minutes of agent inactivity (no mouse or keyboard usage) that triggers application locking. If the agent has been inactive longer than the number of minutes this option, the agent session is ended.
- **Alert before timeout (sec)** specifies the number of seconds that pass before the inactivity alert is sent to the agent.
- **Sidebar Region** specifies the order of the Region to be displayed in the sidebar.
- **Use Performance Tracker** allows the use of the Performance Tracker.
- **Use Dashboard** allows the use of the Dashboard.
- **Auto-focus on inbound interactions** enables inbound interactions to automatically be in focus when accepted.
- **Channel to be auto-focused** specifies whether the inbound interaction of a particular media type is automatically in focus when accepted.
- **Invalidate Auth SSO session on Workspace logout** specifies whether the Single sign-on (SSO) authentication session is invalidated when an agent logs out of the Workspace. By default, when an Agent exits Workspace Web Edition, the Workspace session and the Genesys Authentication SSO session is removed and the agent is redirected to the Genesys Authentication login screen. This is the default behavior when this option is selected. Clearing this option removes only the Workspace session and the keeps the Genesys Authentication SSO session alive. In this scenario, the agent is then redirected to a login-info.html webpage with the message "Your session has ended". If the Genesys Authentication session has not expired, and the agent uses Workspace from the same browser, no

authentication is required.

- **Show Change Account Link** specifies whether or not to display the Change Login Account link on the login error page and the second step login page. This option is not used if the **Invalidate Auth SSO session on Workspace logout** option is selected.

Single Sign-On

Contents

- Administrator

Single Sign-On (SSO) identity authentication enables your users to securely access multiple Genesys applications with a single credential.

Related documentation:

After entering their username in the application login screen, users are taken to your company's authentication provider where they will enter their username and password. After that, they will not have to log in again until your authentication expires which is typically every eight hours.

You can enable Single Sign-On for your environments in the **SAML** section under **Single Sign-On**. Security Assertion Markup Language (SAML) is an open standard for exchanging authentication and authorization data between parties, in particular, between an identity provider (IdP) and a service provider (SP).

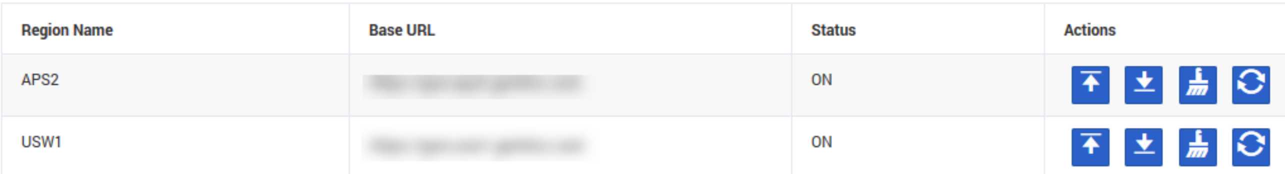
Important

You do not need to enter any IdP-metadata in the "Region Name" field in order to enable SAML.

Tip

For a list of all Genesys Multicloud CX applications which support Single Sign-On, see the Single sign-on topic in the *Cloud Basics for Administrators* guide

SAML fields and actions

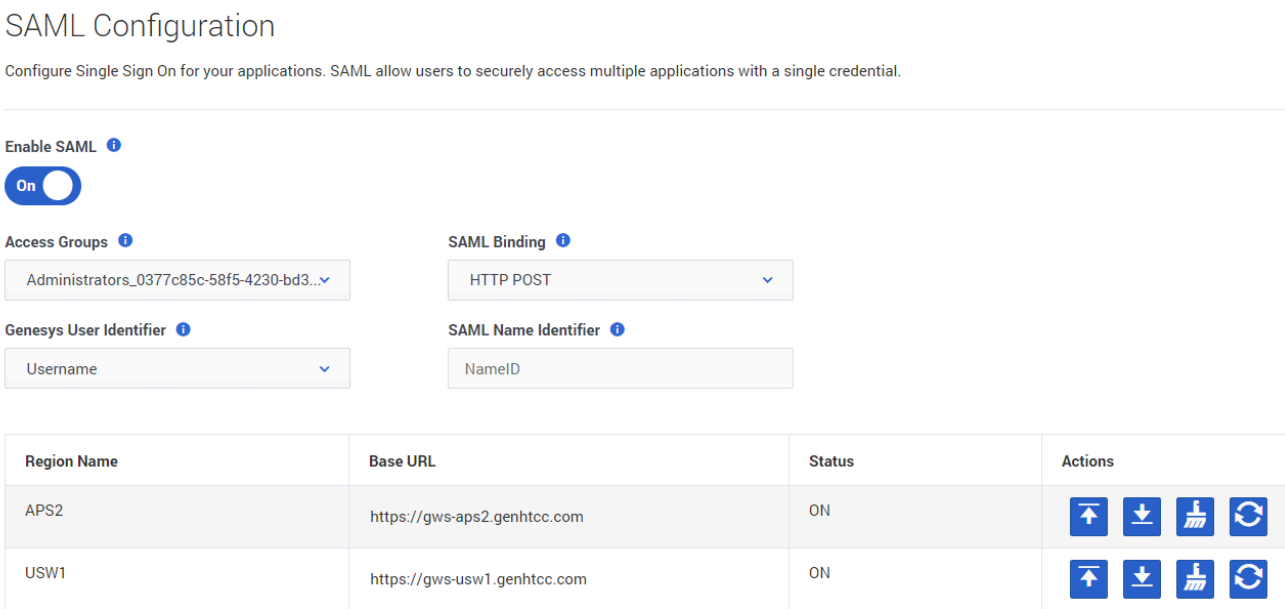


Region Name	Base URL	Status	Actions
APS2	[illegible]	ON	
USW1	[illegible]	ON	

On the SAML Configuration screen, a table displays the following information:

- **Region Name** - the name of the region in which your contact center is located.
- **Base URL** - the base URL associated with the region. This field is editable - simple double click anywhere within the text box to edit it.
- **Status** - indicates the status of configuration:
  - **ON** - the configuration is complete.
  - **OFF** - there is no configuration.
  - **PENDING** - configuration is in progress.
- **Actions** - you take any of the following actions for a particular region:
  - **Upload SAML metadata** enables you to upload your metadata;
  - **Download SAML metadata** enables you to download SP metadata for your use. This is available after your IdP metadata has been uploaded;
  - **Clear SAML metadata** enables you to clear previously uploaded metadata;
  - **Reload SAML configuration** refreshes the configuration for a specific region.

Configure SAML

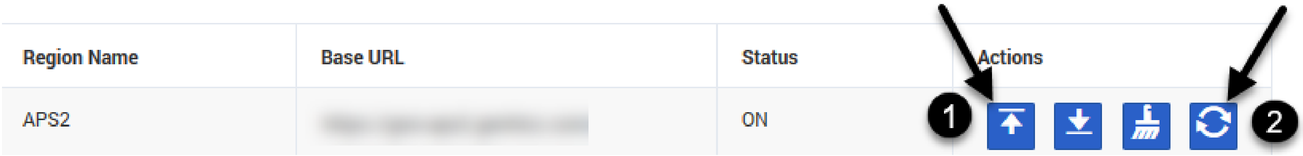


To configure SSO:

1. From the **Access Groups** list, select one or more access groups. These groups contain users who will use SSO.
2. Optional: From the **SAML Binding** list, select the SAML Binding type (HTTP POST or HTTP Redirect).
3. The next 2 fields specify how to match the user defined in your IdP with its corresponding Genesys user at the time of login. In the **Genesys User Identifier** field, select the field you wish to use as the user identifier on the Genesys side - either the Username or the External ID.
4. In the **SAML Name Identifier** field, enter the name of the attribute of your SAML assertion that contains the user identifier. This attribute is matched with the Genesys Username (or External ID). If you leave this field empty, the "NameID" attribute is used by default.
5. Set the Base URL to the region(s).
6. Upload the idP metadata to the region(s).
7. Turn the **Enable SAML** to the **On** position.
8. Click **Save**.

When SAML configuration completes, the status changes from PENDING to ON and the **Download SAML metadata** button is enabled. Note: for secondary regions, SAML configuration can take about 15 minutes.

Reconfigure SAML



If SAML is already enabled and you need to reconfigure it with new IdP metadata, do the following:

1. Upload the new IdP metadata (remember: for secondary regions, SAML configuration can take up to 15 minutes).
2. Next, you must click the **Reload SAML configuration** button.

Voicemail Management within Agent Setup

Contents

- Administrator

Learn how to manage voicemail in your contact center within Agent Setup.

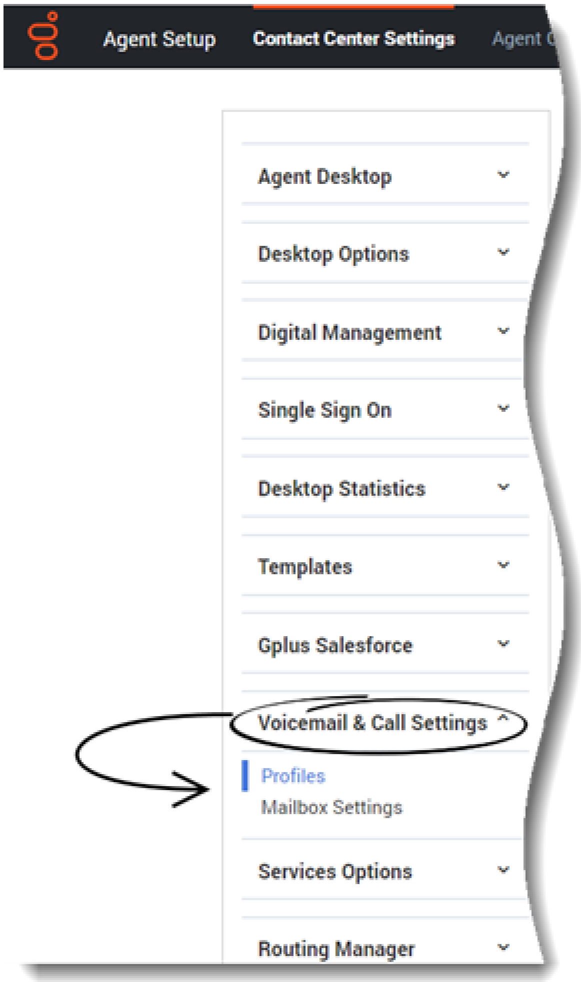
Related documentation:

Important

The features described here may not apply to your organization's setup. If you need features that aren't available to you, contact your administrator or Genesys representative.

Voicemail management gives you control over Voicemail Profiles and Voicemail Settings. To use voicemail, see Voicemail for agents and supervisors.

Accessing Voicemail Management



To Access Voicemail Management within Agent Setup:

1. From the **Contact Center Settings**, select the **Voicemail & Call Settings** menu.
2. Choose a category to manage:
    1. Profiles
    2. Mailbox Settings

Profiles

Voicemail profiles are a common set of configurations that can be assigned to a set of mailboxes. These configurations include determining how many voicemails can be stored in a mailbox, the maximum message duration, how long voicemails are stored before they’re deleted, enabling email notifications, and voicemail forwarding.

You can create profiles that set retention limits of 1 to 100 days or use No Limits to set voicemails not to expire.

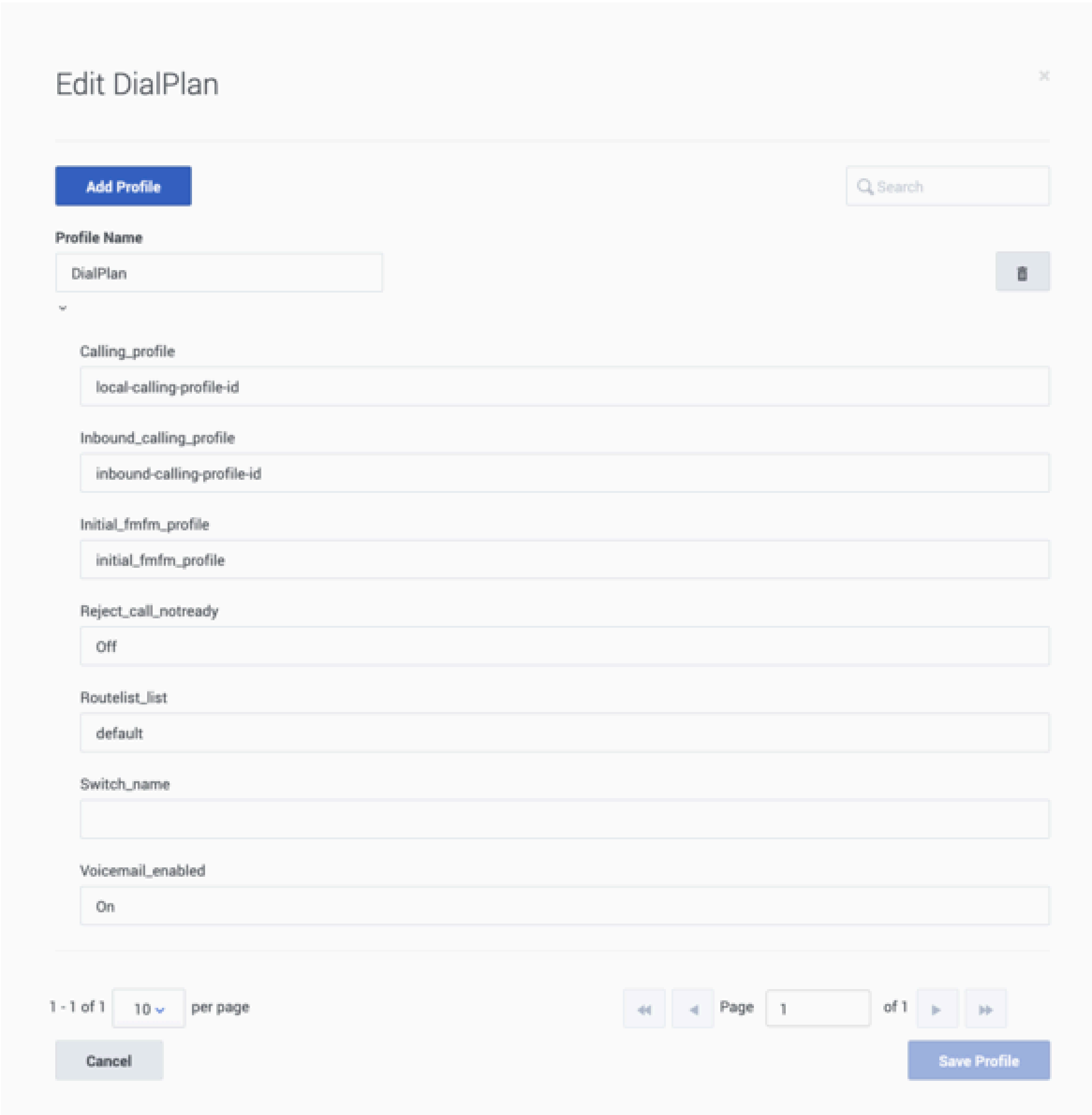
Within the **Profiles** section you'll find the profile rules. To edit an existing profile rule, check the checkbox next to the Profile name and click the **Edit** icon ().

For information on all possible configurations for these profile rules, see:

- DialPlan
- Partition
- CallingProfile
- VoicemailProfiles

DialPlan

The DialPlan governs the disposition of inbound and outbound calls in SIP Server.

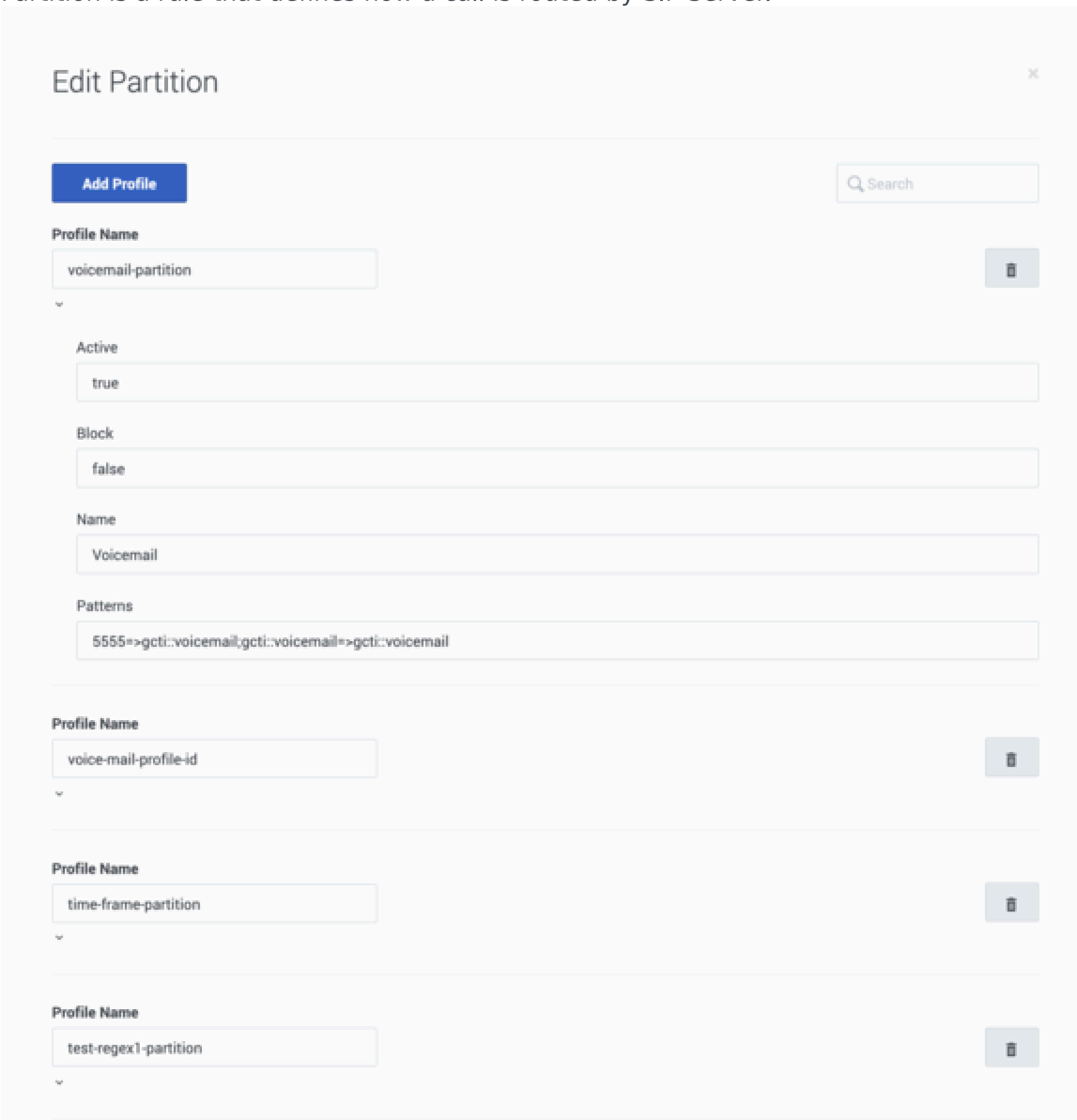


The following table lists all possible configurations for **DialPlan**:

Name	Description
Calling_profile	Configured as per Customer needs
Inbound_calling_profile	Configured as per Customer needs
initial_fmfm_profile	Configured as per Customer needs
Reject_call_notready	Configured as per Customer needs
Routelist_list	Configured as per Customer needs
Switch_name	Configured as per Customer needs
Voicemail_enabled	Configured as per Customer needs

Partition

Partition is a rule that defines how a call is routed by SIP Server.



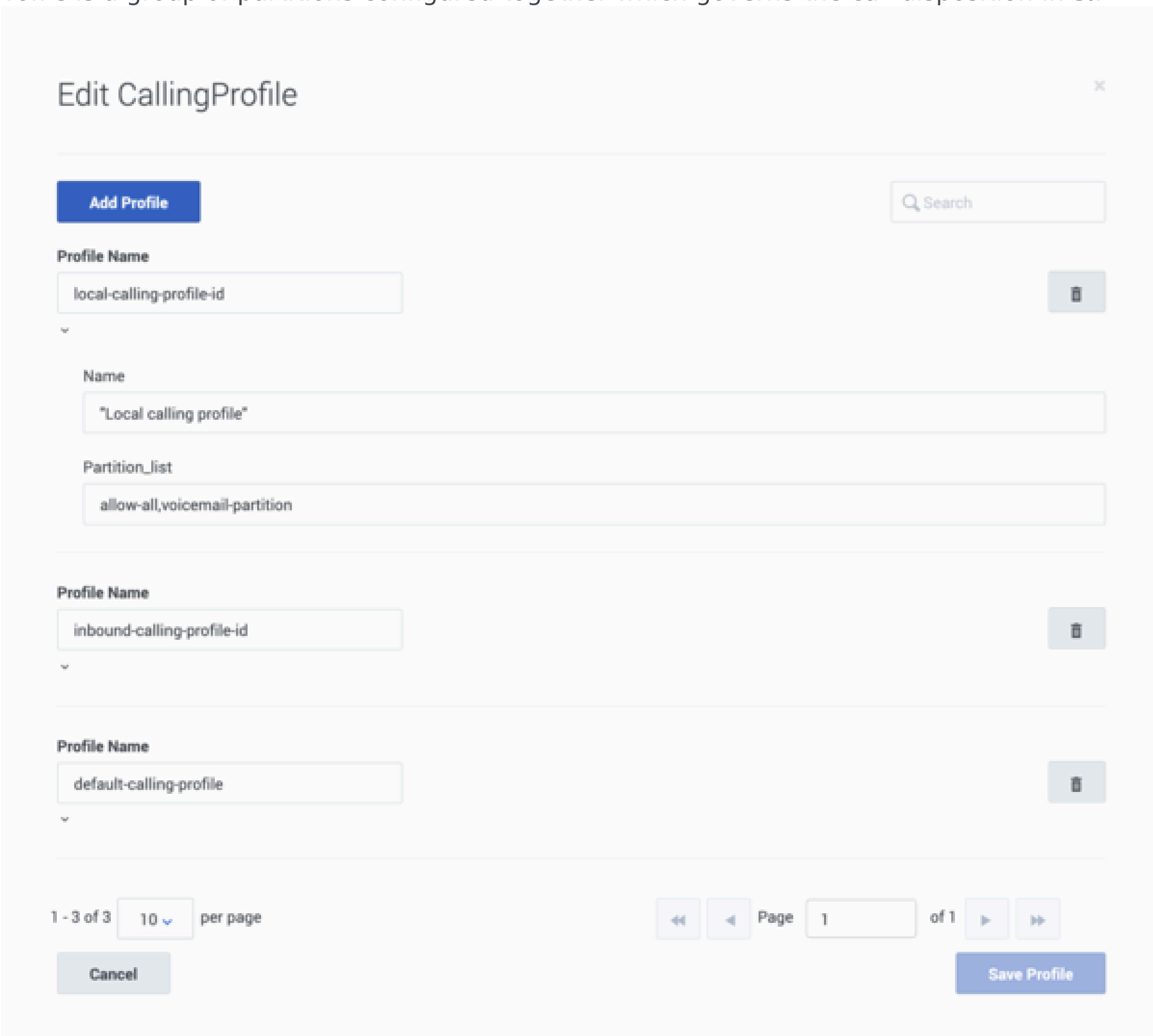
The following table lists all possible configurations for **Partition**:

Name	Description
Active	`true` or `false`; defines whether or not the partition is enabled or disabled
Block	`true` or `false`; if the partition is configured as true, it bars all the calls
Name	Name of the partition

Name	Description
Patterns	Partition rule

CallingProfile

CallingProfile is a group of partitions configured together which governs the call disposition in SIP



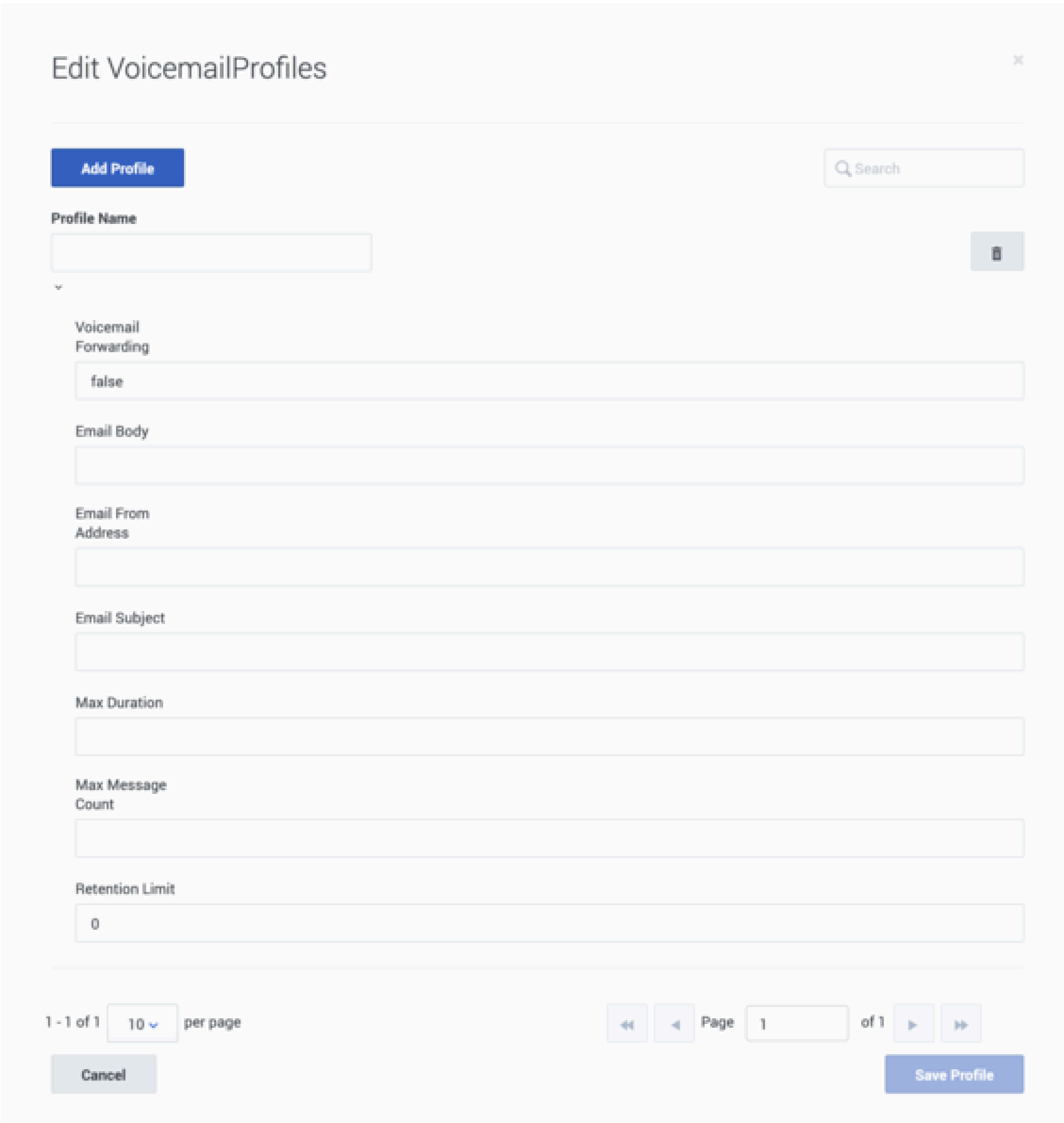
Server.

The following table lists all possible configurations for **CallingProfile**:

Name	Description
Name	The name of the Calling Profile
Partition_list	List of partition rules that are configured under the Calling Profile

VoicemailProfiles

Use VoicemailProfiles to assign voicemail settings such as e-mail notification details or retention limits, to user groups or specific collections of users.

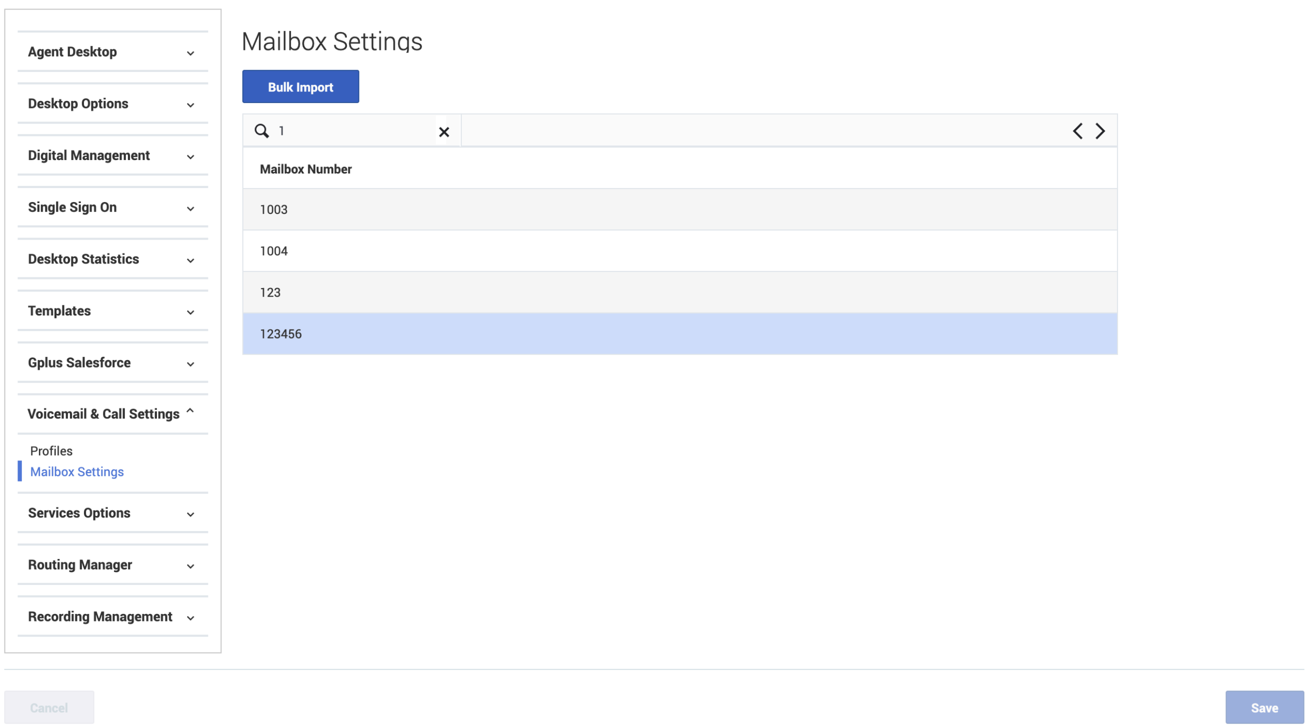


The following table lists all possible configurations for **VoicemailProfiles**:

Name	Description
Profile Name	The name given to the Profile.
Voicemail Forwarding	Specifies whether or not to forward a message from a mailbox.

Name	Description
Email Body	The Email Body for the email. For example, "Mailbox has a new message from ."
Email From Address	The From Address used in the email notification.

