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# Genesys Engage cloud Workspace Web Edition Agent Desktop Help

Workspace Web Edition v852

8/30/2022

# Table of Contents

# Workspace Web Edition Help

## Important

This is the Agent help for Workspace Web Edition 8.5.2 for on-premises deployments. Are you looking for Genesys Engage cloud Workspace Web Edition Agent Desktop 9.0? It can be found here.

## Tip

*Workspace Web Edition Agent Desktop Help* is available in the following localized editions:

- French (Canadian)
- French (France)
- German
- Japanese
- Korean
- Portuguese (Brazilian)
- Spanish (Latin American)

## Link to video

Workspace lets contact center agents communicate with customers and team members through channels such as calls, chats, and email. You can

- respond to or contact customers through the channels assigned to you
- get help from team members
- find standard responses and answers to customer questions
- Change your status to **Ready** when you are ready to receive new interactions or **Not Ready** when you need more time to work on your current interaction or are away from your desktop. Your system might be set up to enable you to extend your after call work.
- Forward your calls to a different phone number.

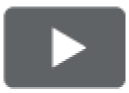
Ready? Watch the video for a quick tour of Workspace, and then get started.

## Looking for answers to specific questions? Try these topics:

- Customer interactions
- Internal interactions
- Voicemail
- Channels
- Contact Directory

Lost? See Navigating Workspace.

Are you a supervisor? You can also monitor agents and calls and provide email quality assurance. Or check out the Workspace video on the left!



## Want quick Workspace video tutorials? See our "How To" Videos collection!

### Tip

- The pictures and videos in this Help document show native Genesys Workspace. Your company might have customized many features including corporate logos and the name of the product. This document uses the name Workspace to mean the Agent Desktop application that you use to handle calls and other interactions and to manage your work and your contacts.
- The screen shots and videos show the Dashboard tab. This is available only in the cloud version of Workspace Web Edition.

# Getting started

Workspace Web Edition is your gateway for handling calls (both inbound and outbound) and other interactions, such as chat or emails.

### Important

What you see in Workspace depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this help. If you think you should be able to do or see something you can't, check with your supervisor or system administrator.

Now that you know what Workspace Web Edition is, you're probably wondering how to use it. This Getting Started page will get you logged on and ready to take a call. Let's get started.

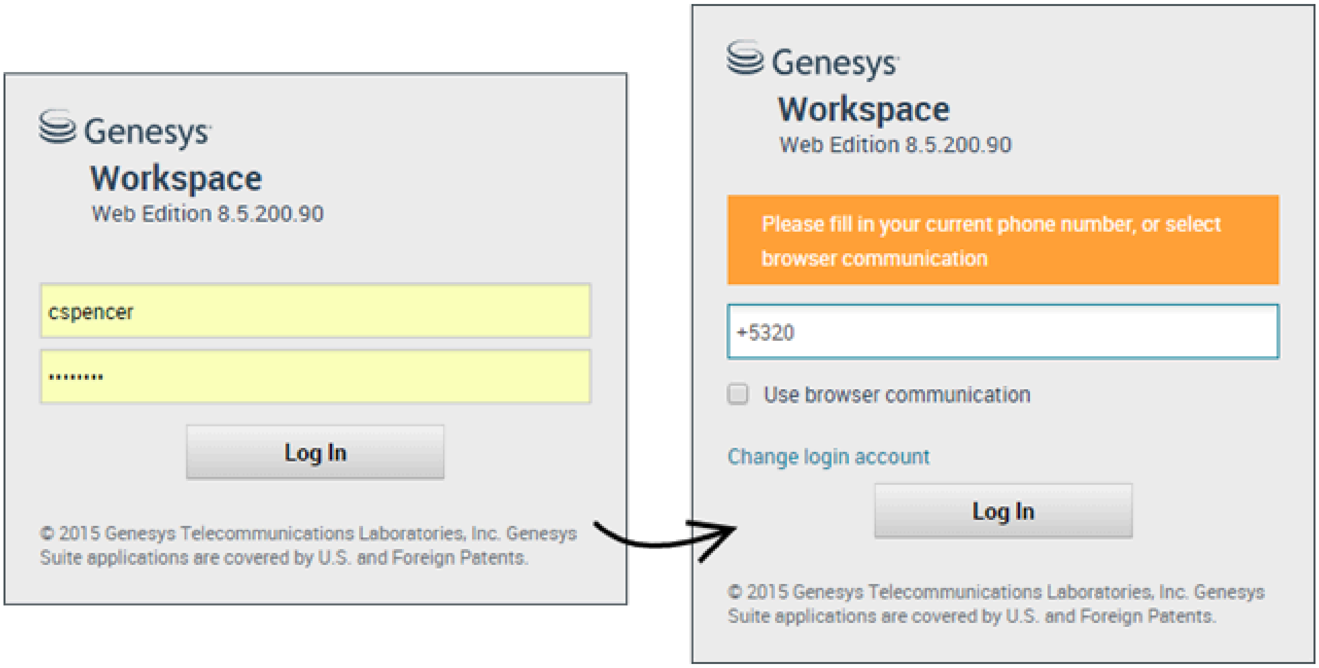
### Tip

- The pictures and videos in this Help document show native Genesys Workspace. Your company might have customized many features including corporate logos and the name of the product. This document uses the name Workspace to mean the Agent Desktop application that you use to handle calls and other interactions and to manage your work and your contacts.
- The screen shots and videos show the Dashboard tab. This is available only in the cloud version of Workspace Web Edition.

## Workspace Video Tutorials

| | |
|---|---|
| Want quick video tutorials? See our "How To" Videos collection! | |
| Check out this video about how to handle a phone call! | Link to video |

# Log in to Workspace




Open a supported browser (if you are using browser communication, use Chrome) and go to the link for Workspace that your supervisor gave you.

Log in with your username and password. You might also have to enter some additional information:

- If prompted, enter your phone number, place, or preferred language.
- If your system uses browser communication, select **Use browser communication**.
- If this is your first time logging on, a dialog box might be displayed asking you to change your password.

If you are not sure about any of the prompts, ask your supervisor for help.

## Please read the following tips and important notes:

### Tip

- Clicking **Change login account** takes you back to the main log in screen.
- Workspace has a security feature that might be set up for your account that logs you out if you stop using Workspace for a while. Workspace first displays a message to warn you that you are going to be logged out. If Workspace logs you out, just log back in again when you are ready to start using Workspace.

- Workspace does not let you change your password. Contact your administrator to have your password changed.
- To ensure that your account and password remain secure, ensure that auto-fill, "remember me", and password manager are disabled in your browser. Your administrator might already have done this for you. If your browser asks you if you want it to remember passwords, select **No** or **Never**. If you have questions about password security, contact your supervisor, administrator, or IT personnel.

### Important

- You may log in only to a single Workspace session at a time. You must log out of one session before logging into a new session.
- To log out of Workspace, you must use the **Exit** option from the menu in the upper right-hand corner. You won't be able to log out if you have any active calls or interactions.

## Single Sign-On environments

You might work in an environment that uses Single Sign-On (SSO) identity authentication. If you do, your log in experience will 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.

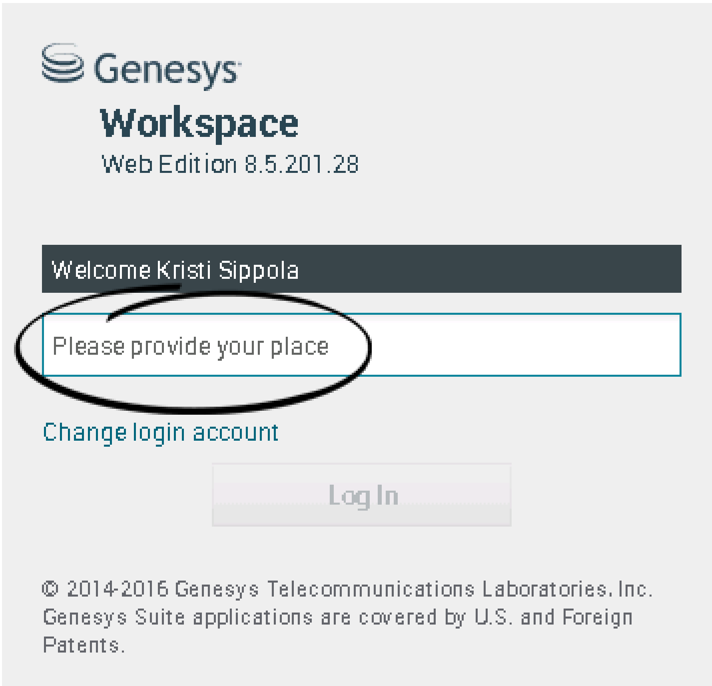
## Remote and virtual desktop environments

You might work in an environment that uses Virtual Desktop Infrastructure (VDI, sometimes called VMware) to run Workspace. This means that when you start Workspace, it is displayed on your screen, but it is not actually running on your workstation, it is running on a remote machine.

In VDI environments, your administrator installed the Genesys Softphone on your workstation before you logged in, or, you were instructed to install it by clicking on an installation hyperlink in an email or other document.

When you start your workstation, the Genesys Softphone automatically launches and the Genesys Softphone icon is displayed in your system tray. Until you log in to Workspace, this icon looks like this: . After you launch Workspace and the Genesys Softphone is connected, the Genesys Softphone icon looks like this: .

## Place




During login, you might see a window that asks you to input your Place.

Your Place is the name or number of the workstation or phone you are using. If you do not know what to enter, ask your supervisor.

If you do not see this window, your account is set up to always log you in on the same Place.

> **Tip**
> By default, the last Place that you logged in is already in the Place field.

If you move around from Place to Place, you might have to enter a different Place each time that you log in.

## Change your status to Ready

Link to video

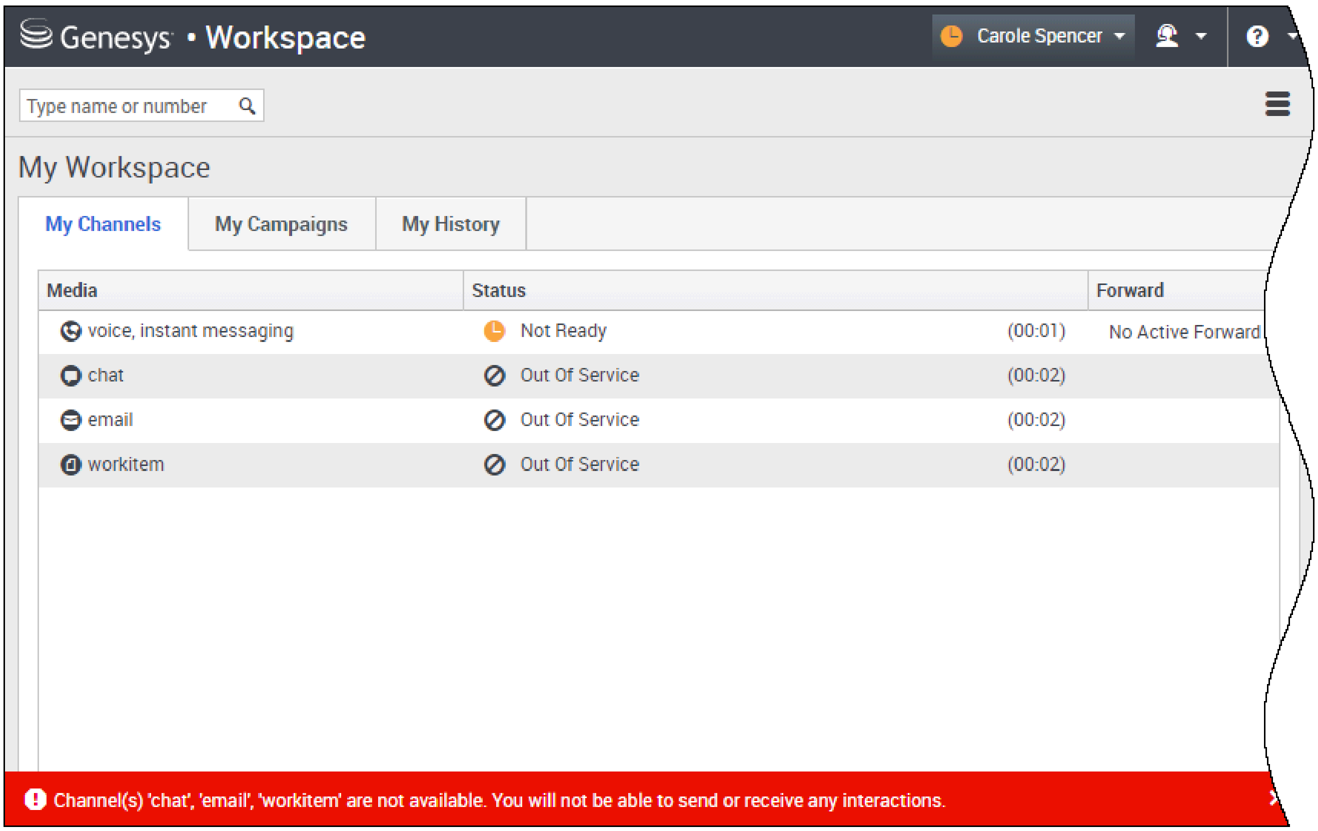
To receive calls, you must be in a **Ready** status (indicated by a green checkmark beside your name).

If you need to change your status, go to **My Channels** and toggle the voice channel to **Ready**.

**Tip:** You can also change your status for all channels in one easy step. Click your name at the top right-hand corner of the screen and select **Ready**.

Watch the video for a short demonstration of changing your status.

## What happens if not all channels are available when I log in?



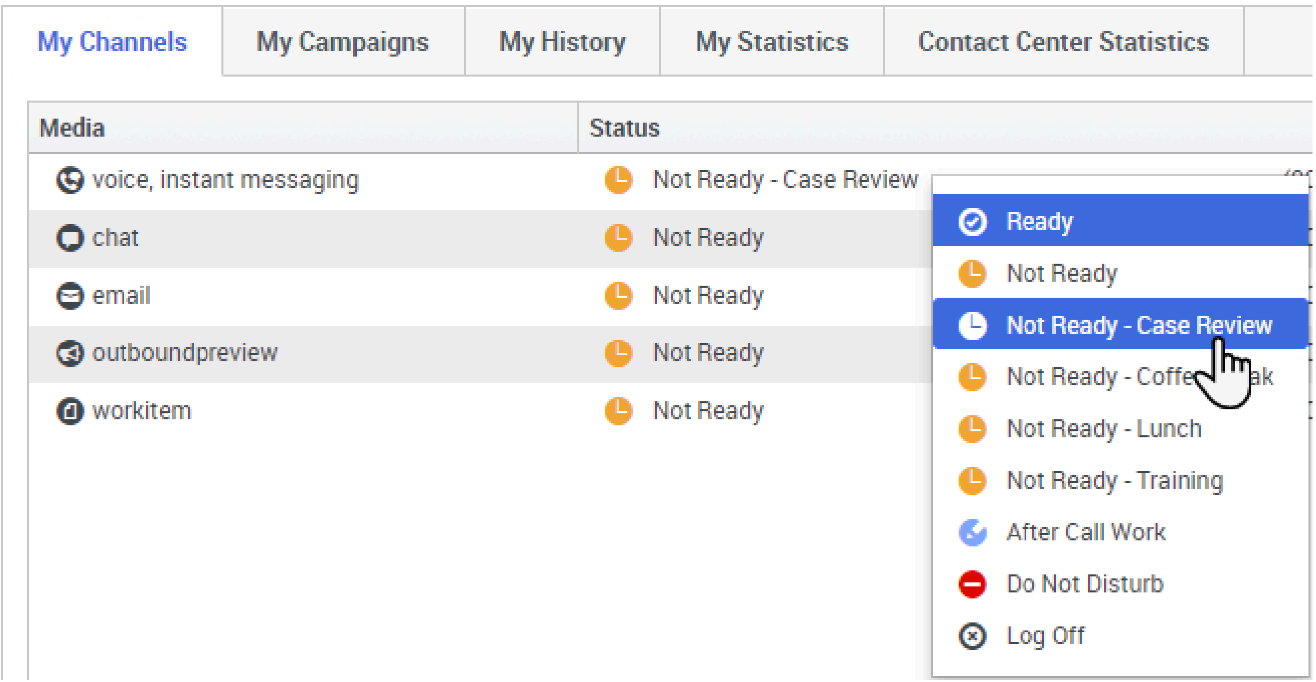

Sometimes when you log in, one or more of the channels that you are assigned might not be available.

You will know that one or more channels are not available because you will see a warning message at the bottom of the Workspace window.

When this happens, you can still log in, but when you look at your My Channels tab, you'll see that one or more channels have the **Out Of Service** status. When a channel is out of service, you cannot log on or off on that channel and you cannot set your status.

When the channel becomes available again, a message will be displayed at the bottom of the Workspace window. You can use the **My Channels** tab to change your status on that channel.

## Setting your status to Not Ready with a Reason




Sometimes you need to set your status on one or more channels to Not Ready so that you do not receive new interaction on that channel. You can choose to set the status to Not Ready or Not Ready with a reason. Your administrator sets up the Not Ready Reasons that are available to you from the Status drop-down menus.

> **Tip**
> If you manually set your status to Not Ready while you are handling a phone call, chat, or email, the system starts recording your time in that state rather than the time spent handling the call. Some contact centers have the Pending state enabled so that the Not Ready state does not take effect until after you end your phone call or chat interaction, or after you send your email or place it in a workbin.

## Handle an inbound call

### Link to video

Make sure your softphone or phone device is connected and ready.

Need help with your softphone? See How do I use my web phone with Workspace?

When a call arrives, you'll get a pop-up in the bottom right-hand corner of your screen. You might also hear a sound to alert you that a call has arrived.

Click **Accept** to connect the call. If you **Reject** the call, or ignore the pop-up, it goes to the next available agent.

> Tip
>
> If your account is set up to automatically answer calls, you will not see the pop-up

To get you started, here are some common call handling features:

 = Hold

 = Resume

 = Transfer

 = Hang up

 = Mark Done

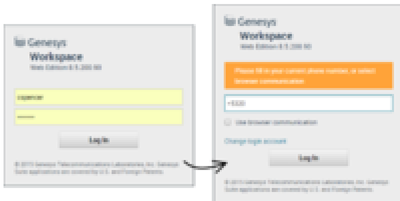
After the call is complete, you might enter an **After Call Work** state, during which you can complete any tasks related to the call. For example, you could add a Note or select a Disposition code.

> Tip
>
> If dispositions are mandatory in your contact center, you will not be able to close a call without specifying a disposition

Watch the video for a short demonstration of how to handle a voice call.

## Log in, log out, log on, log off, and exit, what's the difference?

You log in and log out of the Workspace Agent Desktop application. Logging in means launching the application in your browser and identifying yourself to the system so that you become authorized to receive interactions and use the various features that are enabled for you.



Typically, you log in to Workspace Agent Desktop at the beginning of your shift and log out (Exit) at the end of your shift. To log out of Workspace, you must use the **Exit** option from the menu in the upper right-hand corner. You won't be able to log out if you have any active calls or interactions.

You log on to and log off of channels in Workspace Agent Desktop. Channels include voice, email, chat, and so on. Channels are the media that you use to interact with contacts. When you log in to Workspace Agent Desktop, you are usually logged on to all the channels assigned to you, and when you log out (exit) of Workspace Agent Desktop, you are logged off from all the assigned channels. In some environments, you might be logged off from one or more channels when you log in because the channel is out of service or your administrator has set up your account to be logged on to specific channels only.

Use the **My Channels** tab to log on or log off one or more channels. Logging off of all your channels does not log you out of Workspace Agent Desktop. You must still exit the application to log out.

You can log on or log off all your assigned channels by using the Global Status menu.

## What do I do next?

You might want to learn more about:

- Media channels
- Handling calls
- Working with contacts
- Using standard responses
- Managing your workbins (which store your work in progress)

# Navigating Workspace

Having trouble finding your way around Workspace? If you need help identifying a button or field, hold your mouse pointer over it to reveal a tooltip.

Do you use a screen reader? Do you navigate Workspace using a keyboard? You can find out all about it here!

## Main view

### Link to video

The main view lets you access the most common features that you use every day, such as managing your channels, campaigns, KPIs, workbins contacts/customers, and messages.

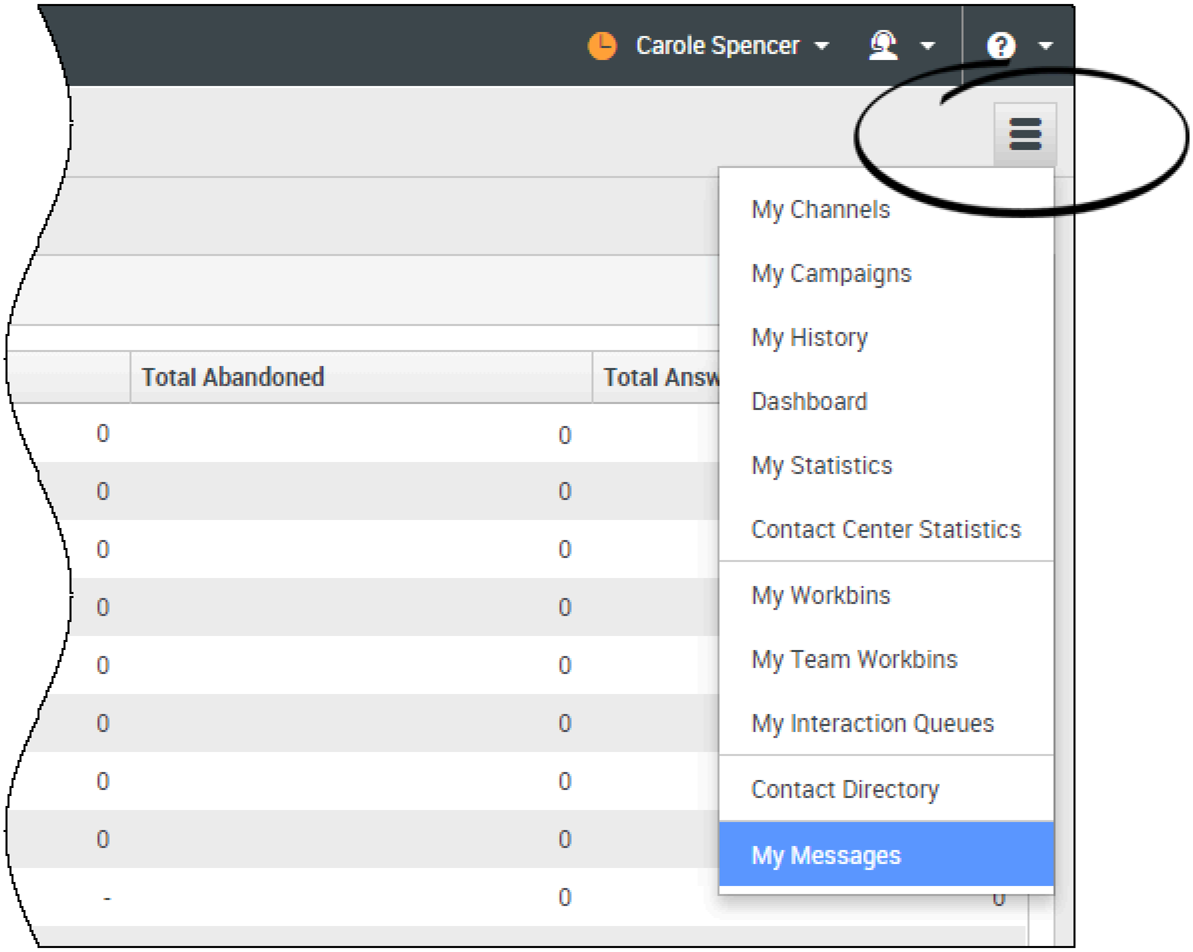
Some of the tabs include:

- **My Channels** — Set your status on individual channels, such as voice, chat, and email.
- **My Campaigns** — View and manage your Outbound campaigns.

Watch the video for a quick tour of the Workspace main view.

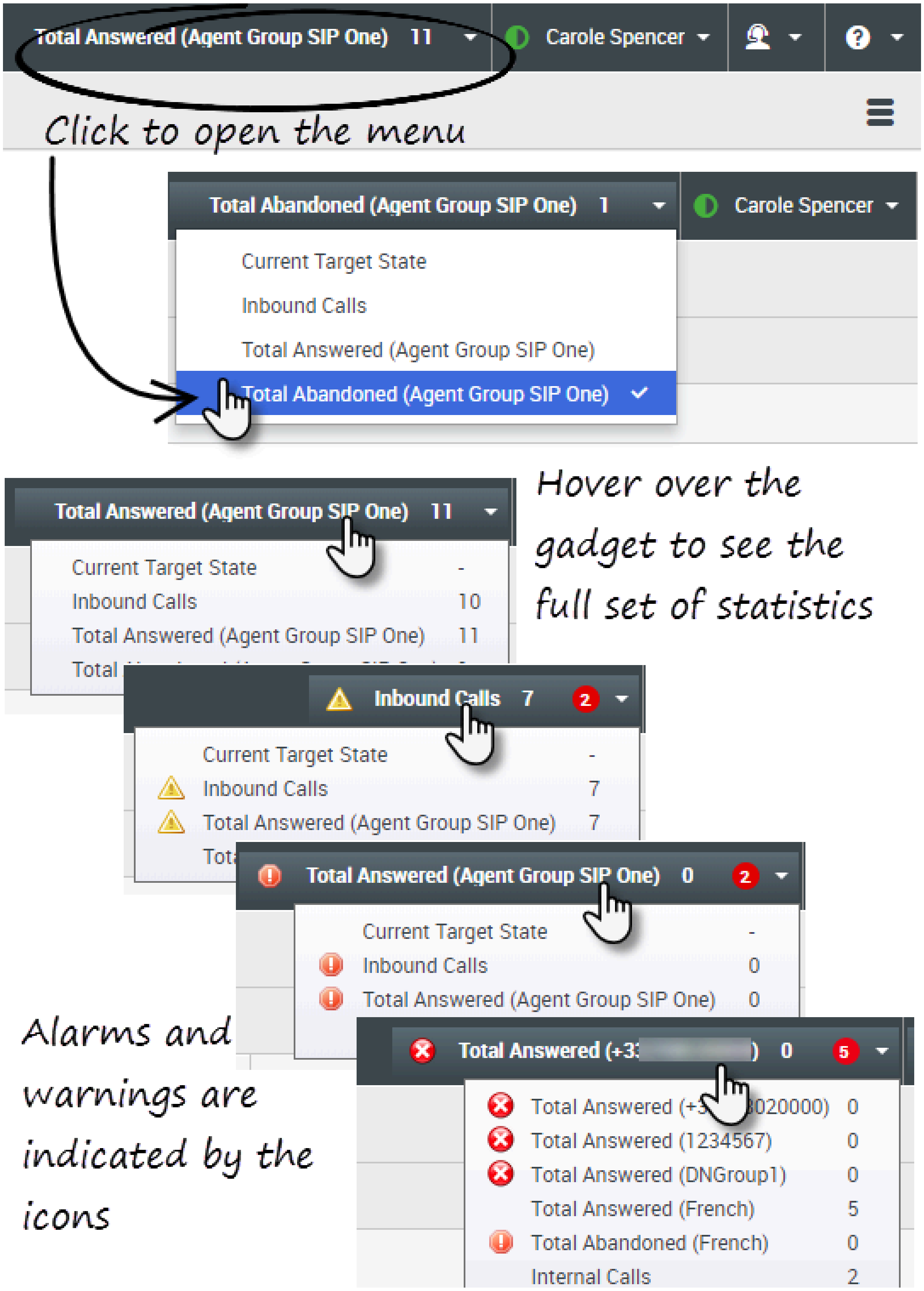
> **Tip**
> The video includes a description of the Dashboard tab. This is available only for the Cloud version of Workspace.

## Supporting views




Use ☰ to access all of the views available to you, including returning you to the tab views.

## Contact Center Statistics and KPIs



There are three places where you can view and track your performance and the performance of your contact center:

- The Statistics Gadget in the main menu bar
- The Contact Center Statistics tab in My Workspace
- The My Statistics tab in My Workspace

**Note:** Some or all of these features might not be available in your environment.

## Statistics Gadget

The Statistics Gadget helps you to stay up to date on certain key statistics. Your administrator decides which statistics are available for you to view.

The Statistics Gadget displays one statistic at a time, giving you the current status of service level, number of calls waiting, number of calls you have handled, and so on.

### Hover your mouse pointer over the Statistics Gadget to see the current values for all of the statistics that have been assigned to the gadget by your administrator.

The red circle with the number tells you how many alarms currently apply to the statistics being evaluated by the gadget.

If more than one statistic has been assigned to the gadget, click it to open a list of currently available statistics and select a different one to display. A check mark is displayed next to the current statistic.

Here are the icons that you might see in the Statistics Gadget, the Contact Center Statistics tab, and the My Statistics tab:

- A worst icon is displayed if the evaluation of the performance is the worst of your group ().
- An error icon is displayed if the evaluation of the performance is below the expected error level for the KPI ().
- A warning icon is displayed if the evaluation of your performance for the KPI goes beyond the expected warning level for the KPI ().

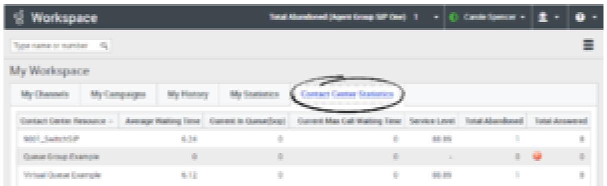
To see all of the statistics available for your contact center or for yourself (all your KPIs), click the appropriate tab in My Workspace. You can also choose these tabs from the Available Views () menu.

## Contact Center Statistics tab

The items displayed on this tab are statistics for Routing Points, Queues, and other contact center fascilities.

The Contact Center Statistics tab displays statistics that summarize the state of various conditions, such as waiting time, calls in queue, average maximum waiting time, service level, and answered and abandoned calls, that are monitored by your contact center.

Click the **Contact Center Resource** column head to change the sort order of the resources.

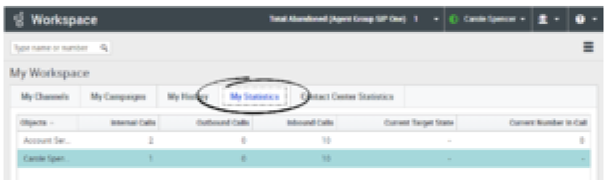


## My Statistics tab

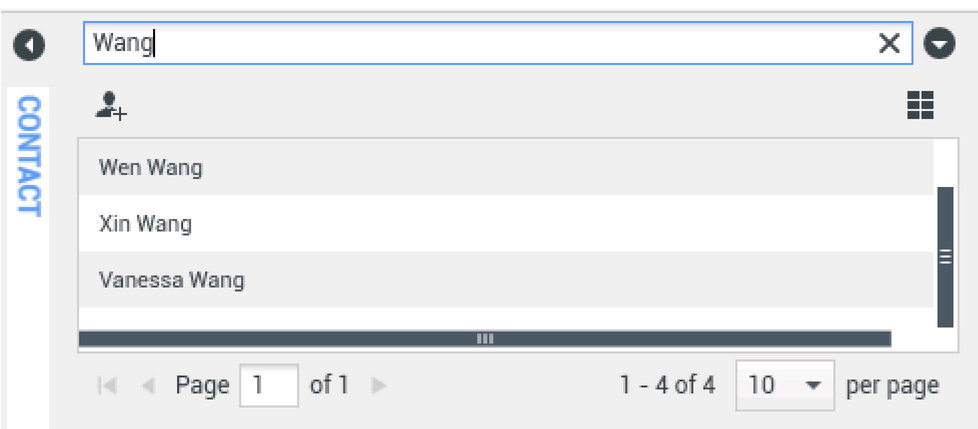
This tab displays the list of your Key Performance Indicators (KPIs).

The KPIs that are displayed are set up by your system administrator. The statistics might be for your agent group rather than for you personally.

Click the **Objects** column heads to change the sort order of the KPIs.



# Quick Search




In the Quick Search field, you can enter the name or other information, such as a phone number or email address, of a contact, then click the magnifying-glass icon to begin the search of the contact database.

## Chronology slider


The chronology slider lets you search the contact history for interactions that took place within a certain time period. The slider has four positions:

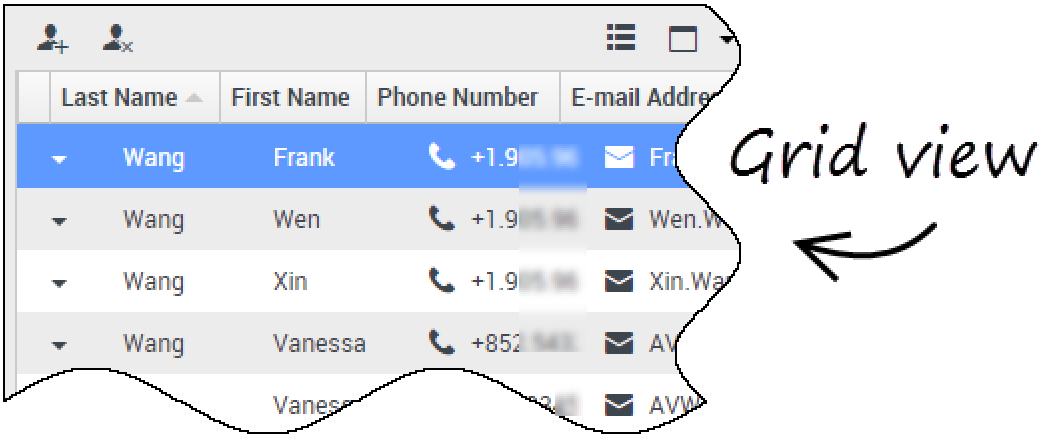
- **All**—Search the entire database from the most recent interaction back to the earliest interaction
- **Last Month**—Search the database from the most recent interaction back to one month ago
- **Last Week**—Search the database from the most recent interaction back to one week ago
- **Last Day**—Search the database from the most recent interaction back to one day ago

## Page controls


Page through the list of search results by doing any of the following:

- **Go to the Next Page** ()
- **Go to the Previous Page** ()
- **Go to First Page** ()
- Specify the number of items that are displayed on each page by using the **per page** drop-down list.

## List and Grid views




The List view displays an unsorted list of all of the contacts in the contact database that match the search criteria.

Grid mode results are returned in tabular form and sorted according to the default search field, such as Last Name. The Grid view can be used to help to refine your search by sorting the results.

Click a column head in the Grid view to sort the list based on that criterion. Click a column head a second time to switch between ascending and descending sort order.

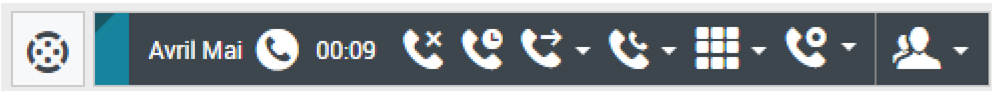
## Show/Hide panel details

The **Show Details Panel on Bottom/Hide Details Panel** button ( ) enables you to specify how the Details panel is displayed. The details panel can be shown or hidden, and, when shown, can be displayed below or to the right of the window.

Click the **Show Details Panel on Bottom/Hide Details Panel** button to choose one of the following views:

- —Displays the Details panel below the workspace area.
- —Hides the Details panel.

# Interaction Bar




The Interaction Bar is displayed in the main view whenever you have one or more active interactions. If you have multiple active interactions, only the tools for the current active interaction are displayed. The toolbar for other active interactions collapse until you click them to make them current.

Each interaction is represented by a control bar. You can use the control bar to perform basic actions that are specific to the interaction type, such as ending a call.

- Click the control bar for an interaction to give it the focus. All other open interactions are collapsed to the Interaction Bar.
- Click the small colored bar on the left of the interaction control to toggle between pinned mode and floating mode. In floating mode, other open views appear dimmed behind the interaction view.

Entries in the Interaction Bar flash (or blink) when specific events occur that might require your immediate attention.

**Tip:** To allow for the maximum space in the Interaction Bar, when you are handling an interaction, the Team Communicator is reduced to a button.

# Team Communicator

## Link to video

Team Communicator lets you find someone in your company's internal directory (such as a team member, a routing point, or an agent group), and sometimes someone outside your company, such as an external resource person or even a customer contact. It's useful for getting help or consulting with someone while working with an interaction.

To start a call or email interaction, just click in the Team Communicator search field and start typing a name, number, or email address.

You can also filter the search results:

-  to search all contacts
-  to search your favorites
-  to search recent contacts
-  to group (or ungroup) your results by category or type

If you miss a call, the clock button changes to orange, like this: . Click it to display any missed calls. If you hover your mouse pointer over the contact entry, a tooltip displays the missed call information, including date, time, and known contact details.

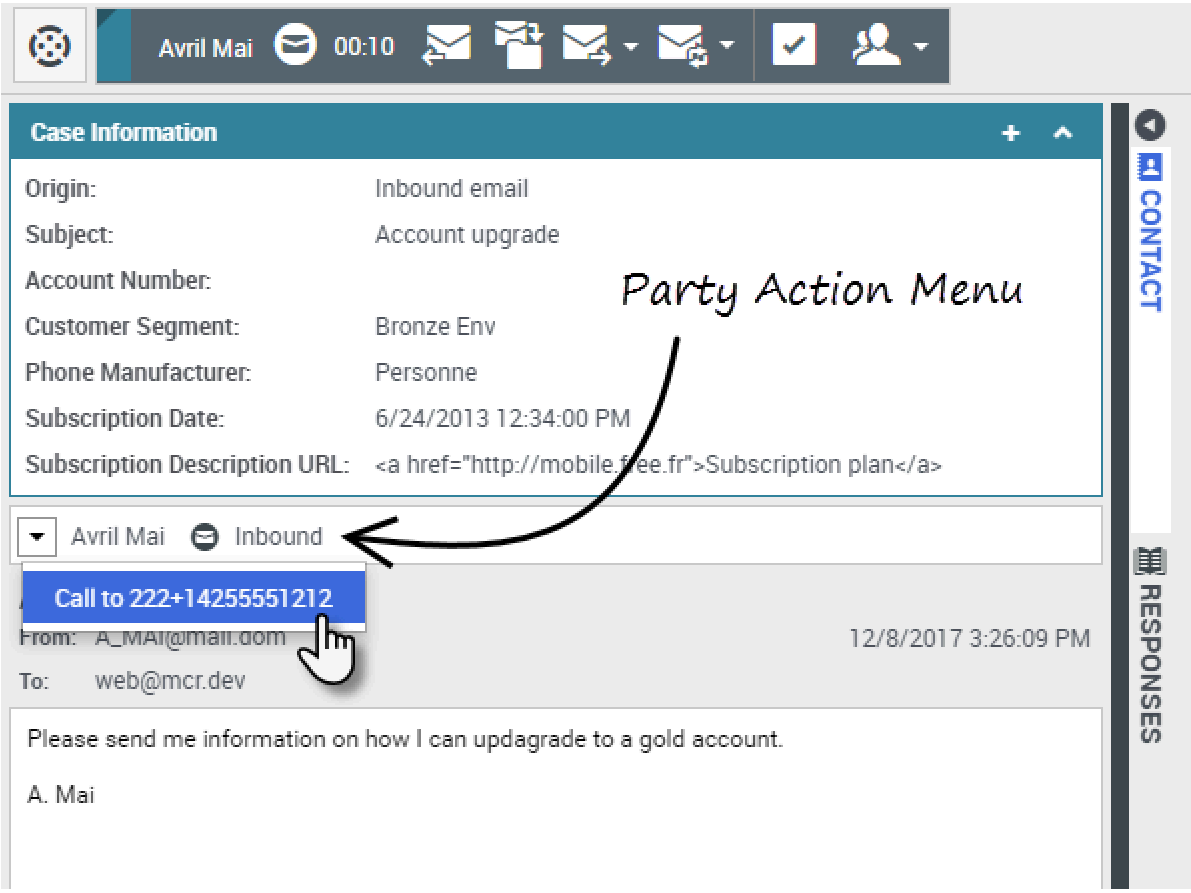
**Tip:** When you close the Team Communicator, or if you switch the filter to All contacts or Favorite contacts, the **Recent** button changes back to white if you have viewed your recent and missed calls, or if you have called back all of your missed calls.

Watch the video for a short demonstration of how to use Team Communicator.

### Tip

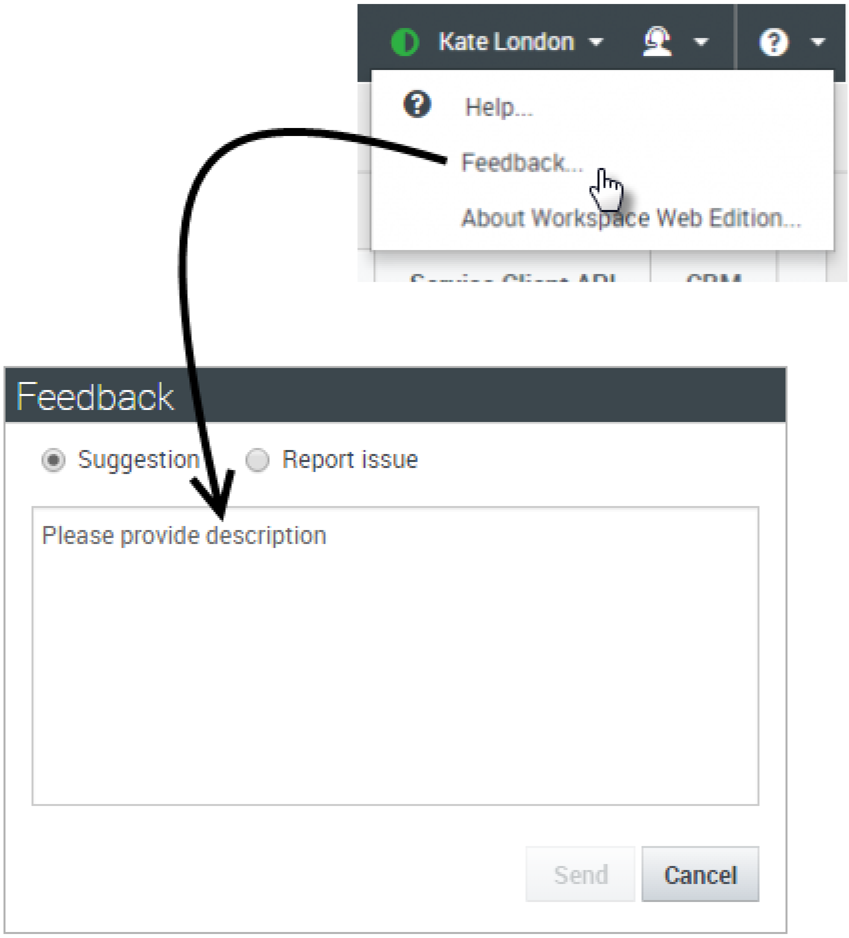
If you are using Workspace in Accessibility Mode, the Team Communicator remains collapsed. To open it, navigate to the Team Communicator button, then press **Enter**.

## Party Action menu




The **Party Action** menu is a part of every interaction. You can use it during an interaction to launch a secondary interaction. For example, while you are handling an email interaction from a contact, you can use the **Party Action** menu to call the contact if their phone number address is stored in your corporate database.

## How to provide feedback when something goes wrong




Sometimes web-based applications don't work as expected. There might be network connection issues, or the system that sends you phone calls, emails, and chats might be slow or behaving in odd ways. Sometimes the sound quality of a phone call is bad. Sometimes an error message is displayed on your desktop.

These and other issues are problems that you should report to your supervisor. Open the **Help** menu and select **Feedback** to open the **Feedback** window. Choose the type of feedback that you want to give, either a suggestion or to report an issue, describe the problem or suggestion by typing in the text box, then click **Send** to submit your feedback. This information, along with logs about what you were doing in your most recent Workspace session, are sent to Genesys and are available to Customer Care for later reference.

If for some reason Workspace becomes disconnected from your network and you have to close your browser and launch a new one to log in again, Workspace automatically opens the **Feedback** window to let you write a report about the disconnection problem immediately.

After you complete a feedback report, please tell your supervisor about it. He or she might want to call Genesys Customer Care about the problem and will be able to refer to the feedback you just submitted.

# Keyboard Navigation and Accessibility

Workspace lets you navigate the interface entirely by keyboard. This means that you don't have to use a mouse to activate different features or select buttons.

It also means that you can use a screen-reader application to perform all the functions you need.

Whenever an event happens in Workspace, like you get a new interations or an error message is displayed, Workspace makes a sound to alert you.

All the different ways that you can use the keyboard and a screen-reader to move around are described in this section.

Workspace lets you use keyboard shortcuts combinations for some common actions. Ask your administrator for a list of the shortcuts that are set up for Workspace.

# Shortcut Key Combinations

## A shortcut is a combination of keys that you press to make something happen in a Workspace window.

### OS Shortcuts

The computer operating system also has shortcut keys to let you copy, cut, paste, undo, delete, find, maximize window, minimize window, open menu and select command, switch application, cancel, change focus, and so on. Consult your operating-system documentation for a list of supported keyboard shortcuts.

### Workspace Shortcut Keys

Workspace supports three shortcut key combinations that you can use to make you more productive. These are the default shortcuts (your administrator might have set up different shortcuts for you):

- **Alt+N** — Jump to the next interaction if you have multiple interactions open
- **Alt+B** — Jump to the previous interaction if you have multiple interactions open
- **Alt+L** — Jump to the last error message that you received

# Keyboard Navigation

Workspace supports keyboard navigation for all features, functions, options, and menus.

If you do not use a mouse or if you are using a device for accessibility that needs keyboard navigation, you can still use all the Workspace features. Many *expert users* prefer to use keyboard navigation to maximize productivity.

Colors and appearance changes as you select different items on the Agent Desktop. For example, buttons change color and menus open with the current selection highlighted by color.

## Basic navigation using the TAB key

The simplest way to navigate by keyboard is to use the **TAB** and **SHIFT+TAB** keys.

- **Tab**—Moves your focus to the next menu, field, button, view, and so on.
- **Shift + Tab**—Moves your focus to the previous menu, field, button, view, and so on.

Movement occurs from left to right and from top to bottom, unless the ordering of components dictates otherwise. Navigation moves from component to component within a view, and from view to view within the application.

## Navigation Shortcuts

This table shows you the keyboard shortcuts that let you control Workspace without using a mouse.

**Workspace Keyboard Shortcuts**

| Shortcut | Description |
|---|---|
| Left Arrow | • Move left in a menu bar or out of a submenu.<br>• Move to the next tab on the left.<br>• Move left in the history slider. |
| Right Arrow | • Move right in a menu bar or out of a submenu.<br>• Move to the next tab on the right.<br>• Move right in the history slider. |

| Shortcut | Description |
| --- | --- |
| Up Arrow | Move up in lists and menus. |
| Down Arrow | Move down in lists and menus. |
| Alt+Down Arrow | Open a selected drop-down list. |
| Enter | For a modifiable list, apply the edit mode, or validate the modification.<br><br>For a button, execute the associated action.<br><br>For a menu item, execute the associated action. |
| Space | For some controls, select or clear the check box that has the focus. |
| Escape | For a modifiable list, cancel the edit mode. |

# "How To" Videos

This topic features a collection of videos from the Genesys Vimeo channel that demonstrate some of the most commonly used features of Workspace Agent Desktop.

## Logging in and going Ready

- Logging in to Workspace Agent Desktop

**[+] Show video: Logging in to Workspace**

Link to video

- Using the status controls

**[+] Show video: Status Controls**

Link to video

- Quick tour of the Main Window

**[+] Show video: Main View Overview**

Link to video

## Handling voice calls

- Taking a Voice Call

**[+] Watch video: Taking a Voice Call**

Link to video

- Transferring a call to an Agent Group

**[+] Watch video: Transferring to an Agent Group**

Link to video

- How to make a new call

**[+] Watch video: Finding a Contact**

Link to video

- How to mute/unmute and control the volume of a call

**[+] Watch video: Controlling your microphone and speakers**

Link to video

## Using a web phone

- Web Phone Browser Communications Overview

**[+] Watch video: Using a Web Phone**

Link to video

- Using the Browser Communications Diagnostics Tool to Troubleshoot Call Quality Problems

**[+] Watch video: Troubleshooting call quality issues**

Link to video

## Outbound Campaigns

Here are four tutorial videos that give you a quick overview of being an agent in an Outbound Campaign. The first video introduces Outbound Campaigns, the second demonstrates Predictive and Progressive (automatic) campaigns, the third demonstrates Preview (manual) campaigns, and the fourth demonstrates Push-Preview (semi-automatic) campaigns.

- Overview

| | |
|---|---|
| | **[+] Show video: Outbound Campaign Overview**<br>Link to video |

- Automatic record retrieval (and scheduling a callback)

| | |
|---|---|
| | **[+] Show video: Automatic Mode**<br>Link to video |

- Manual record retrieval

| | |
|---|---|
| | **[+] Show video: Manual Mode**<br>Link to video |

- Semi-automatic record retrieval

| | |
|---|---|
| | **[+] Show video: Semi-automatic Mode**<br>Link to video |

## Handling email

- Receiving a new email

| | |
|---|---|
| | **[+] Show video: Receiving a new email**<br>Link to video |

- Sending an outgoing email

| | |
|---|---|
| | **[+] Watch video: Sending an email**<br>Link to video |

- Forwarding an email as an attachment

**[+] Watch video: Forwarding an email as an attachment**

Link to video

- Forwarding an email in-line

**[+] Watch video: Forwarding an email in-line**

Link to video

- Using the forward combination menu

**[+] Watch video: Using the forward combination menu**

Link to video

## Handling chats

- Handing a chat interaction with a customer

**[+] Show video: Handling a chat**

Link to video

- Sending a URL to your customer

**[+] Show video: Sending weblinks to your contact**

Link to video

## Handling Workitems

- Handing a workitem interaction

**[+] Show video: Handling a workitem**

Link to video

## Finding and managing contacts

- How to find a contact using the Team Communicator

**[+] Watch video: Finding a Contact**

Link to video

- Contact Directory Overview

**[+] Show video: Contact Directory Overview**

Link to video

- Finding Contacts using Quick Search

**[+] Watch video: Contact Directory Quick Search**

Link to video

- How to view details as a grid or list in the Contact Directory

**[+] Show video: Contact Directory Viewing Details as a Grid or a List**

Link to video

- How to call or email a contact using the Contact Directory

**[+] Show video: Contact Directory Phone and E-mail**

Link to video

## Finding Interactions

- Contact History Tab

**[+] Show video: Contact History**

Link to video

- Contact History Quick Search

**[+] Show video: Contact History:Quick Search**

Link to video

- Contact History Advanced Search

**[+] Show video: Contact History: Advanced Search**

Link to video

- My History Quick Search

**[+] Show video: My History: Quick Search**

Link to video

- My History Advanced Search

**[+] Show video: My History: Advanced Search**

Link to video

- Interaction Search Quick Search

**[+] Show video: Interaction Search: Quick Search**

Link to video

- Interaction Search Advanced Search

**[+] Show video: Interaction Search: Advanced Search**

Link to video

## Browser history

- Viewing the Browser History of Your Customers

**[+] Watch video: Viewing the Browser History of Your Customers**

Link to video

## Instant Messaging in your organization

- Sending and receiving texts with others in your organization

**[+] Watch video: Texting with others in your organization**

Link to video

## Using supervisor features

Supervisors can use the Team Lead Workbins

- Team Lead Workbins Overview

**[+] Watch video: Team Lead Workbins Overview**

Link to video

# Channels

Channels are the different methods, such as email and chat, that you use to communicate with customers and team members in your contact center.

## What does each channel do?

Each channel lets you communicate with your contacts in different ways. You can make and receive phone calls (known as the Voice channel). You can also receive and reply to emails, interactive live chats, Facebook messages, Tweets on Twitter, and Workitems such as faxes and PDFs. Use Instant Messaging to exchange text messages with your coworkers. You can also use a co-browse session to navigate your company website with a contact.

## Why can't I see all the channels?

Depending on your assignment, you might have all, some, or just one of the channels available to you.

## Aren't chats and IMs the same thing?

Yes, to the extent that they both enable real-time text communication. In Workspace, the chat channel is used to communicate with customers and Internal IMs lets you communicate with people in your contact center. IMs are not saved.

## What's the difference between a consultation and a conference?

Both activities involve getting help from an agent or supervisor. Consultations let you communicate with a team member privately while handling an interaction. Conferences let someone else from your contact center join the chat or phone call with your contact.

If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

## What can I do in the My Channels tab?

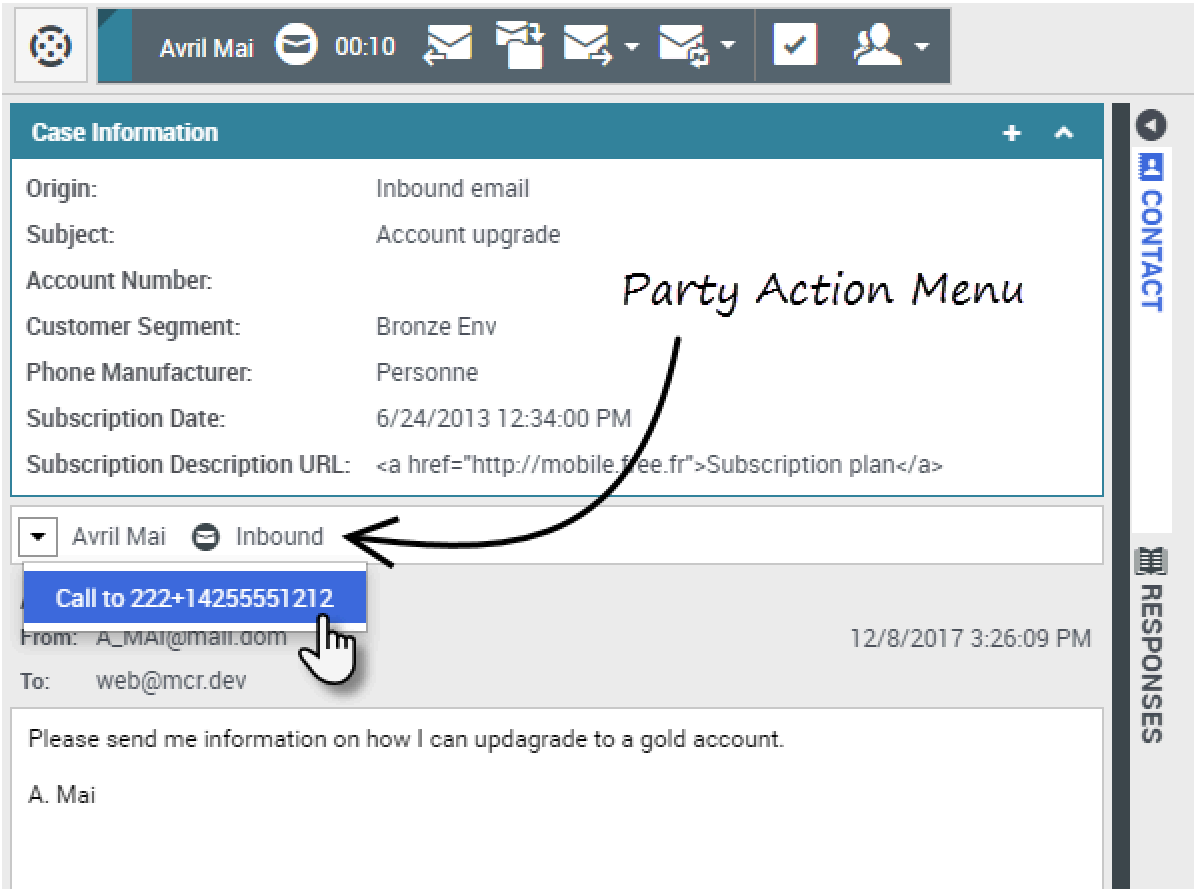
Use the My Channels tab to:

- Change your status on a channel
- Log off from a channel
- Turn on/off your Do Not Disturb status (applies to all channels)
- Forward calls that are directed to your extension to another extension

### Tip

If you manually set your status to Not Ready while you are handling a phone call, chat, or email the system starts recording your time in that state rather than the time spent handling the call. Some contact centers have the Pending state enabled so that the Not Ready state does not take effect until after you end your phone call or chat interaction, or after you send your email or place it in a workbin.