Mailbox Settings



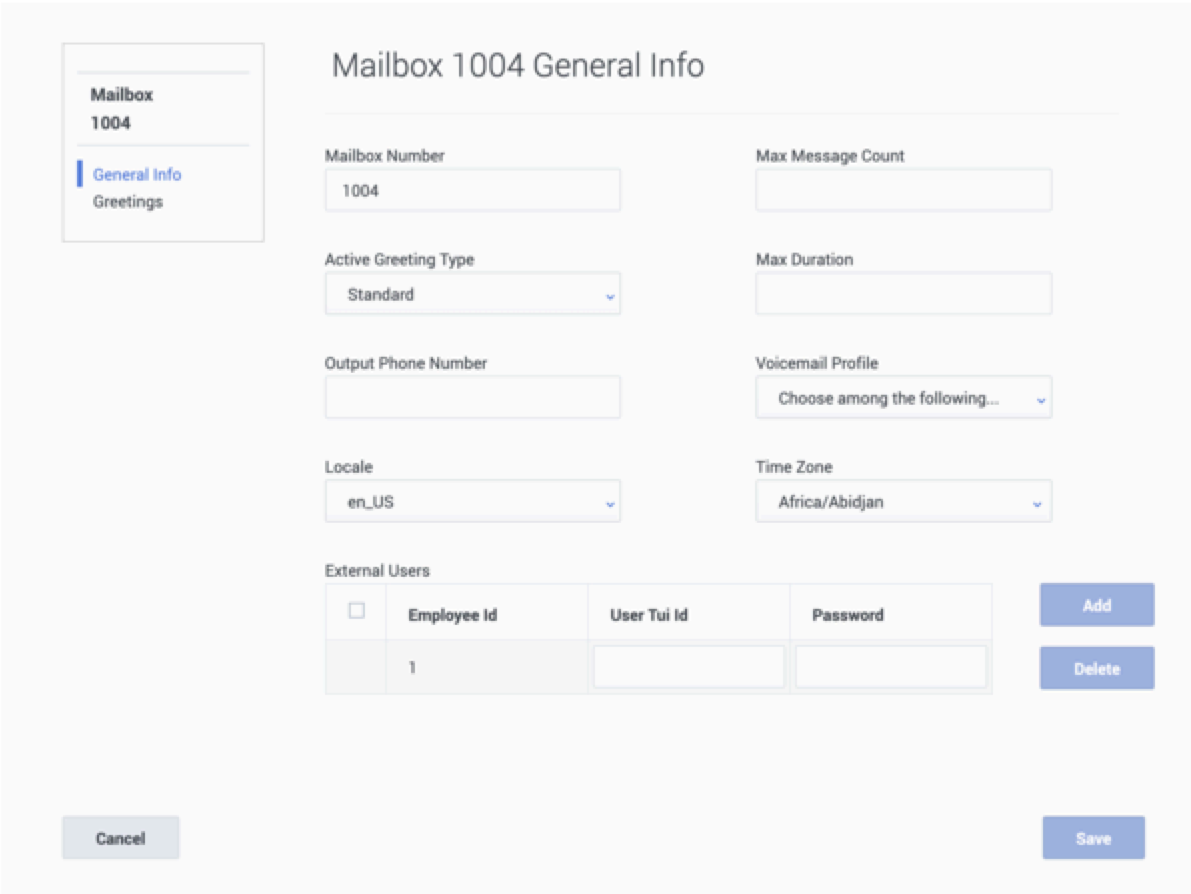
Mailbox Settings are configurations that customize the mailbox as per the user's needs. This includes mailbox greetings, locale, time zone, optout number, and few more basic configurations listed in the **General Info** table, further down this page.

If you have a Comma-Separated Values (.csv), or Excel spreadsheet (.xls) file of your bulk mailbox settings already saved to your local drive, you can import it by clicking the **Bulk Import** button and navigating to that file's location on your local drive.

Click on a **Mailbox Number** to open that mailbox and review or update its settings. When you open a Mailbox Number, you're presented with 2 categories in the left-hand menu:

- General Info
- Greetings

General Info

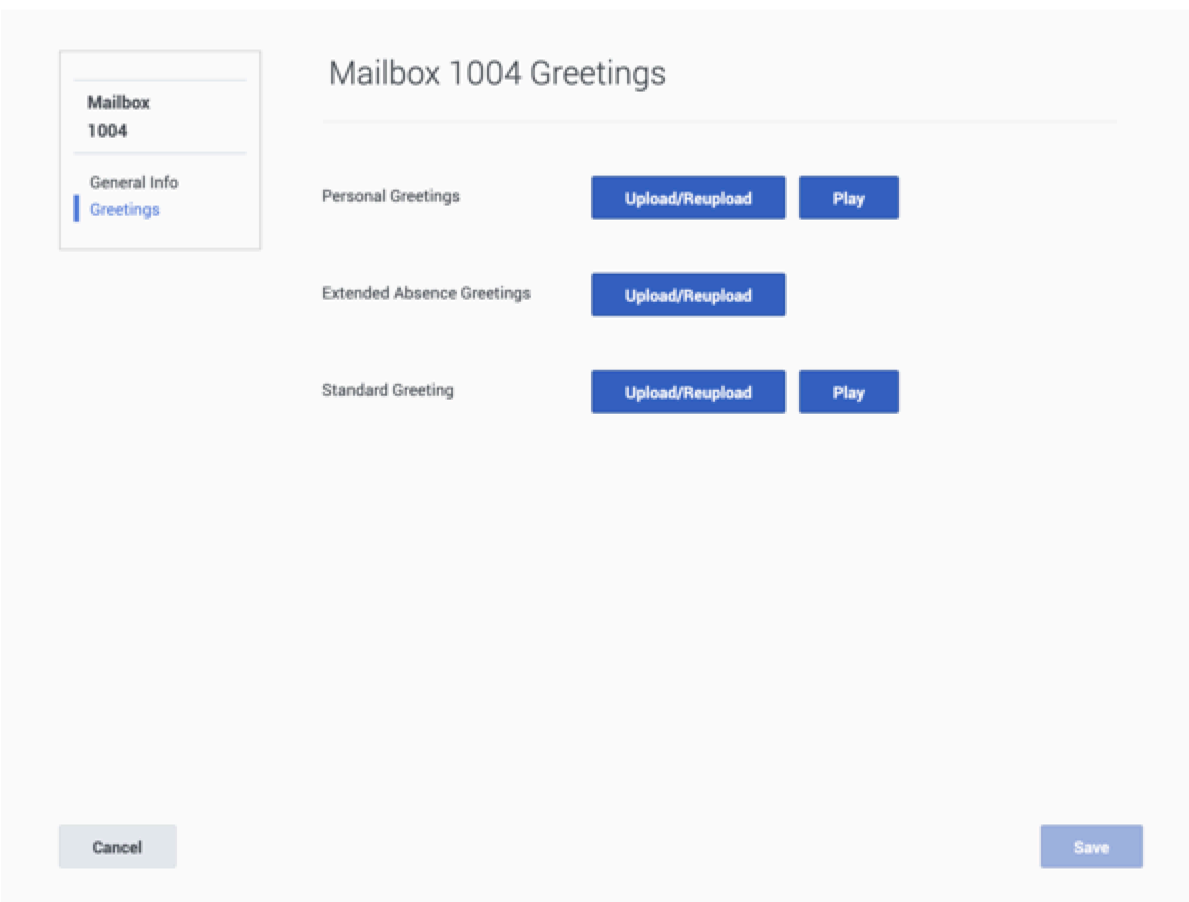


The following table lists all possible configurations for **General Info**:

Name	Description	Values (default value in bold)
Mailbox Number	The mailbox number of the caller	Numeric
Active Greeting Type	Type of greeting including Standard, Personal, or Extended Absence	**`Standard`**, `Personal`, `Extended Absence`
Output Phone Number	If end users do not want a deposit voicemail then this setting can be configured to opt out to another destination such as Route Point, or a DN, or others.	**`Null`**
Locale	Language for voicemail access or deposit	**`en_US`**, set of valid locales
Max Message Count	The maximum number of messages which can be stored in a mailbox	**`Null`**

Name	Description	Values (default value in bold)
Max Duration	Maximum voicemail message duration	**`Null`**
Voicemail Profile	Voicemail profiles are a common set of configurations that are assigned to a set of mailboxes	**`Null`**, valid Profile name configured under Voicemail Profile Script object
Time Zone	The time zone for this mailbox profile.	**`Null`**, set of time zones
External Users	To allow the agents to access their mailbox outside of contact center. Agents defined in External Users can access their mailbox with the given authorization password.	**Employee Id**: The Employee Id of the Agent as created in CME. **User Tui Id**: Telephonic User Interface; User Tui Id is a form of numeric username used to recognize the agent. **Password**: The password used to authorize the mailbox

Greetings



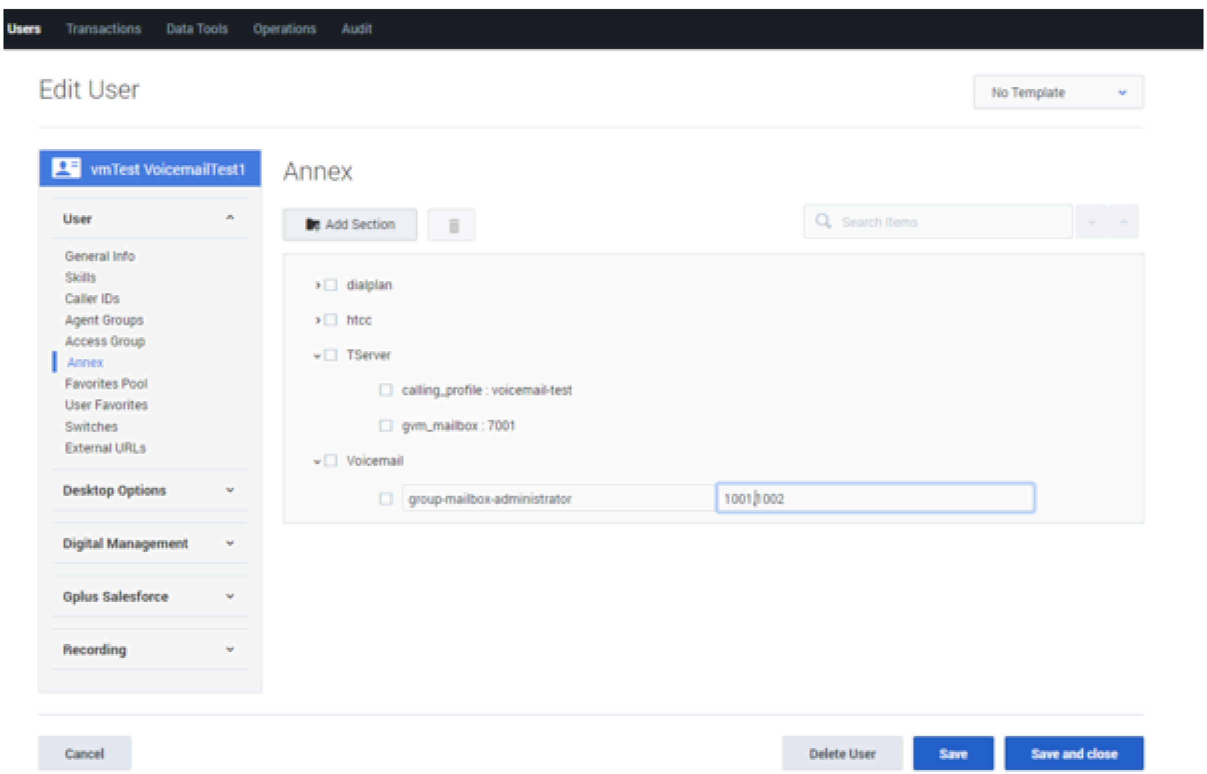
> **Important**
> Greetings must be in .wav format.

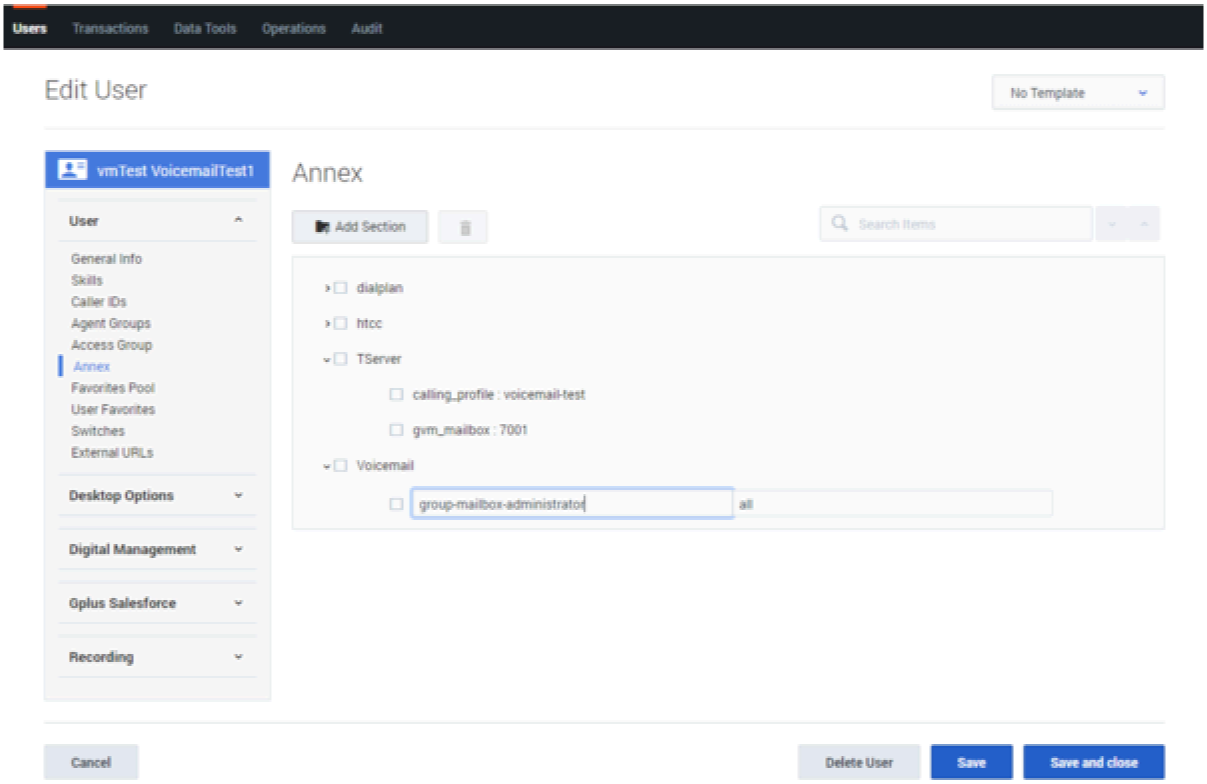
To upload a **Personal**, **Extended Absence**, or **Standard Greeting**, click the **Upload/Reupload** button and choose a file from your local machine. Click **Play** to listen to the greeting before confirming your selection by clicking **Save**.

Group mailbox administrator

To define a specific user as a group mailbox administrator for a group mailbox associated with an Agent Group, add the **Voicemail** section to the annex of the user, then add the option **group-mailbox-administrator** with the following values:

option	value
group-mailbox-administrator	`all` or comma-separated mailbox numbers




Users
Transactions
Data Tools
Operations
Audit
Edit User
No Template
vmTest VoicemailTest1
User
General Info
Skills
Caller IDs
Agent Groups
Access Group
Annex
Favorites Pool
User Favorites
Switches
External URLs
Desktop Options
Digital Management
Gplus Salesforce
Recording
Annex
Add Section
Search Items
dialplan
htcc
TServer
calling_profile : voicemail-test
gvm_mailbox : 7001
Voicemail
group-mailbox-administrator
all
Cancel
Delete User
Save
Save and close

Voicemail management

Contents

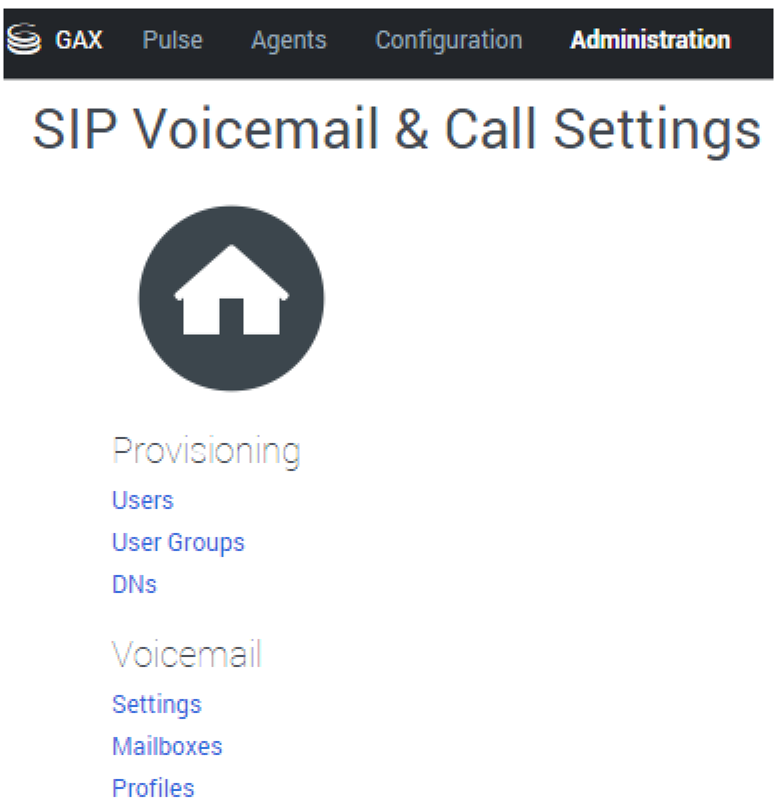
-
- Administrator

Learn how to manage voicemail in your contact center.

Related documentation:

-
-

Voicemail management gives you control over Users and User Groups, DNs, Settings, Mailboxes, Greetings, and Voicemail Profiles. To use voicemail, see Voicemail for agents and supervisors.



To Access Voicemail Management...

1. Start Genesys Portal and select login to **Platform Administration**.
2. Select **SIP Voicemail and Call Settings** from the Administration menu.
3. Choose a category to manage:

- Users
- User Groups
- DNs
- Settings
- Mailboxes
- Greetings
- Voicemail Profiles

Managing Voicemail Users

Here, you can manage user roles, mailbox access, voicemail profile, time zone, DNs, voicemail notification, and web service notification preferences:

General tab

1. Select **Users**, then search for and select a specific user. You can enter the first letter to see a list.
2. Specify Roles, Mailbox Access, Voicemail profile, and Time Zone from drop-down menus.
3. Click the values in the Agent Logins, DNs, and Mailboxes tables to view details.

Feature Server Roles field:

Select one:

- `User` (default) grants the user access to voicemail.
- `Administrator` grants the user the ability to log in as administrator and perform all the tasks available in Agent Workspace.
- `Group Mailbox Administrator` grants the user the ability to log in as administrator and manage group mailboxes. Only users who are Group Mailbox Administrators can change greetings and passwords for group mailboxes.

User Mailbox Access drop-down menu:

Select one:

- `Phone + Web View + Web Playback` enables the user to access voicemail over the phone and to view and play voicemail.
- `Phone + Web View` enables the user to access voicemail over the phone and to view, but **not** play, voicemail.
- `Phone Only` enables the user to access voicemail over the phone, without web access.

Voicemail Profile drop-down menu:

- To activate voicemail access, select a profile other than `Not Set`.

Time Zone drop-down menu:

- Select a time zone for message playback.

Email Notifications tab

- Set Notifications On or Off in the drop-down menu.
- Specify a destination email in the **Email To** field. Use the standard address format: `name@domain`.

Web Service Notifications tab

- Set Notifications On or Off in the drop-down menu.
- Specify a destination phone in the **Phone Number** field. Use only digits.
  Note: If your notification message does not include the user phone number, this field does not appear.

Managing Voicemail User Groups

You create user groups and perform most provisioning in Genesys Administrator, not here.

Here, you can manage user-group voicemail profiles:

General tab

1. Select **User Groups**, then search for and select a specific user. You can enter the first letter to see a list.
2. Specify a Voicemail profile from the corresponding drop-down menu.
   Voicemail Profile: To activate voicemail access, select a profile other than `Not Set`. If the menu is empty, you can create a voicemail profile or let the default calling profile apply to the user.

Email Notifications tab

- Set Notifications On or Off in the drop-down menu.
- Specify a destination email in the **Email To** field. Use the standard address format: `name@domain`.

Web Service Notifications tab

- Set Notifications On or Off in the drop-down menu.
- Specify a destination phone in the **Phone Number** field. Use only digits.
  Note: If your notification message does not include the user phone number, this field does not appear.

Managing Voicemail DNs

To create DNs, see the topic DNs.

1. Select **DNs**, then search for and select a specific DN. You can enter the first number to see a list.
2. Optionally, set a password for the DN. This password controls device authentication.

Managing Voicemail Settings

General tab

- Set **Voicemail Enabled** to Yes or No in the drop-down menu.
- Click the value for **Voicemail Profile** to edit it.

Email Notifications tab

The system uses notification defaults if the voicemail profile doesn't contain a value for a given field.

- Turn **Notifications** On or Off by selecting from this drop-down menu.
- Enter the email address to receive notifications in the **Email to** field.

Web Service Notifications tab

The system uses notification defaults if the voicemail profile doesn't contain a value for a given field.

- Turn **Notifications** On or Off by selecting from this drop-down menu.
- Enter the phone number to receive notifications in the **Phone number** field.

Managing Voicemail Mailboxes

- Select **Mailboxes**, then search for and select a specific mailbox. You can enter the first number to see a list.
- Before you select a mailbox, you can enable or disable the Disclaimer. Click on that word to see the status and instructions.

You can configure these settings for the selected mailbox:

Setting	Values (default value in bold)	Description
Status	**Active**, Locked	When Locked, four unsuccessfully times, locks you out for 10 minutes. Select Active

Setting	Values (default value in bold)	Description
		to override.
Voicemail Deposit Enabled	**Yes**, No	**Yes** forwards unanswered calls to voicemail under various conditions, depending on the options set. **No** plays a "voicemail is disabled" message to the caller.
Mailbox Password	**System**, *user-selected*	Press **Reset** to reset the password to the system (default) value.
Max Messages	**10**, 1 to *n*	Select the second radio button and type a value to set a new maximum number of messages. Select **System** to restore the system (default) value.
Optout Phone	**System (Not Set)**, *any phone number or routing point*	When set, enables a caller to transfer out of voicemail to the specified destination at any time during a call. Select the second radio button and type a value to set a new optout phone. Select **System** to restore the value to the number in parentheses, which is the value set at the application or switch level for the configuration option `voicemail-optout-destination`.
Time Zone	**System**, *time zone from menu*	Select a time zone from the menu to set a new time zone for all mailboxes that use the system (default) time zone. Select **System** to restore the system value.
Language	**System (English(United States))**, *language from menu*	Select a language from the menu to set a new language. Select **System** to restore the system value.
Assigned	n/a	The Assigned table lists the objects (directory numbers, agents, users, user groups) to which this mailbox has been assigned. For some objects you can click the object name to view the object.
Messages	Unread/Read (Unread high-priority messages/Read high-priority messages)	Press **Delete All** to delete all normal and high-priority messages.

Managing Greetings

Users can manage greetings for their personal mailboxes.
Users who are Group Mailbox Administrators can change greetings and passwords for group mailboxes, by accessing the group mailbox remotely. See Voicemail for agents and supervisors.

To manage your greetings from a local or remote telephone, press 4 and use these commands:

- Press **1** to record an `extended absence greeting`.
- Press **2** to record a `personal greeting`.
- Press **5** to activate the `standard greeting` that inserts your recorded name into a standard message. For example: You have reached the mailbox of *play_recorded_name*.
- Press **6** to activate your `personal greeting`. Not available or played unless this greeting exists.
- Press **7** to activate your `extended absence greeting`. Not available or played unless this greeting exists.

After initiating each action, follow the audio prompts.

- Press ***** to exit the Greetings menu and return to main menu.

Managing Voicemail Profiles

About Voicemail Profiles

Voicemail profiles determine how long voicemails are kept for a user or user group before deletion. Voicemail profiles use a Class of Service model to enable the quick assignment of voicemail notifications and retention limits to user groups or specific collections of users.

You can create profiles that set retention limits of 1 to 10,000 days, or use **`No Limits`** to set voicemails not to expire. You can effectively disable voicemail profiles by keeping the default Retention Limit value of the System Profile, **`No Limits`**, and assigning no other profile to your users.

The System Profile applies only when none of the users or user groups assigned to a mailbox has an assigned profile.

- To create a new profile, select **New**. To edit an existing profile, select it from the list.

General tab

- **Name** is an editable field.
  - Empty if you clicked **New**. Enter a name.
  - Populated if you selected an existing profile. You can change its name if you want.
- **Retention Limit** specifies the limit for each profile, in number of days.

    - Use the radio buttons to select `No Limits` or the editable field.

- **Notifications** are described below.

Notifications tab

- Set each of the first four values to `Yes` or `No` using its drop-down menu.
    - **Email Notification Enabled** Yes enables email (SMTP) notifications.
    - **Email Notification Allow User Setup** Yes allows users and user group administrators to turn email notifications on or off for themselves, and to specify the recipient email address. (No allows only administrators to control user and user group settings.)
    - **Web Service Notification Enabled** Yes enables web (HTTP) notifications.
    - **Web Service Notification Allow User Setup** Yes allows users and user group administrators to turn web notifications on or off for themselves, and to specify the recipient phone number. No allows only administrators can control user and user group settings.

Genesys Softphone

-
- Administrator

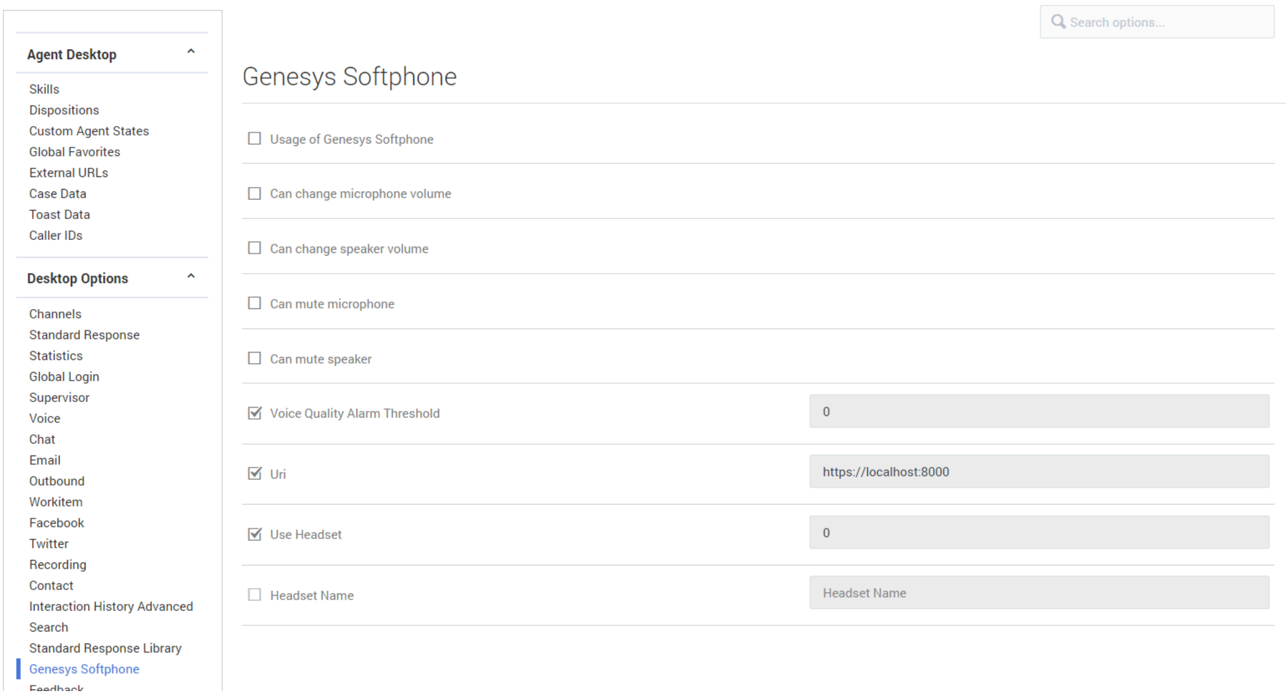
Control the behavior of Genesys Softphone in your environment.

Related documentation:

-
-

Important

Some features described here may not apply to your organization's setup. If you need features that aren't available to you, contact your administrator or Genesys representative.



In the **Genesys Softphone** section of the **Contact Center Settings** page, you can enable the following options:

- **Usage of Genesys Softphone** enables the use of Genesys Softphone.
- **Can change microphone volume** allows the agent to control the volume of their microphone.
- **Can change speaker volume** allows the agent to control the volume of their speaker.
- **Can mute microphone** allows the agent to mute and unmute their microphone.
- **Can mute speaker** allows the agent to mute and unmute their speaker.

- **Voice Quality Alarm Threshold** specifies the mean opinion score (MOS — a measure of reported network quality ratings) threshold for generating Voice Quality Alarms. The value `0` disables the alarms. The recommended threshold value is `3.5`.
- **URI** specifies the URI of the SIP endpoint.
- **Use Headset** enables the use of a headset for voice calls. Valid values for this field are `0` - *disable headset*; `1` - *enable headset*.
- **Headset name** specifies the name of the headset model if **Use Headset** is enabled.
- **Can Use WebRTC** enables WebRTC in Workspace. Depends on 'Voice - Can Use Voice Channel'.
- **Can change speaker volume** allows an agent to change speaker volume. Depends on 'Voice - Can Use Voice Channel' and 'WebRTC - Can Use WebRTC'.
- **Can mute microphone** allows an agent to mute and unmute the microphone. Depends on 'Voice - Can Use Voice Channel' and 'WebRTC - Can Use WebRTC'.
- **Can mute speaker** allows the agent to mute and unmute their speaker. Depends on 'Voice - Can Use Voice Channel' and 'WebRTC - Can Use WebRTC'.

- **Can send DTMF** specifies if DTMF is available for WebRTC calls. Depends on 'Voice - Can Use Voice Channel' and 'WebRTC - Can Use WebRTC'.
- **Quality request interval** specifies the voice channel ringing sound-configuration string. It consist of three options:
    - **WebRTC Ringtone Type** sets WebRTC call ringing sound. Depends on 'Voice - Can Use Voice Channel' and 'WebRTC - Can Use WebRTC'.
    - **WebRTC Ringtone Priority** sets WebRTC call ringing priority between different channels. Depends on 'Voice - Can Use Voice Channel' and 'WebRTC - Can Use WebRTC'.
    - **WebRTC Ringtone Duration** sets WebRTC call ringing duration. Depends on 'Voice - Can Use Voice Channel' and 'WebRTC - Can Use WebRTC'.