## Can I use more than one channel at a time?



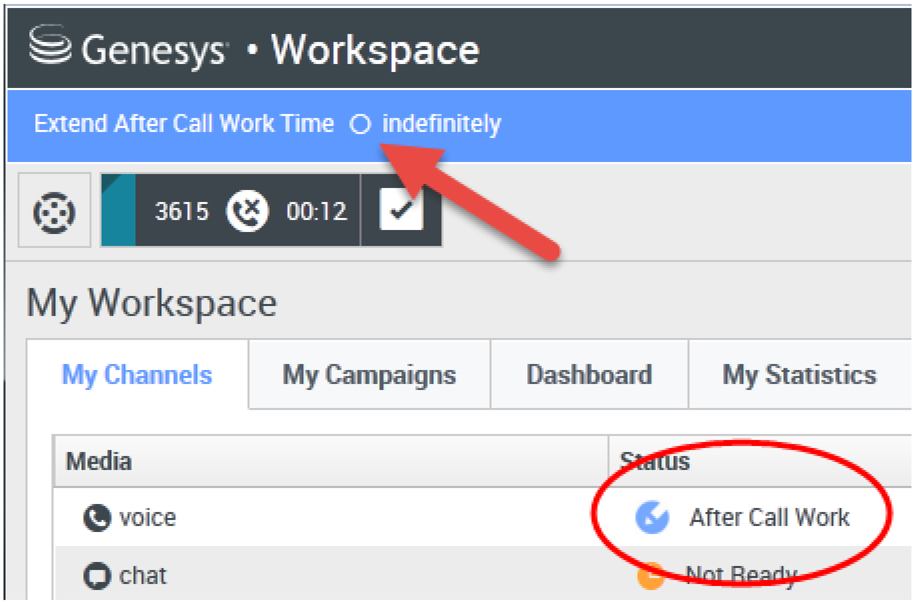

Your environment might be set up to let you use another channel while you are active in a different one. For example, you might want to call a contact while you are handling their email or chat request.

To do this, use the **Party Action** menu in the Interaction Status area to find a list of all phone numbers and email addresses your company has for the contact, and select the one you want to use. If the connection is made, the status area and interaction control buttons are updated to include the new channel.

You might also be set up to handle multiple interactions over different channels simultaneously, such as three emails, two chats and a call with different customers.

If your account is set up for it, you can also click a phone number or email address that your contact sends you as a chat message to call or email the contact.

## What happens when I mark an interaction as Done?




The answer depends on your account setup.

You might have to mark an interaction as **Done** before you can close the interaction view.

When you click **Mark Done**, your status might automatically change from **After Call Work** to **Ready**, **Not Ready**, or some other value, or you might have to manually set your status to **Ready**, or some other value, after you complete your after call work.

You might be allotted a certain amount of time after each call to perform After Call Work (ACW). If so, your status for the voice channel will be **After call work** until the time interval has passed, then it might change to **Ready** or **Not Ready**. You might also be able to extend your after call work time indefinitely, if a call requires more than the usual amount of after call work.

# Customer interactions

A customer interaction has two parts: the actual communication with the customer over one or more channels, and the tools that help you address the customer's issue.

> **Important**
> What you see in Workspace depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this product help. If you think you should be able to do or see something you can't, check with your supervisor or system administrator.

## What kinds of customer interactions can I receive?

Depending on your assignment, you might receive interactions through almost any channel, directly from customers or by way of a consultation, conference, or transfer. Some contact centers are set up to always direct interactions from the same customers to the same agents. If your assignment is set up this way, then you will be able to assist certain customers whenever they call, email, chat, and so on when you are available.

## What kinds of customer interactions can I start?

Depending on your assignment, you can:

- call a customer directly
- make outbound calls as part of a campaign
- send an email
- send Tweets or post to Facebook, though more likely your social media interactions will begin with customers

Only customers can initiate chats and co-browse sessions.

## Can I use more than one channel at a time?

In some cases, you can use multiple channels during a single customer interaction. You can, for instance, send an email to customer you are speaking with.

## Where can I find answers to common contact questions or problems?

First, try the Knowledge Center, standard responses, your own contact history, and any customized knowledge repositories your contact center uses. If none of those options works, you can start a consultation with one of your team members.

## How do I search through previous interactions with customers?

You can view customer interactions in three ways:

- My History lets you browse your interactions
- The Contact Directory lets you browse all interactions with a customer or team member
- Interaction Search lets you browse the complete interaction database using either a Quick Search or an Advanced Search.

## How do I accept an incoming interaction?

New interactions (calls, chats, emails, or social media postings) arrive at your workstation in a pop-up. In some contact centers you can decide whether to accept or reject the interaction, in others, the interaction will be answered automatically. If you take no action at all, it will eventually time out and go to the next available agent.

If you're configured for auto-answer, of course, you can't choose to reject an interaction.

Many internet browsers also display notices to you about interactions and other events. You can manage these notifications through the settings in the browser. See the help for the browser you are using if you want to control browser notifications.

## Why do my emails contain odd-looking codes?

Standard responses use "tokens" (such as `<$ Contact.FullName $>`) that replace a code with specific text. For instance, `Dear <$ Contact.FullName $>` becomes `Dear John Smith` in the email. If you copy and paste token code (such as `<$ Contact.FullName $>`) into your draft email, the replacement happens only after you send the email. To see the replacement text before sending, you must click **Insert Standard Response Text**.

## What are these other websites I'm seeing?

Internal and external websites might be integrated into your Workspace Main view by your administrator. At the Workspace level, the external website is displayed in dedicated tabs. These tabs allow you access to the website without leaving Workspace.

At the case level, there are two ways to display websites depending on the display mode of 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 itself.

## How do I set a disposition code?

You can assign one disposition code to an ongoing or terminated interaction to characterize the outcome of the interaction.

The Disposition Code view is a tab in the Interaction view. It contains a list of choices that you can click to specify the outcome of the interaction. A search field is available to search among the disposition codes.

The Disposition Codes are organized within grouping folders, which cannot be selected as dispositions. These grouping folders do not correspond to business attributes, as they are only textual information.

Select a disposition for the interaction. Once a disposition is selected, the disposition list is hidden and the selected disposition appears in a textbox located at the top of the listing. You can't edit a disposition but you can select a different one to replace it.

The complete path to the disposition is available as a tooltip of the disposition name.

Depending on your system configuration:

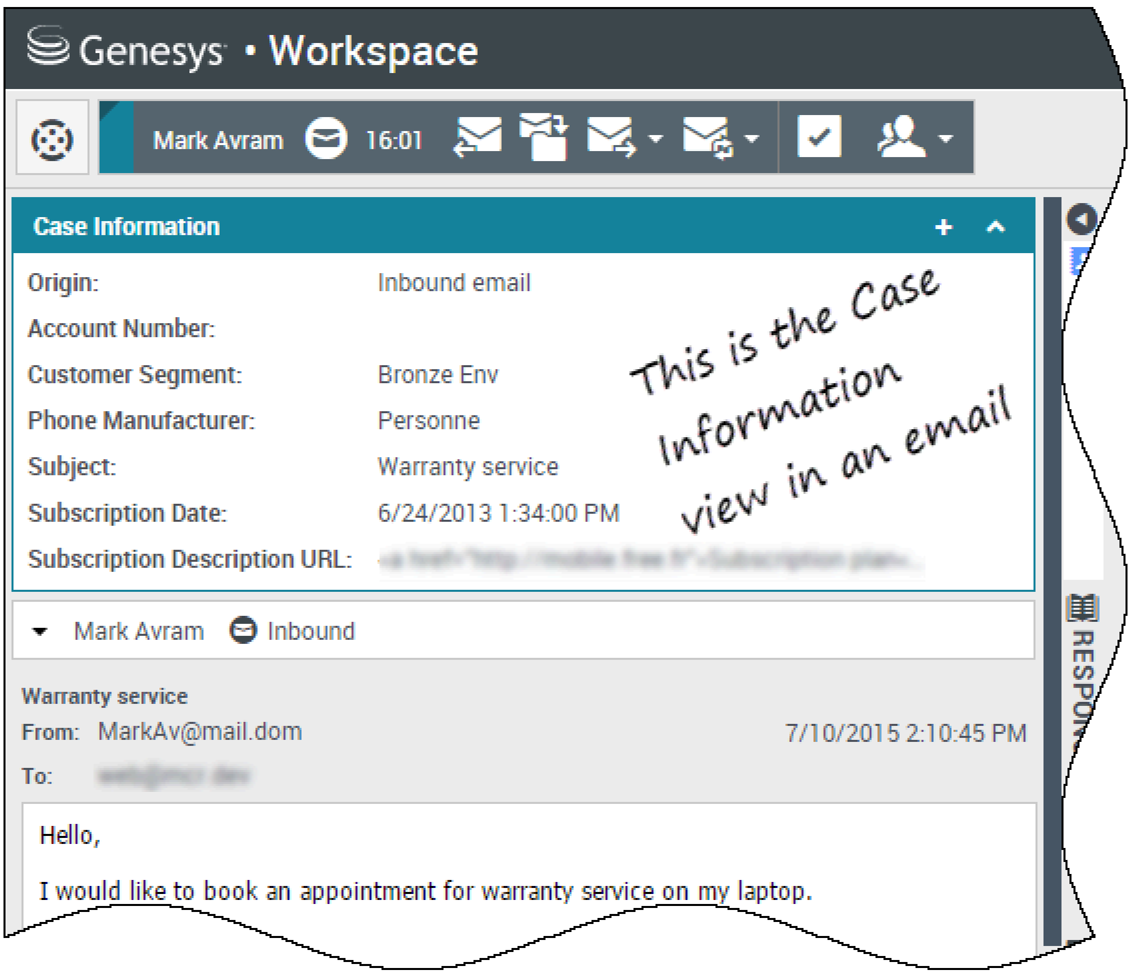
- You might have to set a disposition code before you click **Mark Done**.
- You might be able to click **Mark Done** without a disposition code.
- The Disposition Code view might not be displayed.

## How do I add a note to an interaction?

The note is a feature that enables you to enter comments about the current interaction or about a selected interaction. You can view the note in most channels as well as contact history, My History, and My Workbin.

**Important:** You must click **Save** to store your note.

## How do I work with case information?




The case information view (also called attached data) provides information about an interaction — for example, an account number or type of service.

Some case information might be displayed as the title of the web page, an anchor, or a link. If the link is active, it is displayed as blue text. Links might be displayed as a URL or hyperlink display text, and might have a tooltip that tells you want to do or where the link goes. Links might open as a new tab or a new window; your administrator might override your browsers settings for this behavior.

To make changes, select the field you want to edit or delete. Fields that you can edit display a pencil icon when you roll your mouse pointer over them.

You can add more fields with .

# Calls

## Tip

Are you experiencing any of the following issues? Contact your supervisor, Genesys administrator, or IT personnel. These issues are related to your organization's settings or network.

- Cannot login.
- Channels out of service.
- Servers out of service.
- No ring tone when a new interaction is directed to you.
- Calls dropping.

Workspace provides you with controls and features that let you handle voice interactions with contacts or team members. For information about making calls, see the following topics:

- How do I start a call or an email message?
- Outbound campaigns
- Videos: Handling voice calls

## How do I handle an incoming call?

### Link to video

- Handle it myself
- Handle it myself with help
- Transfer it
    - Instantly 
    - After a consultation
- End the call 

If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

# How do I use my mobile or desk phone to answer a call?

If you use a mobile phone or a desk phone instead of a headset connected to your workstation to handle calls, you might have to handle things a little differently if your contact center uses Nailed Up connections. If you don't use a Nailed Up connection, just use Workspace to answer your calls as usual.

## How do I handle calls with a Nailed Up connection?

If your contact center uses Nailed Up connections, your supervisor should tell you to use your phone to answer calls, not the Workspace desktop.

Log in and set your status to Ready as usual.

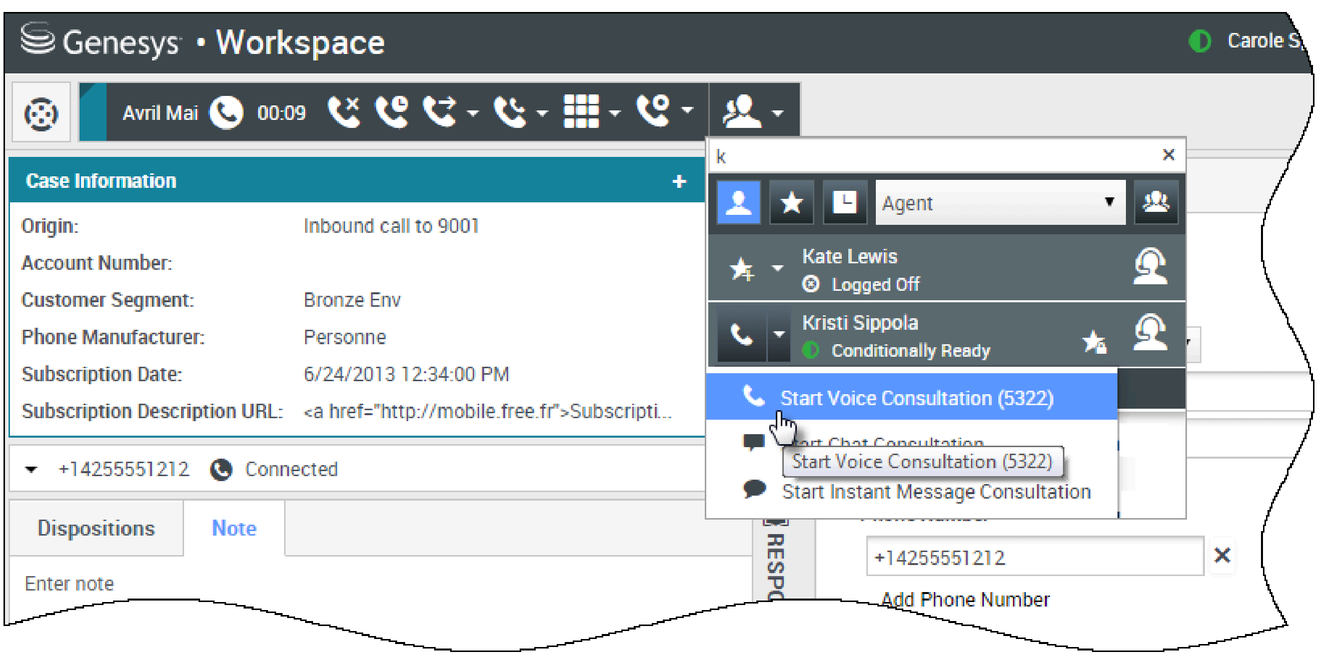
When a new call is directed to you, a notification pops up on your desktop to inform you that you have a new call. **DO NOT** click **Accept** to dismiss the pop-up!

Answer the call on your phone. Information about the call is displayed in Workspace.

Don't end the call by hanging up your phone. Use Workspace to end the call by clicking .

If you end the call by hanging up your phone, Workspace cannot automatically answer your calls, and you will have to answer them yourself using your phone.

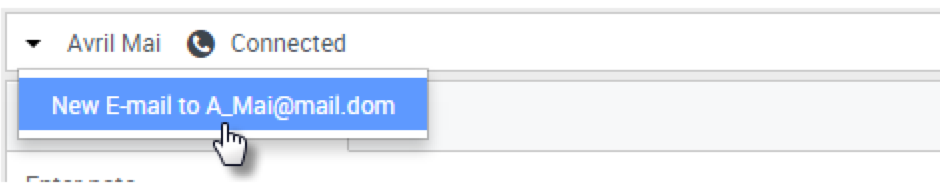
# Where can I get help to handle a call?

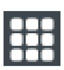


- Look for standard responses
- Search the knowledge base
- Search contact and interaction history
- Start a consultation 
- Start a conference 

If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

## What other actions can I take during a call?




- Send an email or make another call
- Update contact information
- Record the call
- Hold  and resume 
- Dial digits  without using your phone. For instance, you can use this dialer when you are navigating a phone system. You might not hear tones when you dial using this tool.

## How do I control the volume of my headset and mute myself?

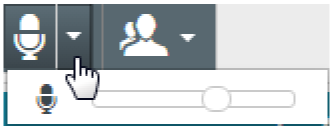
### Link to video

Your administrator can set up the controls for your microphone and speakers on your headset to let you mute and unmute yourself and/or your contact, and let you control the volume of your microphone and speakers.

Depending on how things are set up, you might see different configurations of buttons:

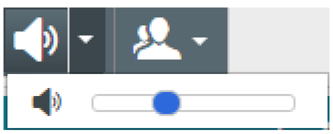
- Mute/unmute your microphone

- Adjust the volume of your microphone

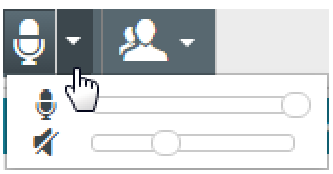


- Mute/unmute your speaker

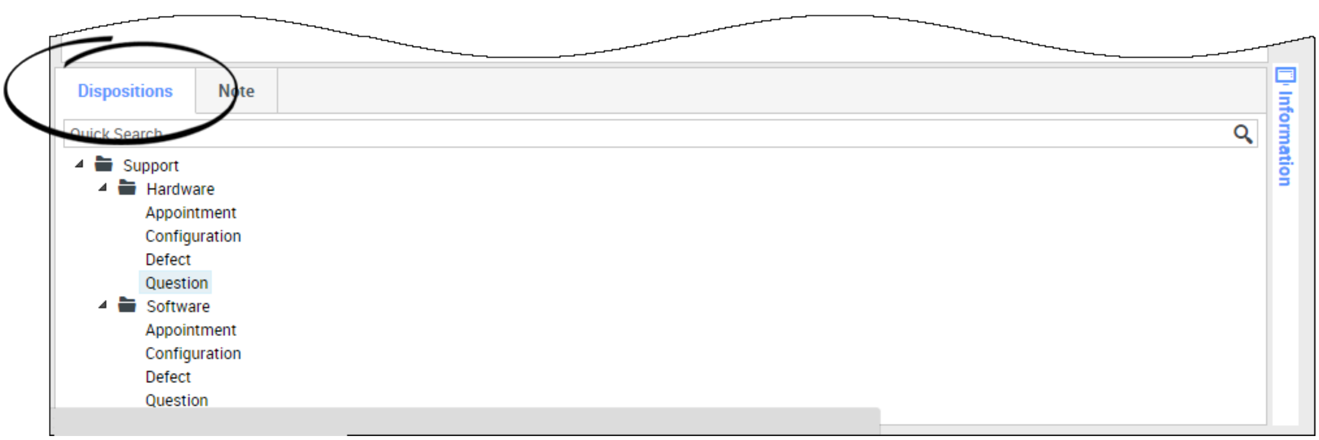
- Adjust the volume of your speaker



- Adjust the volume of both your microphone and your speaker

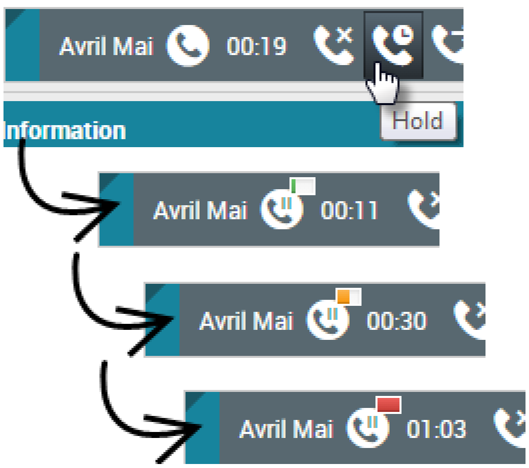


## What do I do at the end of a call?



- End call 
- Take notes
- Select a disposition code if required
- Mark Done 
- Change status as needed

## What happens when I put someone on hold?

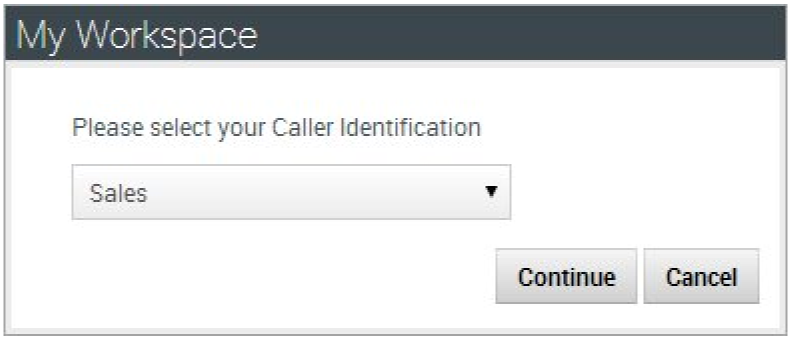



You can see how long you have placed a caller on hold, if enabled.

After you click **Hold** (), a timer and progress bar begin to count the seconds that the call is on hold.

The progress bar changes from green to yellow to red as time goes by. If the progress bar changes to red, the call might have been on hold too long and you should click **Resume** () to update the contact and let them know that they are still on the call.

## How do I manually select a Caller Identification?




When you make a call, you might have to choose a Caller Identification to be displayed on the phone of the contact. This feature might also be enabled for calls that you are transferring or conferencing.

The person you call sees the Caller ID you select. The previous Caller ID that you selected is selected by default. To hide your identity, you can select `Anonymous` if available. Ask your supervisor about when to use this feature.

## How do I record a call?

The Call Recording functionality (for VoIP/SIP enabled agents only) enables you to record the current voice interaction with a contact or an internal target. Workspace supports two different types of call recording: emergency recording and controlled call recording. Your system administrator configures the type of call recording that is supported in your environment.

> **Important**
> Your contact center might record every call. You might not have the ability to control call recording. You will receive a notification that recording is in progress.

If your account is set up for emergency recording, you can start and stop recording by using a single toggle button.

If your account is set up for controlled recording, you can start a recording, pause a recording, resume a recording, and end a recording.

Call recording enables you to perform the following functions:

- **Record the call** — Select Record the Call () to record a call.

- **Stop recording the call** — Select Stop Recording the Call () to stop recording a call that you are currently recording.
- **Pause recording the call** — Select Pause Recording the Call () to pause recording a call that you are currently recording.
- **Resume recording the call** — Select Resume Recording the Call () to stop recording a call that you are currently recording.

When you are recording a call, the call icon in the connected-parties area changes to red.

When you pause a call recording, the red call icon changes back to gray.

A call-recording icon () is displayed in the title bar of the Main View when a call recording is active.

## How do I forward my calls?

To forward calls to a different extension or phone number, on the selected media channel, in the Forward column, click No Active Forward and **Forward**.

This action opens the Forward dialog box. Enter the number to which you want to forward your calls and click **Apply**. Click **Cancel** to return to the My Channels tab without forwarding your calls.

If you have an Active Forward set and you want to disable it, on the voice channel, in the Forward column, select **Forwarded to <number>**, and select **Cancel Forward to <number>**.

In the Cancel Forward dialog box, select **Yes** to cancel the forward; this removes the active forward and changes the Forward status to **No Active Forward**. To keep the forward active, select **No**.

> **Important**
> When an Active Forward is set, no call is received by the application.

## How do I call someone back?

If you are handling a call and the call drops you can call the contact back either by opening Team Communicator, filtering for Recent Calls (), and selecting their name, or by opening the **Party Action** menu and selecting the contact's phone number from the pop-up menu.

# Email

The email interaction window enables you to view all of the information necessary to handle inbound and outbound email interactions with a contact.

## How do I handle an inbound email?

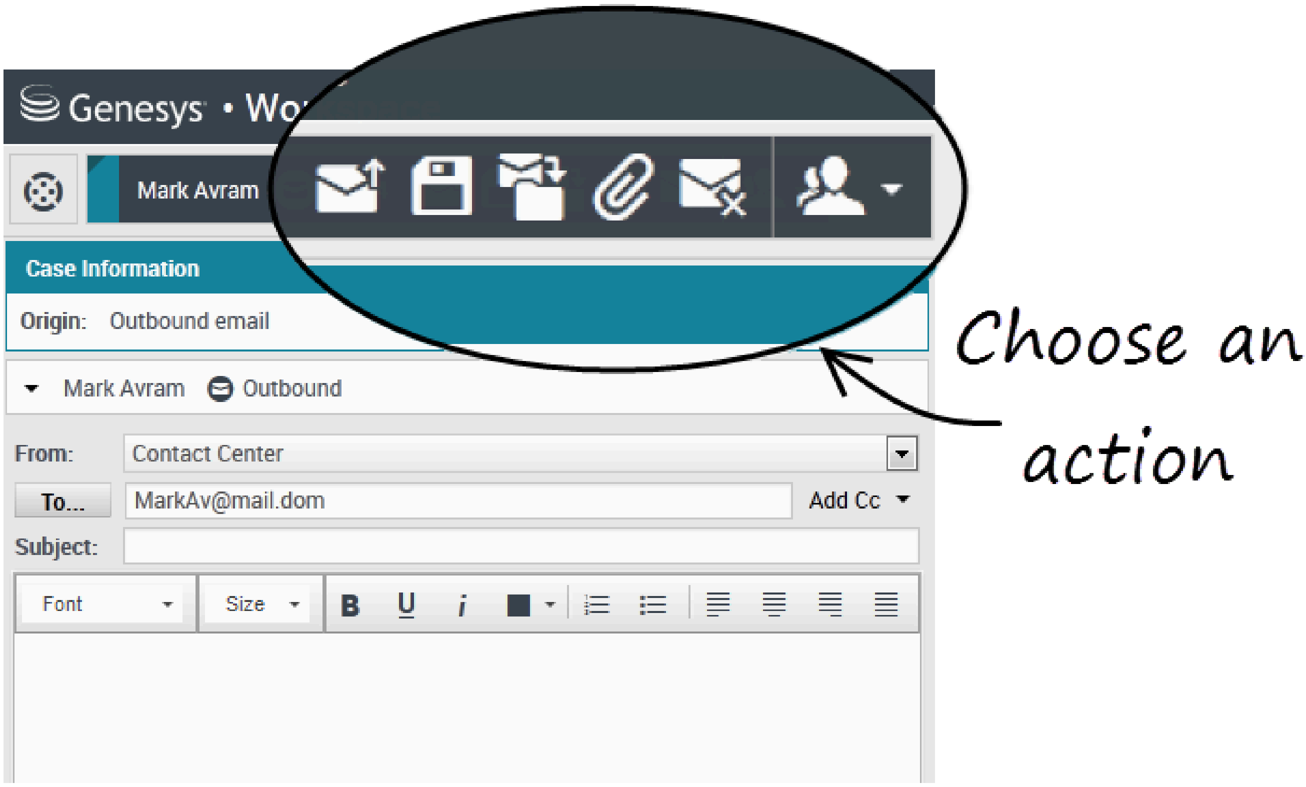
### Link to video

Typical actions you can take with an email are:

-  to reply to the email, using your own message or a standard response.
-  to reply all.
-  to transfer the email to another agent.
-  to forward the email to an external resource.
-  to save it in your workbin.
- View the associated case data.
- Add a note or disposition code.
- Mark it as done.

Watch the video to see what happens when an email arrives at a workstation.

## How can I get help with an email?

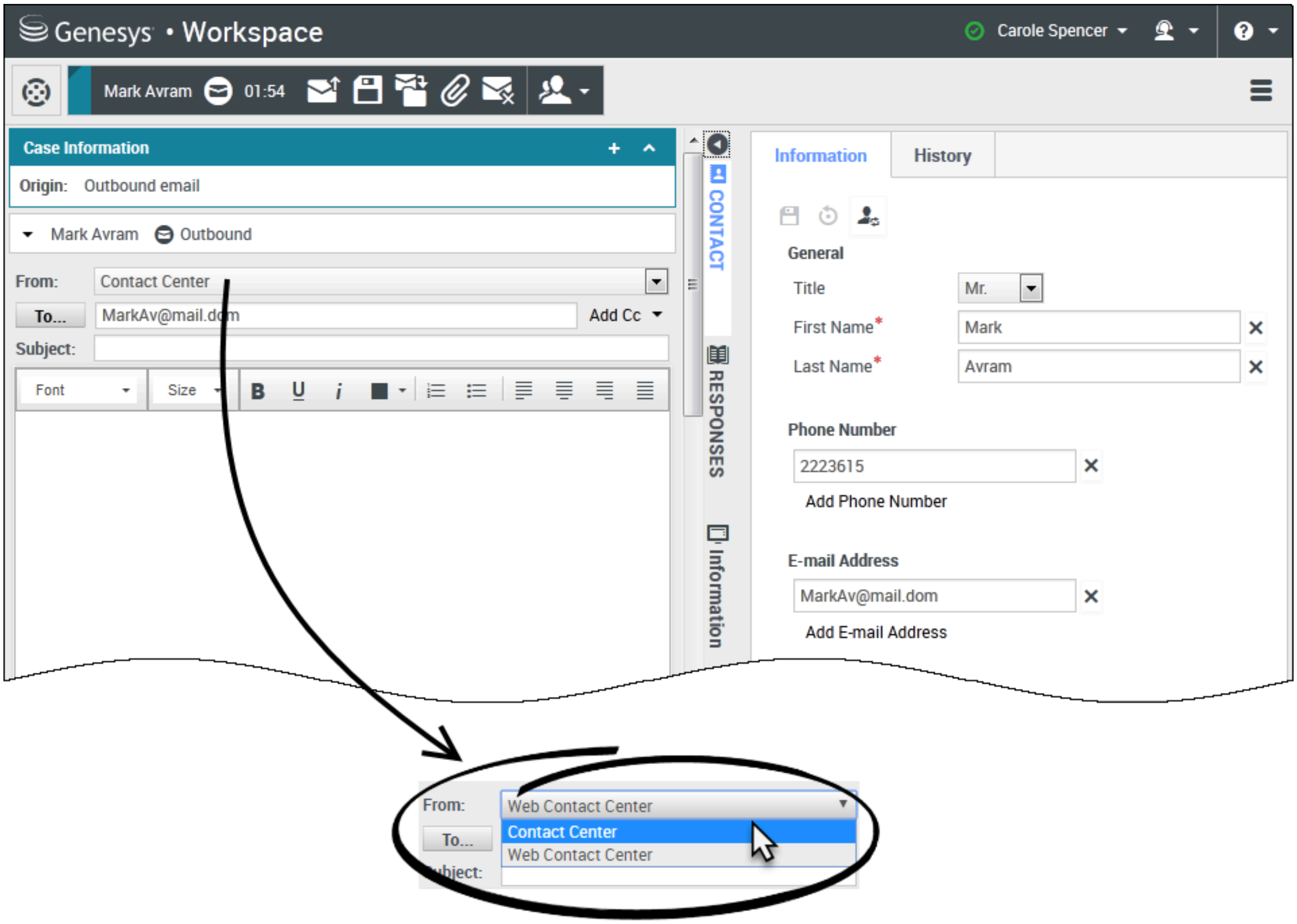



- Check the associated case data for information that might help you.
- Call the contact, if your site has this feature and their number is available in your contacts list.
-  to start a consultation with a team member.
-  to forward the email to an external third-party resource for additional support or help.

If you are sending the email to someone else, you can add your own notes or instructions for that person to review.

If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

# How do I compose and send an email?




There are three main ways to compose and send an email in Workspace:

- Reply to an active interaction.
- Find a contact (using your internal team or contacts directory) and select the email option from their contact details.
- During a call, click the party action menu and select **New E-Mail to...**.

While the outbound email window is open, you can compose a message, add any required notes, dispositions, attachments, and recipients, and then send the email.

Use the **From** drop-down to choose a different 'from' email address. Your administrator sets the 'from' default address.

If you are not yet ready to send it, you can save it as a draft in your workbin, or delete it.

## Forwarding an email as an attachment to an external resource

Link to video

To send a copy of an email interaction as an attachment to an external resource (someone in your company directory that is outside of the control of the Genesys environment — for example, your back office). A forwarded inbound email is copied as an attachment to a new email interaction from you. You are still responsible for responding to the original inbound email interaction. You might or might not be required to wait for an answer to this forward, depending upon your corporate policies and processes.

To forward the email, click **Forward** () on the active inbound email window toolbar. This feature is available only for current email interactions.

To add a target to the **To** address field, do one of two things:

- Type an email address in the address field. Click **Add Email Address** to enter the email address of the target in the address field. If your environment is set up to let you add multiple addresses, you can click in the address field and enter additional email addresses.
- Click the **To...** button beside the **To** address field to display the Contact Search view. You can use this view to perform a search of the Contact Directory for targets. The Contact Search view can also be used to add **Cc** targets (if Cc is available in your environment).

To display the **Cc** address field, click **Add Cc**. The **Cc** address field is displayed below the **To** address field. You add target email addresses to the **Cc** field in the same way that you add addresses to the **To** address field. Click **X** to remove the **Cc** address field.

To add a comment, information, or instructions to the forwarded email interaction for the target, enter your message in the **Enter Forward Instructions** area, above the original email that you are forwarding.

To send the forwarded inbound email to the targets, click () **Complete Forward**.

When you forward an email, it is temporarily stored in your In-Progress workbin until the forward is completed, then it is removed from the workbin.

## Forwarding an email inline to an external resource

Link to video

To send a commented copy of an email interaction to an external resource (someone in your company directory that is outside of the control of the Genesys environment — for example, your back office). This is called inline forwarding. A forwarded inbound email is copied into a new email interaction. The new email has a note with the date and contact name or the header of the email that you are forwarding and below that, the contents of the original email quoted. You are still responsible for responding to the original inbound email interaction. You might or might not be required to wait for an answer to this forward, depending upon your corporate policies and processes.

To forward the email, click **Forward** () on the active inbound email window toolbar. Usually this feature is available only for current email interactions; however, some contact centers might give you the ability to forward email interactions from the Interaction History that have already been closed.

To add a target to the **To** address field, do one of two things:

- Type an email address in the address field. Click **Add Email Address** to enter the email address of the target in the address field. If your environment is set up to let you add multiple addresses, you can click in the address field and enter additional email addresses.
- Click the **To...** button beside the **To** address field to display the Contact Search view. You can use this view to perform a search of the Contact Directory for targets. The Contact Search view can also be used to add **Cc** targets (if Cc is available in your environment).

To display the **Cc** address field, click **Add Cc**. The **Cc** address field is displayed below the **To** address field. You add target email addresses to the **Cc** field in the same way that you add addresses to the **To** address field. Click **X** to remove the **Cc** address field.

To add a comment, information, or instructions to the forwarded email interaction for the target, enter your message above the original email that you are forwarding.

To send the forwarded inbound email to the targets, click () **Complete Forward**.

When you forward an email, it is temporarily stored in your In-Progress workbin until the forward is completed, then it is removed from the workbin.

### Forwarding from History

You can inline forward from the Interaction History. In the following windows, select an interaction and click :

- **Interaction History**
- **Contact History**
- **My History**

## Forwarding either inline or as an attachment

Link to video

Some contact centers are set up to enable you to choose whether you want to forward an inbound email in-line or as an attachment. If this feature is enabled for you, the Forward button has a drop down menu that lets you choose how you want to forward an email.

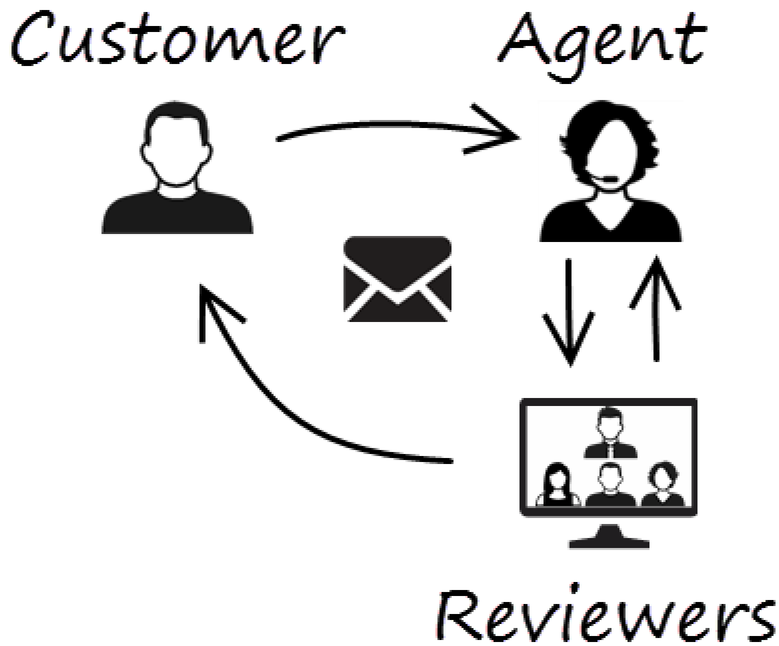
Click **Forward** to open the menu.


Choose one of the following options:

- Forward
- Forward as an Attachment

Follow the steps in the sections above, depending on which way you are forwarding your email.

## How does email quality assurance work?




Workspace lets you and your team lead or supervisor work together to perform a Quality Assurance (QA) review of outbound emails. If your contact center is set up for email QA, any emails that you send are first sent to a reviewer for approval.

Here's an example of how a typical email QA review cycle might work:

- A customer sends an email to an agent.
- The agent sends a reply, which is directed to a reviewer.
- The reviewer either approves the email (sends it to the customer) or rejects it (holds it back for changes). The reviewer might make the updates themselves, or send it back to the agent with notes or instructions. The Case Information for the interaction might also show a **Rejected** status.
- After the changes are made, the review process repeats.

(Ask your administrator about the QA review process in your contact center as it might differ from the one described here.)

# Chat

The chat channel lets you handle customer chats. To chat with your team members outside of a consultation, use instant messaging.

This page describes the typical options for handling a chat interaction. During a chat session, you and your contact send messages back and forth in real-time. When your contact is typing, you will see a notice that they are writing a response, but you won't see what they have written until they send it. The Interaction View keeps track of the conversation and allows you to review what has been said.

## How do I handle a chat interaction?

### Link to video

When you accept a chat request, the name of the contact is displayed at the top of the screen and the timer for the pending response indicator starts. The color of the indicator begins as green, then changes to yellow if you have not responded within the specified time limit. If you still do not respond, the indicator changes to red and begins to flash.

Some of the things you can do while handling a chat include:

- Transfer () the chat to someone else in your company.
- Start a chat conference () with yourself, the customer, and someone else in your company.
- Start a Voice (internal targets and contacts) or Chat (an internal target only) consultation. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.
- Call or email the contact, if there is a phone number or email address in the contact database. (You can also launch a call or email from the **Party Action** menu by clicking an email address or phone number.) If your account is set up for it, you can also click a phone number or email address that your contact sends you as a chat message to call or email the contact.
- Add a disposition code or note.
- End the chat () and mark it as done ().

If you place your mouse pointer over the interaction in the Interaction Bar, you can see the elapsed time of the interaction and the last lines of the chat transcript. Connection-status information is displayed next to the**Party Action** menu.

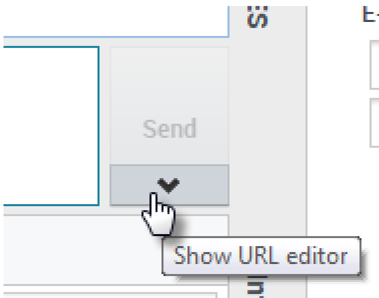
**Note:** If you have a pending response and the Chat Interaction window is not the active window, it will start flashing in the Windows taskbar, regardless of the pending-response indicator status (green, yellow, or red).

Watch the video to see what happens when a chat request arrives at a workstation.

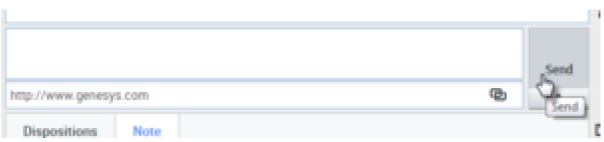
# Pushing weblinks (URLs) to your contacts

## Link to video

Some agents might be set up to push website links (URLs) to contacts. If you are, you will see a down arrow below the **Send** button.




Click the button to open the URL Editor below the chat text editing area. Type or paste the website address (URL) that you want to send to your contact and click **Send**.




To check the URL before you sent it, click the link symbol (▼) to open the URL in your browser. This way you can be sure that you are sending your contact to the correct website.

If you have sent previous URLs, a down arrow is displayed next to the link symbol in the URL Editor area. Click the arrow to open a menu that contains a list of URLs that you have sent to your contacts. Select one of the URLs to push it to your contact. You can use arrow keys to navigate through the list of URLs: up and down highlights the next URL, left or right selects it and inserts it into the Push URL field.

Your contact will receive a message in their chat window telling them to click the link that you sent them.

# Facebook

The Facebook channel enables you to handle interactions with contacts and team members on the popular social networking service.

You must be a registered user before using the site, so that you can create a personal profile, add others as friends, and exchange messages, including automatic notifications, when friends update their profile.

Businesses use Facebook to reach their target customers, choosing their audience by location, age and interests. Businesses can also promote their Facebook page or website, use Facebook's "Like" button to increase their advertising influence, and build a community around their business.

**Note:** You cannot attach files or pictures to your comments.

## How do I handle a Facebook interaction?


When a new inbound Facebook interaction is sent to your workstation, a preview of the interaction is displayed at the bottom right-hand corner of your desktop.

If you accept the interaction, the inbound Facebook interaction view is displayed with the original-routed post on the left margin under the Facebook interaction toolbar. Subsequent comments are indented underneath the original post.

To view your Facebook contact information, select **Show Info** to open a user profile tab or select the username to open the Facebook page with user profile information.

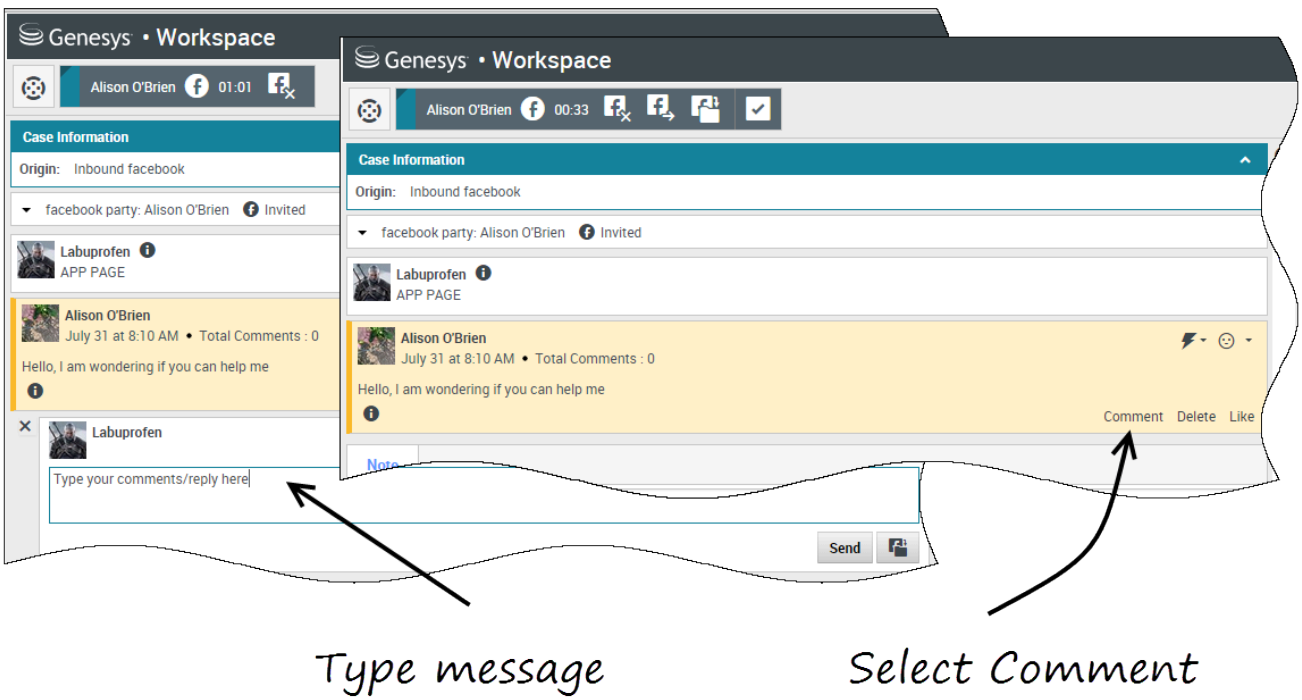
To reply to an original post, click **Comment** on the right of the post. Your comment is attached with the post and sent to your Facebook contact.

Some of the things you can do while handling a Facebook interaction include:

- Transfer the interaction to someone else in your company.

- Start a chat conference with yourself, the customer, and someone else in your company.
- Start a voice (internal targets and contacts) or chat (an internal target only) consultation. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.
- Call or email the contact, if there is a phone number or email address in the contact database. (You can also launch a call or email from the chat transcript area by clicking an email address or phone number.)
- Respond with another media channel, such as voice or email.
- Reply with a Standard Response.
- Add a disposition code or note.
- End the interaction and mark it as done.

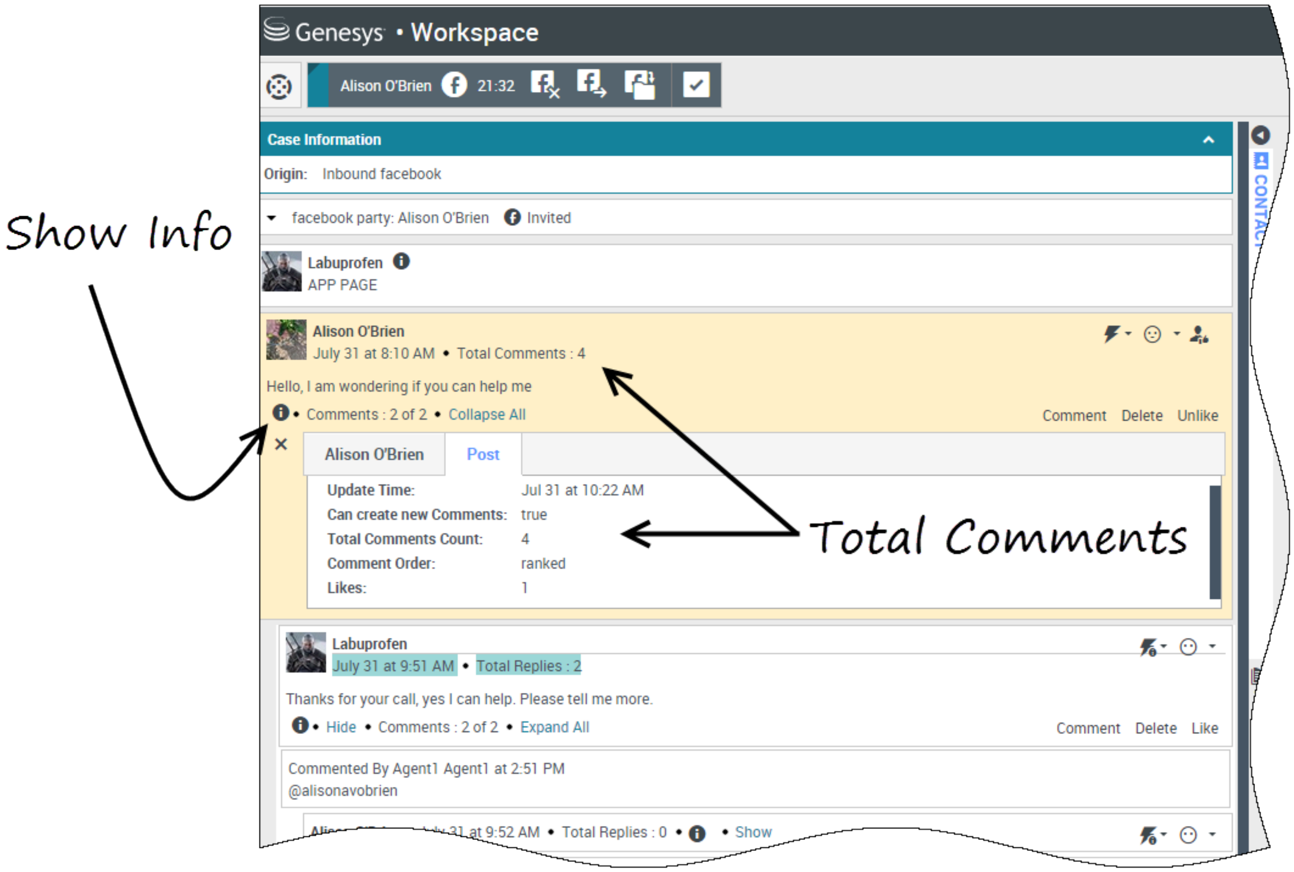
## What actions can you take while viewing comments



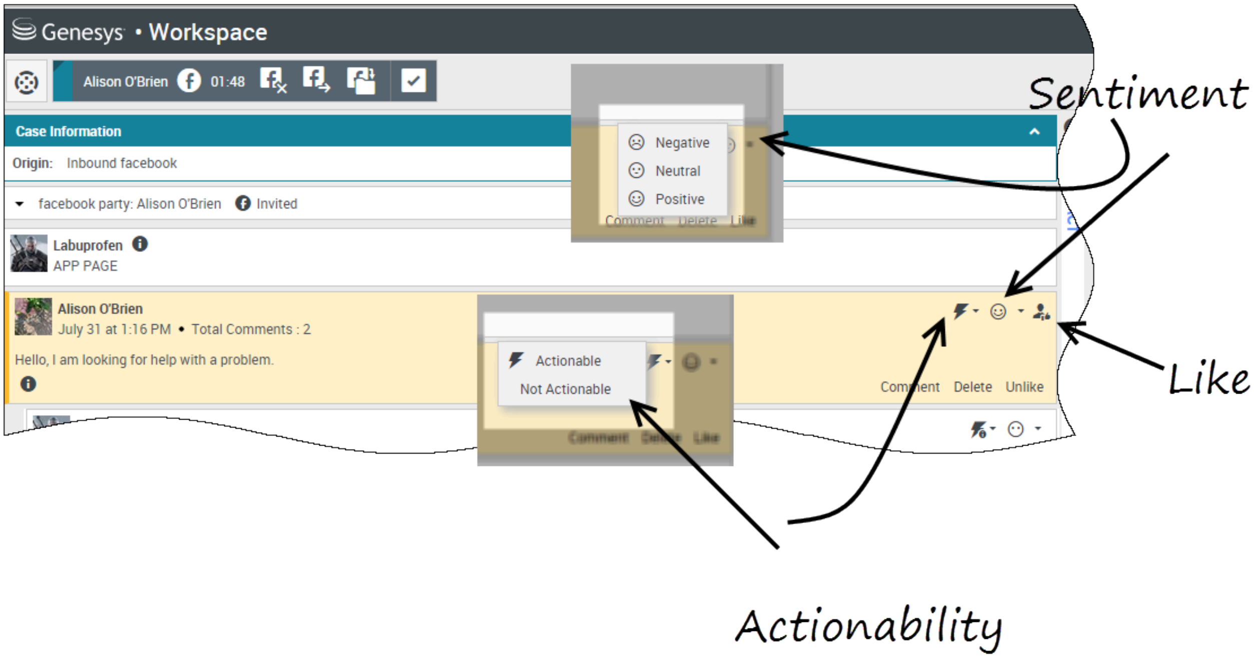

You can reply to your Facebook contact. Select "Comment" and type your message in the text box.

Select the **Show Info** button to open the user profile then select the **Post** tab to view the total comments count. Total comments also appears above the original post. Your administrator sets up the number of comments to display per page. If the number of comments exceeds the set number, **Show more** appears. Click **Show more** to view additional comments.