Email addresses and mailboxes

Contents

- Administrator

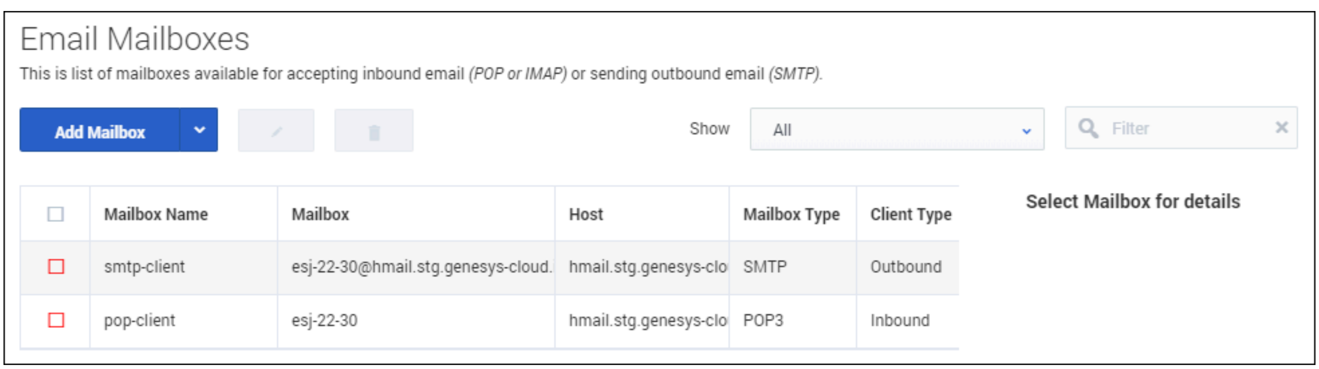
Set up agent mailboxes and specify additional From email addresses for agent responses.

Related documentation:

Create and configure inbound and outbound mailboxes for your contact center through **Digital Management** in the **Contact Center Settings** section.

> **Important**
> These instructions below refer to setting up E-mail Server (classic) in Engage Cloud. If you are using the latest version of Genesys Multicloud CX Email (powered by our IWD solution), refer to the topic View, edit and create Genesys Multicloud CX Email boxes for instructions on setting up your email mailboxes in Workload Manager.

Mailboxes

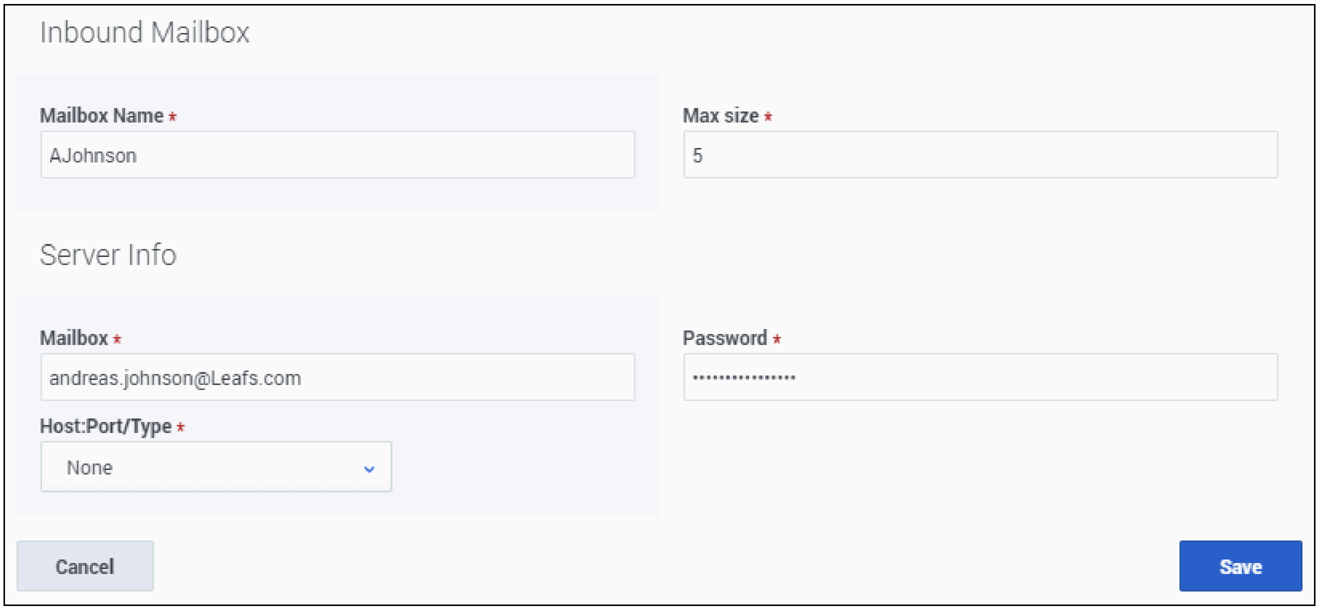


The **Email Mailboxes** sub-section displays all configured mailboxes for your contact center. The mailbox table will be empty if there are no mailboxes configured.

Select a mailbox in this view to see its details displayed on the right side of the view.

You can also filter this view by Inbound and Outbound mailboxes, as well as search for mailboxes.

Add or edit a mailbox



To create a new mailbox, select either **Inbound** or **Outbound** from the **Add Mailbox** menu. A mailbox is created in a disabled state.

Mailboxes are enabled when they are assigned to a Digital application in Designer. If the application stream is disabled, so are the mailboxes assigned to it.

Once enabled, the selection box beside the mailbox turns red. The mailbox cannot be deleted until it is disabled.

Note: Only one outbound mailbox is permitted at this time.

To edit a mailbox, select the mailbox you wish to edit and click the **Edit** button at the top of the page.

Use the following table for advice on how to fill in the mailbox creation/edit modal fields:

Outbound mailbox create and edit form

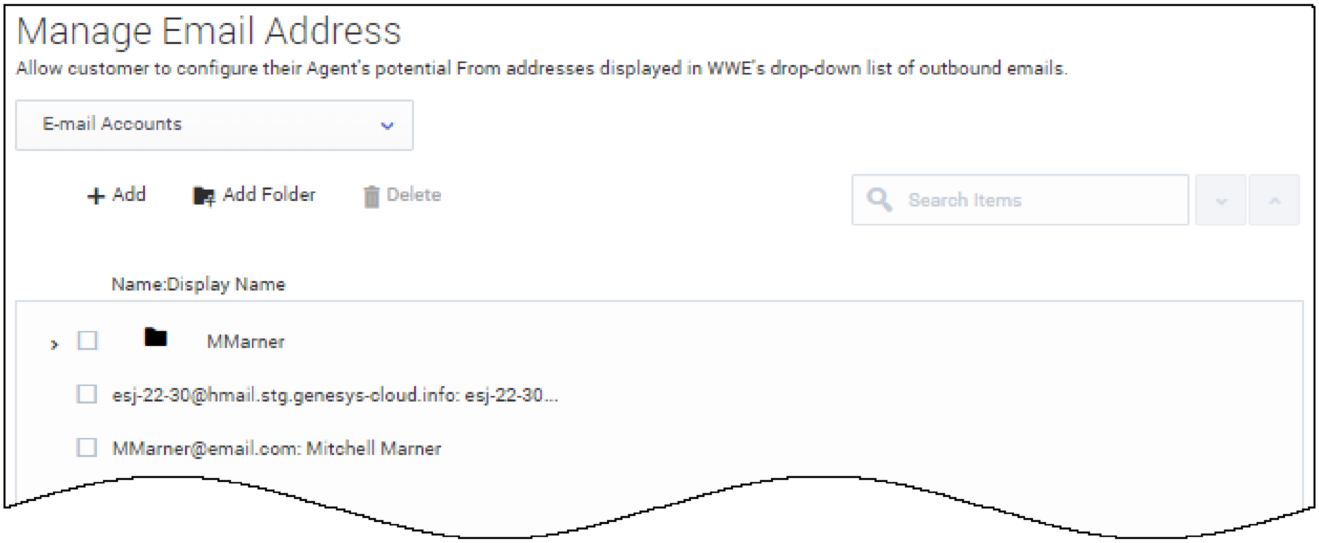
Label	Field type	Default values	Possible values	Action	Description
Mailbox Name	Strings: alphanumeric, special characters "@", "_", and ".", no more than 40 characters	smtp-client	N/A	A read-only field to be displayed	Outbound mailbox names are set as smtp-client
From Address	Strings:	N/A	N/A	Create and Edit	The email

Label	Field type	Default values	Possible values	Action	Description
	alphanumeric				address associated with this account
Mailbox	Strings: alphanumeric	N/A	N/A	Create and Edit	The name used to log in to the corporate email server
Password	Strings: alphanumeric	N/A	N/A	Create and Edit	The password associated with this account
Host/Port/Type	Drop-down list	N/A	SMTP	Create and Edit	The name of the corporate SMTP server

Inbound mailbox create and edit form

Label	Field type	Default values	Possible values	Action	Description
Mailbox Name	Strings: alphanumeric, special characters "@", "_", and ".", no more than 40 characters	N/A	N/A	Create only, Edit field is read-only	Any valid login name associated with a POP/IMAP account
Max size	Numeric: minimum = 5, maximum = 20	5	Range between 5 and 20	Create and Edit	The maximum size (in MB) of an incoming message
Mailbox	Strings: alphanumeric	N/A	N/A	Create and Edit	The login name associated with the POP/IMAP account
Password	Strings: alphanumeric	N/A	N/A	Create and Edit **Note:** The user must type in a password.	The password associated with this account
Host/Port/Type	Drop-down list	N/A	POP3, IMAP	Select only	Parameters of the corporate email server where the account resides

Add From addresses



You can configure your agent's potential From addresses displayed in Agent Workspace drop-down list of outbound emails.

When setting up additional addresses, you must first select or create the Business Attribute folder that will contain the Attribute Values that are used as available addresses. These come from the addresses of email interactions.

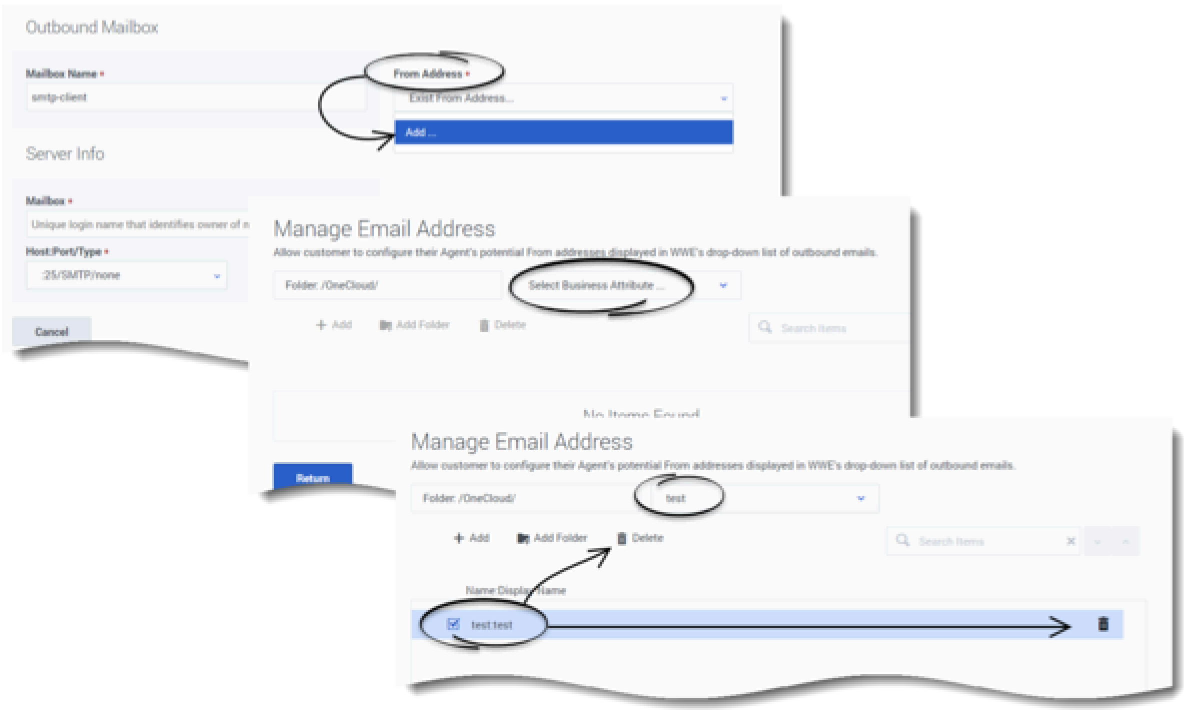
Once your intended Business Attributes folder is selected, you can begin adding new From email addresses by entering the address **Name** and an associated **Display name**. Once you have updated the users profile, the new From email addresses will be available for the agent to use when they start a new session or restart their current session.

Add or delete Business Attributes

Business Attributes can be added and deleted within Agent Setup through the **From Address** field in the **Outbound Mailbox** window.

From the main **Email Mailboxes** window, select the outbound email mailbox name and click the **Edit** button.

From the drop-down list under **From Address**, select **Add...**. The **Manage Email Addresses** window opens. Here you can add a new Business Attribute, as well as delete an existing Business Attribute. *(click to expand the image)*



Setting up mailboxes for OAuth 2.0 authorization

You can set up mailboxes for the OAuth 2.0 authorization access to Microsoft Exchange Online API for Office 365 with the IMAP and EWS protocols. To do this:

1. Create a Microsoft Azure application.
2. Add application permissions.
3. Complete special mailbox settings.

Create a Microsoft Azure application

Starting with version 8.5.205.03, Email can support the Graph API with Client Credentials Grant Flow with client secret only.

OAuth defines the following grant types: authorization code, implicit, resource owner password credentials, and client credentials. The Genesys solution uses resource owner password credentials.

1. Follow Steps 1-8 as described in this documentation to register an Azure public client application for the mailbox(es) that will be accessed by Genesys E-mail Server. Note that a single Azure application can support all mailboxes for the same company.

Important

The Azure client application does not need to be public if it is for Graph.

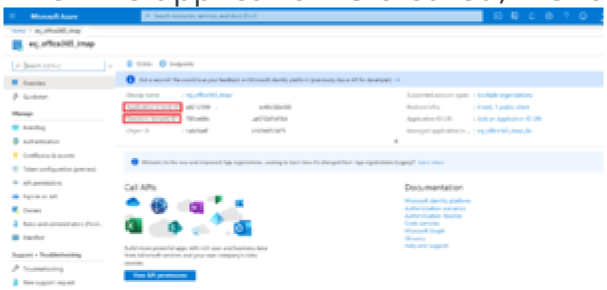
2. In step 6, for entering the name in Supported account types:
    - Select **Accounts in any organizational directory (Any Azure AD directory – Multitenant)**.

    ## Important

    Single-tenant accounts, Accounts in this organizational directory only, are also supported.

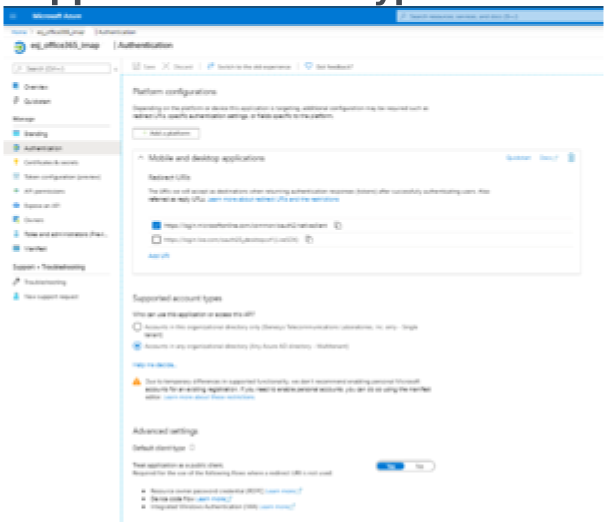
    - Leave the **Redirect URI** empty (as well as in Step 7).
3. Copy and paste the Application (client) ID and the Directory (tenant) ID into a text document that will be submitted to Genesys to configure mailboxes to use OAuth2.

After the application is created, it should look similar to this:



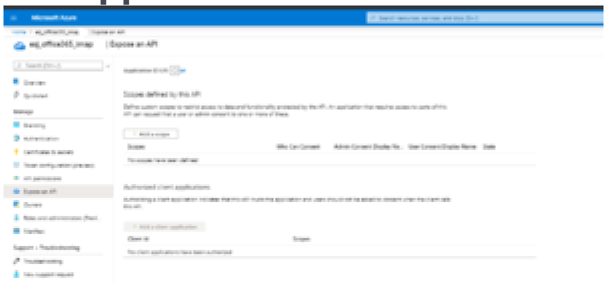
(Click to expand)

Where **esj_office365_imap** is the Azure application name. If you open the **Supported account types** and **Redirect URIs**, it should look similar to this:



(Click to expand)

The **Application ID URI** should be empty:



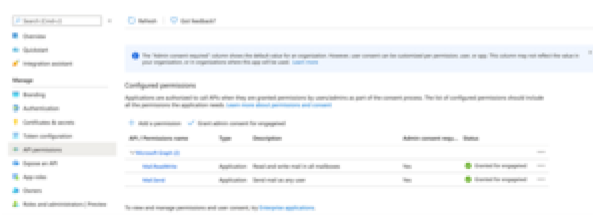
(Click to expand)

Add application permissions

Read through the article Permissions and consent in the Microsoft identity platform endpoint to learn about permissions and consent.

Graph

Set the application permissions for graph as given in this document Configure permissions for Microsoft Graph. Ensure that the application has the following application permissions with an admin consent grant:



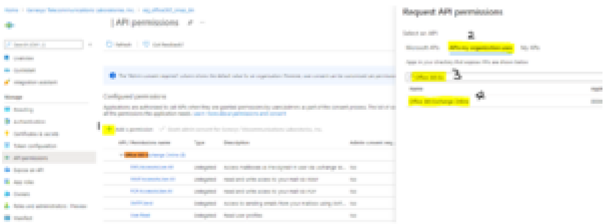
(Click to expand)

We recommend to read through this document Limiting application permissions to specific Exchange Online mailboxes to learn how to limit app access to specific mailboxes.

Legacy protocols

For other protocols (EWS, IMAP, POP3, and SMTP), you might want to consult this document, Configure permissions for Microsoft Graph, although it focuses on getting permissions for the Graph API and you must configure application permissions for Office 365 Exchange Online.

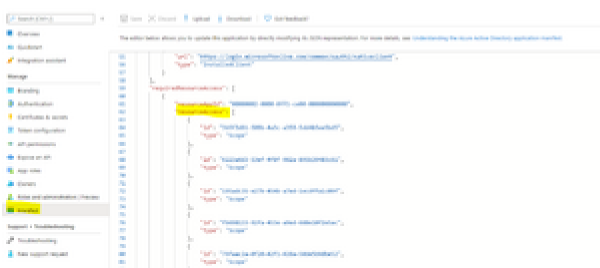
For IMAP, POP3, and EWS, the application must have the following permissions granted by the company's administrator, depending on the email protocols used:



(Click to expand)

Since early 2020, Microsoft stopped exposing API permissions for IMAP, POP3, and SMTP under Office 365 Exchange Online, although it still supports those protocols and continues exposing the **User.*** and **EWS.*** permissions. Based on the article, Azure Active Directory app manifest, users can edit the Azure App manifest to configure an app’s attribute.

Users can manually edit the *requiredResourceAccess* attribute by adding **IMAP.AccessAsUser.All**, **POP.AccessAsUser.All**, and **SMTP.Send**. The following example shows the related part (*requiredResourceAccess*) in the manifest of an Azure app. The app has all 5 permissions. As Microsoft continues to expose the **User.*** and **EWS.*** permissions under Office 365 Exchange Online, users can add these two permissions in the Azure UI. The *requiredResourceAccess* attribute contains two items. Then, the user can manually add the items that represent **IMAP.AccessAsUser.All**, **POP.AccessAsUser.All**, and **SMTP.Send** under the same *resourceAccess* of the same *resourceAppId*. The ID values for **IMAP.AccessAsUser.All** and other protocols could be different for different apps. The Exchange Admin must find it out.



(Click to expand)

Important

- For the EWS protocol, the Azure application must have the following permission:
  User.Read

  EWS.AccessAsUser.All
- For the IMAP protocol, the Azure application must have the following permission:
  User.Read

IMAP.AccessAsUser.All

- For the POP3 protocol, the Azure application must have the following permissions:
  User.Read

  POP3.AccessAsUser.All

Special mailbox settings

The mailbox has the following special settings in the company's system:

- Multifactor authentication is disabled on the mailboxes for the legacy protocols (POP3, IMAP, SMTP, and EWS).
- The IMAP protocol is enabled (if IMAP is used).
- The POP3 protocol is enabled (if POP3 is used). (Note that OAuth2 for POP3 is not supported yet.)
- Nothing is needed for the EWS protocol.

Migrating existing mailboxes

Genesys recommends that you create a mailbox for testing purposes to be used for migration to OAuth2. This test mailbox must also have its own credential. Ensure the Azure Application and mailbox setup is correct before migrating the mailboxes.

Contact Genesys Customer Care by opening a case in the My Support Portal, http://www.genesys.com/customer-care, to request mailboxes migration with the following data for each mailbox including the test mailbox:

- **Mailbox Name** and its values of the test mailbox
- **directory-id**—Specify the Directory (tenant) ID of the registered Microsoft Azure application for the test mailbox
- **client-id**—Specify the Client ID of the registered Microsoft Azure application for the test mailbox
- **tenant-authority**—Specify the authority server of the registered Microsoft Azure application if it is different from https://login.microsoftonline.com/
- Is it a test mailbox—Yes or No

Important

If you have service issues, please contact Genesys Customer Care by opening a case in the My Support Portal, http://www.genesys.com/customer-care.

Case and toast data

Contents

- 
- Administrator

Case Data specifies the information to be displayed to agents when a call, chat, or other interaction is transferred to them.

Toast Data specifies the information to be displayed to agents when they directly receive a call, chat, or other interaction.

Related documentation:

Case Data

On the **Case Data** page, you can specify the information to be displayed to agents when a call, chat, or other interaction is transferred to them.

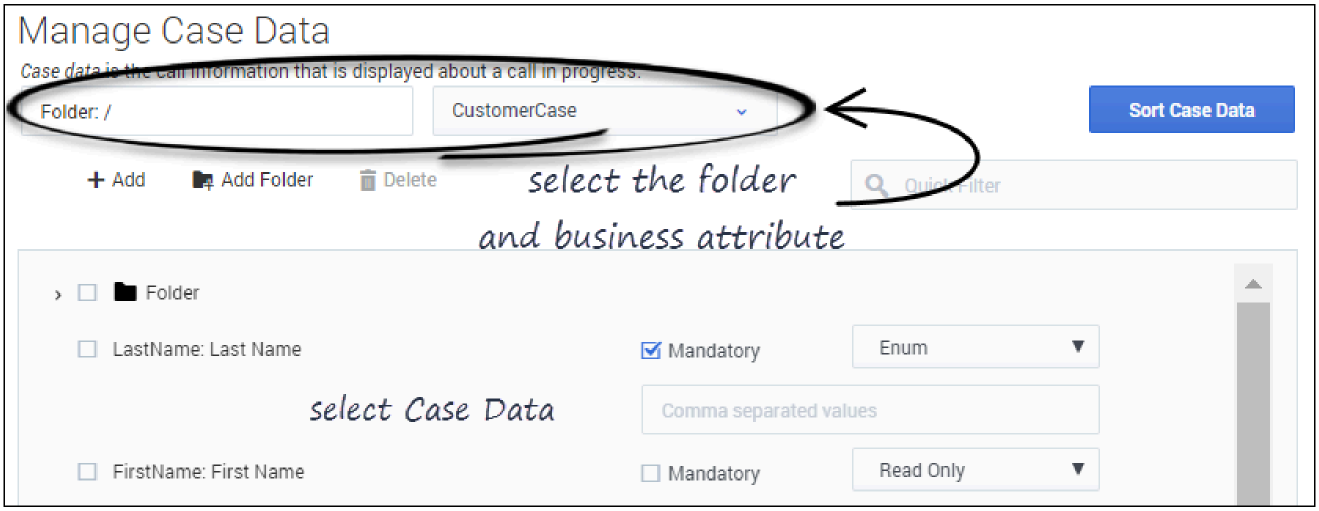
Creating a sharable Case Data business attribute

Case data can be used as sharable business attributes for agents, agent groups, and the global contact center. To view an article about how to create sharable business attributes, see Business attributes.

Tip

- To view an example of Case Data in Agent Workspace, see Interaction history views in *Agent Workspace Agent's Guide*.
- In the table of configured Case Data, in addition to selecting and adding Case Data, you can also filter items using the **Quick Filter** field, and **Delete** Case Data.

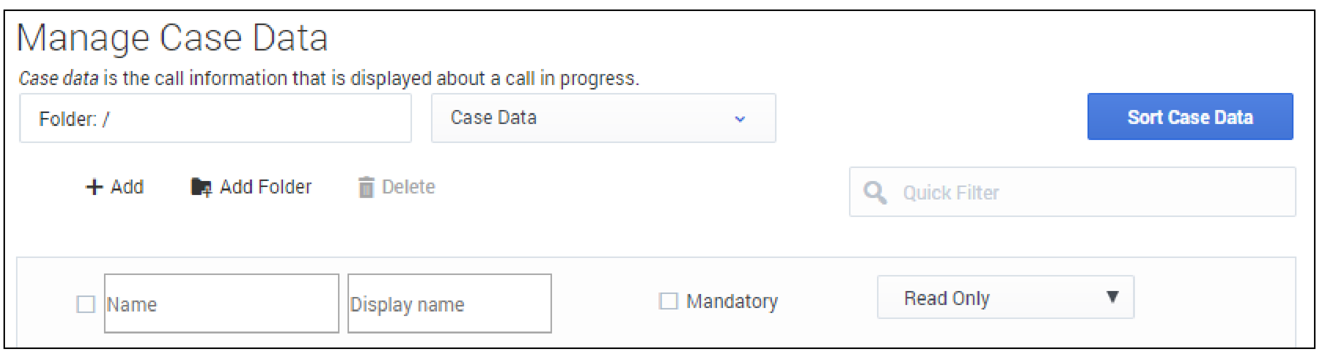
Selecting Case Data



1. Select a business attribute:
   a. Select the folder you want to view from the **Folder** drop-down list box.
   b. Click the second drop-down list box and select the business attribute for the Disposition.

      You can consider a business attribute to be the container that holds a list of Dispositions that have a common theme.
2. Select a Case Data from the list.

Adding Case Data



Select the folder you want to view from the **Folder** drop-down list box.

1. Click the second drop-down list box and select the business attribute into which you want to add the Case Data.
2. Click **Add**.
3. Specify a name and display name.
4. Select **Mandatory** to specify that the case data is mandatory.

5. Enable the **Read Only** option if you do not want the agent to be able to update the data. Or, select a data validation type, such as **Boolean**, **String**, **Integer**, or **Enum** which allows the agent to edit the data. If the case data is mandatory, the **Read Only** option is disabled.

> **Important**
>
> To configure the order in which the case is displayed in the UI, click **Sort Case Data** and follow the instructions in the dialog box.

> **Tip**
>
> To add a new folder to the list, you can do one of the following:
>
> - Click **Add Folder**; or
> - To add a subfolder, click the **Folder** drop-down list box, select a folder, and then click the **Add folder** icon.

Toast Data

On the **Toast Data** page, you can specify the information to be displayed to the agent when they receive a call, chat, or other interaction.

Creating a sharable Toast business attribute

Toast Data can be used as sharable business attributes for agents, agents groups, and the global contact center. To view an article about how to create sharable business attributes, see Business attributes.

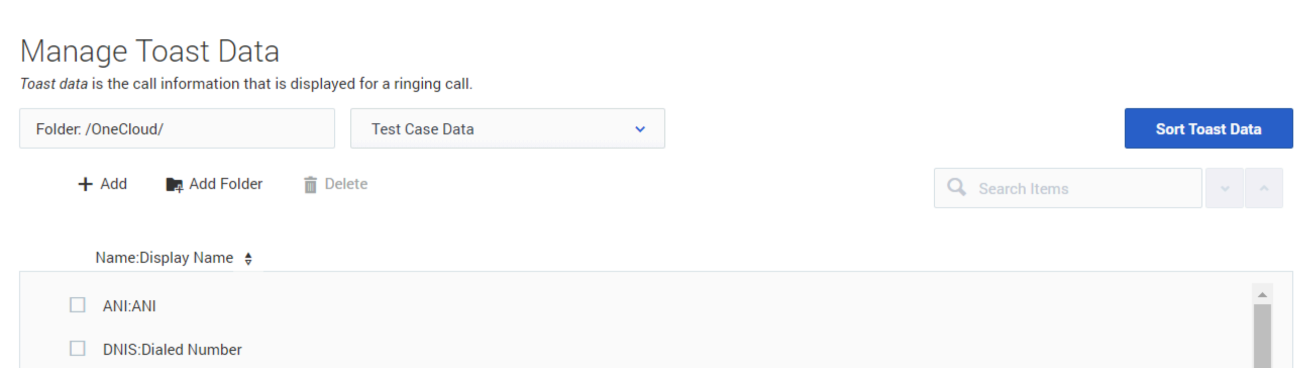
> **Tip**
>
> - To view an example of Toast Data in Agent Workspace, see Interaction history views in *Agent Workspace Agent's Guide*.
> - In the table of configured Toast Data, in addition to selecting and adding Toast Data, you can also filter items using the **Quick Filter** field, and **Delete** Toast Data.

Selecting Toast Data

1. Select a business attribute:
   a. Select the folder you want to view from the **Folder** drop-down list box.
   b. Click the second drop-down list box and select the business attribute for the Disposition.

      You can consider a business attribute to be the container that holds a list of Dispositions that have a common theme.
2. Select a Toast Data from the list.

Adding Toast Data



Select the folder you want to view from the **Folder** drop-down list box.

1. Click the second drop-down list box and select the business attribute into which you want to add the Toast Data.
2. Click **Add**.
3. Specify a name and display name.

> **Important**

To configure the order in which the toast data is displayed in the UI, click **Sort Toast Data** and follow the instructions in the dialog box.

Tip

To add a new folder to the list, you can do one of the following:

- Click **Add Folder**; or
- To add a subfolder, click the **Folder** drop-down list box, select a folder, and then click the **Add folder** icon.

Add and manage Caller ID

Contents

-
- Administrator

Create Caller Identification (Caller ID) options to be displayed when an agent makes an outbound call or transfer

Related documentation:

-
-

About Caller ID

A Caller ID is typically the phone number that you want displayed on the phone of the person who receives the call when the agent consults, conferences, or transfers a call.

You can also specify a display name, such as your company name, to be included with the Caller ID. For example, SalesForMore 1-555-555-5555. In this case, Agent Workspace shows **SalesForMore** on the list of Caller IDs that an agent can select.

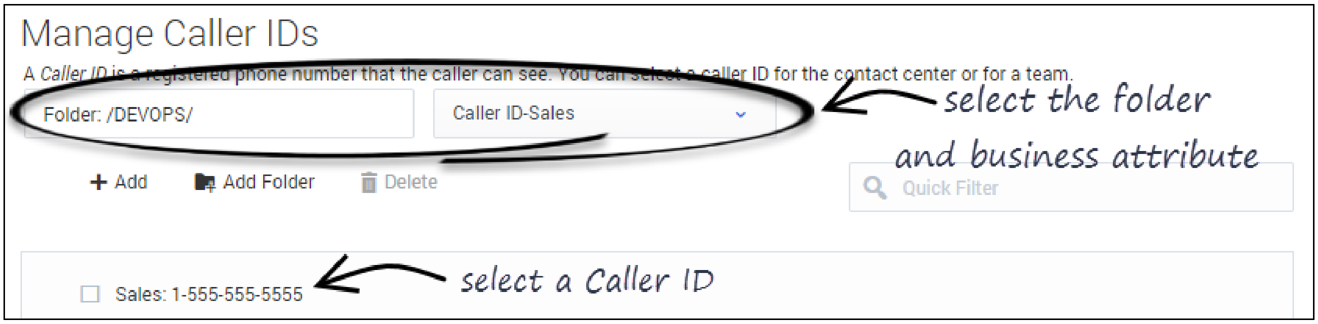
Creating a shareable Caller ID business attribute

Caller IDs can be used as shareable business attributes for agents, agents groups, and the global contact center. To see how to create shareable business attributes, see Business attributes.