### [+] Show more screenshots.


Genesys • Workspace
Alison O'Brien 21:32
Case Information
Origin: Inbound facebook
facebook party: Alison O'Brien Invited
Labuprofen
APP PAGE
Alison O'Brien
July 31 at 8:10 AM • Total Comments : 4
Hello, I am wondering if you can help me
Comments : 2 of 2 • Collapse All
Comment Delete Unlike
Alison O'Brien
Post
Update Time: Jul 31 at 10:22 AM
Can create new Comments: true
Total Comments Count: 4
Comment Order: ranked
Likes: 1
Show Info
Total Comments
Labuprofen
July 31 at 9:51 AM • Total Replies : 2
Thanks for your call, yes I can help. Please tell me more.
Hide • Comments : 2 of 2 • Expand All
Comment Delete Like
Commented By Agent1 Agent1 at 2:51 PM
@alisonavobrien
Total Replies : 0 • Show

## Display the actionability and sentiment



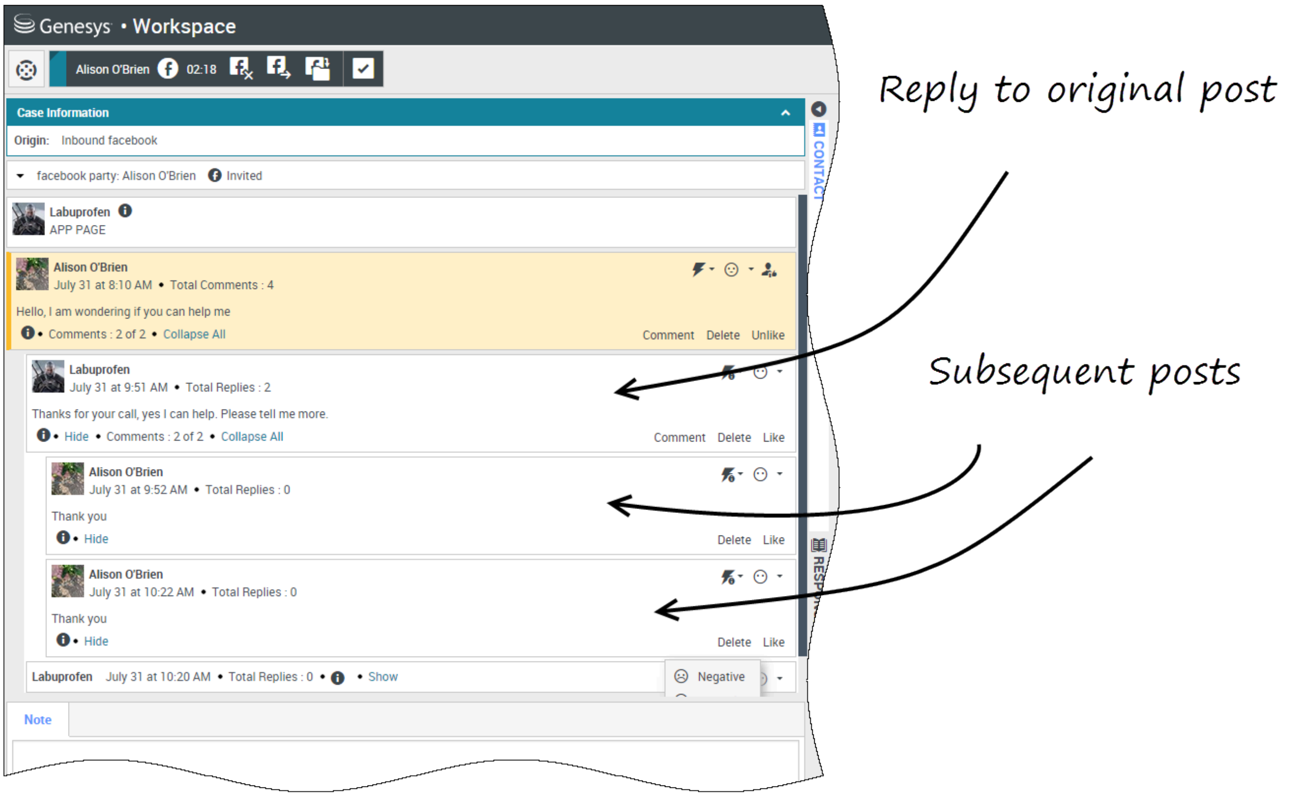

When a Facebook interaction arrives, you can see **Actionability** and **Sentiment** icons, which could have one of the following values:

- **Actionability** — Can be actionable, not actionable, or undeclared
- **Sentiment** — Can be Positive, Negative, Neutral or undeclared

Actionable Facebook posts are colored yellow and non-actionable posts are colored gray. Facebook comments are automatically expanded and colored yellow if they are actionable, and collapsed and colored gray if they are non-actionable. You can update each Facebook comment's **Actionability** and **Sentiment** icon.

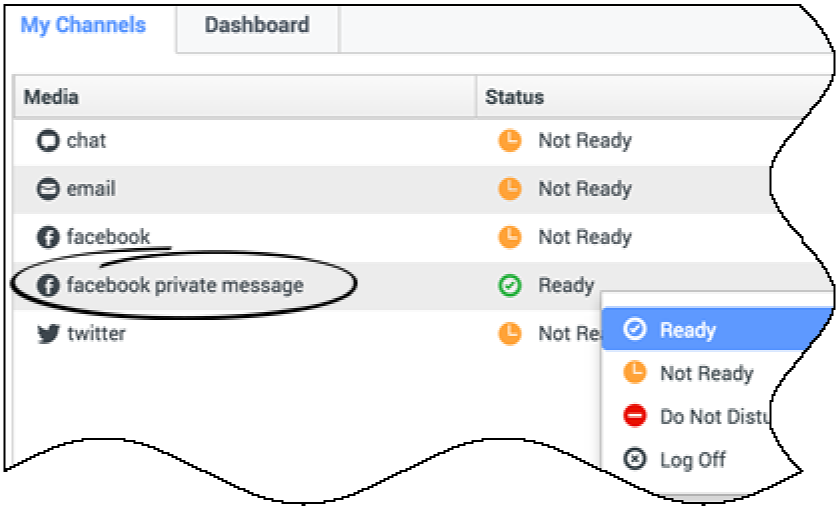
If you favor an interaction, select **Like**.

## Reply to comments



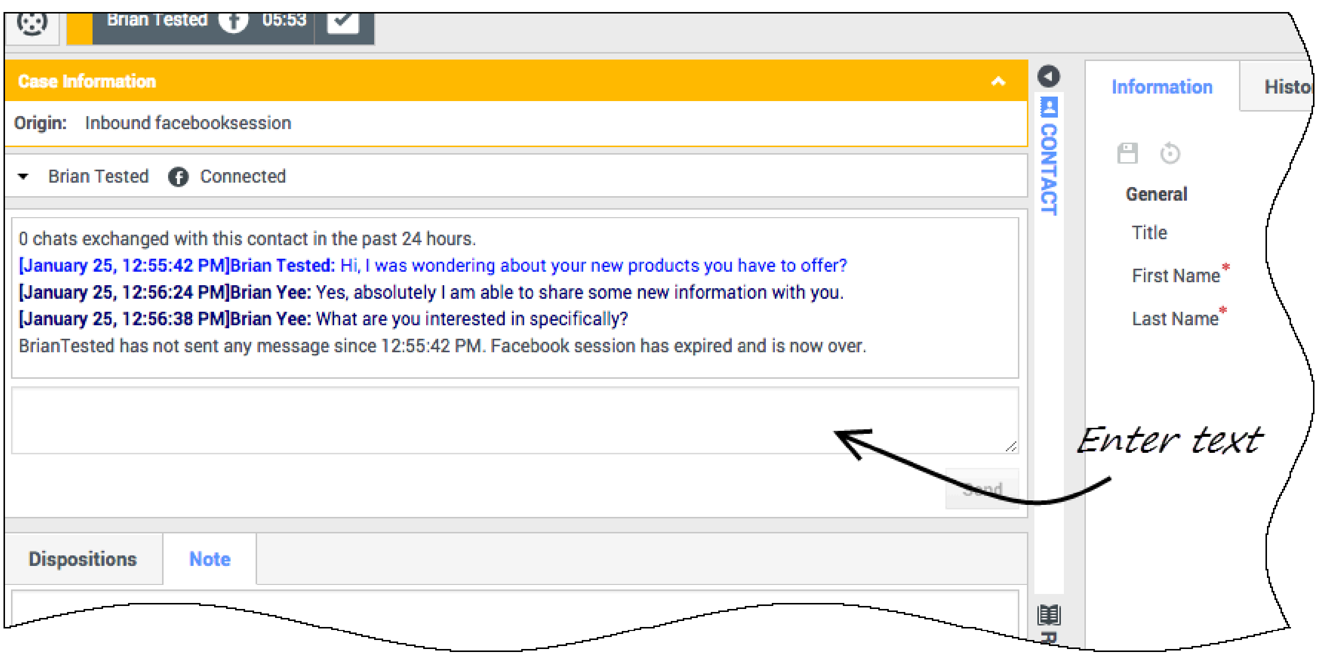

You can reply to the original routed Facebook post, or reply to a Facebook comment. The subsequent comments are indented underneath the original post. Select the applicable comment, enter your reply (you can cut and paste text), and select **Send**.

# Reply to a private message: log in



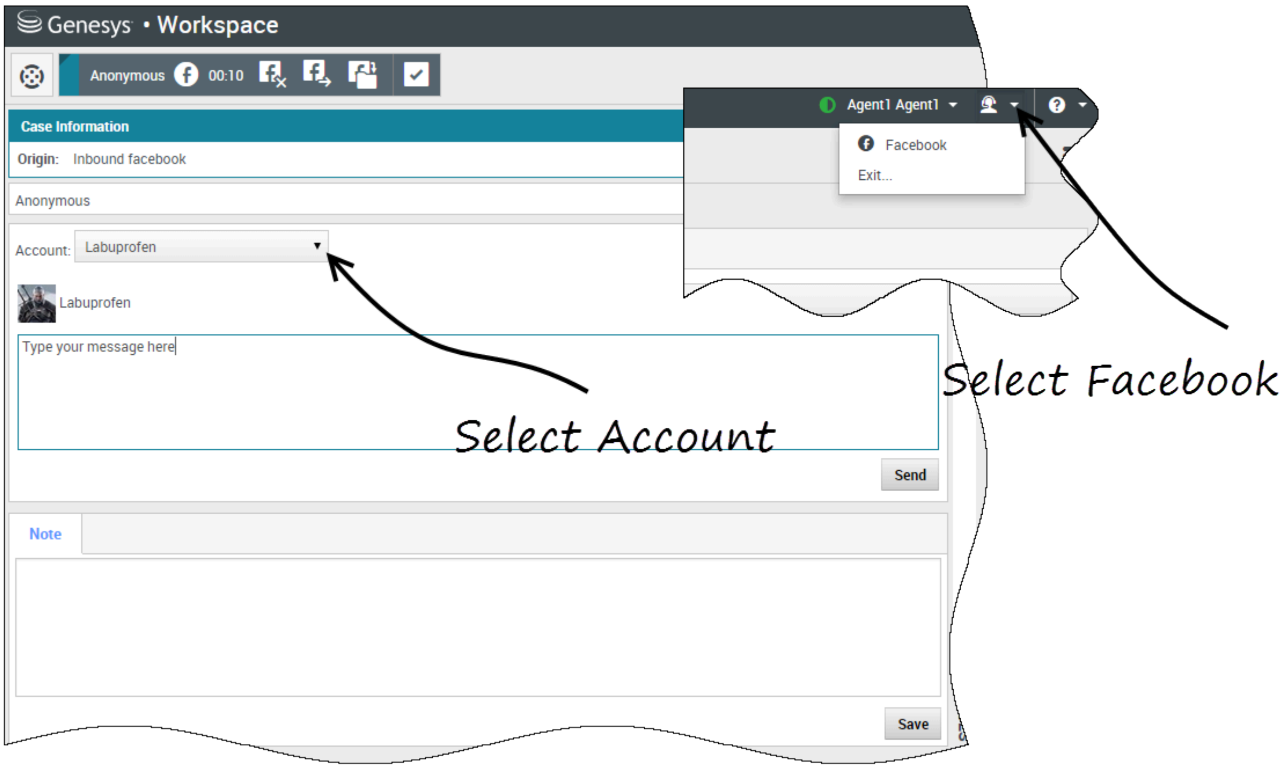

You can reply to a private message from a Facebook contact (you cannot send new private messages). To do so you must log in to a special channel called **facebook private message**.

# Reply to a private message: enter your reply




Once you've logged in to the **facebook private message** channel, you can accept private message interactions and reply to them in a way very similar to the way you conduct chat interactions.

# Post to Facebook




You can post to your Facebook contact's page. From the drop-down menu beside the **Agent** icon, select **Facebook**. Select the account to which you want to send the post. Type your message and send it to your contact.

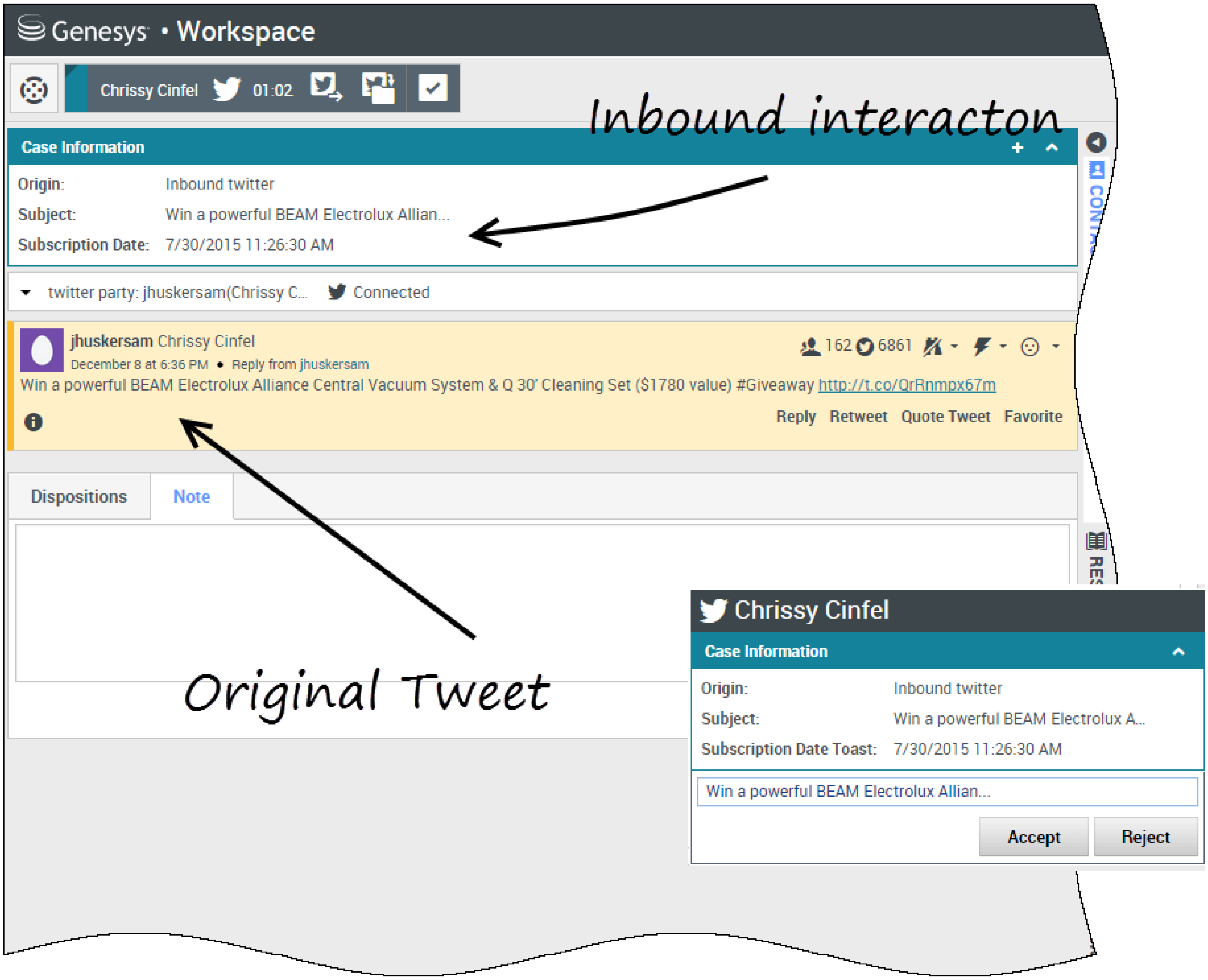
# Twitter

Twitter, a popular online social networking and micro-blogging service, lets you send and read text-based messages called Tweets. These messages are posted to a person's Twitter feed, sent to their followers, and are found on Twitter by searching.

Twitter also has a suite of advertising products to help brands and businesses promote their content within the Twitter experience. Businesses can use Tweets to reach Twitter users while they search for their interests on Twitter.

**Note:** You cannot attach files or pictures in your comments.

# How do I handle a Twitter interaction?




When a new inbound Twitter interaction is sent to your workstation, a preview of the interaction is displayed in the bottom right-hand corner of your desktop.

If you accept, the inbound Twitter interaction view is displayed and the original-routed Tweet appears in the left margin under the Twitter interaction toolbar.

Select **Reply**, or select the down arrow after **Reply**.

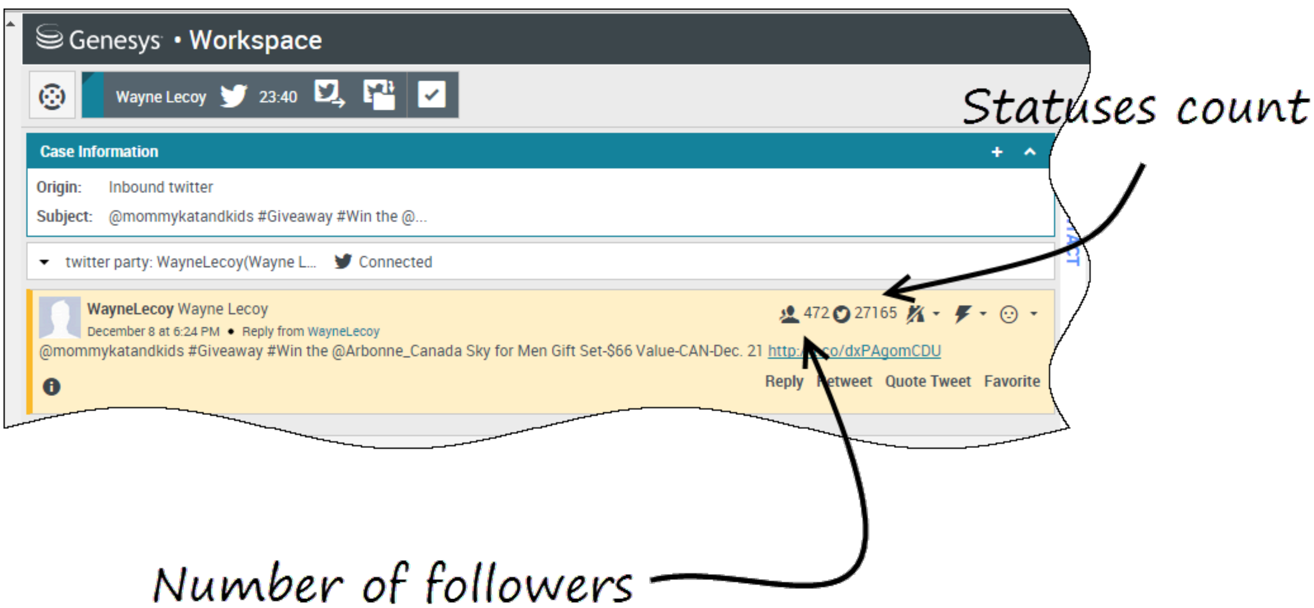
Your message is displayed to the contact on Twitter. Your message is also added to the transcript area of the Twitter interaction view.

To view your Twitter contact's profile information, select the **Show Info** icon or click the username to open the Twitter page that contains the user's profile information.

Some of the things you can do while handling a Twitter interaction include:

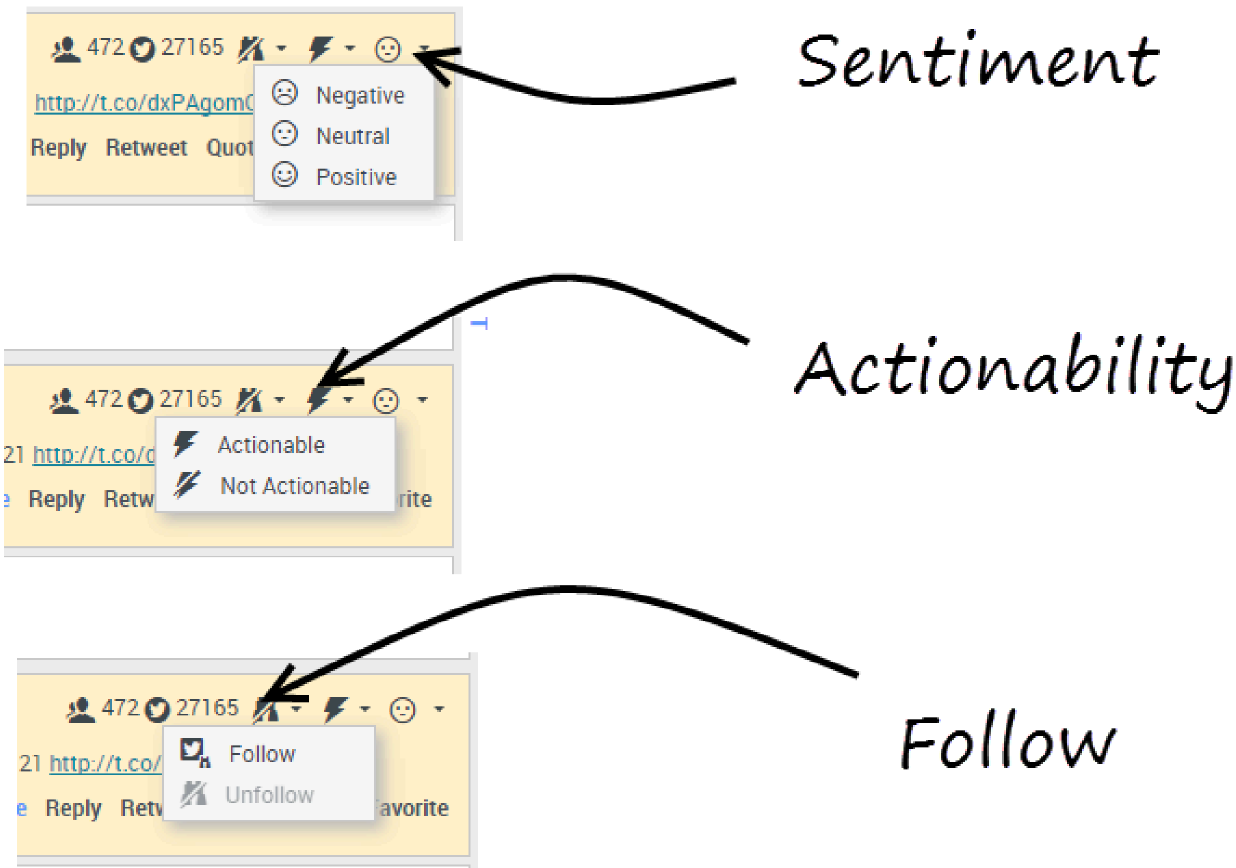
- Transfer the interaction to someone else in your company.
- Start a chat conference with yourself, the customer, and someone else in your company.
- Start a voice (internal targets and contacts) or chat (an internal target only) consultation. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.
- Call or email the contact, if there is a phone number or email address in the contact database. (You can also launch a call or email from the chat transcript area by clicking an email address or phone number.)
- Respond with another media channel, such as voice or email.
- Reply with a Standard Response.
- Add a disposition code or note.
- End the interaction and mark it as done.

## Display the number of your Twitter contact's Tweets and followers




The number after the **Statuses Count** icon indicates the number of user Tweets. You can also see how many followers the user has.

## Display the actionability and sentiment

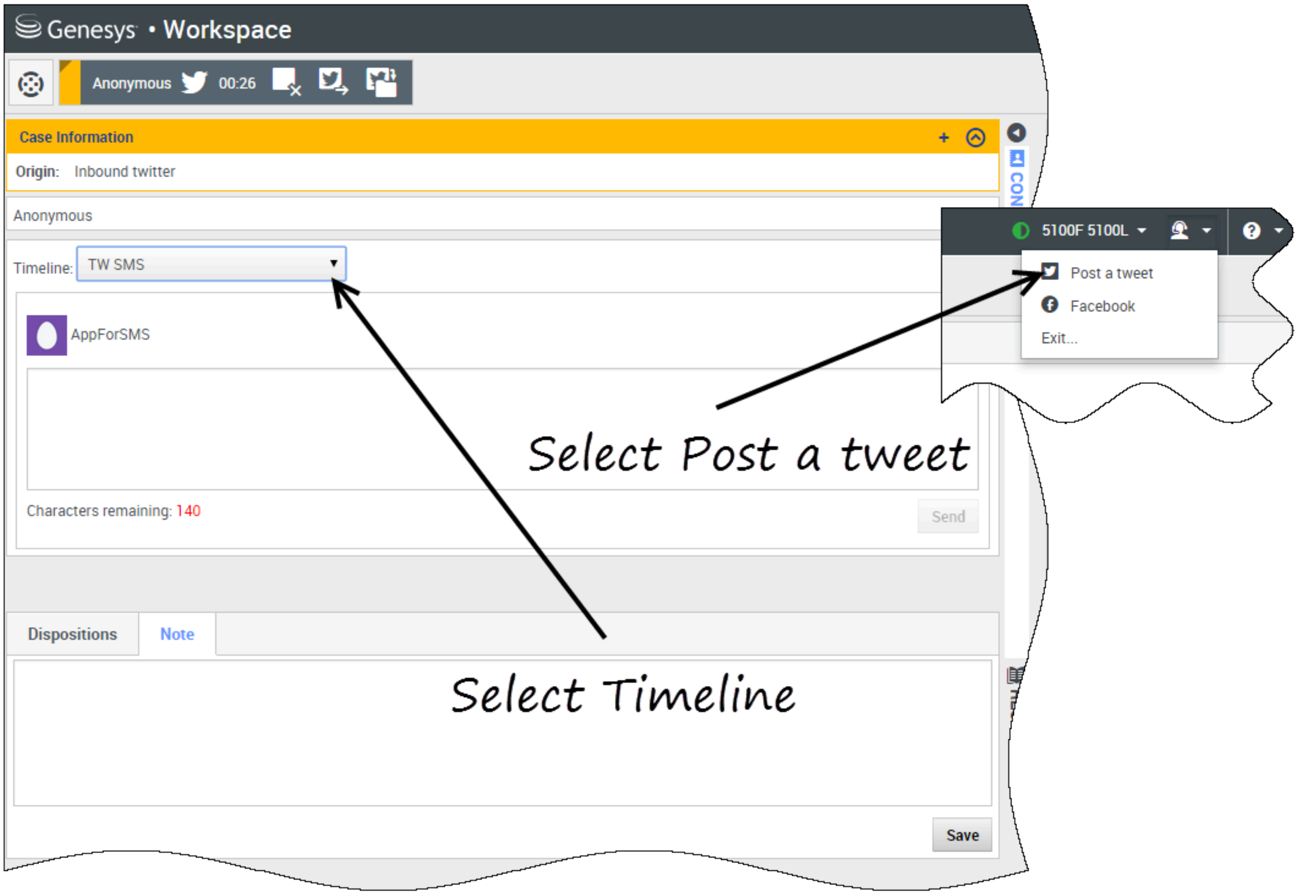



When a Twitter interaction arrives, you can view **Actionability** and **Sentiment** icons, which could have one of the following values:

- **Actionability** — Can be actionable, not actionable, or undeclared.
- **Sentiment** — Can be Positive, Negative, Neutral, or undeclared.

You can become or stop being a follower of an author of the Twitter message. Select the **Followed** button to unfollow the selected account.

# Post to Twitter




You can post a tweet to your Twitter contact's page. From the drop-down menu beside the **Agent** icon, select **Post a tweet**. Select the Timeline you want to post the tweet on. Type your message and send it to your contact.

# Workitems

Workitems are documents that might be directed to you for handling. They include many media types, such as faxes or PDFs, that you might have to view while you are handling interactions of another type, such as email.