Tip

- To view an example of Caller ID options in Agent Workspace, see How do I manually select a Caller Identification? in *Agent Workspace Agent's Guide*.
- In the table of configured Caller IDs, in addition to selecting and adding Caller IDs, you can also filter items using the **Quick Filter** field and delete a Caller ID.

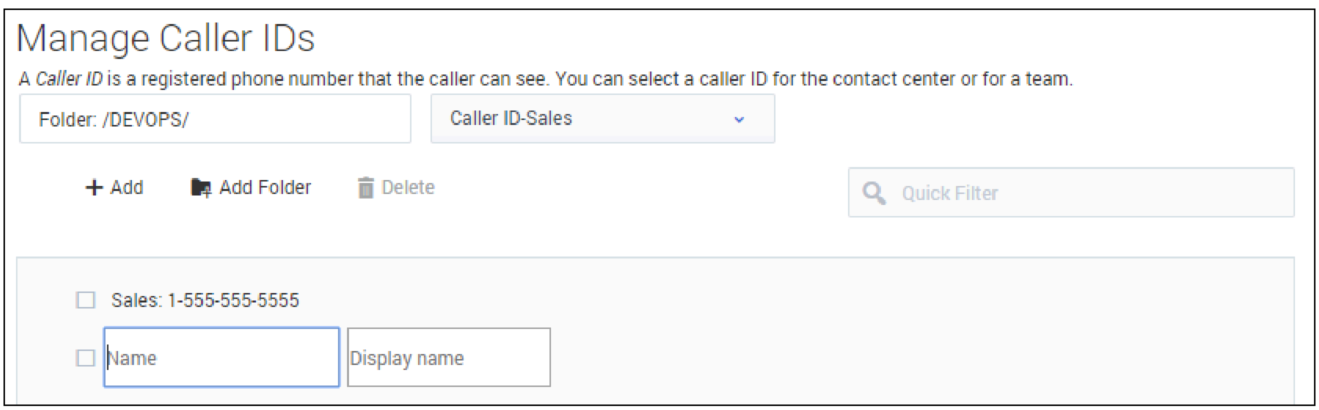
Selecting a Caller ID



1. Select a business attribute:
   a. On the Caller ID page, select the folder you want to view from the **Folder** drop-down list box.
   b. Click the second drop-down list box and select the business attribute for the Caller ID.

      You can consider a business attribute to be the container that holds a list of Caller IDs that have a common theme.
2. Select a Caller ID from the list.

Adding a new Caller ID



1. Select the folder you want to view from the **Folder** drop-down list box.
2. Click the second drop-down list box and select the business attribute into which you want to add the Caller ID.
3. Click **Add**.
4. Type the **Name** and **Display Name** for the new Caller ID.

Tip

To add a new folder to the list, you can do one of the following:

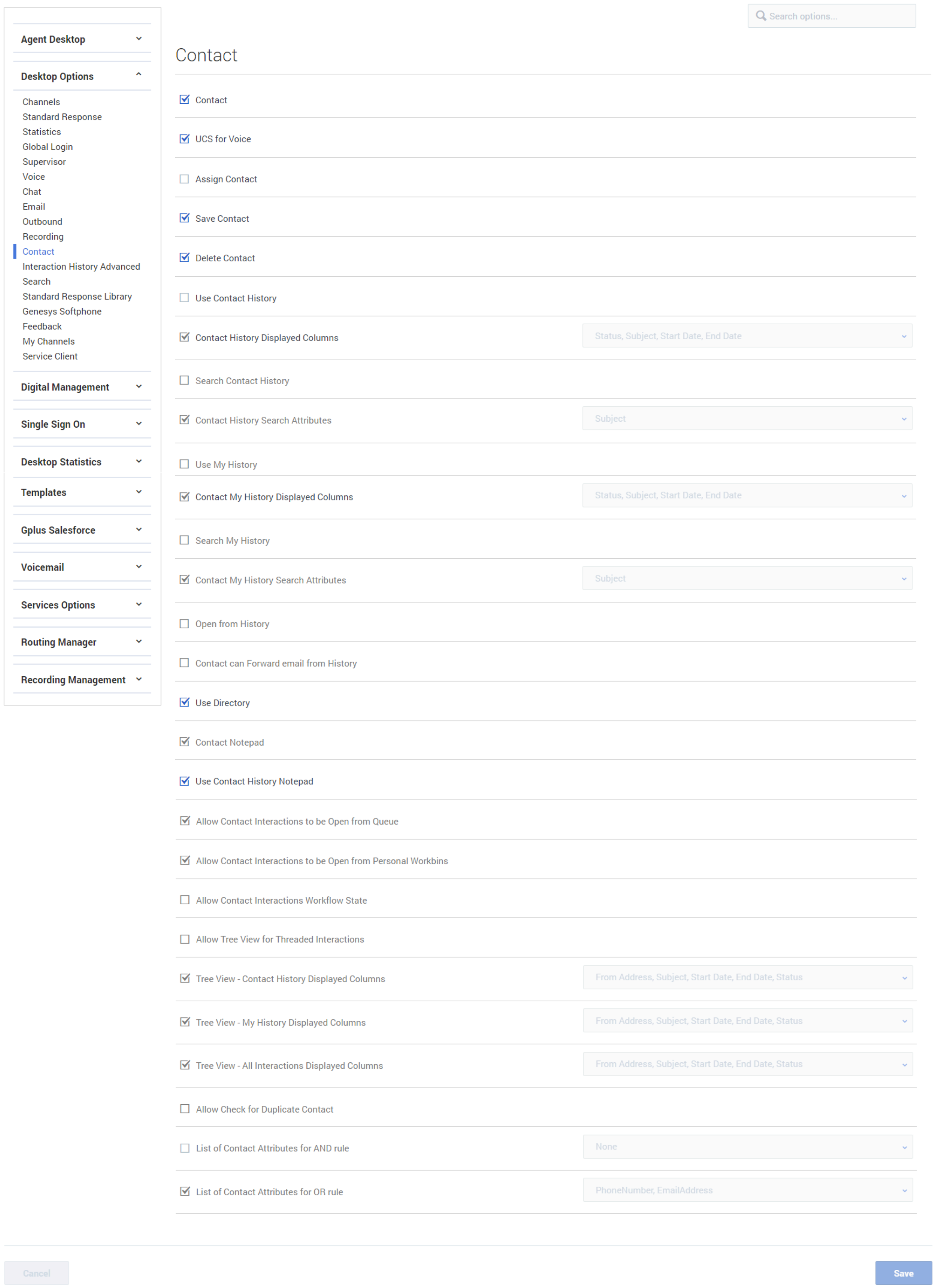
- Click **Add Folder**; or
- To add a subfolder, click the **Folder** drop-down list box, select a folder, and then click the **Add folder** icon.

Contacts

- Administrator

Configure contacts in Agent Workspace so agents can manage their own list of contacts and contact history.

Related documentation:


Search options...
Agent Desktop
Desktop Options
Channels
Standard Response
Statistics
Global Login
Supervisor
Voice
Chat
Email
Outbound
Recording
Contact
Interaction History Advanced
Search
Standard Response Library
Genesys Softphone
Feedback
My Channels
Service Client
Digital Management
Single Sign On
Desktop Statistics
Templates
Gplus Salesforce
Voicemail
Services Options
Routing Manager
Recording Management
Contact
Contact
UCS for Voice
Assign Contact
Save Contact
Delete Contact
Use Contact History
Contact History Displayed Columns
Status, Subject, Start Date, End Date
Search Contact History
Contact History Search Attributes
Subject
Use My History
Contact My History Displayed Columns
Status, Subject, Start Date, End Date
Search My History
Contact My History Search Attributes
Subject
Open from History
Contact can Forward email from History
Use Directory
Contact Notepad
Use Contact History Notepad
Allow Contact Interactions to be Open from Queue
Allow Contact Interactions to be Open from Personal Workbins
Allow Contact Interactions Workflow State
Allow Tree View for Threaded Interactions
Tree View - Contact History Displayed Columns
From Address, Subject, Start Date, End Date, Status
Tree View - My History Displayed Columns
From Address, Subject, Start Date, End Date, Status
Tree View - All Interactions Displayed Columns
From Address, Subject, Start Date, End Date, Status
Allow Check for Duplicate Contact
List of Contact Attributes for AND rule
None
List of Contact Attributes for OR rule
PhoneNumber, EmailAddress
Cancel
Save

In the **Contact** section of the **Contact Center Settings** tab, you can enable the following options:

- **Contact** enables agents to access contact features.
- **UCS for Voice** enables the Universal Contact Server to generate voice interaction history in Agent Workspace. This option is enabled when the **Contact** and **Voice** check boxes are selected.
- **Assign Contact** enables agents to assign contacts to an interaction. This option is enabled when the **Contact** check box is selected.
- **Save Contact** enables agents to modify contacts.
- **Delete Contact** enables agents to delete contacts.
- **Use Contact History** enables agents to access contact history. This option is enabled when the **Contact** check box is selected.
- **Contact History Display Columns** allows you to manage the interaction attributes you want to display in the **Contact History** view in Agent Workspace. This option is enabled when the **Contact** and **Use Contact History** check boxes are selected.
- **Search Contact History** enables agents to search contact history. This option is enabled when the **Contact** and **Use Contact History** check boxes are selected.
- **Contact History Search Attributes** allows you to manage the interaction attributes you want to display in the **Contact History Quick Search** view in Agent Workspace. This option is enabled when the **Contact**, **Use Contact History**, and **Search Contact History** check boxes are selected.
- **Use My History** enables agents to access their own contact history. This option is enabled when the **Contact** check box is selected.
- **Contact My History Displayed Columns** allows you to manage the interaction attributes you want to display in the **My History** view in Agent Workspace. This option is enabled when the **Contact** and **Use My History** check boxes are selected.
- **Search My History** enables agents to search their own contact history. This option is enabled when the **Contact** check box is selected.
- **Contact My History Search Attributes** allows you to manage the interaction attributes you want to display in the **My History Quick Search** view in Agent Workspace. This option is enabled when the **Contact**, **Search My History**, and **Search My History** check boxes are selected.
- **Open from History** allows agents to open in-progress emails from the interaction history. This option is enabled when the **Contact** and **Email** check boxes are selected.
- **Use Directory** enables agents to view and search the contact directory. This option is enabled when the **Contact** check box is selected.
- **Contact Directory View** specifies the format for the Contact History View. Options include **List View** or **Grid View**. This option is enabled when the **Contact** check box is selected.
- **Contact Notepad** allows an agent to display and edit notes while handling an interaction. The notepad is a feature that enables agents to enter comments about the current interaction or about a selected interaction. Agents can view the note in most channels as well as contact history, My History, and My Workbin.
- **Use Contact History Notepad** allows an agent to see notes about interactions in Contact History.
- **Allow Contact Interactions to be Open from Queue** enables agents to open in-progress interactions from their workbin history.
- **Allow Contact Interactions to be Open from Personal Workbins** enables agents to open in-progress interactions that are in another agent's workbin history.

- **Allow Contact Interactions Workflow State** enables the use of the interaction workflow state in an interaction's details.
- **Allow Tree View for Threaded Interactions** enables agents to swap the interaction display format from grid view to tree view and inversely.
- **Tree View - Contact History Displayed Columns** specifies the list of interaction fields that are displayed in the Contact History screen for tree view.
- **Tree View - My History Displayed Columns** specifies the list of interaction fields that are displayed in the My History screen for tree view.
- **Tree View - All Interactions Displayed Columns** specifies the list of interaction fields that are displayed in the Interaction Search screen for tree view.
- **Allow Check for Duplicate Contact** enables workspace to alert agents when creating a duplicate contact. This option can be overridden by a routing strategy as described in the Configuration Guide.
- **List of Contact Attributes for AND rule** specifies the list of contact attributes, each of which are added as an AND clause in the search query to retrieve potential duplicate contacts from UCS during contact creation in Workspace.
- **List of Contact Attributes for OR rule** specifies the list of contact attributes, each of which are added as an OR clause in the search query to retrieve potential duplicate contacts from UCS during contact creation in Workspace.

Global favorites

Contents

- Administrator

Create and maintain a list of Global Favorites agents can access quickly in the Team Communicator in Agent Workspace.

Related documentation:

As a contact center administrator, you can create and maintain a list of Favorites, which are contacts and internal targets that your agents can access quickly in the Team Communicator. To see how agents use global favorites (also known as corporate favorites) in Agent Workspace, see Using Favorites in the *Agent Workspace Agent's Guide*.

In addition to managing favorites from the **Agent Desktop** Settings, you can also manage favorites on the **Agent Groups** page and the **Add/Manage User** window. No matter from what screen you add a favorite, you can include the favorite in the list of shareable favorites to be reused in all places where Global Favorites (or Personal Favorites for user accounts) are available for configuration in Agent Setup.

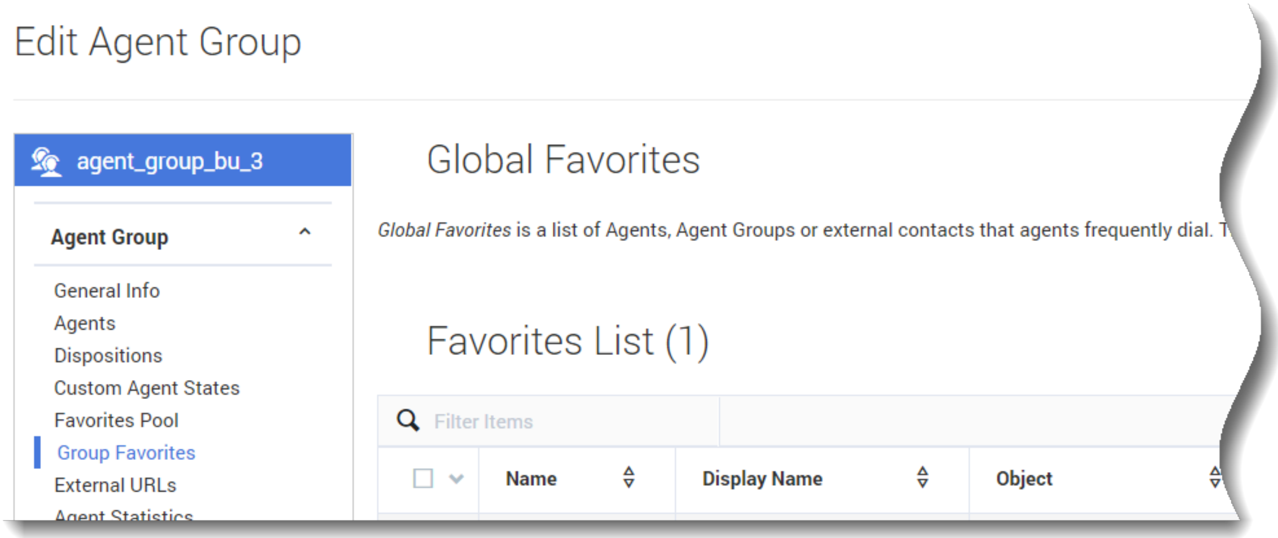
Tip

- When editing an existing Favorite, the changes are applied to all Agent Groups who have that Favorite assigned to them in their Global Favorite list.
- When deleting a Favorite from the Favorites Pool, it is removed from all Agent Groups who have that Favorite assigned to them in their Global Favorite list.
- When deleting a Favorite from an Agent Group, it is only removed from that Agent Group's Global Favorite list, It is not removed from the Favorites Pool.

Scenario

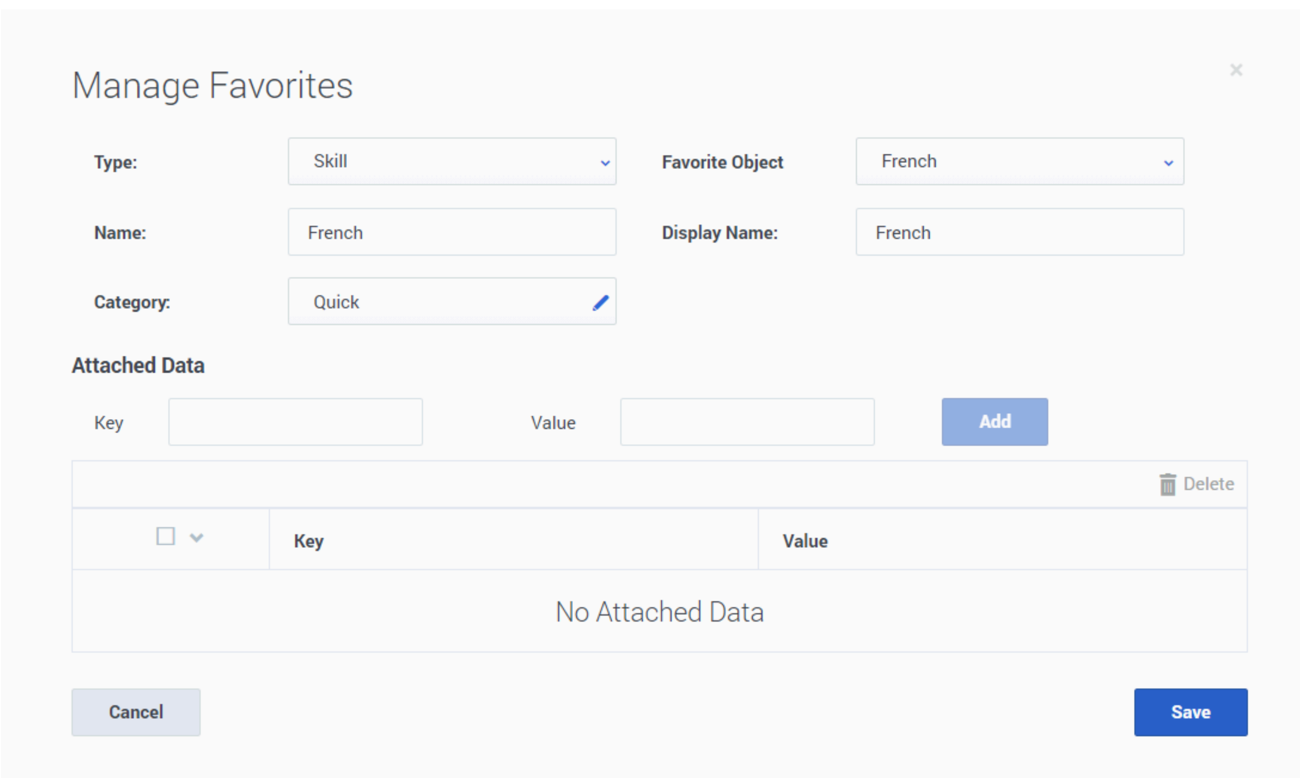
To help demonstrate how this all works, let’s observe how Henry, a contact center administrator, adds a favorite to one agent group and then applies the same favorite to another agent group.

Henry is configuring Agent Workspace settings for agent_group_bu_3. As part of the setup, he needs to create a list of contacts to be displayed in the Team Communicator for each agent that belongs to the group. For the purposes of this demonstration, he’ll add only one favorite. In reality, he would set up as many favorites as required to meet the needs of his contact center. The goal is to include a quick way for agents to transfer an interaction to an agent who can speak French.

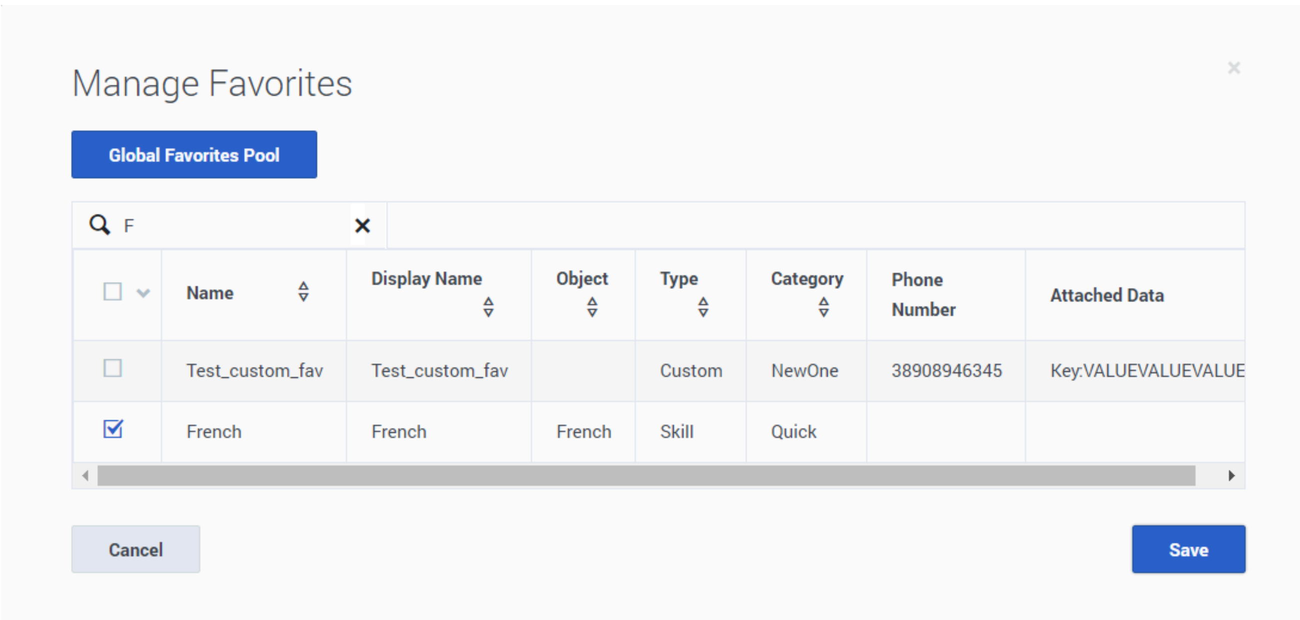


These are the steps he takes:

1. Access the Agent Group (**Agent Groups> agent_group_bu_3**)
2. Click **Agent Group > Group Favorites**.

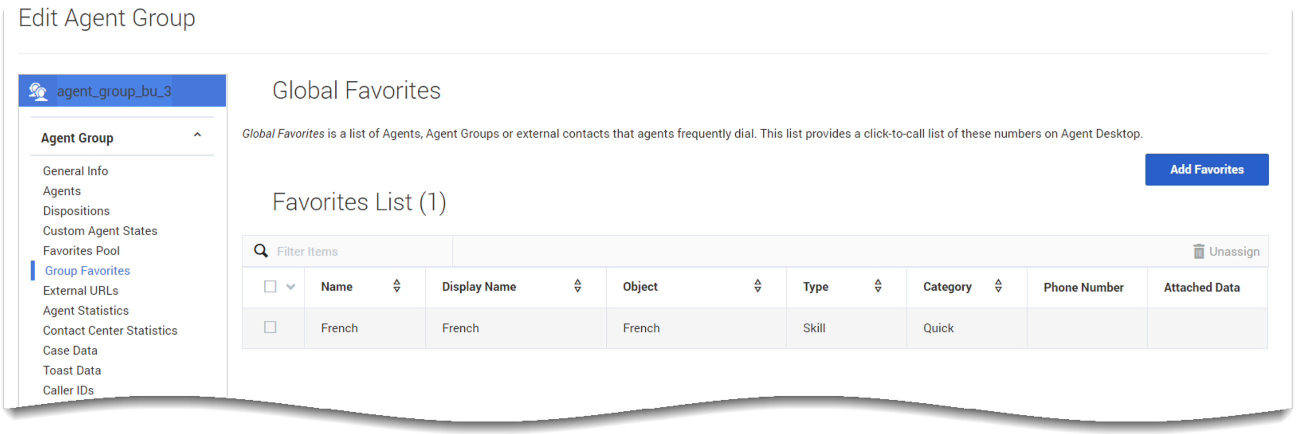


3. Henry adds the French skill as a new favorite in the global list. He:
    a. Clicks **Add Favorites > Global Favorites Pool > Create Favorite**
    b. On the **Manage Favorites** window, he selects **Skill**.
    c. Types **French** in the **Name** and **Display Name** fields.
    d. Chooses **French** from the **Favorite Object** field.
    e. Selects a category. Categories organize how the favorites are displayed in Team Communicator. Henry selects **Quick**.
    f. At this time, Henry chooses not add any **Key/Value** pairs.
4. He clicks **Save**.



The new favorite (French) is now added to the global favorites list on the **Manage Favorites** window. However, at this point, the new favorite is not assigned to "agent_group_bu_3" yet. It’s simply available in the global list. He now needs to add the new favorite to "agent_group_bu_3". Henry clicks **Add Favorites**, and uses the Filter field to search for the new **French** favorite. Henry then selects the check box beside **French** and clicks **Save**.

Result



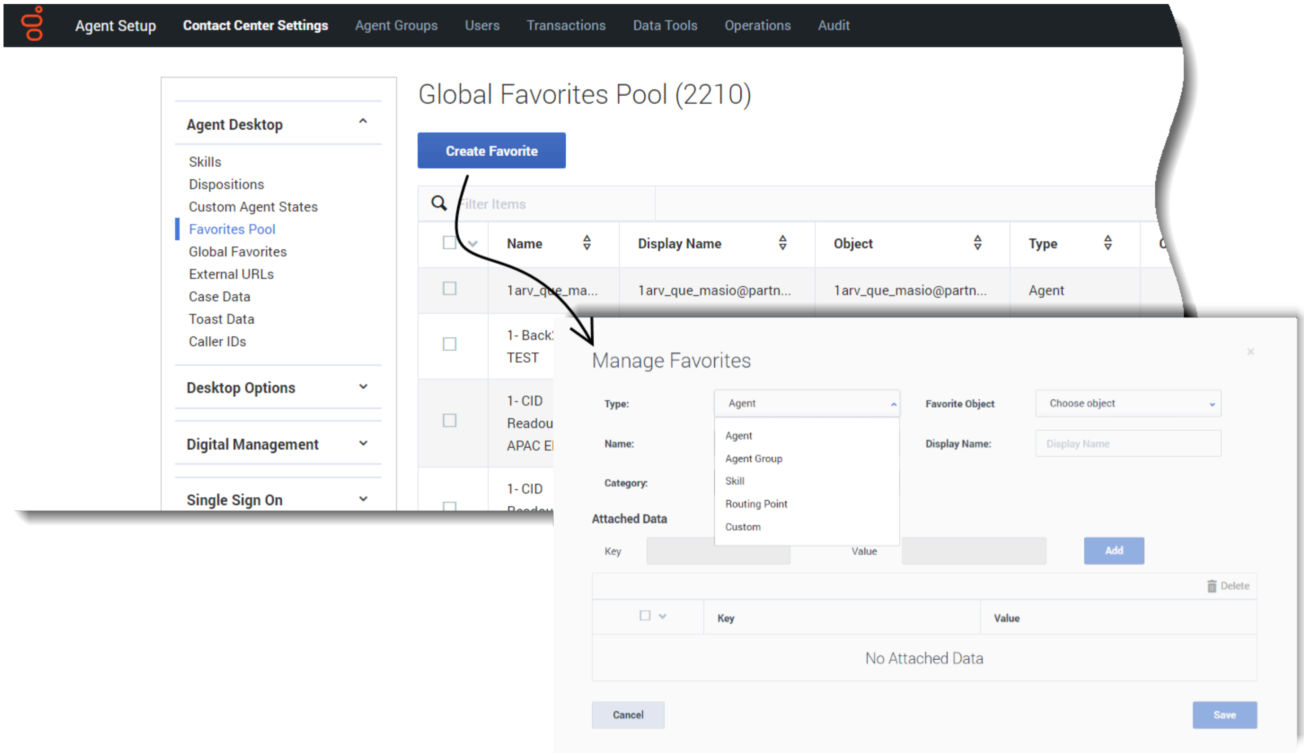
When Henry clicks **Save**, the **Manage Favorites** window closes and the new favorite is added to the **Group Favorites** list for "agent_group_bu_3", as shown.

If Henry wishes to add **French** as a group favorite for any other Agent Group, all he needs to do is:

1. From the main **Agent Group** tab at the top, click the **Agent Group** from the list.
2. From the left-hand menu, click **Agent Group > Group Favorites** to open the global list of favorites.
3. Click **Add Favorites**
4. Select **French** from the **Manage Favorites** list and click **Save**.
5. Finally, click **Save** from the **Global Favorites** window.

Now that French is listed in the global favorites list, Henry has the option in the future to easily add **French** as a personal favorite for other agent groups, individual users, or all users in the contact center.

Favorites Pool



Through the Favorites Pool, you can add, delete, and edit the global favorites available in your contact center.

- To add a new Favorite to the Pool, click **Create Favorite**, add in all the required information in the **Manage Favorites** window, and then click **Save**.

> - ## Tip
> When you choose **Custom** from the **Type** field, you get the addition of a **Phone Number** field.

- To delete a Favorite from the Pool, Use the **Filter Items** field to search for the Favorite **Name**, click the check box next to its name, and then click the trash can icon to delete. A dialogue box opens asking you to confirm your selection.
- To edit a Favorite from the Pool, Use the **Filter Items** field to search for the Favorite **Name**, double click its name to open the **Manage Favorites** window, make changes to the **Name**, **Type**, or **Category**, and then click **Save** to save your changes.

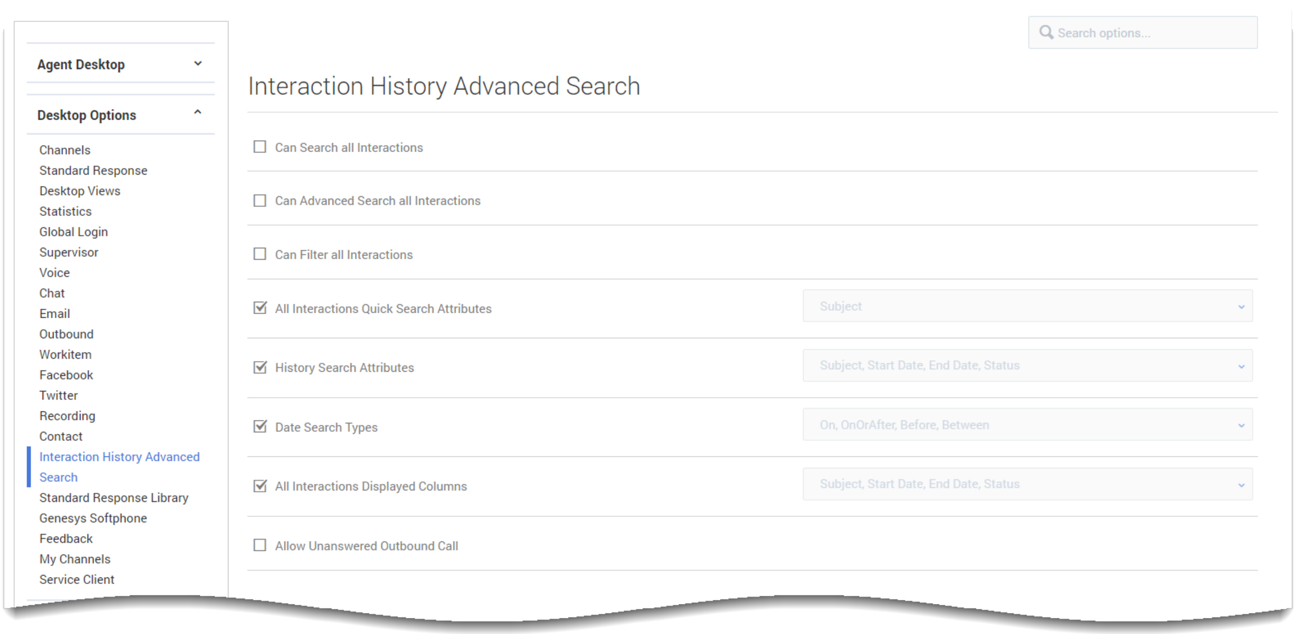
Interaction history advanced search

-
- Administrator

Configure search for interaction history so agents can find previous interactions in Agent Workspace.

Related documentation:

-
-



In the **Interaction History Advanced Search** section, you can configure the following options:

- **Can Search all Interactions** allows an agent to search among all interactions.
- **Can Advanced Search all Interactions** allows an agent to conduct an advanced search among all interactions.
- **Can Filter all Interactions** allows an agent to filter all interactions.
- **All Interactions Quick Search Attributes** specifies the interaction attributes used to search

interactions in quick search mode of the Interaction Search view.

- **History Search Attributes** specifies the list of interaction attributes an agent can use in the Advanced Search mode of the Contact History, My History and Interaction Search views.
  Search attributes include Subject, Start/End Date, Status, Contact, From Address, Phone Number, Released Date, Sent Date, Notes, and Interaction Type.
- **Date Search Types** specifies the search types available to search the contact database by date. Types include On, On or After, Before, and Between.
- **All Interactions Displayed Columns** specifies the interaction attributes displayed in the result list of the Interaction Search view.
- **Allow Unanswered Outbound Call** specifies an interaction is created in the Universal Contact Server database, even if the outbound call is unanswered by the customer.

Standard responses

-
- Administrator

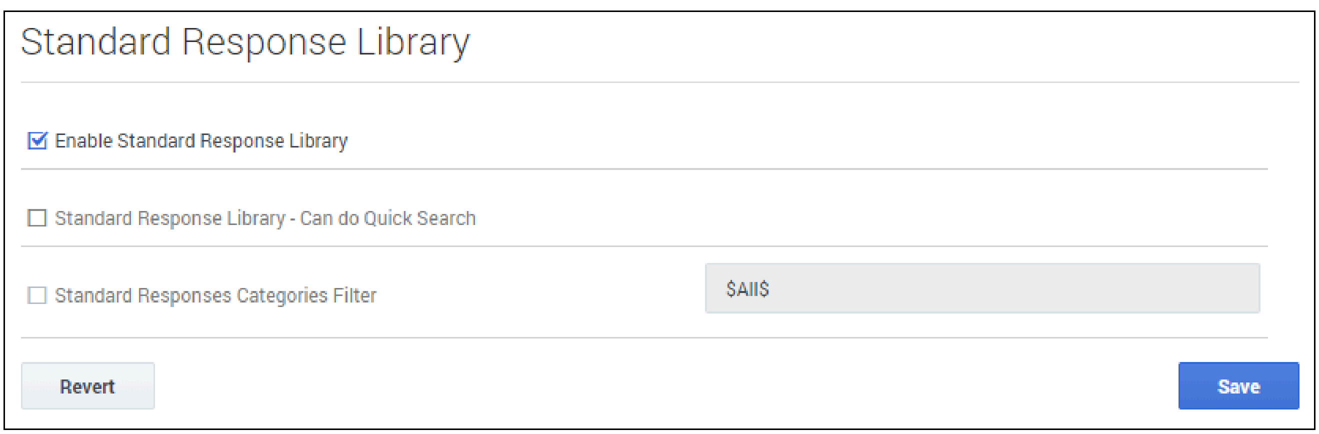
Enable standard responses for agents.

Related documentation:

-
-

Important

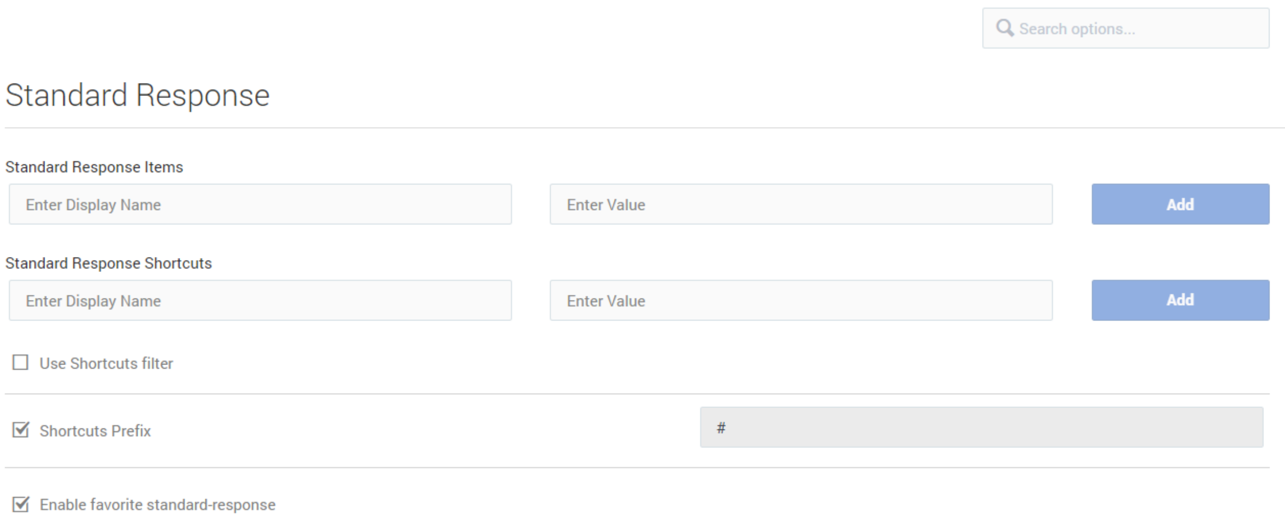
Some features described here may not apply to your organization's setup. If you need features that aren't available to you, contact your administrator or Genesys representative.



In the **Standard Response Library** section, you can enable or disable the Standard Response Library and the ability to Quick Search within the library. You can also apply a filter to specify what response categories are available to the agent in Agent Workspace.

Important

When using Workspace Web Edition 8.5 (Agent Setup v2), the **Enable Standard Response Library** option default value is `true`. When using Workspace Web Edition 9.0 (AS v3) the **Enable Standard Response Library** option default value is `false`.



In the **Standard Response** section, you can specify custom field codes, such as agent nicknames, roles, departments, and email signatures. You can format custom field codes to represent agent attributes using `Agent.`, or any custom attribute by dropping the agent modifier and using . Enter a **Display Name** and the corresponding **Value** for each field code.

Other options include:

- **Standard Response Shortcuts** — This template option can be cloned to specify the association between a keyword and a standard response defined in Knowledge Manager. An agent can type the keyword in a text media view and press CTRL + SPACE to have it automatically replaced by the rendered text of the associated standard response.
- **Use Shortcuts filter** — Enables an agent to filter Standard Responses in the Standard Responses tree view to show only those with shortcuts.
- **Shortcuts prefix** — Specifies a prefix to identify a keyword associated to a standard response.
- **Enable favorite standard-response** — Enables agents to use favorites for standard responses.

Enable external URLs

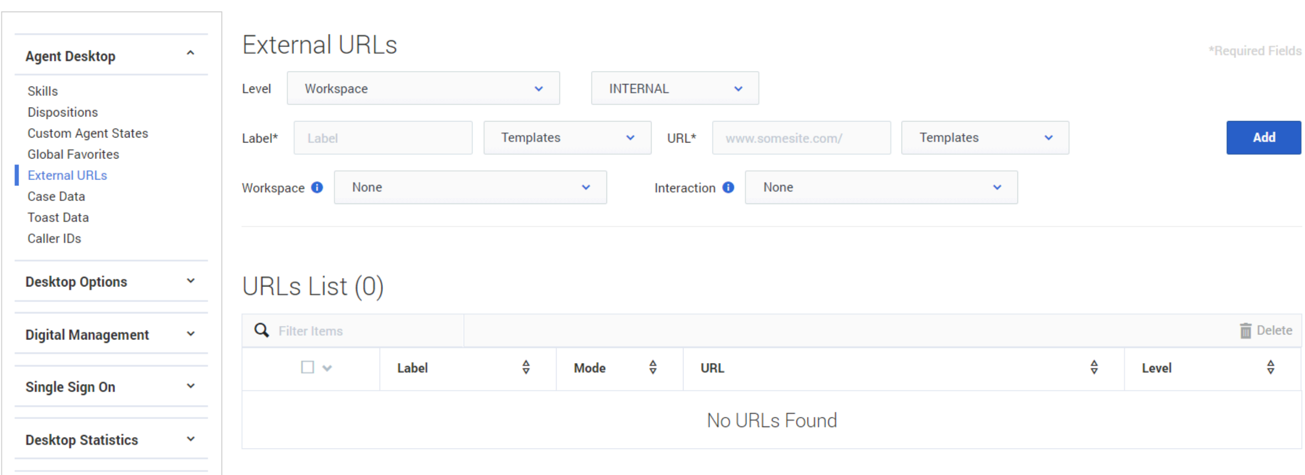
- 
- Administrator

Integrate external and internal websites into your agent's main view in Agent Workspace.

Related documentation:

-
-

At the Agent Workspace level, the external website is displayed in dedicated tabs. These tabs allow you to access the website without leaving Agent Workspace.



At the interaction level, there are two ways to display websites depending on the main interaction type.

- For voice, the external website is displayed in the background when an interaction is selected. When the interaction is unselected or closed, the external website is replaced with the previous panel displayed in the background.
- For multimedia, the external website is displayed in a dedicated view in the case data.

To add a URL to the list, select **Workspace** or **Interaction** from the **Level** menu, type a label for the

URL, type or paste the URL in the URL field, and click **Add**.

To enable an external URL (in other words, one that was created outside of Agent Setup):

- For a Workspace Level, chose the external URL from the **Workspace** menu. Changes are applied automatically when you click the **Save** button.
- For an Interaction Level, chose the external URL from the **Interaction** menu. Changes are applied automatically when you click the **Save** button.

Depending on the Level you choose, Workspace or Interaction, the following options populate in the **Templates** menus for both Label and URL:

Workspace:

- `Agent.FullName`
- `Agent.UserName`
- `Agent.LastName`
- `Agent.FirstName`
- `Agent.EmployeeId`

Interaction:

- `Agent.FullName`
- `Agent.UserName`
- `Agent.LastName`
- `Agent.FirstName`
- `Agent.EmployeeId`
- `AttachedData.{{attached-data-key-name}}`
- `Interaction.id`
- `AttachData.KVPName`

An external web site URL can be defined using the `$AttachedData.Y$` parameter to have flexible text in the URL where Y represents an attached data name.

Warning

- If the `$AttachedData.Y$` parameter is specified for the external website URL, and Y is not part of the attached data associated with an interaction, the external website is not displayed.
- If an agent manually adds the attached data to the interaction (or if it's added by any other means), then the external website tab is displayed with the content of the external website.

For example, the external website specified as follows:

```
label = Customer Location
url = https://www.bing.com/search?q=$AttachedData.CustomerLocation$
```

With this URL, if an interaction is received with a `CustomerLocation` attached data with the value of `Paris`, then the external website will be displayed in a dedicated tab called **Customer Location**, and the external web site will be `https://www.bing.com/search?q=Paris`

`mode`: Specifies the mode Agent Workspace uses to display the web application. The default value is `INTERNAL`. The possible values are:

- `INTERNAL`: The web application is displayed in a dedicated tab in Agent Workspace. It can be viewed and used when the agent clicks the tab to display it. This is the default behavior.
- `EXTERNAL`: The web application is displayed in a popup window.
- `BACKGROUND`: The web application is displayed in the background when the interaction is selected. When the interaction is deselected or closed, the third-party website is replaced with the previous panel that was displayed in the background. This mode is only applicable at the interaction level.
- `HIDDEN`: The web application is loaded but not displayed in Agent Workspace. You can use this mode to integrate Agent Workspace with a non-web application.

Enable feedback

-
- Administrator

Enable feedback so agents can report problems with Agent Workspace or Gplus Adapter.

Related documentation:

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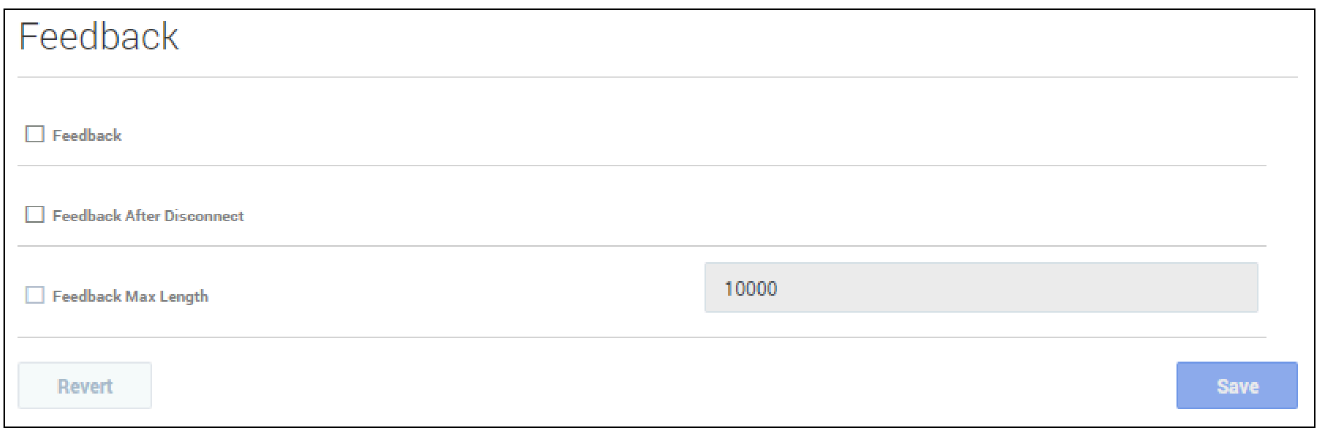
-



In the **Feedback** section, you can enable the following options:

- **Feedback** enables the **Feedback** icon to be displayed on the **About** dialog box.
- **Feedback after disconnect** enables the **Feedback** dialog box to be displayed when a user's browser unexpectedly disconnects. The **Feedback** dialog box is displayed when the user logs back in.
- **Feedback Max Length** specifies how many characters are accepted in the Feedback dialog box.

When Agent Workspace or Gplus Adapter doesn't work as expected, Genesys recommends that agents report the incident in the following ways:

- Use the **Feedback** options to capture logs and details about what the agent was doing in their most recent Agent Workspace or Gplus Adapter session. These logs are sent directly to Genesys and are available to Customer Care for later reference. To provide feedback reports to Genesys, depending on what you enable in the **Feedback** section of the **Desktop Options** page, agents can use either the:

    - **Feedback** option on the **Help** menu
    - **Feedback** dialog box that is displayed after the web browser unexpectedly disconnects and reconnects
- Afterwards, report the incident to their direct supervisor or administrator in person, following your organization's reporting policies and procedures.

When an agent reports an issue to a supervisor or administrator, that person should contact Genesys Customer Care as soon as possible to provide the reporting user's name and DN at the time of the incident, as well as the approximate time the incident occurred. At this point, the Customer Care agent should be able to retrieve the relevant logs that were sent through the **Feedback** options to determine what the issue might have been.

Dispositions

Contents

- Administrator

Manage *Dispositions*, which are descriptions of the final outcome of a call.

Related documentation:

On the **Dispositions** page, you can create a list of Disposition options to be displayed when an agent makes an outbound call or transfer. These codes are used to flag calls for reporting purposes.

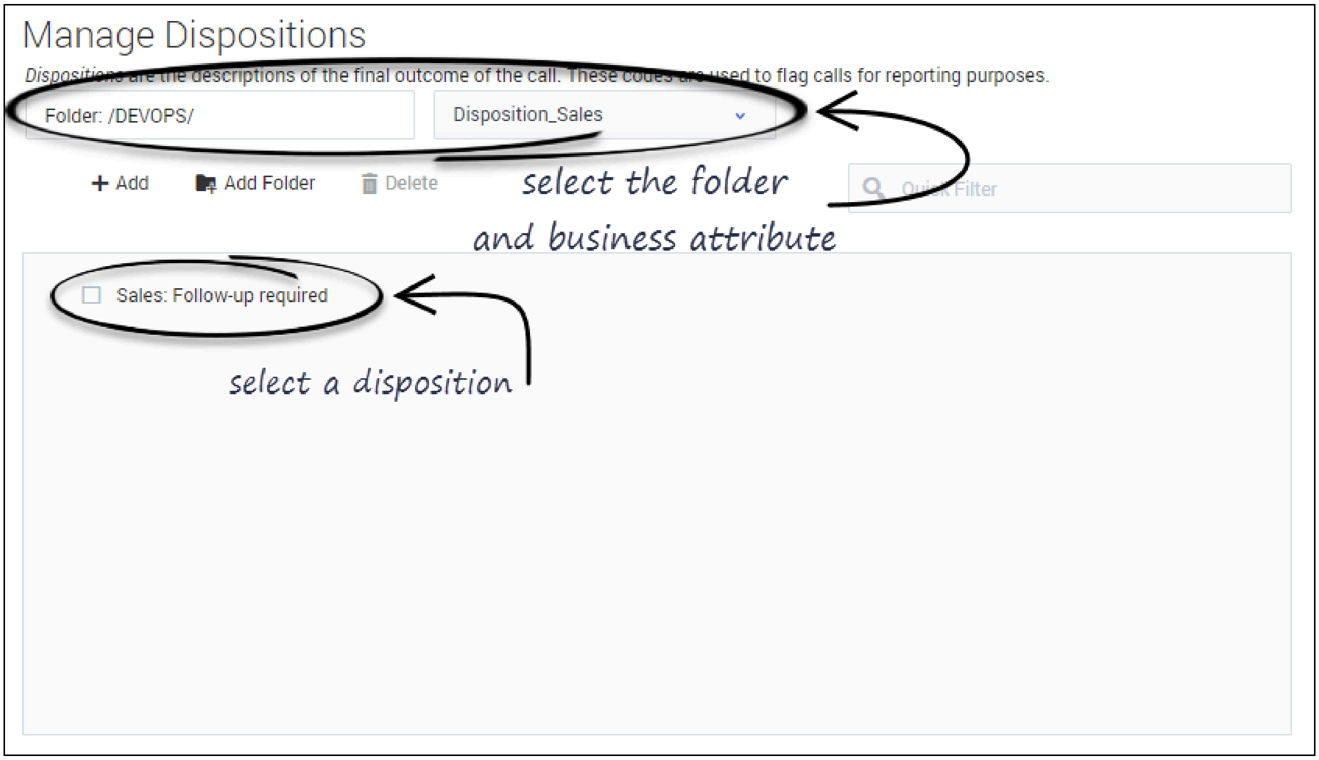
Creating a shareable Disposition business attribute

Dispositions can be used as shareable business attributes for agents, agent groups, and the global contact center. To view an article about how to create shareable business attributes, see Business attributes.

Tip

- To view an example of Disposition options in Agent Workspace, see What do I do at the end of a call?.
- In the table of configured Dispositions, in addition to selecting and adding Dispositions, you can also filter items using the **Quick Filter** field and delete a Disposition.

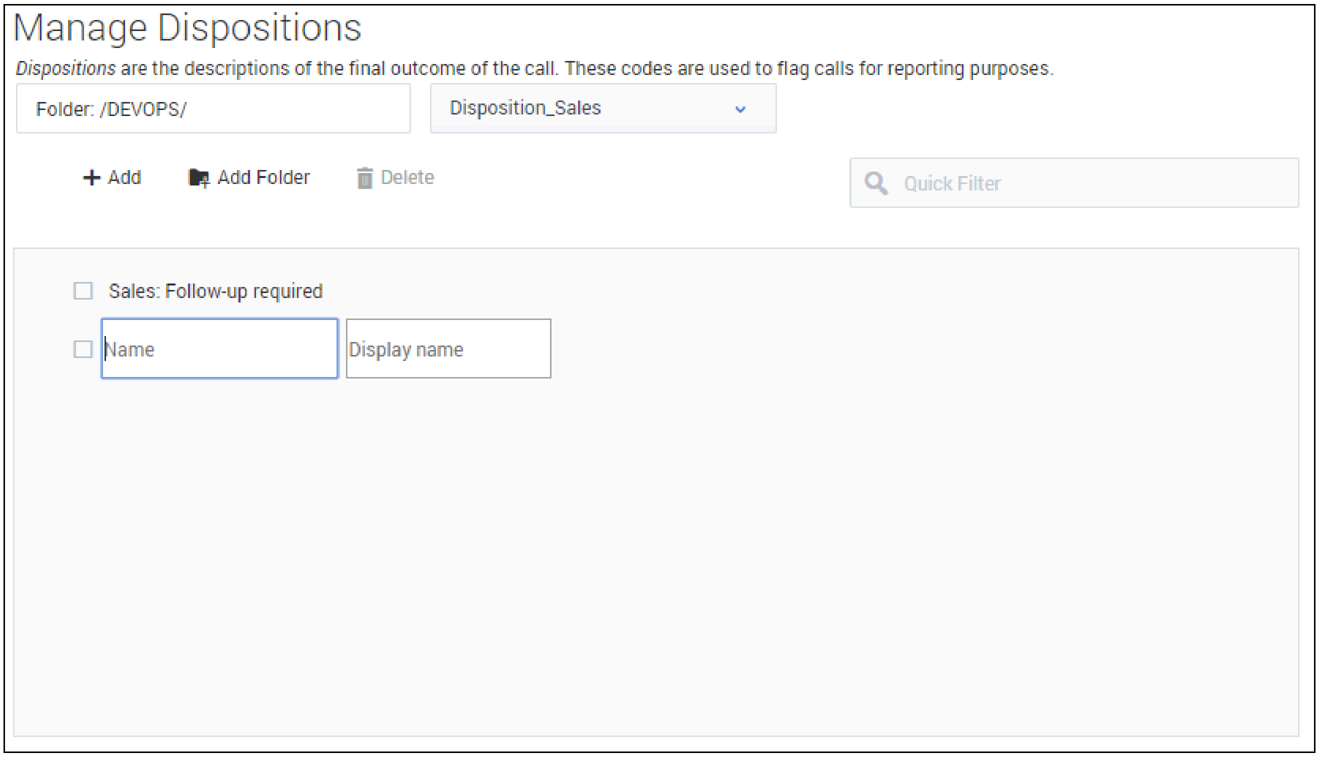
Selecting a disposition



1. Select a business attribute:
    a. Select the folder you want to view from the **Folder** drop-down list box.
    b. Click the second drop-down list box and select the business attribute for the Disposition.

       You can consider a business attribute to be the container that holds a list of Dispositions that have a common theme.
3. Select a Disposition from the list.

Adding a disposition



1. Select the folder you want to view from the **Folder** drop-down list box.
2. Click the second drop-down list box and select the business attribute into which you want to add the Disposition.
3. Click **Add**.
4. Type the **Name** and **Display Name** for the new Disposition.

Tip

To add a new folder to the list, you can do one of the following:

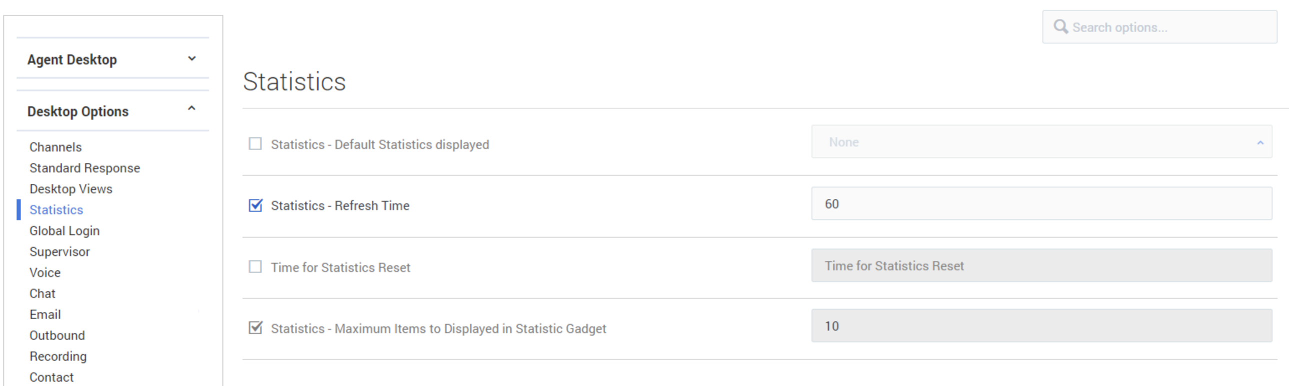
- Click **Add Folder**; or
- To add a subfolder, click the **Folder** drop-down list box, select a folder, and then click the **Add folder** icon.

Statistics options

- Administrator

Configure general statistics options in Agent Setup.

Related documentation:



In the **Statistics** section of the **Contact Center Settings** page, you can configure the following options:

- **Default Statistics displayed** specifies the statistics displayed in the Agent Workspace menu bar. The statistic specified by this option is the name of a section containing the statistic definition or the statistic object.
- **Refresh Time** defines the frequency of notification (in seconds) for statistics.
- **Time for Statistics Reset** specifies the time that you want agent and call center statistics to be reset in Agent Workspace. Indicate the time using UTC time in 24-hour format. For example, PDT midnight is 7AM in UTC and should be specified as `7:00`.
- **Maximum quantity of Gadget Statistics displayed** specifies the quantity of statistics displayed.

Agent and contact center statistics

Contents

- Administrator

Learn about the available agent and contact center statistics.

Related documentation:

-
-

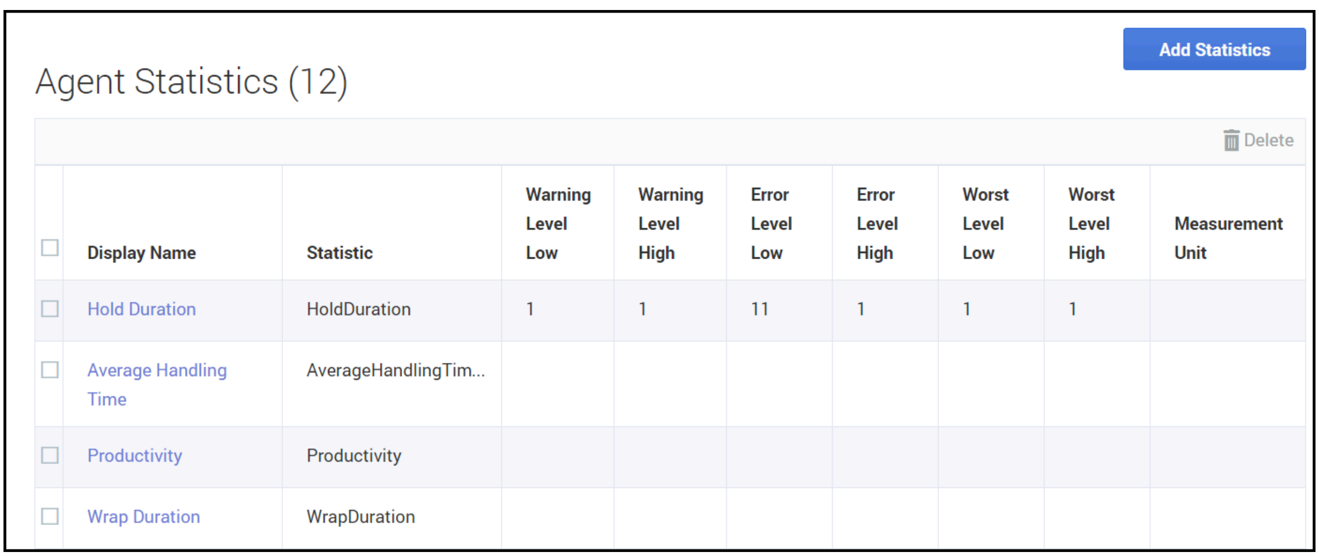
The **Desktop Statistics** section allows you to add, edit, import and export statistics to be displayed under **My Reports** and **Contact Center** panes of the Agent Workspace dashboard or the **Reports** view in Gplus Adapter. The **Statistics** tab includes three sub-tabs to help you manage your statistics:

- Agent statistics
- Contact center statistics
- Statistics definitions

Essentially, you add statistics to a global statistics list. Then from that list, you can select the statistics that you want to apply. Statistics can be re-used, meaning that if you create a statistic for a specific agent group, for example, you can then apply that favorite to another agent group.

Agent statistics

On **Agent Statistics** tab, manage the statistics that are displayed under **My Reports** to the agent. The **My Reports** page gives agents a view of the current state of their own activity.


Add Statistics

Agent Statistics (12)

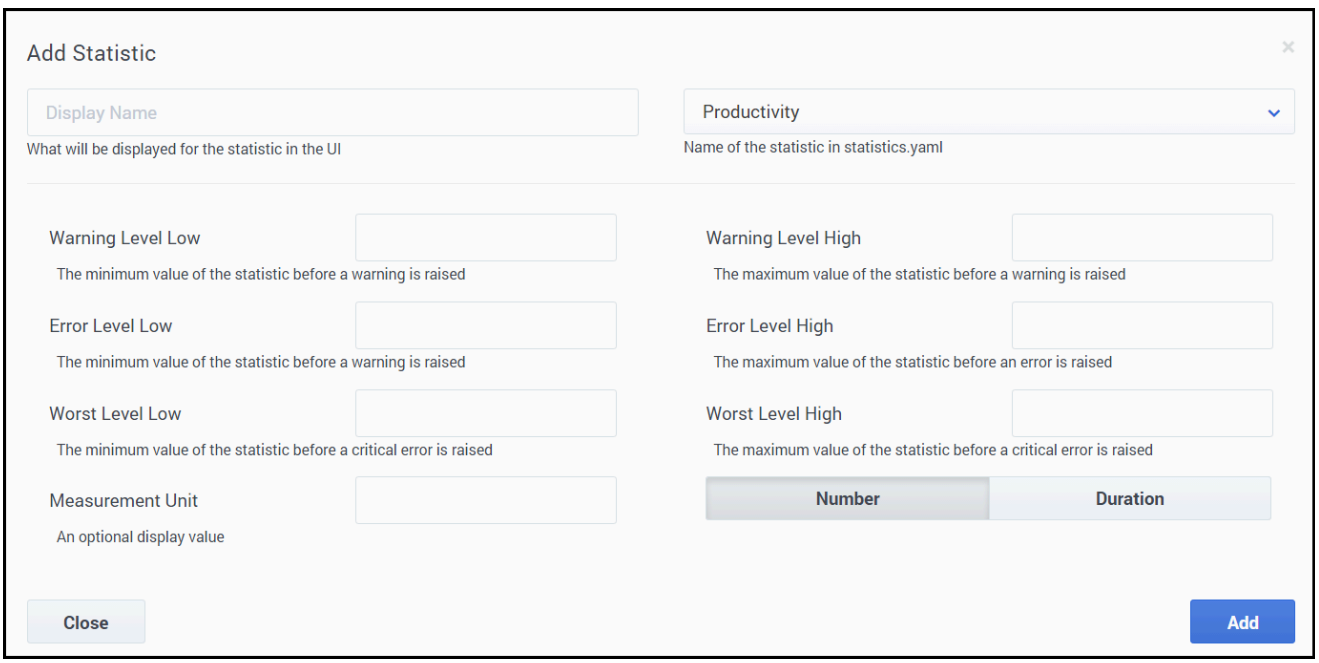
Delete

Display Name	Statistic	Warning Level Low	Warning Level High	Error Level Low	Error Level High	Worst Level Low	Worst Level High	Measurement Unit
Hold Duration	HoldDuration	1	1	11	1	1	1	
Average Handling Time	AverageHandlingTim...							
Productivity	Productivity							
Wrap Duration	WrapDuration							

To access the **Agent Statistics** tab, click **Contact Center Settings > Agent**

Statistics. The list on the page includes all agent statistics that are already configured, either by you or another administrator. For a new implementation, the list might be blank.