The Workitem interaction window enables you to view all of the information necessary to handle a workitem.

## How do I handle a workitem?

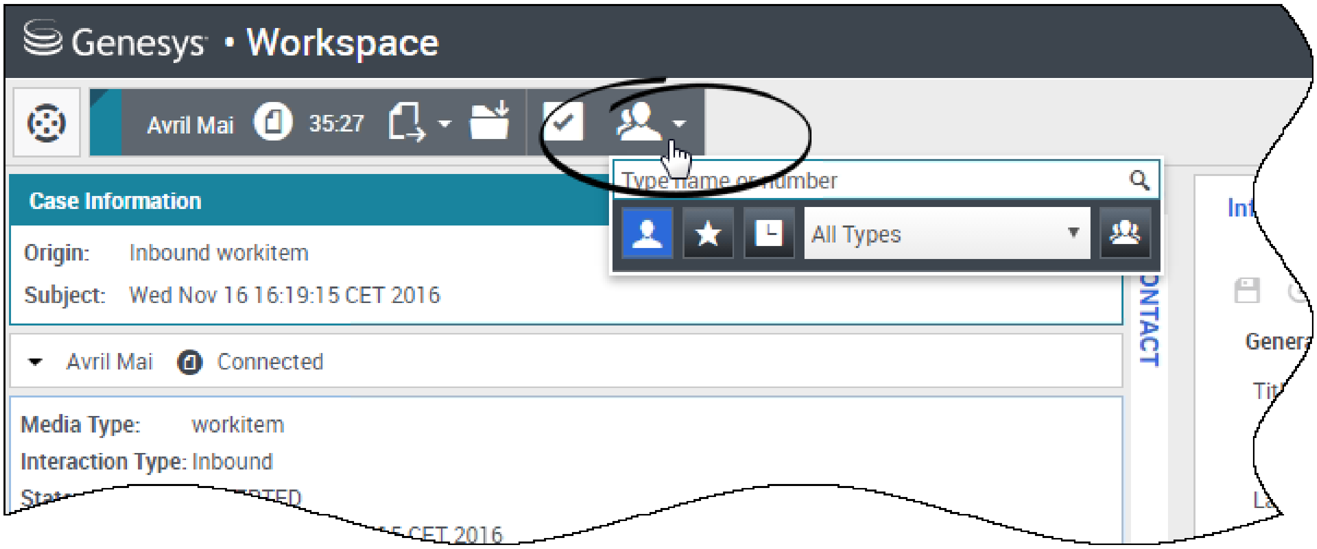
### Link to video

Typical actions you can take with a workitem are:

-  to transfer the workitem to another agent.
-  to save it in your workbin.
- View the associated case data.
- Add a note or disposition code.
- Mark it as done.

Watch the video to see what happens when a workitem arrives at a workstation.

## How can I get help with a workitem?




- Check the associated case data for information that might help you.
- Call the contact, if your site has this feature and their number is available in your contacts list.
-  to start a consultation with a team member. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

If you are transferring the workitem to someone else, you can add your own notes or instructions for that person to review.

## Transferring a Workitem

To transfer a workitem that you have accepted, click the **Workitem Transfer** (  ) is displayed. Choose a transfer target. The target must be configured to receive interactions of the type of the workitem. Select **<workitem type> Transfer**.

If the target accepts the interaction, the interaction window on your desktop closes.

If the target rejects the interaction, the interaction window reopens on your desktop and displays an error that informs you that the target has rejected the interaction.

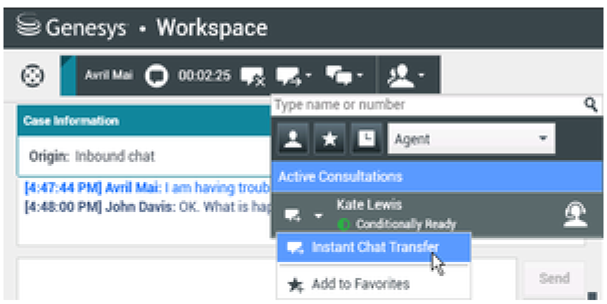
# Blend Different Channels Into A Single Conversation

The Customer Experience power of Workspace comes from seamless blending of channels into a single conversation.

You can chat with a contact online, while at the same time speaking together on the phone and composing an email message to send information in writing!

You can have a conference call with a contact and someone else in your company, and at the same time send Instant Messages to the person in your company.

When you are consulting with someone else in your company, the Team Communicator shows you a list of your active consultations to make it quick for you to choose who to transfer or conference the interaction to, or who to add a different type of consultation (voice or chat). If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.



Team Communicator displaying active consultations

This article shows you many different use cases for channel blending (omnichannel) that you can use to improve customer experience (CX)!

## [+] Guide to media blending combinations

The table **Some of the available media blending by type of interaction** lists some of the media blending combinations that are available from each media channel, including consultations. The table **Available consultation types and blending consultation types by interaction-type** lists the media blending combinations that are available for each consultation media-type.

**Some of the available media blending by type of interaction**

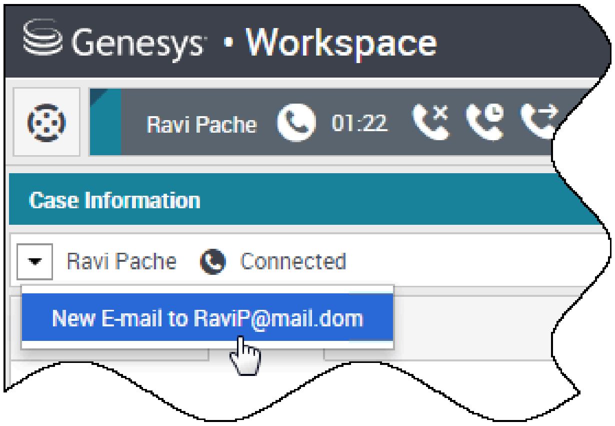
| Interaction | Media blending and consultation |
|---|---|
| Voice (Contact) | Voice consultation |
| | IM consultation |
| Voice (Internal target) | Voice consultation |
| | IM consultation |
| IM (Internal target) | Voice (Internal target) |

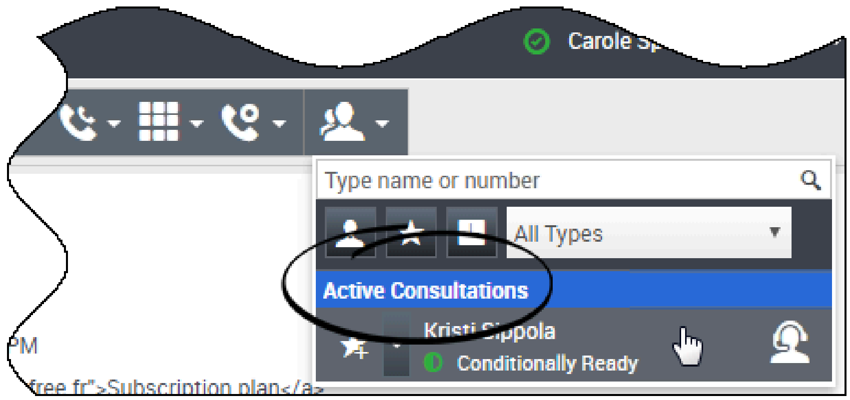
| Interaction | Media blending and consultation |
|---|---|
| Email (inbound from contact) | Voice |
| | Voice consultation |
| | IM consultation |
| Email (outbound to contact) | Voice |
| | Voice consultation |
| | IM consultation |
| Chat | Voice |
| | Voice consultation |
| | IM consultation |
| | Chat consultation |

**Available consultation types and blending consultation types by interaction-type**

| Interaction | 1st consult | 1st transition consult | 2nd transition consult |
|---|---|---|---|
| Voice | Voice consult | IM consult | X |
| E-mail | Voice consult | IM consult | X |
| | IM consult | Voice consult | X |
| Chat | Voice consult | IM consult | Chat consult |
| | | Chat consult | IM consult |
| | IM consult | Voice consult | Chat consult |
| | | Chat consult | X |
| | Chat consult | Voice consult | IM consult |
| | | IM consult | Voice consult |

## Blending one media with another



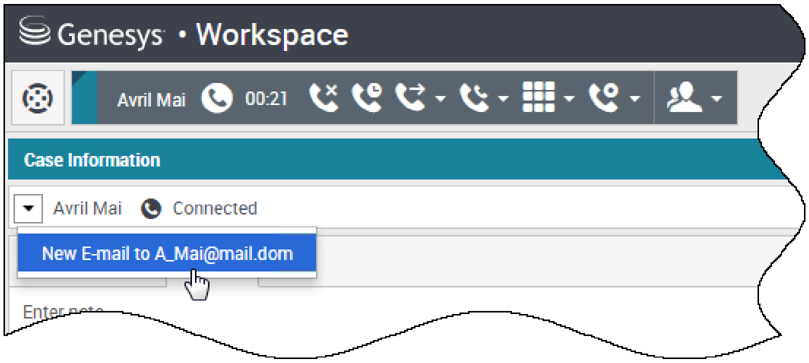

While you are handling a call, chat, or email, it's easy to add a new media-type to a blended conversation.

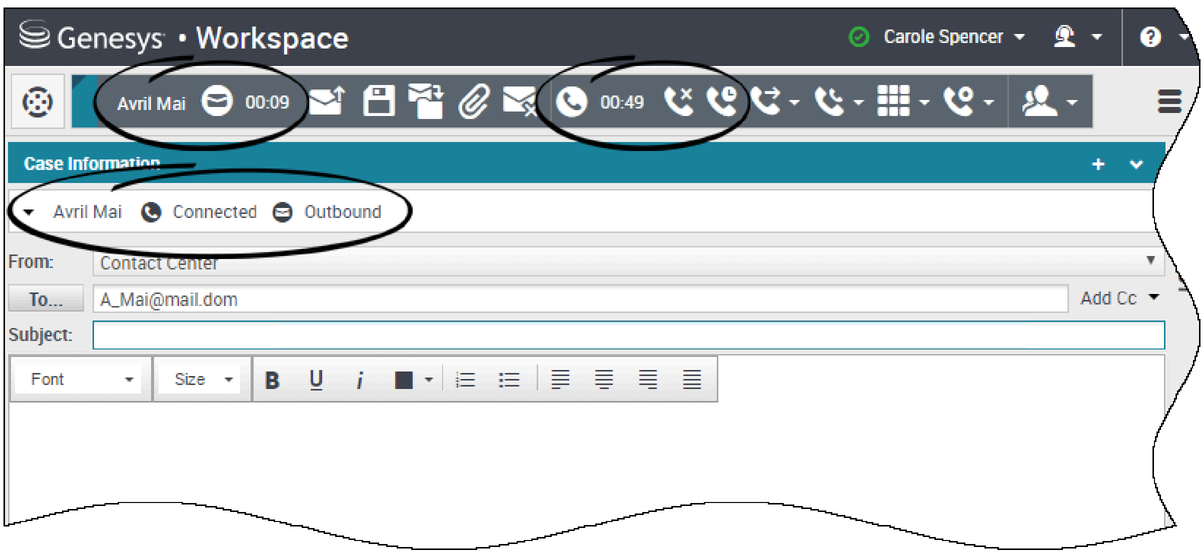
Click to open the Action menu that is next to the name of the party.

The Action menu displays the media channels that are available for blending.

The Team Communicator has an Action menu for each party that you are consulting.

## Blending an email interaction with a voice interaction




You can email the person that you are talking to on the phone while you are talking to them. You can also do the opposite, call a contact from the new outgoing email window while you are writing the email.

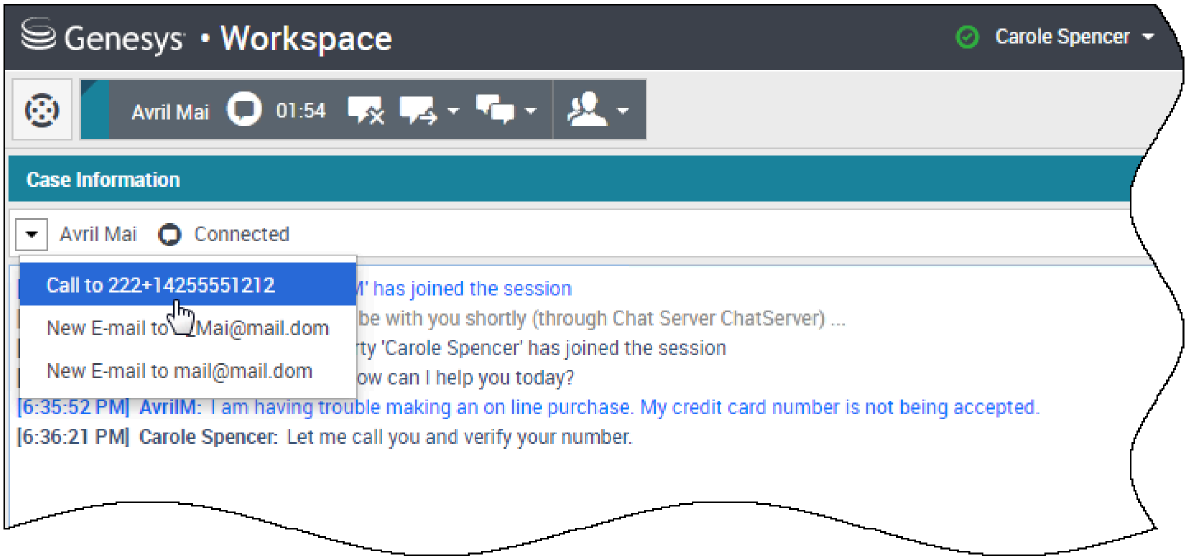
Click the party `Action` menu to open it and select the type of interaction you want to start.

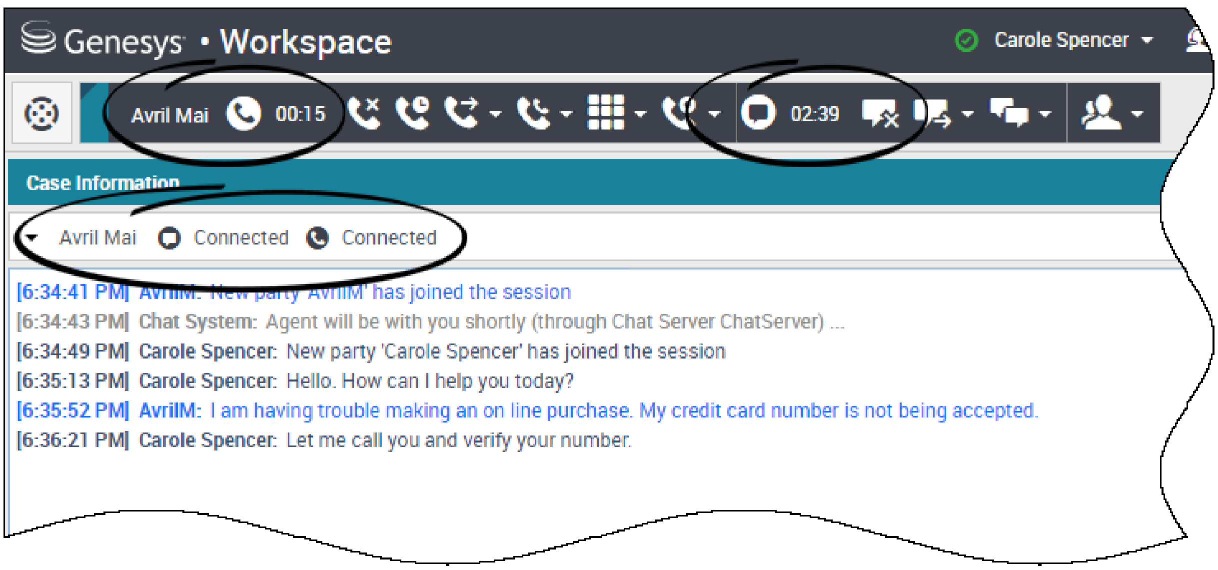
If the contact has more than one email address you can confirm during the call which address to use.

The new email interaction opens as part of the voice call interaction view.

If the address is not in the Contact Database, use Team Communicator to start a new email interaction by typing the email address in the Team Communicator search field. In this case, the new email will open in a separate view, not in the voice interaction view; however, your phone call will not be interrupted.

## Blending a voice interaction with a chat interaction




You can call a contact that you are chatting with, but you cannot start a chat with a contact that you are talking to on the phone.

During a chat with a contact you might want to call the contact. Use the party `Action` menu to select one of the phone numbers for the contact that is stored in the Contact Database.

The new voice call interaction opens as part of the chat interaction view.

## Blending internal voice interactions and internal IM interactions

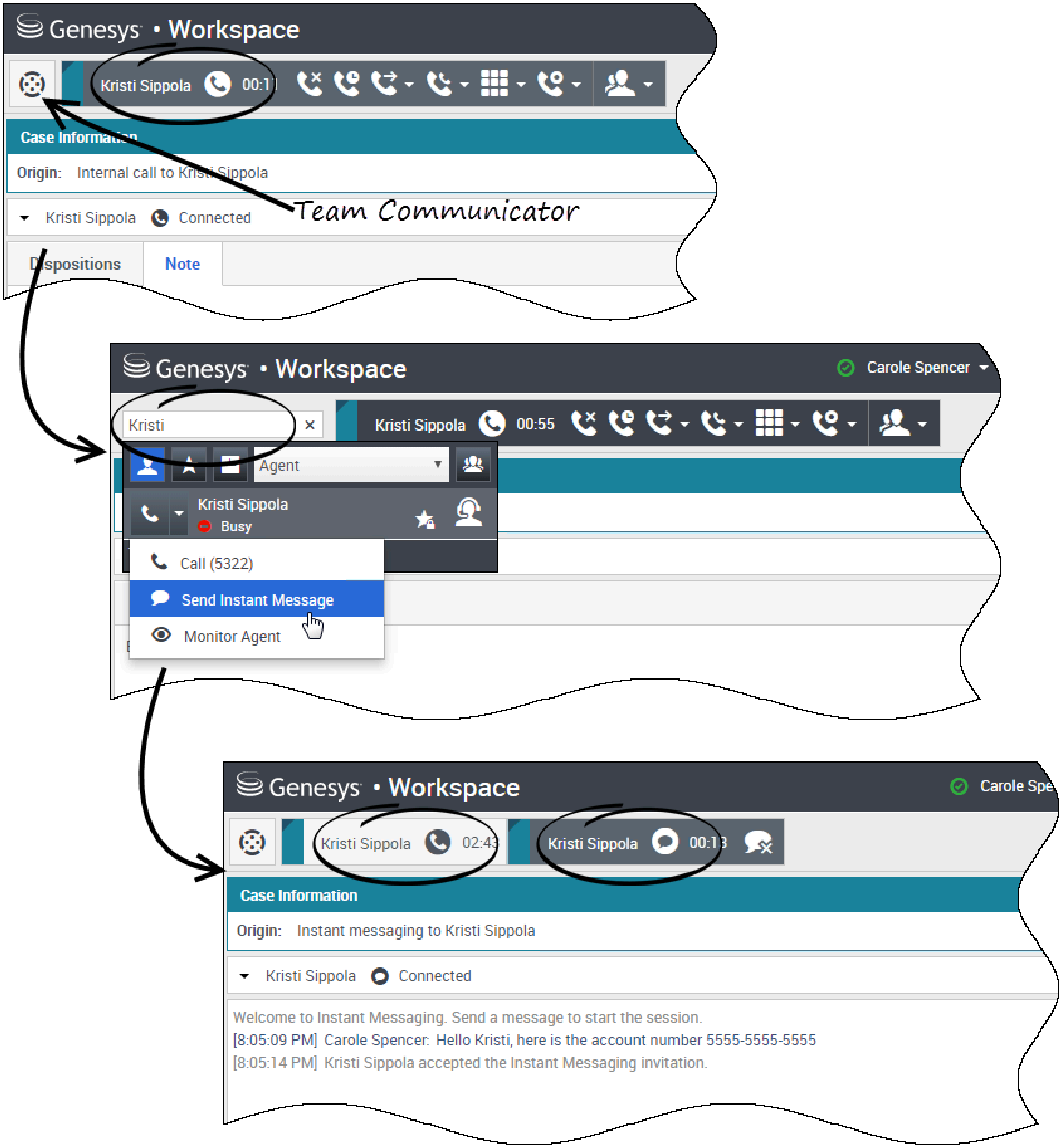
Workspace enables you to blend media during internal interactions, whether you are calling agent-to-agent, or are consulting with another party while you are handling an interaction with a contact, you can add different media to your internal interactions.

To add an IM to your voice consultation call, or your internal voice call, use Team Communicator to IM or call the party. At this time, the party `Action` menu is not supported.

The next few sections show you how to combine Voice and IM in your internal conversations:

- Blend an internal IM with an active internal voice interaction
- Blend an internal IM consultation with an active internal voice consultation
- Blend a voice consultation with an IM consultation

## Blend an internal IM with an active internal voice interaction




You can add an internal IM interaction to an active internal voice interaction and handle both at the same time.

During a call with someone in your company, you might want to send them an IM, perhaps to provide them with an account number, a name, a telephone number, and so on.

To add an IM interaction to your conversation, type the name, phone number, or other information into the Team Communicator field to search for the person. When you find their name, select Send `Instant Message`.

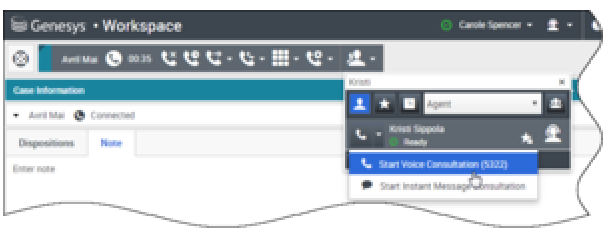
Type something in the IM text field and click **Send** to start the conversation.

## Blend an internal IM consultation with an active internal voice consultation

### You can add an internal IM consultation to an active internal voice consultation and handle both by switching back and forth between interactions.

During a call with a contact you might want to start a voice consultation and then blend in an IM consultation.

First start a voice consultation with someone in your company.




After you connect to the person you are consulting with, open the Team Communicator to start an IM with the same person (or a different person).


You can switch back and forth among your call with your customer, your voice consultation, and your IM consultation with the person in your company.

# Contacts

Contacts can be team members or customers and are stored in the Contact Directory. From the Contact Directory, you can call or email a contact, manage a contact's profile information (such as their name, phone number, email address), and review a contact's past interactions.

## Where are my contacts?

### Link to video

There are a few different ways that you can access your contacts:

- Open your Contact Directory by selecting **Contact Directory** from the Supporting Views menu. This contains all of your contacts, such as team members, customers, and any external contacts.
- Use the Team Communicator to quickly contact a team member, or a favorite or recent contact. This tool is accessed from the **Type name or number** search bar near the top of the screen (or by clicking the button, if you are working with an interaction).

Watch the video to see an overview of the Contact Directory.

## How do I find a contact in the Contact Directory?

### Link to video

The easiest way is to use the **Quick Search** option.

Start typing a name, phone number, or email address into the **Quick Search** field and the matching results are returned in the **Contact** list.

Customize the search results by using to toggle between grid or list view, or click the headers to sort by column (list view only).

Watch the video to see how you can search the directory and customize the results.

## What is the difference between List View and Grid View?

### The Contact Directory uses two different kinds of search modes to find contacts in the Contact Database.

- List View — searches each field of the contact database for the keywords that you specify and displays an unsorted list of all of the contacts in the contact database that match the search criteria.
- Grid View — searches each field of the contact database for the phrase that you specify and displays a list of records where at least one record field contained the search phrase.

See below for more details about these views.

#### List View

Click the **Show Contacts in List View** button (☰) to display the **Contact Directory List** view.

The List view displays an unsorted list of all of the contacts in the contact database that match the search criteria.

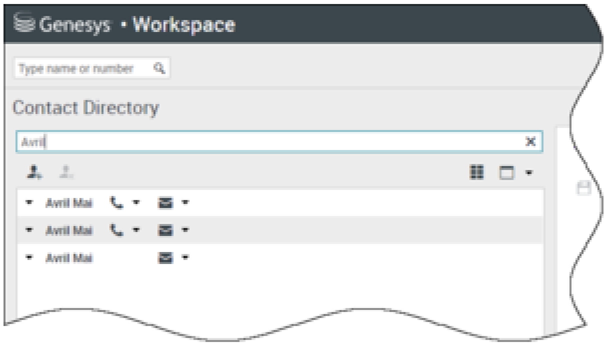
The search is a 'keyword' search that searches each field of the contact database (name, phone number, email address, or other criteria) for the word or words that you provide in the search field. The search engine tries to match *any* word of each field specified in the search criteria (that are allowed by your administrator for Quick Search or that you manually specified for Advanced Search) of the database by using the selected matching mode 'starts with' to search for the keyword(s) that you provide.

Examples:

- Quick search using the keywords *John Daly* as the criteria in a quick search defined to apply to only the **First Name** and **Last Name** fields will match a contact where **First Name**=*John* and **Last Name**= *Daly*
- Quick search using the keywords *John Junipero* as the criteria in quick search defined to apply to only **First Name**, **Last Name**, **City**, and **Address**, will match a contact where **First Name**=*Johnny* and **Address** = *2001, Junipero Serra Blvd*.

Results are returned in a list that is not sortable. If the result set is too large, you can refine the search results by adding more keywords to your search criteria (the sort order in this context is undefined).

> **Tip**
>
> Genesys does not currently support mixed character sets in contact database searches, so, for example, it is not possible to search for words in Chinese Simplified characters and Latin characters in the same search string, and the sequence of Chinese Simplified characters immediately followed by Latin characters will not be considered as two words.




Grid View

Click the **Show Contacts in Grid View** button () to display the **Contact Directory Grid** view.

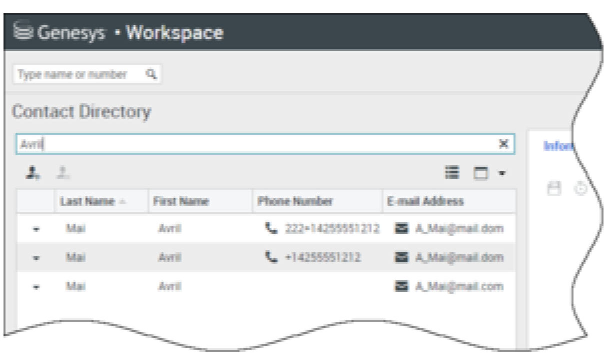
Grid mode performs a search that considers each field of the contact database (name, phone number, email address, or other criteria) as a *phrase* (as opposed to the list view mode that considers each field as a *tokenized* list of words) and uses the search criteria that you provide as a *phrase*, not as a list of words.

Examples:

- Quick search using the phrase *John Pa* as the criteria in a quick search defined to apply to only the **First Name** and **Last Name** fields will match a contact where **First Name**=*John Paul* and **Last Name**=*Doe*
- Quick search using the phrase *John Daly* as the criteria in quick search defined to apply to only the **First Name** and **Last Name** will *not* match a contact where **First Name**=*John* and **Last Name**=*Daly*

Results are returned in tabular form and sorted according to the default search field, such as **Last Name**.

The Grid view can be used to help to refine your search by sorting the results.




Click a column head in the Grid view to sort the list based on that criterion. Click a column head a second time to switch between ascending and descending sort order.

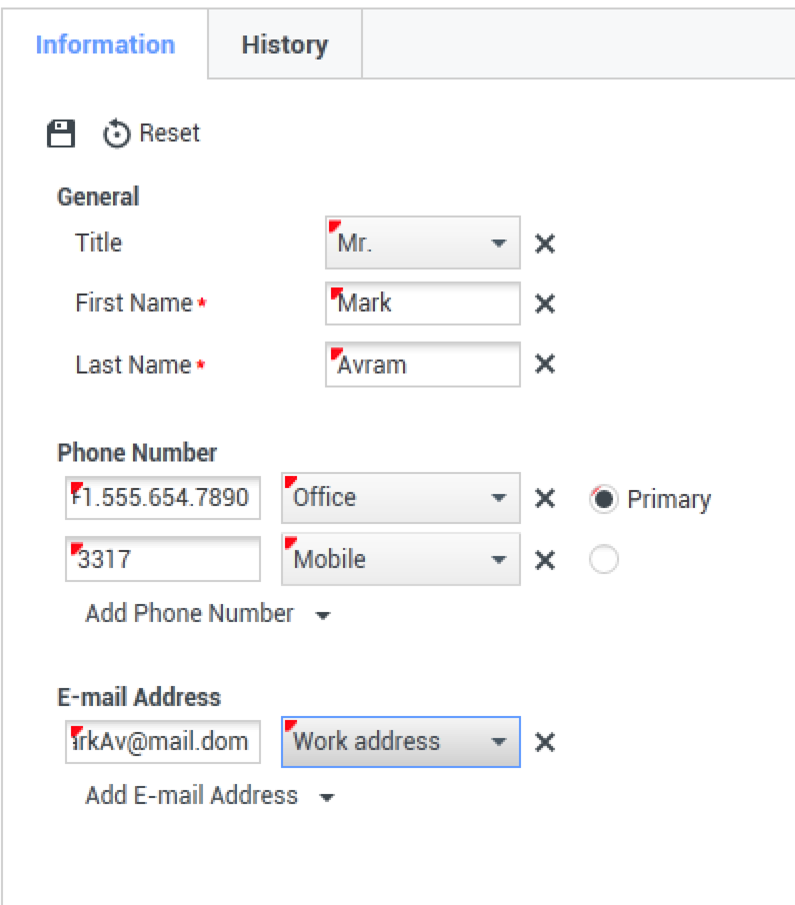
## What actions can I take with a contact?

### Link to video

- Call or email the contact.
- View and manage their profile **Information**.
- View their **History** of interactions.
- Use to delete the contact.
- Use **More Actions** to perform other actions (depends on your permissions).

Watch the video to see how you can call or email a contact from the Contact Directory.

## How do I work with an interaction with an unknown contact?



Your Genesys software administrator has the option to set up your contact center to handle interactions with contacts that are not already in your organization's contact database.

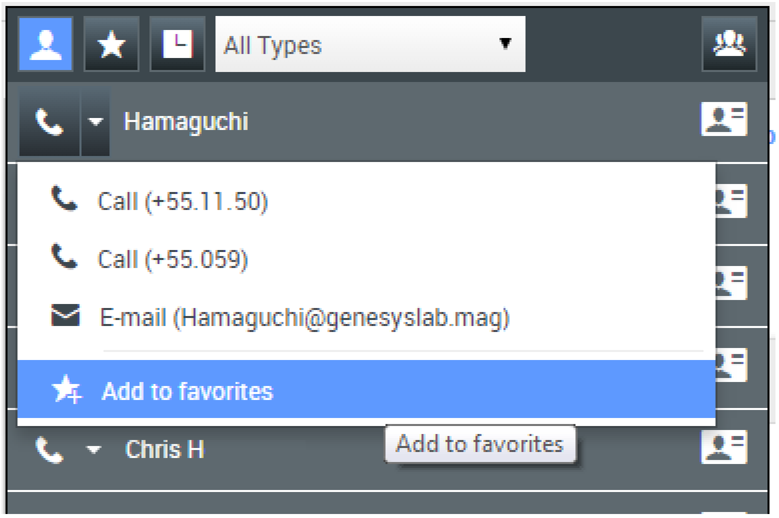
Your contact center might be set up to create new contacts automatically when someone calls in from an unknown phone number. In that case, all you have to do is update the contact information in the **Contact** tab of the interaction with the rest of the contact's information, such as name, email address, and so on.

Your contact center might be set up so that no new contact is created when someone calls in from an unknown phone number. In this scenario, you might be granted the ability to create a new contact and add him or her to the contact database manually. If this feature is enabled for you, follow these steps:

1. Click **Create new contact** to open the contact **Information** view and create a new contact.
2. Add the contact's information in the information fields. You can also add additional phone numbers and email addresses for the new contact, and specify a phone number or email address as the *primary* contact number or address.
3. Click **Save** to save the contact's information to the contact database.
4. If you decide not to save the new contact information, click **Reset** to reset and clear any unsaved information.

Your contact center might be set up so that you do not have the capability to create a new contact when someone calls in from an unknown phone number. In this scenario, the **Create new contact** button and the contact **Information** tab are not displayed. In some contact centers you can still search for completed voice interactions from unknown contacts in the **My History** and **Interaction Search** views, but in other contact centers, interactions from unknown contacts are not saved in the contact database.

## How do I set up my favorites?




Typically, your favorites are team members you contact frequently. You can mark a contact as a favorite by selecting **Add to Favorites** from the drop-down actions menu in Team Communicator. You can also assign the favorite to a category.

To see your personal and corporate favorites, select (favorites filter) on the Team Communicator bar.

Favorites are marked with a (star). Use the filters and sorting options to change the types, categories, and order of your favorites.

To make changes to a favorite, use **Edit Favorite**. To remove a favorite, use .

Favorites marked with (locked star) are corporate favorites, and can't be edited or removed. The same favorite can belong to both your personal and corporate favorites, but it will be shown as a corporate favorite in the results list.

**Note:** A favorite that you created by directly dialing a contact will appear only in a favorites search *and* your list of recent calls if you previously called the person.

# Contact and interaction history

Workspace lets you look at the interactions that you and your coworkers have worked on in the past. You can view information about the interactions, including notes and case data. You can also open and process some interactions.

## How can I find the interactions I've worked on?

The My History view enables you to view and manage your previous interactions with a contact.

To display the My History view in the main view, click and select **My History**.

The Chronology slider lets you see all of your interaction history, or just those from the last day, week, or month.

The My History view **Filter** button enable you to refine your results by displaying only those interaction types that you select.

The Quick Search field enables you to enter keywords or a phrase to search for in the contact's interactions, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

| | |
|---|---|
| | **[+] Show video: My History: Quick Search**<br>Link to video |

The Advanced Search feature enables you to choose conditions to search only within the limits that you define.

| | |
|---|---|
| | **[+] Show video: My History: Advanced Search**<br>Link to video |

When you find the voice, chat, email, workitem, Facebook, or Twitter interaction you are searching for, select it to view the details and other information.

You can open some interactions for editing or handling. Just select it and click .

You can open email interactions and forward them inline to an external resource. Just select it and click .

Use the **Show Details Panel on Bottom/Hide Details Panel** button ( ) to change the display of the Details panel.

## How do I explore the history of a contact?

The Contact History view lets you see and manage previous interactions with a contact you have selected from the Contact Directory or from the information view of the current voice, chat, email, workitem, Facebook, or Twitter interaction.

**[+] Show video: Contact History**

Link to video

Use the Contact History view to do the following:

- Find interactions for the current contact or the currently selected contact.
- View information about the selected interaction.

The Chronology slider lets you see all of your interaction history, or just those from the last day, week, or month.

The Contact History view **Filter** button enable you to refine your results by displaying only those interaction types that you select.

The Quick Search field enables you to enter keywords or a phrase to search for in the contact's interactions, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

**[+] Show video: Contact History:Quick Search**

Link to video

The Advanced Search feature enables you to choose conditions to search only within the limits that you define.

**[+] Show video: Contact History: Advanced Search**

Link to video

When you find the voice, chat, email, workitem, Facebook, or Twitter interaction you are searching for, select it to view the details and other information.

You can open some interactions for editing or handling. Just select it and click .

You can open email interactions and forward them inline to an external resource. Just select it and click .

Use the **Show Details Panel on Bottom/Hide Details Panel** button ( ) to change the display of the Details panel.

## How do I find any interaction?

Sometimes you need to find an interaction that someone else at your contact center worked on, or maybe you worked on it, but you can't remember who the contact was or when you worked on it. You might be a team lead or supervisor who is looking for interactions related to a specific topic or was processed by a specific agent or agents.

The Interaction Search view lets you search the entire interaction database for all media types, with all contacts, and handled by any agent.

To display the Interaction Search view in the main view, click and select **Interaction Search**.

The Chronology slider lets you see all of your interaction history, or just those from the last day, week, or month.

The Interaction Search view **Filter** button enable you to refine your results by displaying only those interaction types that you select.

The Quick Search field enables you to enter keywords or a phrase to search for in the contact's interactions, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

The Advanced Search feature enables you to choose conditions to search only within the limits that you define.

When you find the voice, chat, email, workitem, Facebook, or Twitter interaction you are searching for, select it to view the details and other information.

You can open some interactions for editing or handling. Just select it and click .

You can open email interactions and forward them inline to an external resource. Just select it and click .

Use the **Show Details Panel on Bottom/Hide Details Panel** button ( ) to change the display of the Details panel.

## Using Quick Search

The Quick Search field lets you to enter keywords or a phrase to search for in the interaction database, such as the subject of an email or chat, the body of a chat transcript, a customer name, the name of the agent who handled the interaction, or other text that your administrator allows you to access.

**[+] Show video: Quick Search**

Link to video

Searches of customer information like name and address, and of interaction information like subject or body text are 'starts-with' searches, meaning that each of the fields that you are allowed to search for words or strings, are searched for words that start with the keywords that you enter in the Quick Search field.

Searches of information that has been customized by your administrator are 'equals' searches, meaning that the search looks for exact matches with what you enter. Ask your administrator about custom information.

Text search is:

- Not case sensitive. TEXT, Text, text, and teXt are all treated as the same word.
- Searchable as either a group of individual words or as sentences.
    - Put a group of words in double quotes to search for a specific sentence. Searching for `"Find me"` returns all interactions that contain the exact match for the phrase 'Find me'.
    - Otherwise, each word is treated as a separate search condition. Searching for `Find me` returns all interactions that contain one word that starts with `Find` *and* one word that starts with `me`.

Use the **Filter** menu to see only interactions of a certain type, like voice, email, or chat. Perhaps that interaction you are looking for was handled through a chat. To see only chat interactions, select **Show chat interactions** from this menu.

When you find the interaction you are searching for, select it to view the details and other information in the Details, Notes, and Case Data tabs.

Use the **Show Details Panel on Bottom/Hide Details Panel** button () to change the display of the Details panel.

## Using Advanced Search

The Interaction Search *Advanced Search* feature lets you choose a set of conditions that you want to use to limit the search to only those interactions in the interaction database that match the conditions you specify.

**[+] Show video: Advanced Search**

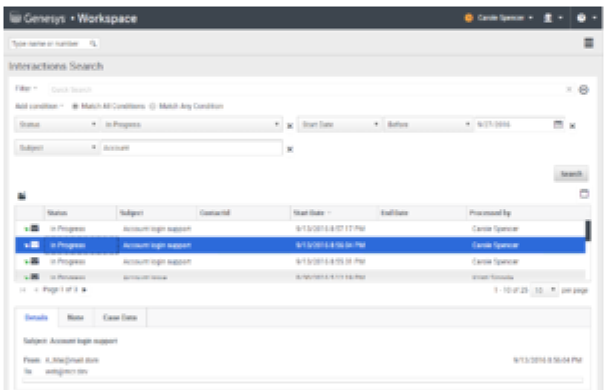
Link to video

Click next to the Quick Search field to open the Advanced Search view.

## Tip

Your administrator decides what conditions you are allowed to search on, so your Interaction Search view might not exactly match the screen shots and video.
For the **Add Condition** menu, your administrator might have set up groups of conditions which appear as submenus. This makes it easier for you to find the condition you want to use.

This is what the Advanced Search view looks like:




Use the controls described here to set up your search, then click **Search** to find the interactions that match the conditions that you specify.

When you find the interaction you are searching for, select it to view the details and other information.

## Filter

Use the **Filter** menu to see only interactions of a certain type, like voice, email, or chat. Perhaps that interaction you are looking for was handled through a chat. To see only chat interactions, select **Show chat interactions** from this menu.

## Add Condition

Use the **Add Condition** menu to add search criteria to the Advanced Search view. When you make a selection from this menu a new condition entry is added above the **Search** button. Add as many conditions as you need. The view will scroll if necessary.

To remove a condition, click the X next to the entry.

Each condition entry that you add lets you refine your search. For example, you might limit your search to interactions that have a status of "In Progress". You might know approximately when the interaction was handled. the **Start Date** and **End Date** conditions let you limit the search to interaction handled before, on, between, or after a certain date.

For some conditions, you might have to enter text instead of selecting criteria from a menu or picking a date.

Text search is:

- Not case sensitive. TEXT, Text, text, and teXt are all treated as the same word.
- Searchable as either a group of individual words or as sentences.
  - Put a group of words in double quotes to search for a specific sentence. Searching for `"Find me"` returns all interactions that contain the exact match for the phrase 'Find me'.
  - Otherwise, each word is treated as a separate search condition. Searching for `Find me` returns all interactions that contain one word that starts with `Find` *and* one word that starts with `me`.

For some conditions, you might have to search the contact database or search for someone in your contact center, such as other agents who processed the interaction you are looking for. For searches of contacts and internal targets, the Team Communicator opens when you click in fields such as **Processed By**.

### Match All/Any Conditions

Use the **Match All Conditions** option to limit the search to only those interactions that meet *All* of the conditions that you specify.

Use the **Match Any Conditions** option to find the interactions that meet *at least one* of the search conditions that you specify.

## Viewing Search Results

The search results are displayed in the interactions table. The search result table is not sortable. To sort the interactions table, clear the search field to display the full history set.

> **Important**
>
> Workspace returns a maximum of 100 interactions. If you do not find the interaction you are searching for, you might have to refine your search criteria further.

### Navigating the Search Results Table

After you click the magnifying glass in Quick Search or **Search** in Advanced Search, Workspace looks through the interaction database to find interactions that meet the conditions that you specified.

All the interactions that are found are displayed for you in the Search Results table. The table displays results in pages if many interactions are found. If multiple pages are returned in the search results, page through the list of search results by doing any of the following:

- Click the **Go to the Next Page** button () to view the next page.
- Click the **Go to the Previous Page** button () to view the previous page.
- Click the **Go to First Page** button () to return to the start of the list of search results.
- Click the **Go to Last Page** button () to return to the start of the list of search results.
- Specify the number of items that are displayed on each page by using the **per page** drop-down list.

## Details, Notes, and Case Data

The **Details**, **Note**, and **Case Data** tabs display information for any interaction that you select in the Search Results table.

- **Details** — displays interaction specific information. For example, if you have selected an email interaction, the Subject, From, To, State, and body of the email interactions are displayed.
- **Note** — enables you to view notes written by the agents who handled the interaction.
- **Case Data** — enables you to view the Case Data/case information and other attached data for the selected interaction.

# Workbins

A workbin is like a personal queue or storage area where you can store email, Facebook, Twitter, and Workitem interactions to be handled later.

As an agent you have two different workbins that you can use. If you are a Supervisor (Team Lead), you might have additional workbins that you can use to manage the interactions of the agents that you supervise, and you might be set up to edit Case Information.

You can access all of your workbins from the **Supporting Views** () menu.

## How do I use the My Workbins view?

### To view another workbin, select it in the Workbin explorer on the left-hand side of the view. The number of unopened email messages in each workbin folder is indicated next to the name of the workbin folder.

The list of available workbins depends on how your system is set up by your administrator. Some of the workbins which might be configured for you include:

- **In Progress** contains unprocessed inbound email interactions and Facebook and Twitter messages that you've saved by clicking **Save In My Inbound E-mails in Progress Workbin**.
- **My Drafts** contains outbound email interactions and Facebook and Twitter messages that you've saved by clicking **Save in My Draft E-mails Workbin**.

To view details, notes, and case data about an interaction that is stored in one of your workbins, select it. Information about the selected interaction is displayed in the tabs at the bottom of the Workbins view. To display the interaction information tabs, click the **Show/Hide Details Panel** button. ()

### To open an interaction for editing or handling, select it and click .

# Standard responses

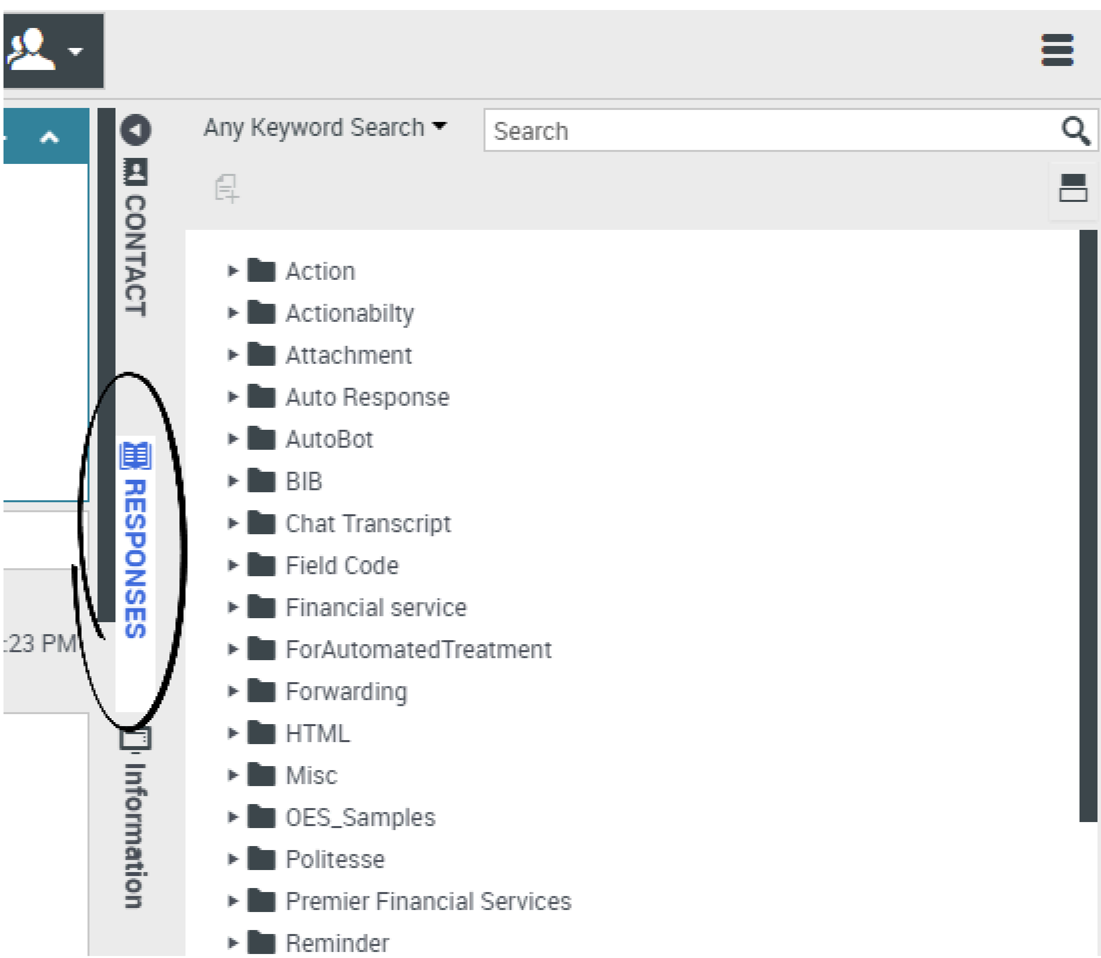
The Responses view enables you to access a database of prewritten standard responses for your interactions. You can insert a response as a reply into any outbound interaction, such as an email or a chat message, or you can read them to the contact during a phone interaction.

After inserting a response into an outbound interaction, such as an email or a chat message, you can modify the contents of the text.

Show video: **Adding a Standard Response to an outgoing email**:

Link to video

## Using the Responses View

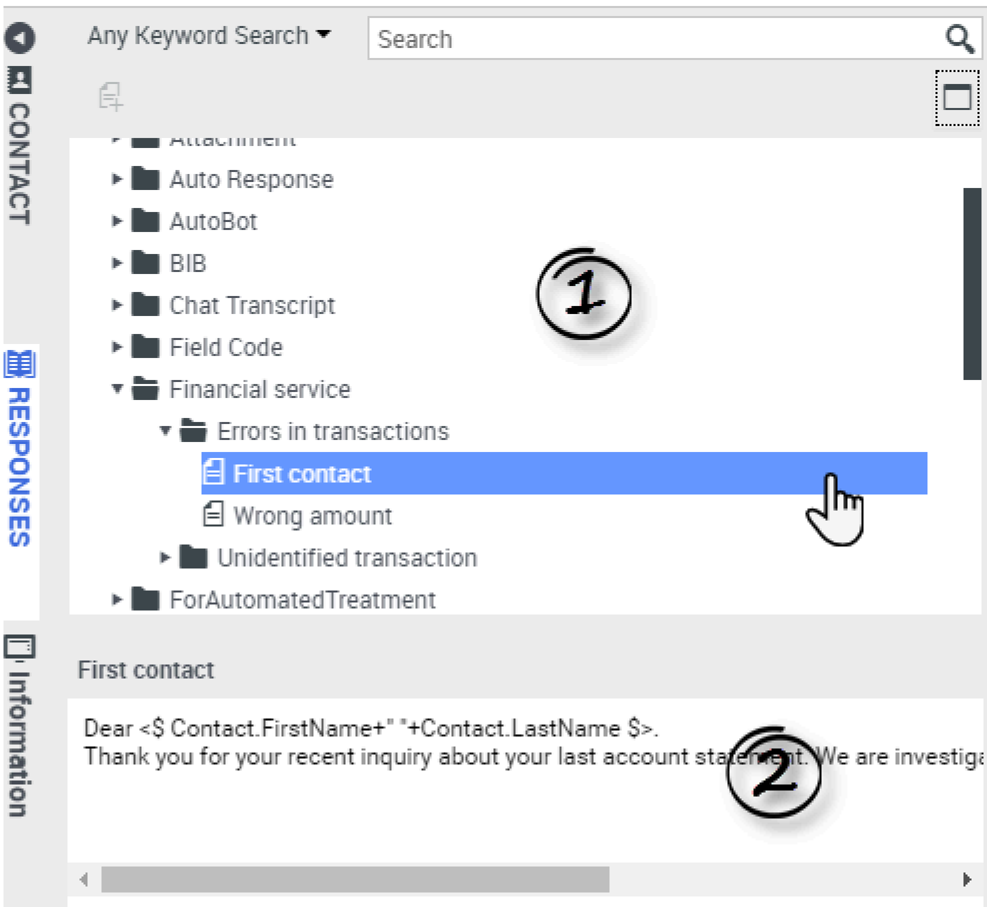


To access the Responses view, select the vertical **RESPONSES** button on the active-interaction window.

The Responses view comprises two main areas: the Responses Explorer folder view and the response display area. You can find responses in one of two ways:

1. Browse using the Responses Explorer folder view
2. Search the responses database by typing in the Search and Filter field.

## Responses Explorer




The Responses Explorer contains a tree view of folders (standard-response categories) and pages (standard-response documents). You can:

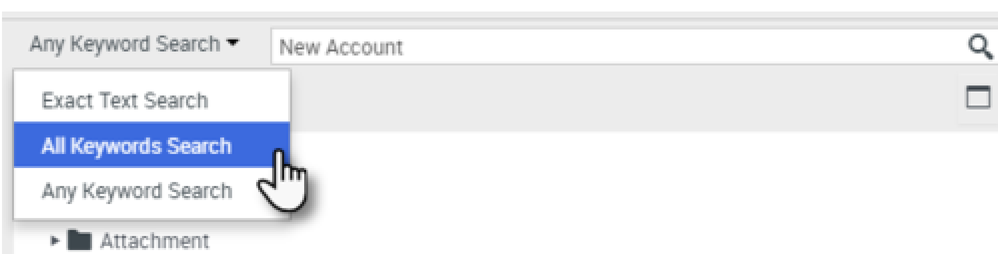
- Select a response in the explorer area (1) to view its contents (2).
- Navigate the responses folders and documents by selecting folders to open or close them and selecting documents to select them.

- Insert standard-response text into the current interaction at the insertion point by selecting a response document and then selecting **Insert Standard Response Text** .
- Show and hide the responses details area by selecting **Show Detail**/**Hide Detail** .
- View the contents of the selected response document in the responses details area.
- Copy content from the responses details area and paste it into the message area of your email or chat interaction. Standard responses use "tokens" (such as <$ Contact.FullName $>) that replace a code with specific text. For instance, Dear <$ Contact.FullName $> becomes Dear John Smith in the email. If you copy and paste token code (such as <$ Contact.FullName $>) into your draft email, the replacement happens only after you send the email. To see the replacement text before sending, you must click **Insert Standard Response Text**.

## Search and Filter

The Search and Filter area enables you to specify keywords for which to search in your company's Standard Response Library. It has the following features:

- **Search field**—Enter the keyword for which you want to search, and click the magnifying-glass icon to initiate the search.
- **Search type**—A drop-down list that enables you to search using one of the following strategies:
    - **Any Keyword Search**—Find all responses that contain at least one of the specified keywords.
    - **All Keyword Search**—Find all responses that contain all of the specified keywords.
    - **Exact Text Search**—Find all responses that contain the specified keywords in the order in which they are specified.




> **Tip**
>
> The search is applied to the selected view; to clear the search criteria and display all contents, click the **X** in the search field.

# Knowledge Center

## What is Knowledge Center?

Knowledge Center allows you to make the best use of your enterprise knowledge by capturing, storing, and distributing that knowledge wherever it is needed. With Knowledge Center you can quickly provide the right answers to customers, leading to better overall customer service.