To add a shared statistic to the list, click **Add Statistics** to access a list of shared statistics. In the window that opens, select an option from the list of statistics, and then click **Add**.



If you don't see the statistic you want, you can create a new statistic for the global list and then add that statistic for the **Agent Statistics** list.

1. Click **Add Statistics**.
2. In the window that opens, click **Add** to create a new statistic.
3. In the **Add Statistic** window, configure the attributes.

4. Click **Add**.
   The statistic is now listed in the list on the **Add Statistic** window. This means that the statistic is now available in the global list, but is not yet assigned.
5. To assign the new statistic to **Agent Statistics** list, select the statistic and click **Add**.
   The window closes and the new statistic is assigned to the **Agent Statistics** list.

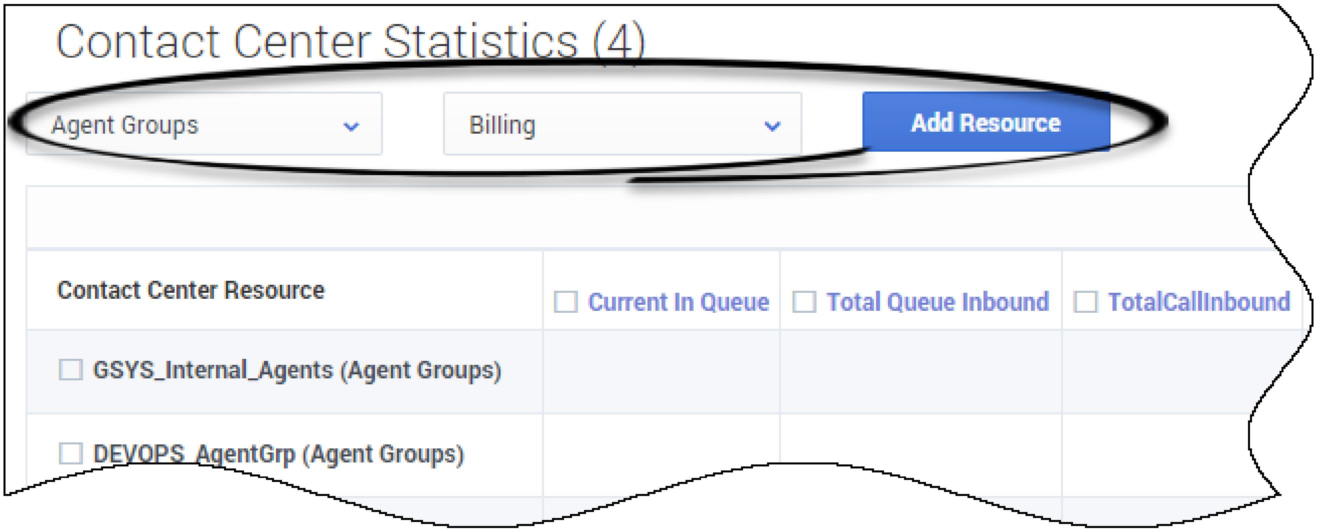
You can set the following attributes for each statistic that you specify to be displayed to agents.

- **Display Name**: The name of the statistic to be displayed.
- **Name of the statistic in the statistics.yaml file**: This must correspond to the value of the `name` attribute in the **statistics.yaml** file.
- **Warning Level Low**: The minimum value of the statistic before a warning is raised. No warnings above this value.
- **Warning Level High**: The maximum value of the statistic before a warning is raised. No warnings below this value.
- **Error Level Low**: The minimum value of the statistic before an error is raised. No errors above this value.
- **Error Level High**: The maximum value of the statistic before an error is raised. No errors below this value.
- **Worst Value Low**: The minimum value of the statistic before a critical error is raised.
- **Worst Value High**: The maximum value of the statistic before a critical error is raised.
- **Measurement Unit**: an optional display value.
- **Number**: Indicates the statistic type is numeric.
- **Duration**: Indicates the statistic type is duration (in HH:MM:SS format).

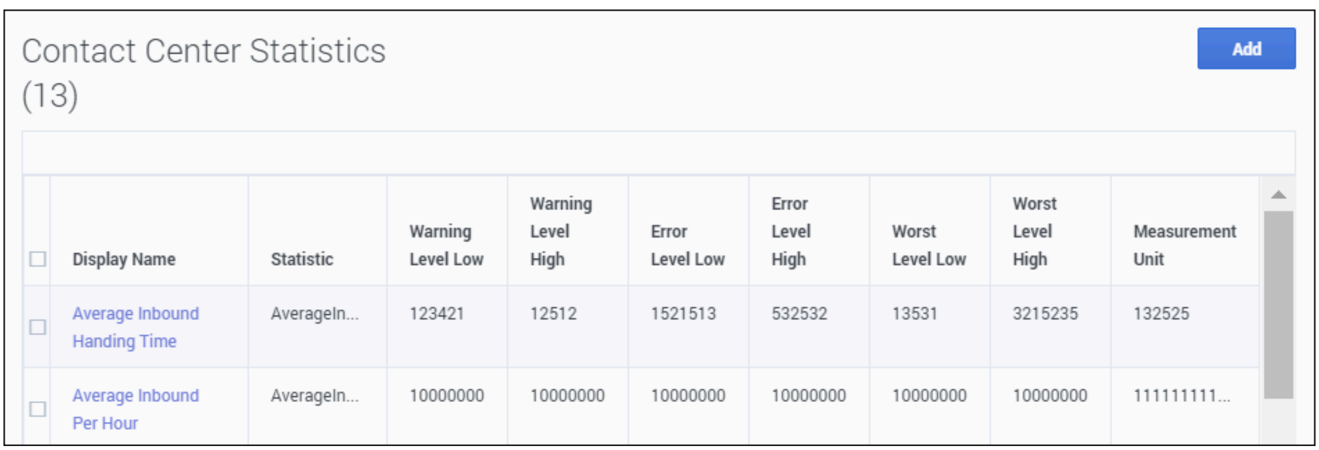
Contact center statistics

On the **Contact Center Statistics** tab, manage the statistics that are displayed under **Contact Center**. The **Contact Center** tab gives agents a view of the current state of activity for the call center.

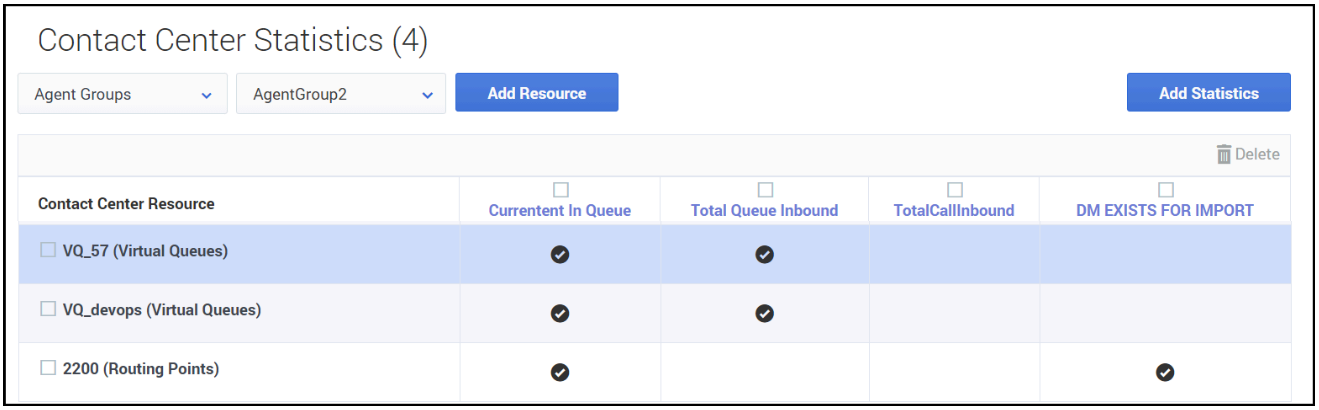
To access the **Contact Center Statistics** tab, click **Contact Center > Contact Center Statistics**.



To configure Contact Center Statistics, you must first add a resource. Resources can include agent groups, queues, DN groups, and routing points. In the first drop-down list box, select the type of resource you want to add, and then select the resource from the second drop-down list box. Click **Add Resource**. This action adds a row for the resource to the **Contact Center Statistics** table.



Then you can add statistics by clicking **Add Statistics**. The **Add Statistics** window opens, where you can either select a preconfigured statistic or create a new one (see Agent statistics). This action adds a column to the **Contact Center Statistics** table. Continue adding the statistics that you want to add to the table.



Contact Center Resource	Currentent In Queue	Total Queue Inbound	TotalCallInbound	DM EXISTS FOR IMPORT
VQ_57 (Virtual Queues)	✔	✔		
VQ_devops (Virtual Queues)	✔	✔		
2200 (Routing Points)	✔			✔

When you are done, notice the black checkmarks in the **Contact Center Statistics** table. The black checkmarks indicate which statistics apply to each resource. For example, the **current number in queue** statistic does not apply to agent groups. Agent desktops shows only statistics with check marks; other desktops show only statistics with hyphens (-).

> **Important**
>
> Agents can only see Route Points on switches they are given permission to view. For example: Your Contact Center Statistics are configured to monitor the following routing points: RP1, RP2, and RP3. RP1 belongs to one switch while RP2 and RP3 belong to another switch. An agent who is only configured to log into the switch that contains RP1 can only see RP1 in the Contact Center Statistics. RP2 and RP3 are not visible to the agent because they belong to a switch that agent doesn't have permission to access.

Statistics definitions

Using the **Statistic Definitions** tab, you can add, delete, edit, import, and export statistic definitions. The supported formats for the statistic definition files are: .CSV and .YAML.

> **Important**
>
> The Import and Export features are only available for Workspace Web Edition 8.5.

About CSV files

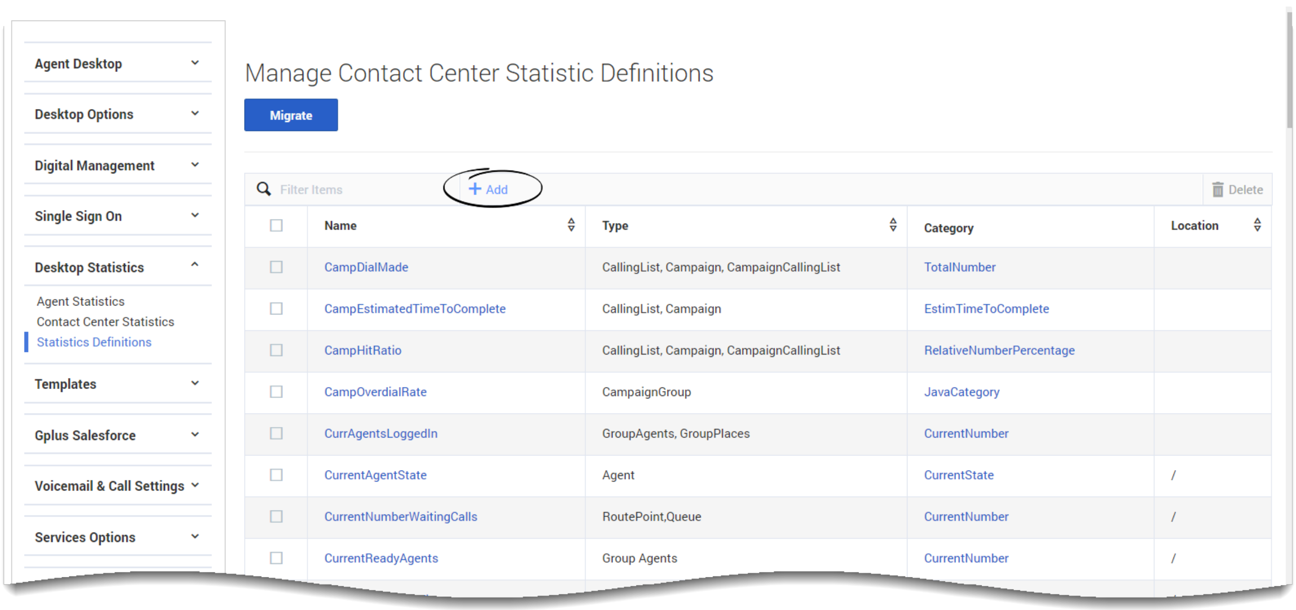
The .CSV file must be a text file in a comma-separated format. In the source file each line represents a single statistic.

About YAML files

Use a YAML file to import custom statistics from a valid .YAML file. The following example shows one custom statistic from a sample .YAML file:

```
name: ReadyDuration

 objectType: AGENT
 notificationMode: PERIODICAL
 notificationFrequency: 10
 statisticDefinitionEx:
   category: TotalAdjustedTime
   intervalType: GrowingWindow
   mainMask: WaitForNextCall
   subject: DNStatus
   dynamicTimeProfile: '8:00'
   dynamicFilter: MediaType=voice
 saveHistory: false
 insensitivity: 1
 location: /
```

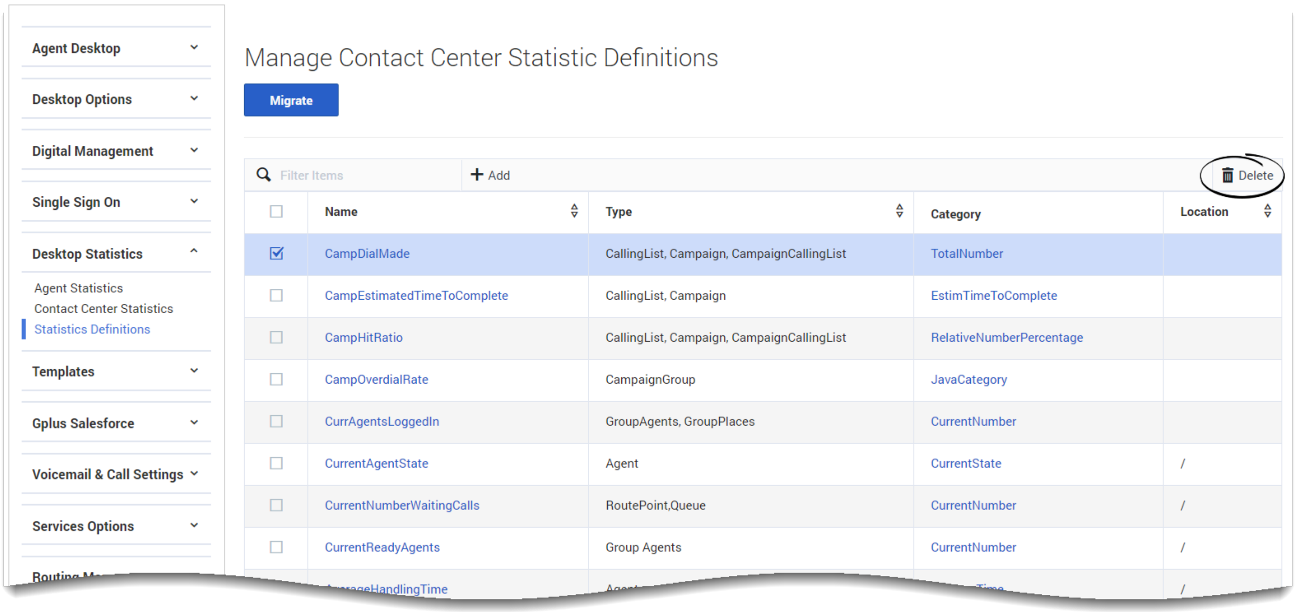


How do I add a custom statistic definition?

To add a new custom statistic definition, click **Add**, and choose an existing statistic definition to start from, then click **Next**. After entering all the required information into the form (all fields marked with an asterisk are mandatory), click **Save**.

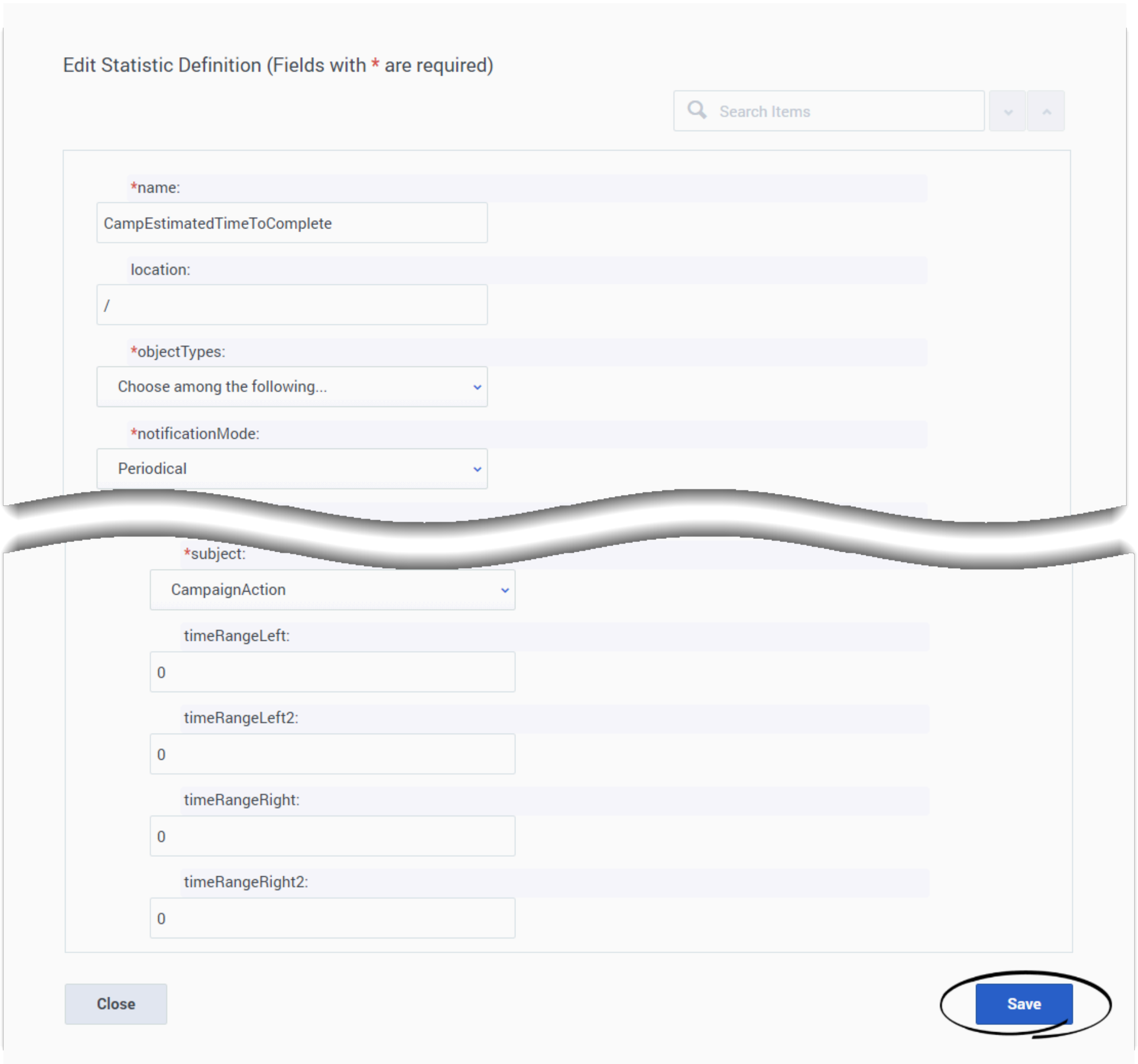
> Important

When creating a new statistic definition, Agent Setup does not require the `mainMask` field to be populated when using the statistic category `ServiceFactor1`.



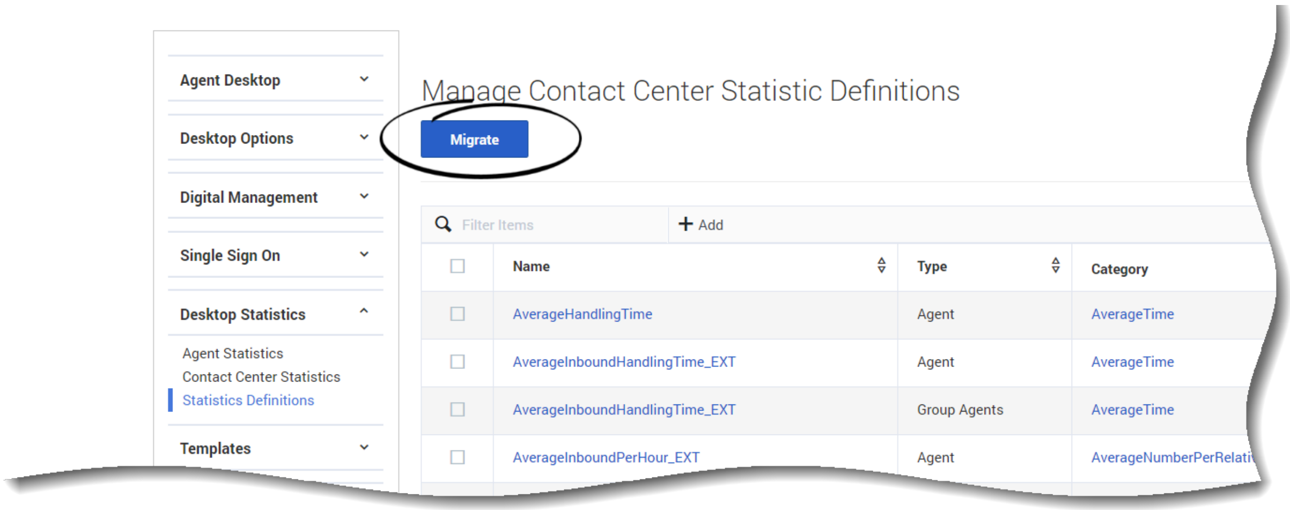
How do I delete a custom statistic definition?

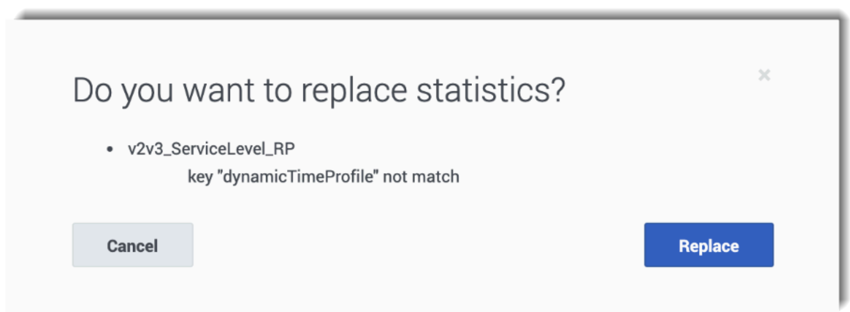
To delete a custom statistic definition, click the checkbox next to the statistic name and then click **Delete**. A confirmation dialogue box appears. Click **Delete.**



How do I edit a custom statistic definition?

To edit a custom statistic definition, click the statistic name to open the **Edit Statistic Definition** window. Make any necessary changes and click **Save**.



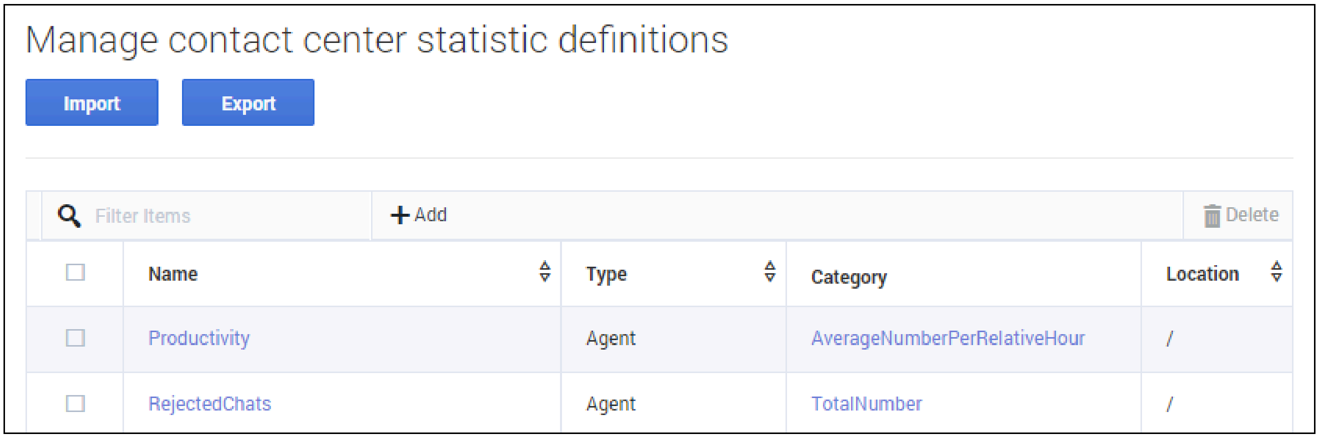


How do I migrate a statistic definition to 9.0?

To migrate a custom statistic definition, check the checkbox next to the statistic name and click **Migrate**.

Important

If any conflicts are found, Agent Setup opens a window asking you to confirm you wish to **Replace** the statistics, or **Cancel** the action.



How do I import custom statistic definitions?

> **Important**
> The Import feature is only available for Workspace Web Edition 8.5.

To import a .CSV or .YAML file that contains your custom statistic definitions, click **Import**, select your file, and then click **Open**. User Setup validates the file and indicates which, if any, values need to be corrected. If you receive such a message, make the recommended corrections and then try again.

How do I export statistic definitions?

> **Important**
> The Export feature is only available for Workspace Web Edition 8.5.

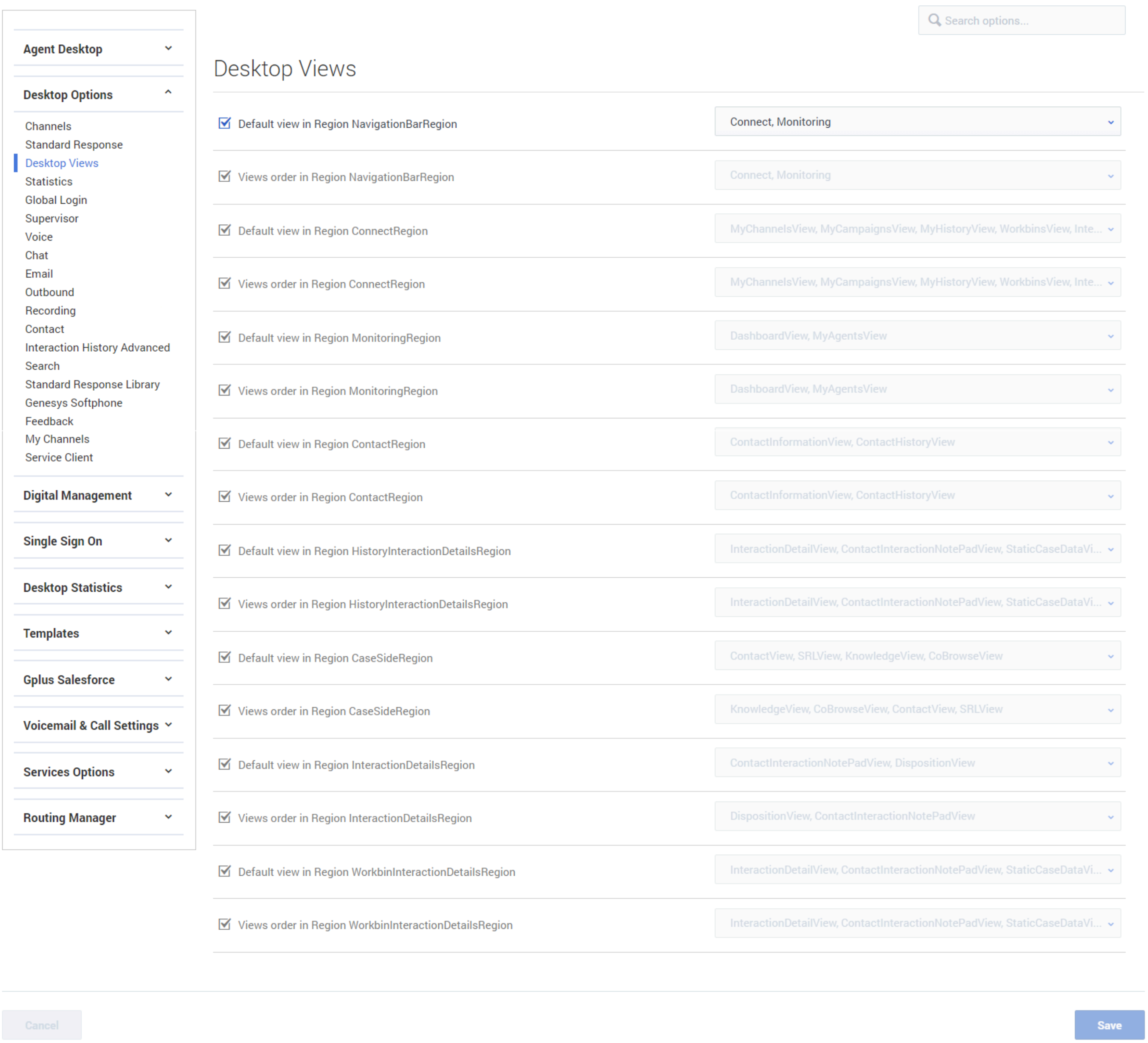
You can export your statistic definitions to an external .CSV or .YAML file. You can select your custom statistics, global statistics, or both. Then you can choose which file type to export. The exported file downloads to your local computer.

Desktop Views options

- 
- Administrator

Use the information below to configure your Desktop Views in Agent Setup. To find out more information about all the different views available within Agent Workspace, see the topic Navigating Agent Workspace for a helpful video of the Main view as well as detailed information on such topics as the Navigation bar, the Side bar, and the Interaction bar.

Related documentation:



In the **Desktop Views** section of the **Contact Center Settings** page, you can configure the options, below.

Important

- For **default view** options, the default view is the first configured view, if visible; else it's the second configured view, if visible, and so on. If the default view option is not configured, then the default setting is used. If you do not specify all the options, then the default order is used except where an item order is specified.

- For **views order** options, the default ordering is used if the views order option is not configured. If you do not specify all the options, then the default setting is used for any item not specified.

- **Default view in Region NavigationBarRegion** specifies, in precedence order, the view selected by default in the Navigation Bar Region. Valid values include, `Connect`, `Monitoring`.
- **Views order in Region NavigationBarRegion** specifies the order (left to right, top to bottom) in which the views are displayed in the Navigation Bar Region. Valid values include, `TeamCommunicatorView`, `NotificationsView`, `VoiceMailView` , `PerformanceTrackerView`.
- **Default view in Region ConnectRegion** specifies, in precedence order, the view selected by default in the Connect Region. Valid values include, `MyChannelsView`, `MyCampaignsView`, `MyHistoryView`, `WorkbinsView`, `InteractionsSearchView`, `ContactDirectoryView`.
- **Views order in Region ConnectRegion** specifies the order (left to right, top to bottom) in which the views are displayed in the Connect Region. Valid values include, `MyChannelsView`, `MyCampaignsView`, `MyHistoryView`, `WorkbinsView`, `InteractionsSearchView`, `ContactDirectoryView`.
- **Default view in Region MonitoringRegion** specifies, in precedence order, the view selected by default in the Monitoring Region. Valid values include, `DashboardView`, `MyAgentsView`.
- **Views order in Region MonitoringRegion** specifies the order (left to right, top to bottom) in which the views are displayed in the Monitoring Region. Valid values include, `DashboardView`, `MyAgentsView`.
- **Default View in Region ContactRegion** specifies, in order of precedence, the view selected by default in the Contact region. Valid values include, `ContactInformationView`, `ContactHistoryView`.
- **Views order in Region ContactRegion** specifies the order (left to right, top to bottom) in which the views are displayed in the Contact Region. Valid values include, `ContactInformationView`, `ContactHistoryView`.
- **Default view in Region HistoryInteractionDetailsRegion** specifies, in order of precedence, the view selected by default in the History Interaction Details Region. Valid values include, `InteractionDetailView`, `ContactInteractionNotePadView`, `StaticCaseDataView`.
- **Views order in Region HistoryInteractionDetailsRegion** specifies the order (left to right, top to bottom) in which the views are displayed in the History Interaction Details Region. Valid values include, `InteractionDetailView`, `ContactInteractionNotePadView`, `StaticCaseDataView`.
- **Default view in Region CaseSideRegion** specifies, in order of precedence, the view selected by default in the Case Side Region. Valid values include, `ContactView`, `ExtensionSectionName`, `SRLView`, `KnowledgeView`, `CoBrowseView`.
- **Views order in Region CaseSideRegion** specifies the order (left to right, top to bottom) in which the views are displayed in the Case Side Region. Valid values include, `KnowledgeView`, `ExtensionSectionName`, `CoBrowseView`, `ContactView`, `SRLView`.
- **Default view in Region InteractionDetailsRegion** specifies, in order of precedence, the view selected by default in the Interaction Details Region. Valid values include, `ContactInteractionNotePadView`, `DispositionView`.
- **Views order in Region InteractionDetailsRegion** specifies the order (left to right, top to bottom) in which the views are displayed in the Interaction Details Region. Valid values include, `DispositionView`, `ContactInteractionNotePadView`.

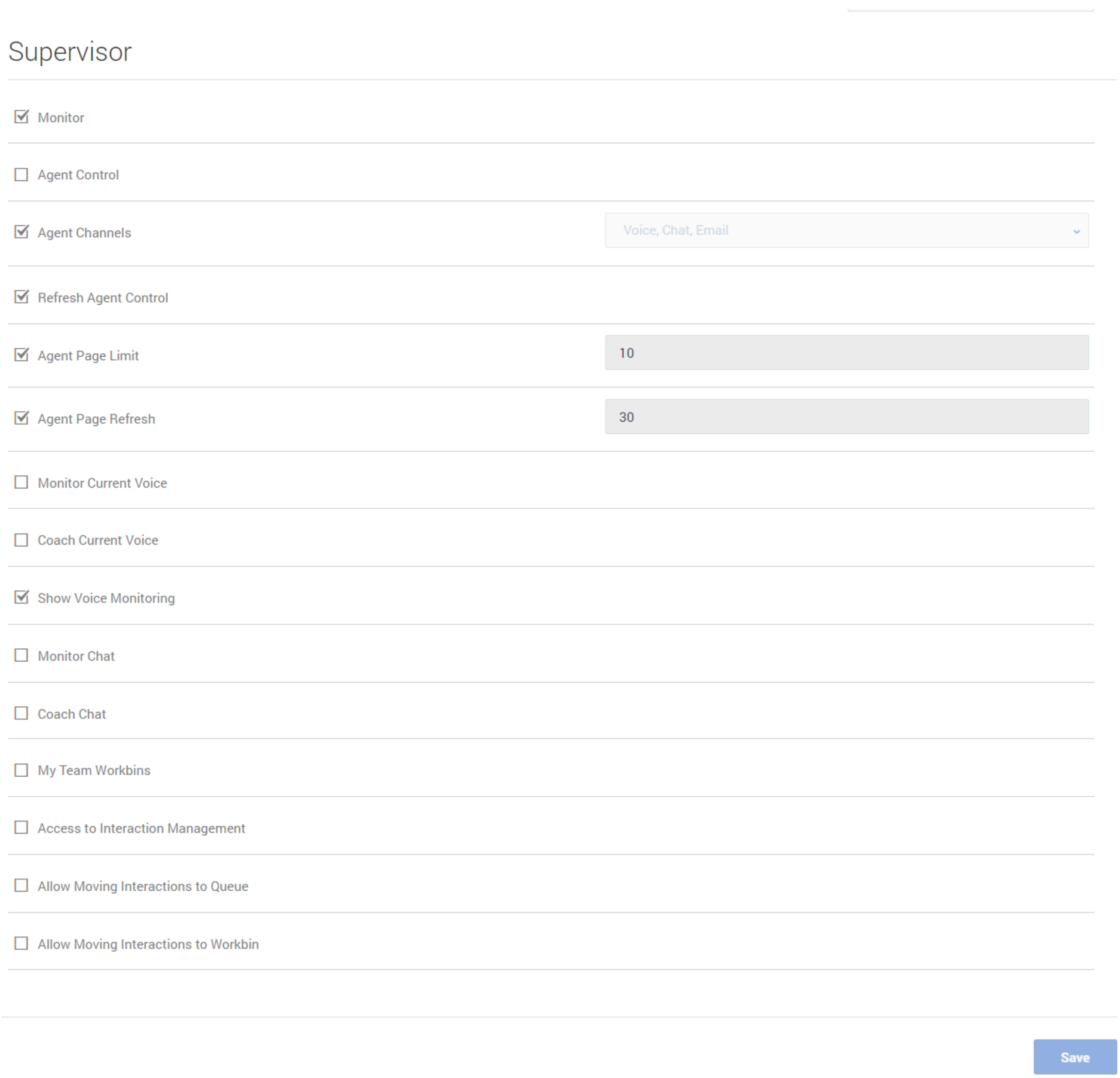
- **Default view in Region WorkbinInteractionDetailsRegion** specifies in precedence order the view selected by default in the Workbin Interaction Details Region. Valid values include, `InteractionDetailView`, `ContactInteractionNotePadView`, `StaticCaseDataView`.
- **Views order in Region WorkbinInteractionDetailsRegion** specifies the order (left to right, top to bottom) in which the views are displayed in the Workbin Interaction Details Region. Valid values include, `InteractionDetailView`, `ContactInteractionNotePadView`, `StaticCaseDataView`.

Supervisor options

- 
- Administrator

Learn about Supervisor options available in Agent Setup.

Related documentation:



In the **Supervisor** section under **Desktop Options**, configure the following options:

- **Monitor** enables supervisor and team lead monitoring on agent interactions. See Supervising agents for more details.
- **Agent Control** allows the supervisor or team lead to access the **My Agents** view.
- **Agent Channels** defines the channels to be displayed in the **My Agents** view.
- **Refresh Agent Control** enables the manual refresh of agent states.
- **Agent Page Limit** specifies the maximum number of rows displayed per page in the My Agents tab.

- **Agent Page Refresh** specifies the frequency, in seconds, to refresh the list of users. Auto-refresh turns off when this option is set to '0' (zero).
- **Monitor Current Voice** allows the supervisor or team lead to monitor voice interactions.
- **Coach Current Voice** allows the supervisor or team lead to coach voice interactions.
- **Show Voice Monitoring** notifies agents when the current call is being monitored by a supervisor or team lead.
- **Cross Site Voice Monitoring** allows the supervisor or team lead to supervise an agent located at a different location. This option is only visible in Agent Setup while in v2 mode.
- **Monitor Chat** allows the supervisor or team lead to monitor chat interactions.
- **Coach Chat** allows the supervisor or team lead to coach chat interactions.
- **My Team Workbins** enables supervisors to see the workbins of the agents in their Agent Group.
- **Access to Interaction Management** enables supervisors to see Interaction Management.
- **Allow Moving Interactions to Queue** enables supervisors to move interactions from displayed workbins to available queues.
- **Allow Moving Interactions to Workbin** enables supervisors to move interactions from displayed workbins to other workbins.

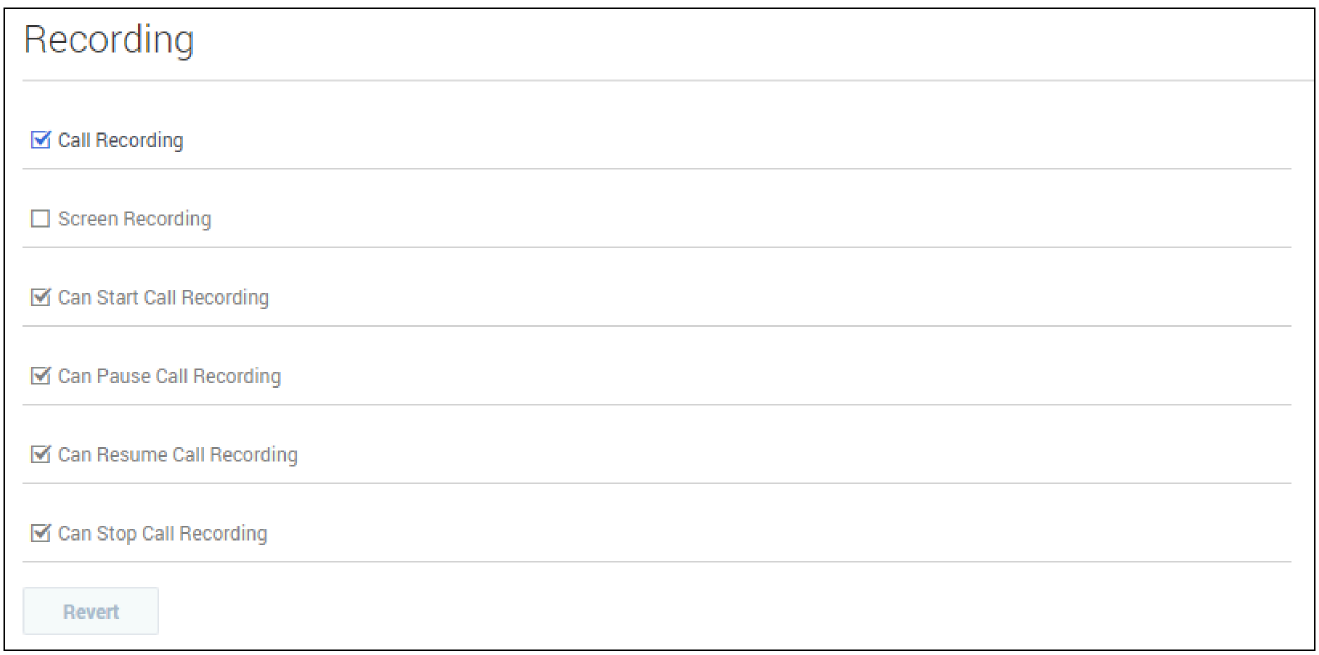
Recording options

-
- Administrator

Learn how to enable recording options in Agent Setup.

Related documentation:

-
-



In the **Recording** section, you can configure the following options:

- **Call Recording** sets the agent's desktop to record all voice interactions.
- **Screen Recording** sets the agent's desktop to record all screen interactions.
- **Can Start Call Recording** allows the agent to start an active recording.
- **Can Pause Call Recording** allows the agent to pause an active recording.

- **Can Resume Call Recording** allows the agent to resume an active recording.
- **Can Stop Call Recording** allows the agent to stop an active recording.

Service Client options

-
- Administrator

Learn about the Service Client options available in Agent Setup.

Related documentation:

-
-

Before using the Service Client API Reference to customize how your web application or website integrates with Agent Workspace, first set the Service Client options in Agent Setup.

In the **Service Client** section of the **Contact Center Settings** page, configure the following options:

- **Block Mark Done Timeout** specifies the duration of timeout in milliseconds. This timeout duration is started by the function `interaction.blockMarkdone()`.
- **List of User Data Read Allowed** specifies the list of keys that can be read in the user data. This applies to the UserData property of the interaction object returned by a function or an event.

- **List of User Data Write Allowed** specifies the list of keys that can be written to when using functions `interaction.setUserData()` and `interaction.deleteUserData()`.
- **Auto Login** returns an agent to their previous state if they are unexpectedly logged out of Agent Workspace.

Gplus Adapter for Salesforce options

Contents

- Administrator

Configure options for the Gplus Adapter for Salesforce.

Related documentation:

> **Important**
>
> Some features described here may not apply to your organization’s setup. If you need features that aren’t available to you, contact your administrator or Genesys representative.

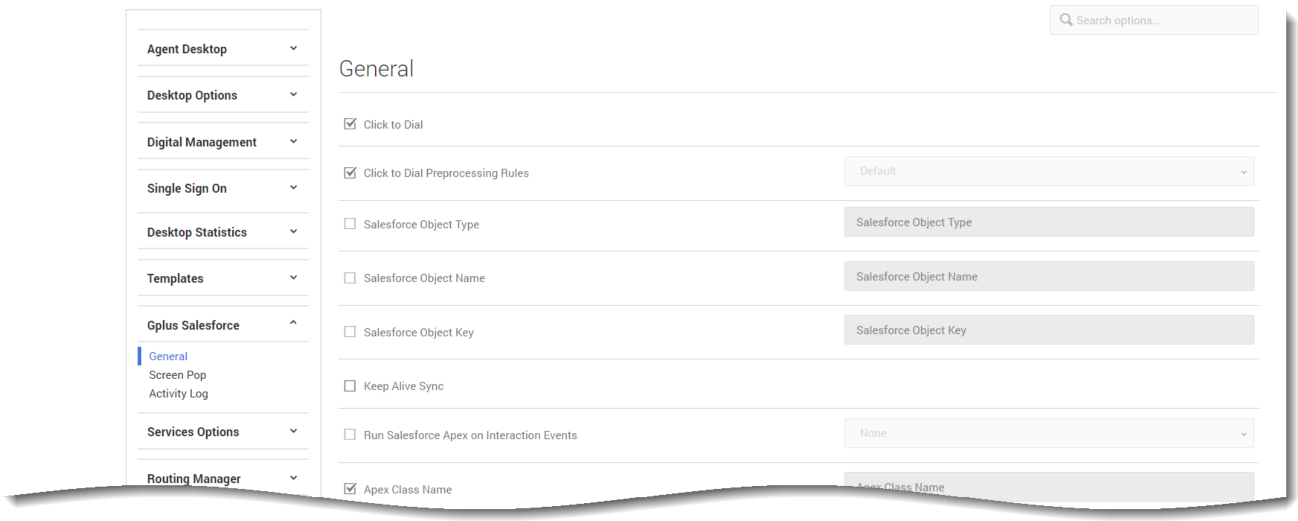
Configure options for the Gplus Adapter for Salesforce on the **Contact Center Settings** page.

The **CRM Adapter** options are organized into three sections: General, Screen Pop and Activity Log options.

The Gplus Adapter for Salesforce Administrator's Guide provides information about how to use the configuration options listed in this article. Refer to the following articles in the guide to learn about what these options do and how they work together:

- Configuring and Using General Features
- Click-to-Dial
- Screen Pop
- Activity History

General options



In the **General** section, configure the following options:

Tip

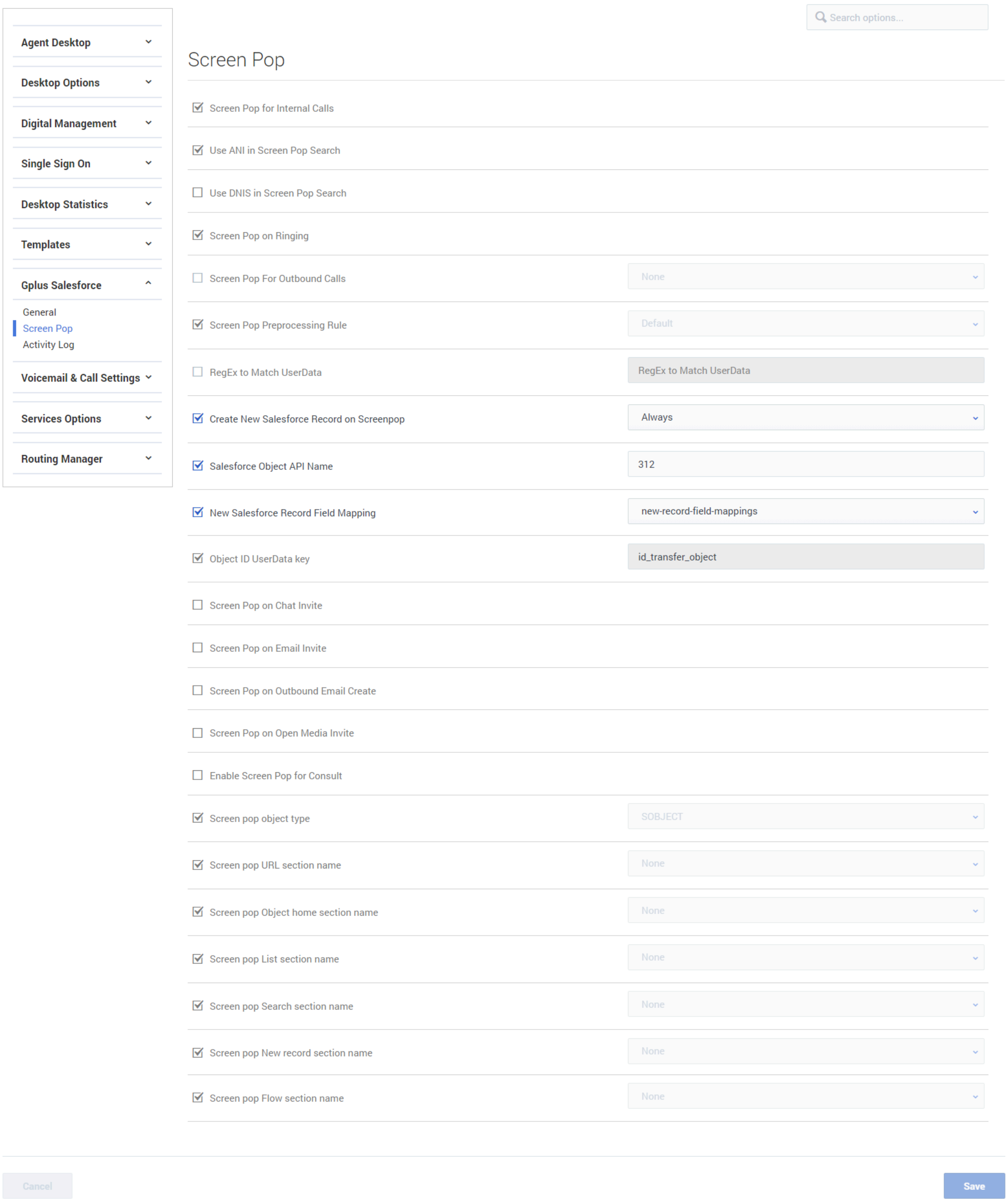
These options are described in the following articles:

- Configuring and Using General Features
- Click-to-Dial

- **Click to Dial** allows Gplus Adapter to enable Click-to-dial within in Salesforce. If this option is *not* selected, Gplus Adapter does not accept Click-to-dial requests, regardless of whether or not Click-to-dial is enabled within Salesforce.
- **Click to Dial Preprocessing Rules** specifies the rules to apply to a phone number before making a dialing request.
- **Salesforce Object Type** specifies the key that Adapter uses when saving the type of the focused Salesforce object to attached data.
- **Salesforce Object Name** specifies the key that Adapter uses when saving the name of the focused Salesforce object to attached data.
- **Salesforce Object Key** specifies the key that Adapter uses when saving the ID of the focused Salesforce object to attached data.
- **Keep Alive Sync** specifies whether to prevent the agent from being logged out of Salesforce when there is no activity in Salesforce beyond the configured time period. If enabled, Adapter refreshes the Salesforce session at short intervals and keeps the Adapter-Salesforce session alive.
- **Run Salesforce Apex on Interaction Events** specifies the interaction event which triggers Salesforce Apex to run for Voice or Digital channels.
- **Apex Class Name** configures the name for a Salesforce custom apex class.

- **Apex Data** specifies a comma-separated list of the userData key names that will be delivered to Salesforce Apex.
- **Salesforce Message Channel Name for Service Client API** specifies the name of the message channel in Salesforce for Service Client API.
- **Notifications** specifies whether Gplus Adapter displays notifications.
- **Prevent Gplus in Browser Multitab** specifies that Gplus Adapter will not work in multiple tabs.

Screen pop options



In the **Screen Pop** section, configure the following options:

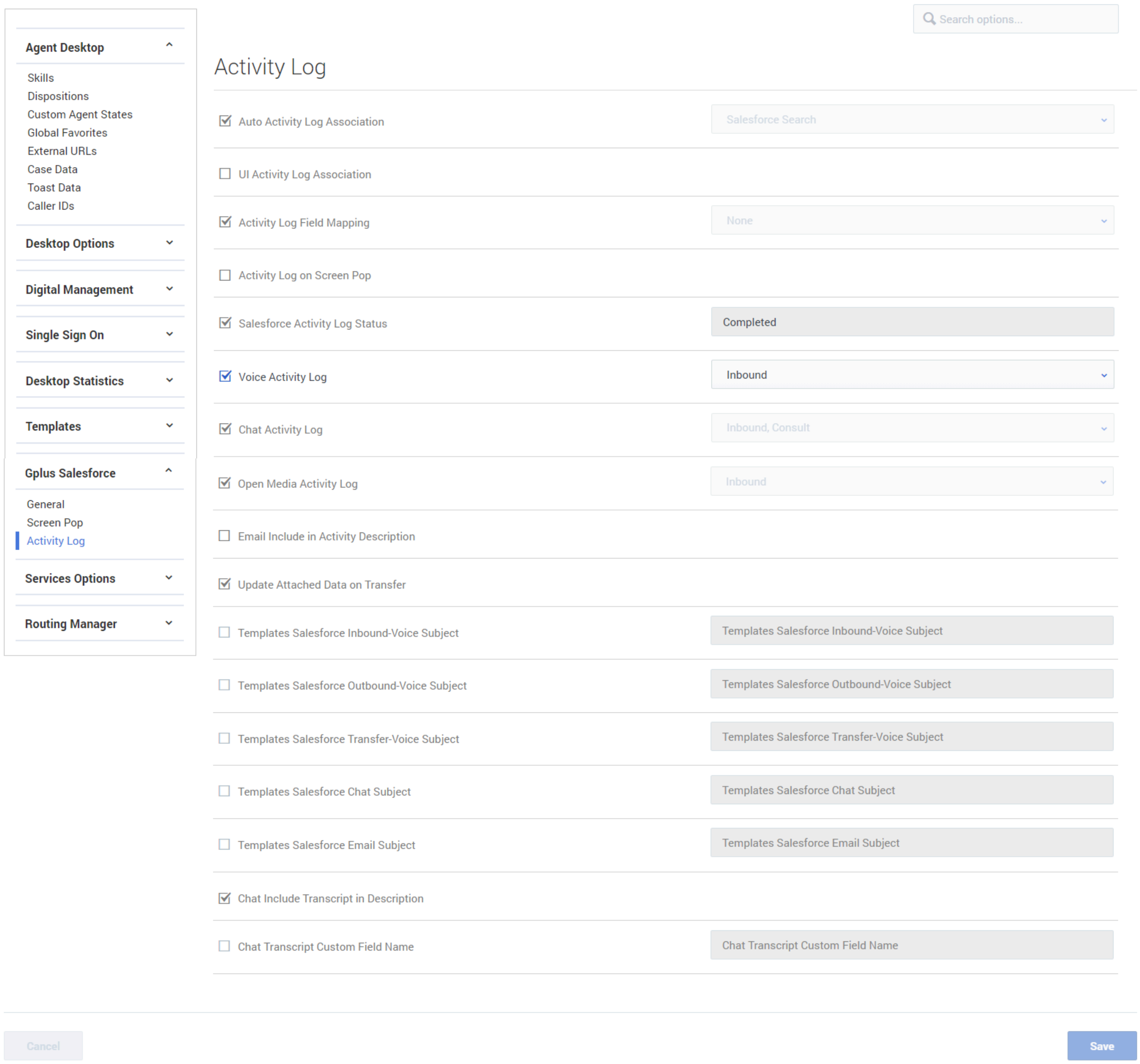
> ### Tip
> These options are described in the Screen Pop article.

- **Screen Pop for Internal Calls** specifies whether the adapter initiates a screen pop for internal calls.
- **Use ANI in Screen Pop Search** specifies whether ANI is to be used in the screen pop search.
- **Use DNIS in Screen Pop Search** specifies whether DNIS is to be used in the screen pop search.
- **Screen Pop For Outbound Calls** specifies whether the Adapter initiates screen pops in Salesforce for outbound calls. Valid values include:
  - `None` — No screen pops are initiated for outbound calls. To set the value to `None`, uncheck the option name.
  - `Dialing` — The Adapter initiates a screen pop on dialing.
  - `Established` — The Adapter initiates a screen pop when the call is established.
- **Screen Pop on Ringing** specifies whether the adapter initiates a screen pop when the call is ringing. If not enabled, or set to **False**, the adapter initiates a screen pop when the call is established.
- **Screen Pop Preprocessing Rule** specifies the preprocessing rule to apply to the ANI or DNIS before showing the screen pop. When you enable this option, you can choose the default preprocessing rules or add a rule. If you add a rule, you will need to define a **Display Name** for the rule and define the **RegEx**, **Replacement**, and **Description**.
- **RegEx to Match UserData** specifies a regular expression pattern used to match one or more UserData keys. The values for these keys are used to build the search and screen pop expression. If this option is not defined, the adapter uses the existing `cti_` prefix logic.
- **Create New Salesforce Record on Screenpop** specifies whether Gplus Adapter creates a new Salesforce record on screenpop. Values include:
  - `None`: No new Salesforce record is created. To set the value to `None`, uncheck the option name.
  - `No Matching Record`: A new Salesforce record is created when a Salesforce search returns no matching record.
  - `Always`: A new Salesforce record is created for every screenpop.
- **Salesforce Object API Name** specifies the Salesforce custom object API name. To find the API name, go to **Salesforce Setup > Object Manager > Custom Object > Details > API Name**.
- **New Salesforce Record Field Mapping** specifies the name of the configuration section where the mapping is defined. In the section, each key must correspond to an interaction UserData key, and each value must correspond to the name of the Salesforce standard or custom object field.
- **Object ID UserData key** specifies the custom UserData key that the adapter should use for the object ID of the focused page when performing a transfer.
- **Screen Pop on Chat Invite** specifies whether the adapter initiates a screen pop in Salesforce immediately after displaying a chat invite notification. If the option is not set or is set to false, the adapter initiates a screen pop only when an agent accepts the chat invite.
- **Screen Pop on Email Invite** specifies whether the adapter initiates a screen pop in Salesforce immediately after displaying an email invite notification. If the option is not set or is set to false, the

adapter initiates a screen pop only when an agent accepts the email invite.

- **Screen Pop on Outbound Email Create** specifies whether the adapter initiates a screen pop in Salesforce immediately after creating an email.
- **Screen Pop on Open Media Invite** specifies whether the adapter initiates a screen pop in Salesforce immediately after displaying the open media invite notification. If the option is not set or is set to false, the adapter initiates a screen pop only when an agent accepts the open media invite. This option supports the items configured in the openmedia.workitem-channels.
- **Enable Screen Pop for Consult** specifies whether the adapter initiates a screen pop in Salesforce when using voice consult. This option works with option **Update Attached Data on Transfer.**
- **Screen pop object type** specifies the the type of object (for instance "URL" or "OBJECTHOME") to screen pop in Salesforce.
- **Screen pop URL section name** specifies the URL for the screen pop object type.
- **Screen pop Object home section name** specifies the object home (for instance, an account or contact) for the screen pop object type.
- **Screen pop List section name** specifies a list view for the screen pop object type.
- **Screen pop Search section name** specifies the top results section of the search page for the screen pop object type.
- **Screen pop New record section name** specifies the new record name (for instance, new account or new contact name) for the screen pop object type.
- **Screen pop Flow section name** specifies the target UI screen flow for the screen pop object type.

Activity Log options



In the **Activity Log** section, configure the following options:

> ## Tip
> These options are described in the Activity History article.

- **Auto Activity Log Association** specifies the Salesforce criterion to use to associate the Activity Log Task when the interaction is completed.

- **UI Activity Log Association** specifies whether Gplus Adapter displays the Object Association table when the interaction is completed.
- **Activity Log Field Mapping** specifies the name of the configuration section where the mapping is defined.
- **Activity Log on Screen Pop** specifies whether Adapter creates the activity in Salesforce on screen pop and modifies logged activity when interaction is completed. Activity on screen pop is created for all interaction types supported by Gplus Adapter. This option depends on **Screen Pop for Internal Calls** being selected and the value of **Voice Activity Log** containing **Inbound** and **Internal**.
- **Salesforce Activity Log Status** specifies the custom task status to be applied when an activity log is created by Adapter. Prerequisite: The status must exist in the Salesforce Task Status Picklist.
- **Voice Activity Log** specifies the call types for the adapter to create in the activity history for Salesforce.
- **Chat Activity Log** specifies the chat types for the adapter to create in the activity history for Salesforce.
- **Open Media Activity Log** specifies the open media types for the adapter to create in the activity history for Salesforce. To disable the open media activity log creation, set the option to None.
- **Email Include in Activity Description** specifies to include the text version of the email body in the activity description in Salesforce. The email body is saved for only inbound emails and outbound replies.
- **Update Attached Data on Transfer** specifies whether to update the call data with the ID of the Saleforce object the agent is viewing when performing a transfer or conference. When set to **True**, the agent that receives the voice or chat interaction gets a screen pop for the most relevant object.
- **Chat Include Transcript in Description** specifies whether the adapter saves the chat transcript, as part of the activity description in Salesforce.
- **Chat Transcript Custom Field Name** specifies the name of a custom activity field in Salesforce.

Custom templates

You can specify what the adapter saves for the subject field in the Salesforce activity by using custom templates with the following options:

- Templates Salesforce Inbound-Voice Subject
- Templates Salesforce Outbound-Voice Subject
- Templates Salesforce Transfer-Voice Subject
- Templates Salesforce Chat Subject
- Templates Salesforce Email Subject

The value specified for each of these fields can be a combination of text and parameters to achieve the desired result for each type of interaction.

For example, you might want the activity for all inbound voice calls to have details about the customer's name and phone number. In this case, here's how you would configure the option:

```
Templates Salesforce Inbound-Voice Subject = Customer: {interaction.contact}, Phone Number: {interaction.ani}
```

If a call comes in from Willard Clinton at 123-456-7890, when the call ends the adapter creates the related activity in Salesforce with following subject field: `Customer: Willard Clinton, Phone Number: 123-456-7890` Another common use case might be to include information from UserData for all inbound calls. This could come from your own UserData keys or from UserData provided by Agent Workspace. For example, you want the activity history's subject to include information from your own UserData key, PurposeOfCall, and the contact's name. Here's how you should configure the option:

```
Templates Salesforce Inbound-Voice Subject = Call from {interaction.contact} about {userData.PurposeOfCall}
```

In this scenario, if Willard Clinton calls into the contact center and chooses the Technical Support option in the IVR, that information is saved in the PurposeOfCall UserData key. When the call ends, the adapter creates the related activity in Salesforce with the following subject field: `Call from Willard Clinton about Technical Support`

The adapter supports the following templating variables:

Variable	Description
interaction.ani	The number that originated the call. This variable identifies the caller for inbound calls and is best used in inbound templates.
interaction.callType	The type of call (inbound/outbound).
interaction.caseId	The unique ID of the related case.
interaction.contact	The first and last name of contact.
interaction.dnis	The last call dialed (useful for call transfer). This variable identifies the outbound location for outbound calls and is best used in outbound templates.
interaction.endDate	The date and time when interaction ended.
interaction.isConsultation	This is true if the interaction is a consultation.
interaction.startDate	The date and time when the interaction started.
userData.	This can be any UserData key available for the interaction. You might also find some of the following UserData keys useful (they're included by default by Agent Workspace on transfers): • userData.GCS_TransferringAgentName — The name of the transferring agent. • userData.GCS_TransferringDate — The date and time of transfer. • userData.GCS_TransferringEmployeeId — The ID of the transferring employee. • userData.GCS_TransferringReason — The reason for the transfer. This is an empty string if no reason exists.
contact.EmailAddresses	A list of email addresses associated with the contact.
contact.PhoneNumbers	A list of phone numbers associated with the contact.

Public and private keys

Contents

- Administrator

The Genesys Voice Platform (GVP) recording solution requires proper management of public and private keys used to encrypt voice recordings. This topic shows you how to upload the recording certificates that contain these keys within Agent Setup. The public and private keys are stored in a certificate file and are used to encrypt a unique session key that is then used to encrypt each media file. These keys must be provisioned for voice recordings.

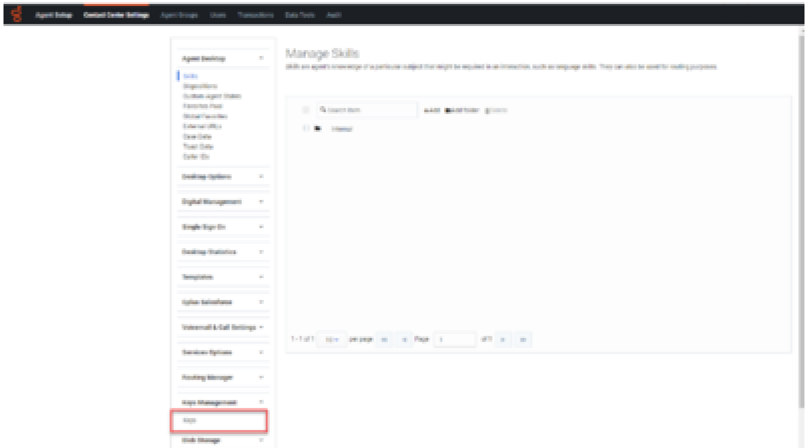
Related documentation:

> **Important**
> Some features described here may not apply to your organization’s setup. If you need features that aren’t available to you, contact your administrator or Genesys representative.

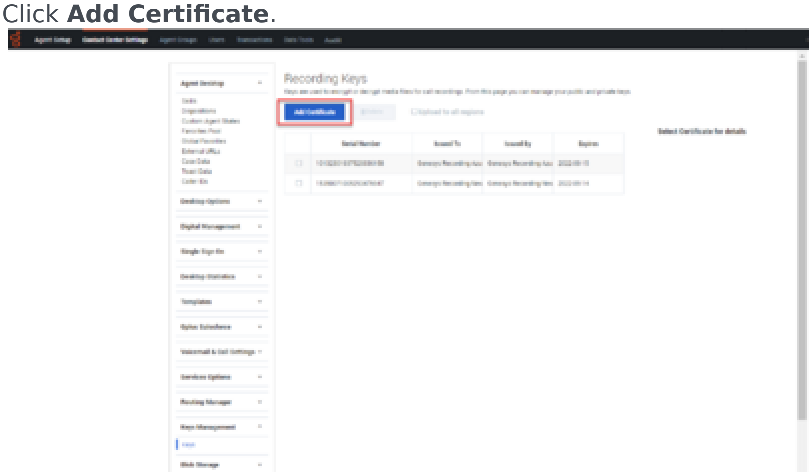
Manage GVP certificate when Genesys Interaction Recording is available

> **Important**
> The following steps should only be performed by an administrator or your Genesys representative.

1. Log in to **Agent Setup**.
2. Select **Contact Center Settings** > **Keys Management** > **Keys**.



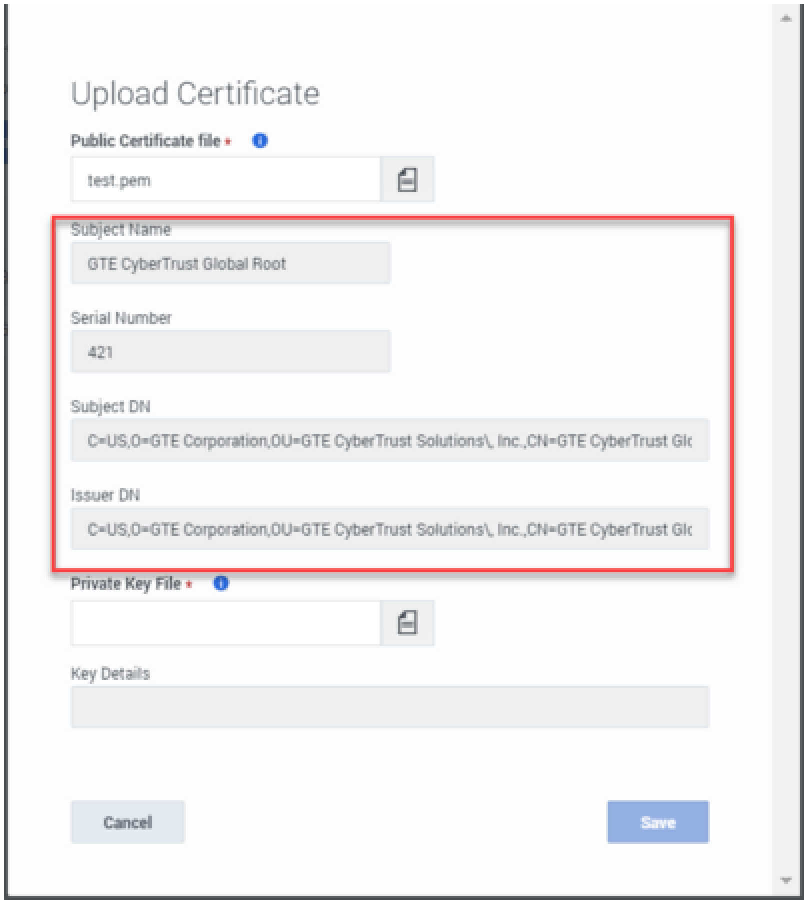
3. Click **Add Certificate**.



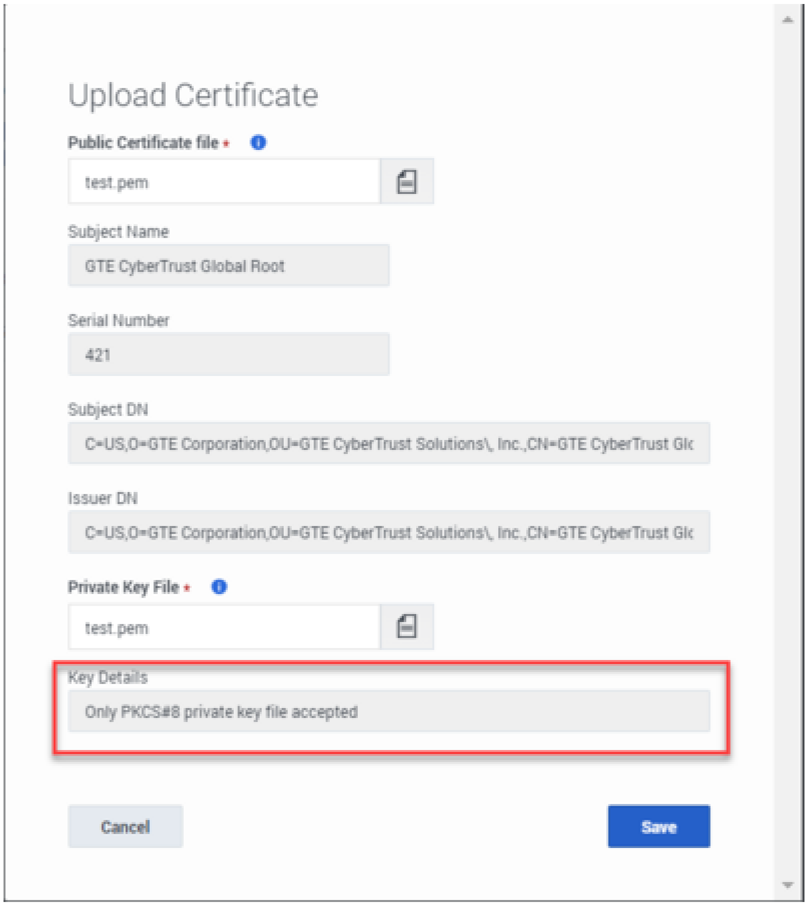
4. In the **Upload Certificate** window, click  to locate the public certificate file on your local machine.

> ## Important
> Certificate files must be in Privacy Enhanced Mail (PEM) format.

5. The **Subject Name**, **Serial Number**, **Subject DN**, and **Issuer DN** fields are updated with the public key details.



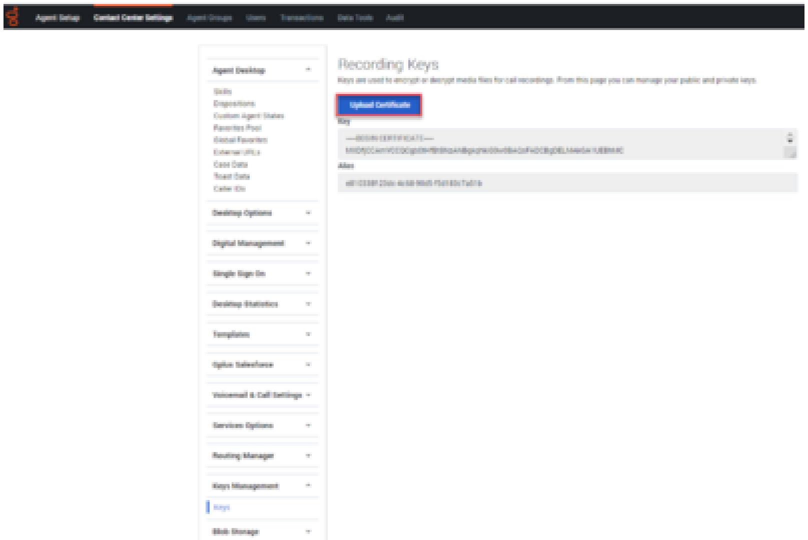
6. Click  to locate the private certificate file on your local machine.
7. The **Key Details** field are updated with the private key details.

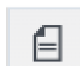


8. Click **Save**. Recording Connector Server (RCS) validates the format and after the keys pass the validation, Agent Setup uploads the public and private keys to RCS and to Genesys Voice Platform (GVP) CS. Keys are uploaded into the regions in which Genesys product is deployed for the user. By default, keys are uploaded to multiple regions.

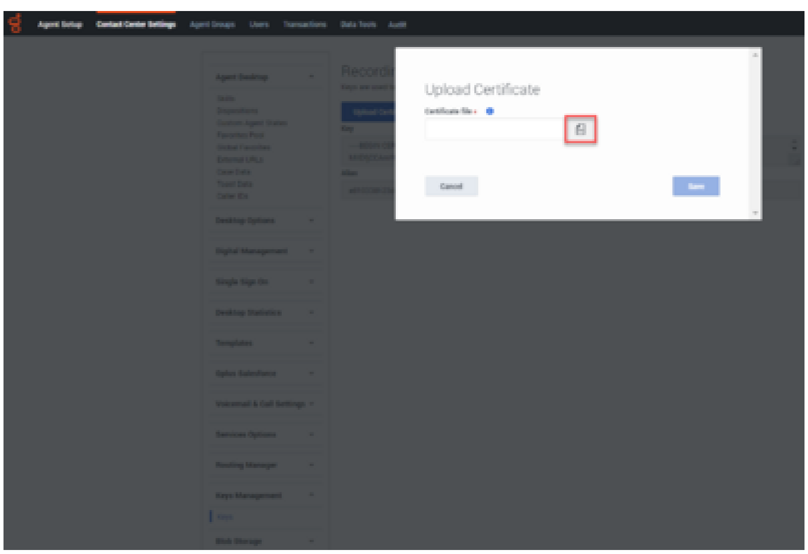
Manage GVP certificate when Genesys Interaction Recording is unavailable

1. Log in to **Agent Setup**.
2. Select **Contact Center Settings** > **Keys Management** > **Keys**.
3. Click **Upload Certificate**.

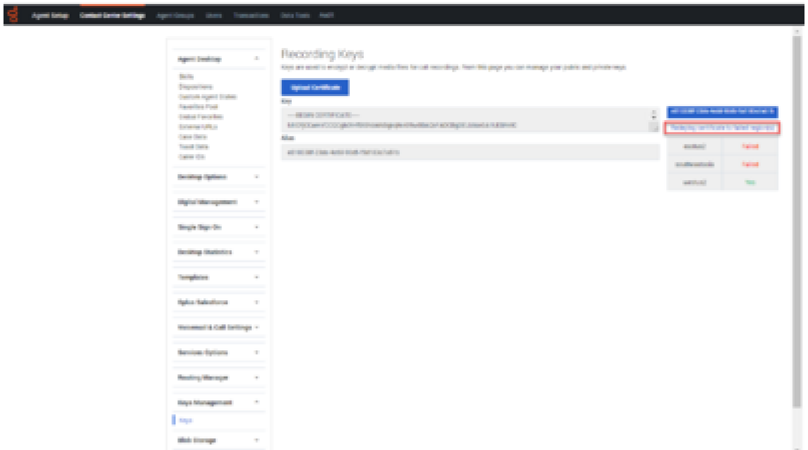


4. In the **Upload Certificate** window, click  to locate the public certificate file on your local machine.

> ## Important
> Certificate files must be in Privacy Enhanced Mail (PEM) format.



5. Click **Save**. By default, keys are uploaded to multiple regions in which Genesys product is deployed for the user. When the certificate is uploaded, the UI displays the status of the upload in all the regions.
   Click **Redeploy certificate to failed region(s)** to redeploy the certificate.



Watch this video to learn how to manage GVP certificate when Genesys Interaction Recording is unavailable

Link to video

Blob Storage

Contents

- Administrator

Shared Access Signature (SAS) tokens enable you to access your tenant-specific blob storage resources. The information provided below will help you get the SAS tokens you need in order to retrieve and download data from your Genesys contact center.

During tenant provisioning, a tenant-specific blob storage account is created for each tenant. Use the Generate SAS tokens screen in Agent Setup to generate the SAS tokens you need to access the contact center data that certain services make available.

To adhere to General Data Protection Regulation (GDPR) requirements, files stored in blob storage containers are deleted after 30 days by default.

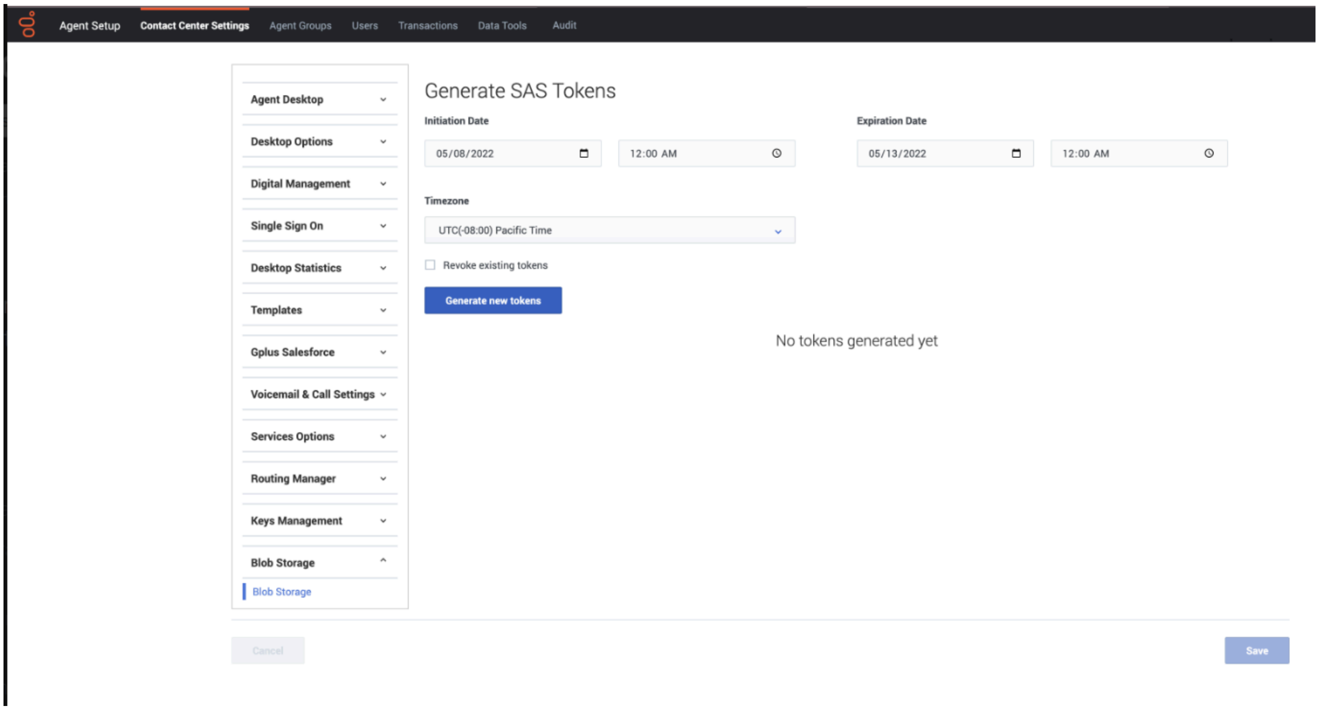
Related documentation:

> **Important**
> Some features described here may not apply to your organization’s setup. If you need features that aren’t available to you, contact your administrator or Genesys representative.

During tenant provisioning, a tenant-specific blob storage account is created for each tenant. Use the Generate SAS tokens screen in Agent Setup to generate the SAS tokens you need to access the contact center data that certain services make available.

To adhere to General Data Protection Regulation (GDPR) requirements, files stored in blob storage containers are deleted after 30 days by default.

Access recordings



In Agent Setup, under **Contact Center Settings > Blob Storage,** you can obtain and refresh URLs and SAS tokens for your recordings and metadata containers.

Let's look at the fields and buttons in this section to learn more about them:

- **Initiation Date** is the date input field where the administrator can set the SAS token start date.
- **Expiration Date** is the date input field where the administrator can set the SAS token expiry date.
- Use the **Revoke existing tokens** checkbox to invalidate any previously created token(s).

- **Generate new tokens** is the button you click to generate and display the new SAS token (using the specified expiry date above).
- **ACCOUNT CONTAINER URL** is only used for the “Find Blobs by Tags” API (the Account SAS token will not work for container Blob Read and List APIs). Account SAS tokens cannot reference Stored Access Policies so Account SAS tokens are only invalid when their expiry date has passed. Providing only the “f” permission prevents anyone from downloading a file using the Account SAS token. The Account SAS token holder can only use that token to find file names that match a customer-provided query against the Blob index tags. This field is read-only.
- **RECORDINGS CONTAINER URL** specifies the new recording SAS token. This field is read-only.
- **GIM-EXPORT CONTAINER URL** is the storage account name and container name used to display the metadata URL string. It relates to the interaction and party historical reporting data, which serves as metadata for the recordings. This field is read-only.

> **Important**
> By default the **RECORDINGS** and **GIM-EXPORT** containers are enabled, however there can be others as screenshots in this guide might show interface elements that might not accurately reflect what you see in the product when you use it.

Link to video

Generate new SAS tokens

To generate new URLs and SAS tokens for your recordings and metadata containers:

1. Use the date picker () to choose an **Initiation date** and an **Expiration date**.
2. If applicable, check the **Revoke existing tokens** box to invalidate any previously created token(s).
3. Click **Generate new tokens**.
4. Click **Copy URL**.

   > **Warning**
   > Once the new token has been generated and the Container URL and Token information displays, ensure that you copy and store the details *securely* elsewhere, before you navigate away from this page. Agent Setup does not display the information for existing tokens again. Also, ensure that your corporate practices enable authorized personnel and automated systems to obtain refreshed information when new tokens are generated.

5. To view and download the recordings and metadata in your storage account, use the relevant Container URL and Container token together to construct the necessary URLs.

Use SAS tokens to list files from the blob storage

> **Tip**
> For more information on listing container contents, see List Blobs from the *Getting Started with REST* guide from docs.microsoft.com.

To list the container contents using your SAS tokens, use the following `GET` method:

```
curl —-request GET “C=list&restype=container”
```

Example

```
curl -–request GET “https://mytenant.blob.core.windows.net/
recordings?sv=2020-02-10&spr=https&st=2021-05-26T10%3A56%3A11Z&se=2021-05-28T22%3A00%3A00Z&sr=c&sp=rl&sig=NOw71
```

The result is an XML document that lists all blobs available for download:

```
      mytenant/
003H1G2A6K8AF5PFKG5SO2LAES0000V3_2021-05-21_06-19-26-0064020A-10013025-00000001.mp3.bin

        Fri, 21 May 2021 06:21:34 GMT
        Fri, 21 May 2021 06:21:34 GMT
        0x8D91C20AE6F18A7
        25216
        application/octet-stream



        k0DUvvcVv1f+wZXECIy9dw==


        BlockBlob
        Hot
        true
        unlocked
        available
        true
```

Use SAS tokens to download files from the Blob Storage

> **Tip**
>
> For more information on downloading a file, see Get Blob from the *Getting Started with REST* guide from docs.microsoft.com.

Once blobs have been listed, they can then be downloaded using the following `GET` method:

```
curl -–request GET “/” –-output “”
```

Example

```
curl -–request GET “https://mytenant.blob.core.windows.net/recordings/mytenant/
003H1G2A6K8AF5PFKG5SO2LAES0000V3_2021-05-21_06-19-26-0064020A-10013025-00000001.mp3.bin?sv=2020-02-10&spr=https
-–output
```

```
“003H1G2A6K8AF5PFKG5SO2LAES0000V3_2021-05-21_06-19-26-0064020A-10013025-00000001.mp3.bin"
```

Find Blobs by Tags using Account SAS Tokens

Over time, recordings can accumulate. This necessitates the ability to find the recordings by means of tags before being able to download the correct files. The find by tags functionality can be accessed using the Account SAS URL and Token that is created from the **Generate SAS Tokens** screen.

To find recordings using your Account SAS tokens, use the following GET method:

```
curl -–request GET “?C=blobs&where= @container='recordings' AND RecordingType = 'CALL'"
```

A date range can also be specified:

```
“comp=blobs&where=@container=recordings AND RecordingType = 'CALL' AND StoredTime >=
'2021-08-19T00:00:00Z' AND StoredTime
```

Example

```
curl -–request GET "https://mytenant.blob.core.windows.net/
recordings?sv=2020-08-04&ss=b&srt=sco&se=2022-01-21T00%3A00%3A00Z&sp=f&sig=18FNWKEQHMksGzySQOQHfmDtawi2hzeYVfD3
```

The result is an XML document that lists all the blobs satisfying the conditions:

```
@container='recordings' AND RecordingType = 'CALL' AND StoredTime >= '2022-01-09T00:00:00Z'
AND StoredTime
20


8888/0004C06AN88TN2MP904SO2LAES000001_2022-01-10_05-59-26-0064021D-10011931-00000001.mp3.bin
recordings



RecordingType
CALL


StoredTime
2022-01-10T06:01:34Z





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```

```
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```

2!356!MDAwMDI3IXJlY29yZGluZ3MBMDFENzRCNEJCNUJBREREOCEwMDAwOTIhODg4OC8wMDA0QzA2QU44OFROMk1QOTA0U08yTEFFUzAwMTNSU

Platform administration

Contents

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- 

- Administrator

Most of the functionality in the Platform Administration application has moved to Agent Setup, which offers a superior user interface and new functionality. A few functions remain available only in Platform Administration.

Related documentation:

Functions in Platform Administration

While most administrative functions now appear in Agent Setup, you must still use Platform Administration if you need to perform the following actions:

- Access Groups
- Roles
- Manage DNs
- Manage Virtual Queues
- Customize Pulse dashboards
- Voicemail management

Your contact center comes preconfigured with roles and access groups that determine the access structure, so that you don't have to assign specific privileges to each user. You can control access by assigning access groups to users and agent groups in Agent Setup.

Functions in Agent Setup and Designer

Functions formerly performed in Platform Administration that are now performed in Agent Setup include:

- Agent/user creation, including administrator accounts and agent accounts for supervisors

- Agent groups and virtual agent groups
- Skills
- Agent desktop customization, including web content, global favorites, and caller ID

Functions formerly performed in Platform Administration that are now performed in Designer include business attributes and attribute values, which are now options offered within routing structures, such as:

- Business controls
- Media resources

Access Groups

Contents

-
- Administrator

Learn how to configure access groups for users in your contact center.

Related documentation:

-
-

Access Groups are groups of users who need to have the same set of permissions for Configuration Database objects.

In many cases, users fall into a small number of categories with similar access needs. A team of agents all performing the same tasks often has identical access needs. Two or three people responsible for maintaining a specific site of the contact center may also have identical access needs. You can greatly simplify access control by adding individuals to Access Groups and then setting permissions for those groups.

> **Important**
> The **default** user account is not related to Access Groups and, therefore, does not appear as a member of any Access Group.

Display Options

The **Access Groups** list shows the Access Groups that are in your environment.

> **Important**
> Access Groups that are disabled will appear grayed out in the list.

To select or de-select multiple objects at once, click **Select**.

Click the name of an Access Group to view additional information about the object.

Possible Procedures from this Panel

To create a new Access Group object, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**.

To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

> **Important**
> When you delete an Access Group, only the Access Group object itself is removed from the Configuration Database. Its member objects—Access Group and User objects—are not deleted.

Otherwise, select the check box beside one or more objects and click **More** to perform the following tasks:

- **Clone**—Copy an Access Group.
- **Move To**—Move an Access Group to another folder.
- Enable or disable Access Groups.
- Create a folder.

Click on the name of an Access Group to view additional information about the object.

Creating Access Group Objects

To create an Access Group, perform the following actions:

1. In the header, click **Configuration**.
2. Under the **Accounts** heading, click **Access Groups**.
3. Click **New**.
4. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from a list:
    - **Name**—The name of the Access Group. You must specify a unique value for this property.
    - **Tenant**—N/A
    - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
5. Click **Apply** to save the access group. The **Members** tab appears.
6. In the **Members** tab, click **Add** to add a User. In the pop-up window, you can create a new user by clicking **New**.
7. Perform one of the following actions after you have added a User to the Access Group:
    - Click **Save** to accept the changes and return to the object list.

- Click **Apply** to accept the changes and remain in the tab.
- Click **Cancel** to discard the changes.

Roles

Contents

- 
- Administrator

Learn how roles work in your contact center.

Related documentation:

Roles define what you can do in a given application. In Platform Administration, roles and their privileges are controlled by the use of Role objects, which are assigned to users (including agents) and Access Groups. Roles are application-specific, and must be defined for each application that supports them.

Display Options

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

To select or de-select multiple objects at once, click **Select**.

Virtual Queues

A Virtual Queue is a virtual device, created and maintained by the switch, with activity identical to an ACD Queue.

Related documentation:

-
-

To create a virtual queue in Platform Administration:

1. In the top menu, select **Configuration** to access the **Configuration Manager** page. While hovering over the **Switching** area, select **DNs**.
2. Navigate to **Switches** > **Target Switch** > **DNs** > **Company Folder** > **Virtual Queues**.
3. Click **New (+)**.
4. Enter a Virtual Queue name in the **Number** field.
5. Select **Virtual Queue** in the **Type** field.
6. Repeat the Virtual Queue name in the **Alias** field.
7. Click **Save**.

DNs

Contents

-
- Administrator

Learn how to configure DNs for your contact center.

Related documentation:

-
-

DNs are communication devices, uniquely identified by their directory numbers (DNs), where customer voice interactions reside and are handled.

Because most types of DNs represent the actual devices of the telephone system, their specification in the Configuration Database must always correspond to their Switch settings. Remember that Platform Administration has no way of verifying this correspondence.

As a general rule, changes made to DN configurations in the Configuration Database must always follow the changes made to DNs within the telephone system, and never the other way around.

Display Options

The **DNs** list shows the DNs that are in your environment.

Important

- The **Switches** list displays when you select **DNs** in Configuration Manager. To access the **DNs** list, you must first select a Switch object and then a DN folder.
- DNs that are disabled appear grayed out in the list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order. You can add or remove columns by clicking **Select Columns**.

Click **Group By** to group objects by various criteria.

To select or de-select multiple objects at once, click **Select**.

Possible Procedures from this Panel

To create a new DN object, click **New**. To view or edit details of an existing object, click on the name of the object, or click the check box beside an object and click **Edit**.

To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

> **Important**
> When you delete a DN, it is removed from the Configuration Database and from any DN Group of which it is a member. If you want to remove only the DN from a DN Group of which it is a member, but leave it still existing in the Configuration Database and available for assignment to another DN Group, you must remove it from the DNs tab of the DN Group.

Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a DN.
- **Move To**—Move a DN to another folder.
- Enable or disable DNs.
- Create a folder.

Click on the name of a DN to view additional information about the object.

Creating DN Objects

To create a DN object, perform the following actions:

1. In the header, click **Configuration**.
2. Under the **Switching** heading, click **DNs**. The **Switches** list displays.
3. Click the Switch object in which you wish to create a DN.
4. Click the DN folder in which you wish to create a DN.
5. Click **New**.
6. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from a list:
    - **Number**—A directory number assigned to this DN within the Switch. You must specify a value for this property, and that value must be unique within the Switch for all DN types. Once you set the value, you cannot change it.
    - **Type**—The type of the DN. This value must be set to **Extension**.
    - **Switch**—The Switch to which this DN belongs. This value is automatically set, based on the Switch being viewed in the **DNs** list.

- **Association**—N/A
- **Register**—N/A
- **Alias**—N/A
- **Route Type**—N/A
- **DN Group**—The DN Group to which this DN belongs.
- **Override**—N/A
- **Login ID**—N/A
- **Switch-specific Type**—N/A
- **Number of Trunks**—N/A
- **Tenant**—N/A
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

7. Click **Save**.