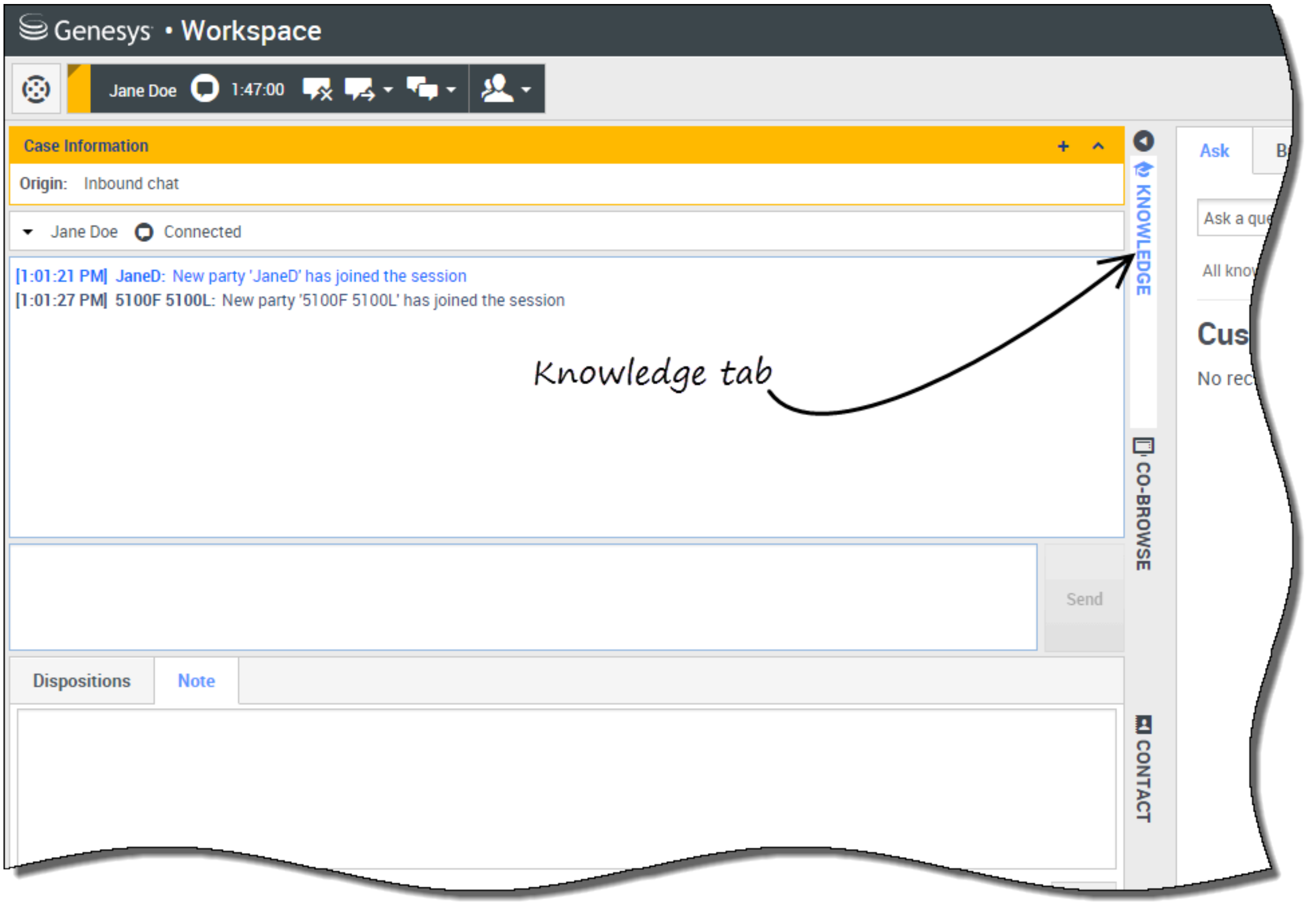
## How can Knowledge Center help me do my job?

With Knowledge Center, you can:

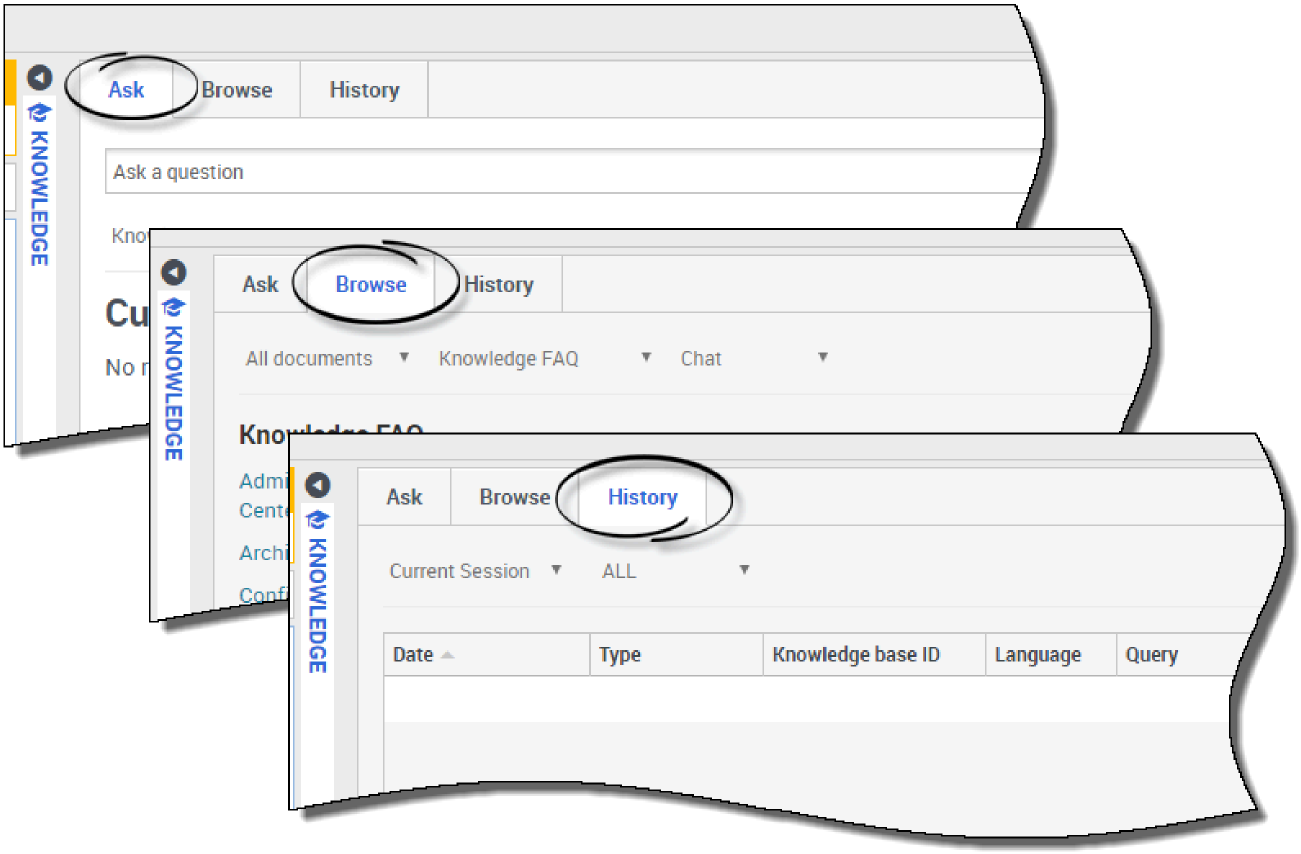
- Provide suggested articles to customers
- Provide feedback to enhance search accuracy and relevancy
- Create knowledge articles through the built-in content management system
- Browse a list of categories to help you find the right answer, quickly
- Review a history of customer searches and answers, read and ignored

## How do I access the plugin?

To access the Knowledge view, select the vertical **Knowledge** tab on the active-interaction window:


Genesys • Workspace
Jane Doe 1:47:00
Case Information
Origin: Inbound chat
Jane Doe Connected
[1:01:21 PM] JaneD: New party 'JaneD' has joined the session
[1:01:27 PM] 5100F 5100L: New party '5100F 5100L' has joined the session
Knowledge tab
KNOWLEDGE
CO-BROWSE
CONTACT
Send
Dispositions
Note
Ask

## How do I interact with Knowledge Center?



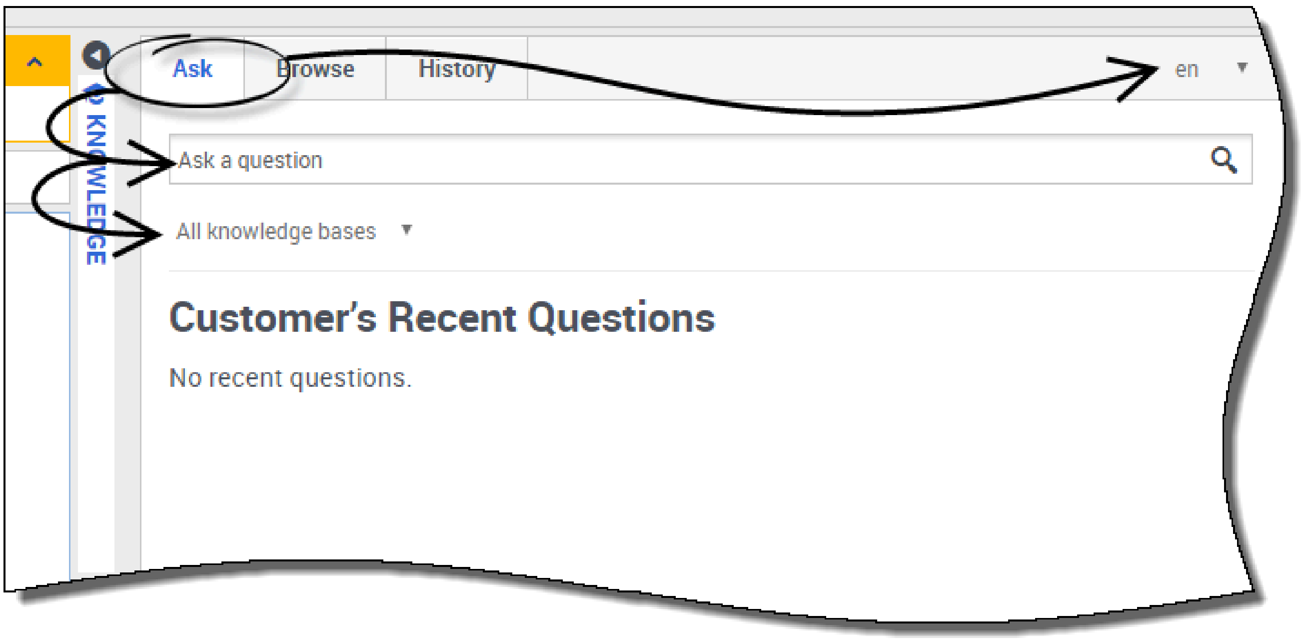

There are 3 different ways you can interact with Knowledge Center:

- you can ask your question from the **Ask** tab
- you can browse a list of categories from the **Browse** tab
- you can view user history from the **History** tab

The next few pages will take you through all the main functions of Knowledge Center and how you can work with this plugin.

# Using the Ask tab

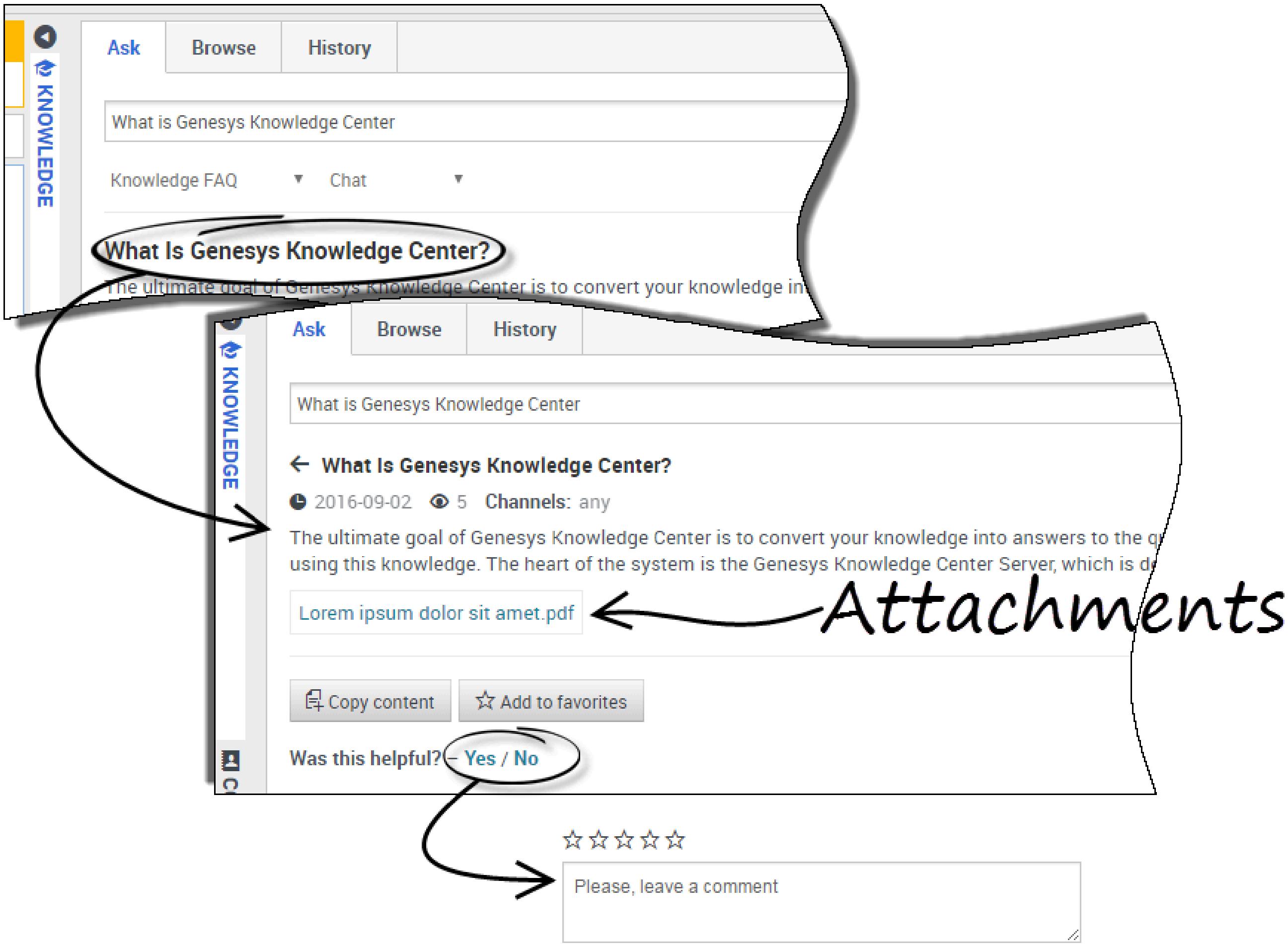
## How do I ask a question?




Asking the knowledge base a question is easy and very intuitive. Once you've opened up the Ask menu by clicking on the **Ask** tab, you simply type your question in the field and then choose your knowledge base and language (both are set up by your Administrator).

As you type, notice that the knowledge base automatically begins suggesting questions for you. These are based on previous Knowledge searches and keywords used. If you see a question in the list that matches yours, you can select it here. If not, continue typing your question and click the magnifying glass icon.

## I found my answer, now what?




Clicking on the question expands the result to display the answer. If you've found the answer to your question, you can either read the answer to the caller (if on a voice call), or you can copy and paste the answer directly into the Workspace chat window.

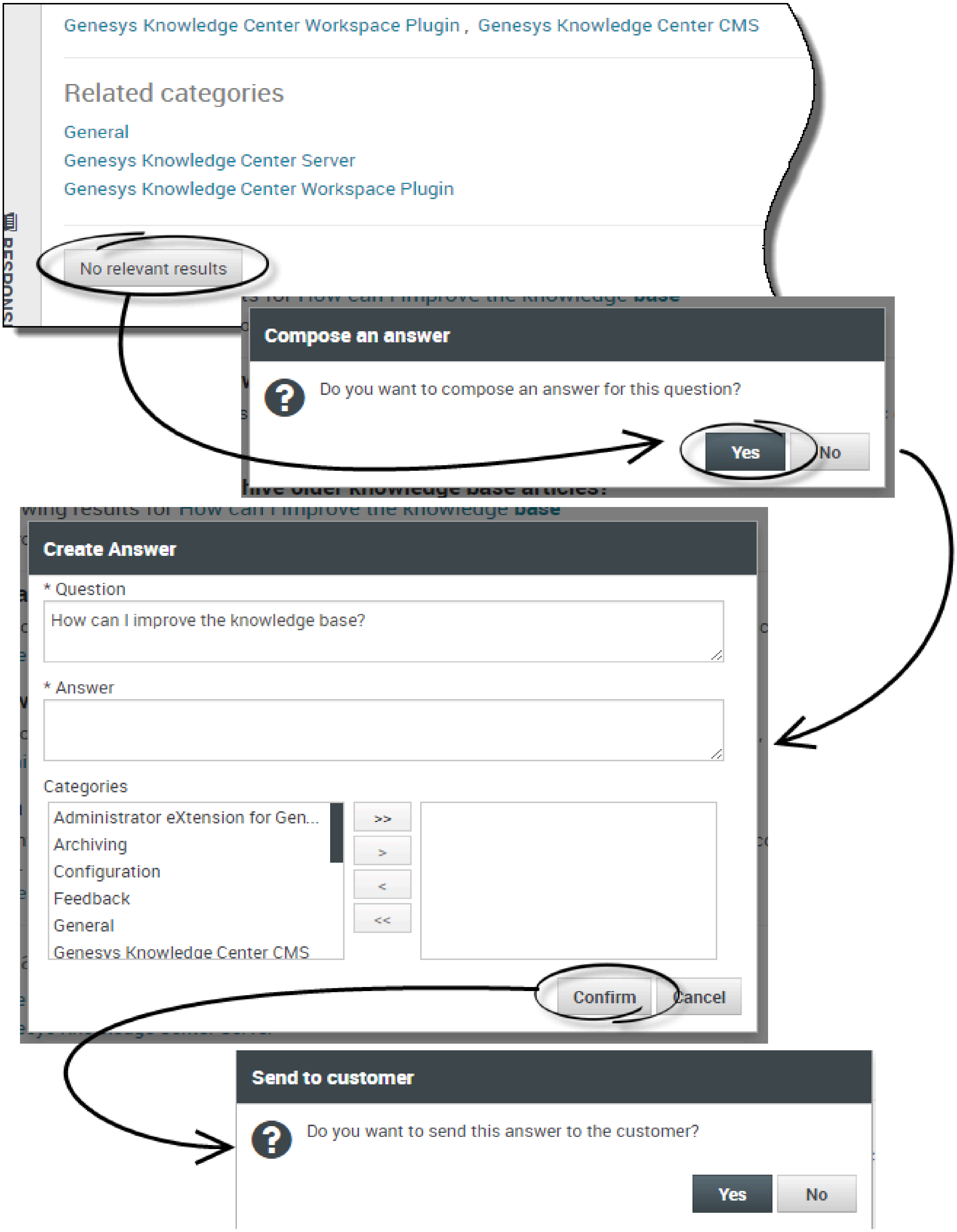
The document you are viewing may also have additional files attached which you can download by clicking the attachment link.

If the answer provided has been helpful, this is your chance to improve the knowledge base by providing feedback. Leaving a star-rating and a comment allows the system to better serve your future interactions by training the knowledge base to know which answers are the most suitable.

You can also add this answer to your favorites by clicking the **Add to favorites** button. All favorites are stored under the **Browse** tab.

To exit the article, simply click the back arrow next to the question.

## What if I didn't find an answer or I don't like the answer provided?


Genesys Knowledge Center Workspace Plugin , Genesys Knowledge Center CMS
Related categories
General
Genesys Knowledge Center Server
Genesys Knowledge Center Workspace Plugin
No relevant results
Compose an answer
Do you want to compose an answer for this question?
Yes
No
Create Answer
* Question
How can I improve the knowledge base?
* Answer
Categories
Administrator eXtension for Gen...
Archiving
Configuration
Feedback
General
Genesys Knowledge Center CMS
>>
>
<
<<
Confirm
Cancel
Send to customer
Do you want to send this answer to the customer?
Yes
No

If the system could not provide you a valid answer to share with your customer, taking the time to suggest an answer will enable the knowledge base to improve over time, thanks to your input.

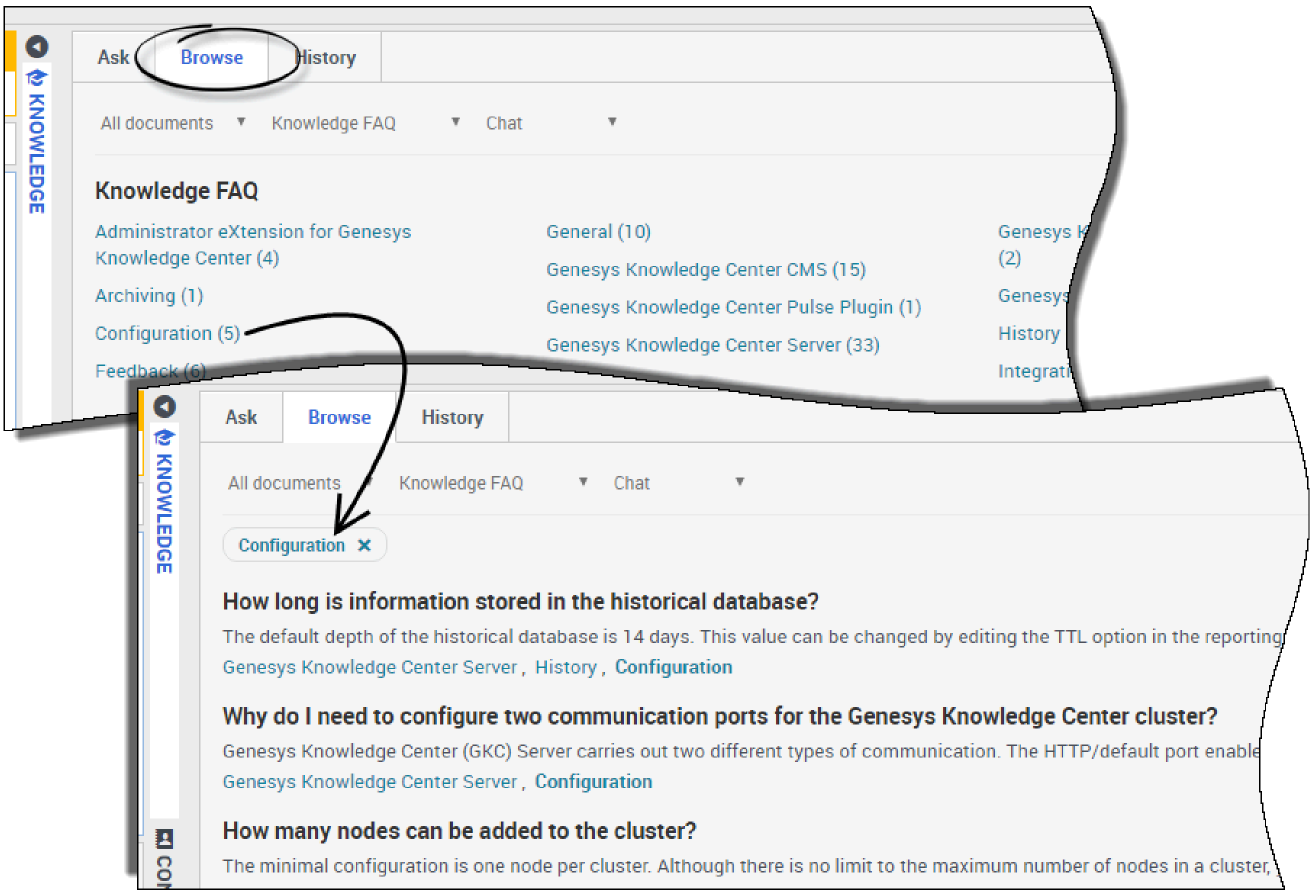
To make a suggestion to the system, simply click the **No relevant results** button at the bottom of the page and confirm that you wish to compose a new answer. In the **Create Answer** window, you can:

- Edit your question
- Suggest the answer
- Select the categories where the question and answer belongs

Once you've confirmed all the details, the system asks you if you'd like to send this answer to the customer. Clicking **Yes** automatically copies your answer into the chat window in Workspace, saving you valuable time.

# Using the Browse tab

## What are categories and why would I use them?

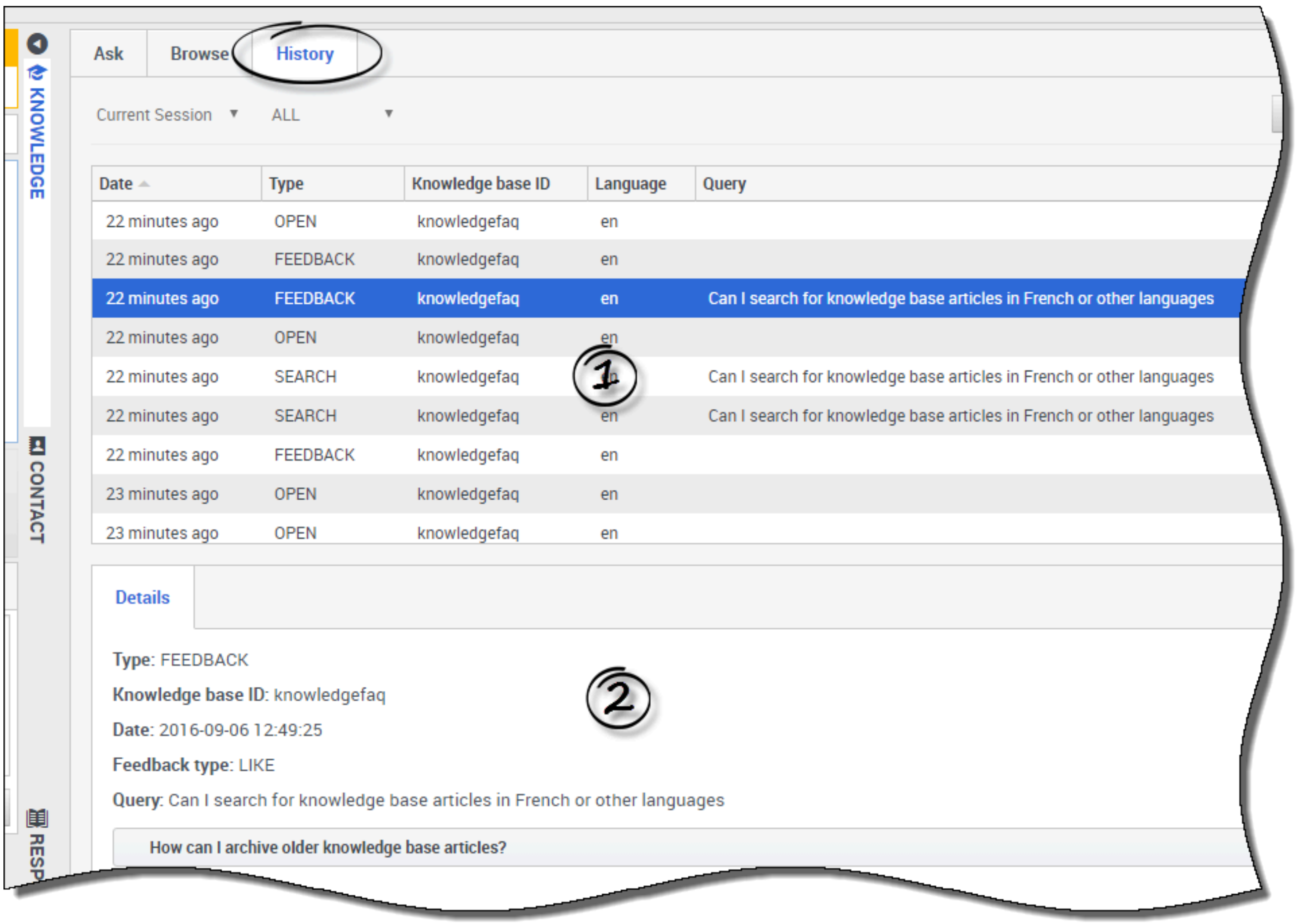



Categories make it easy for you to browse a list of questions and answers that might be useful for your customer interaction. When you click the **Browse** tab, you are presented with a number of category options that, when clicked, display questions and answers relevant to that category. This is particularly helpful if you know the topic but you're unsure of the question to ask. To clear the category, simply click the "x" on the category name and it brings you back to the main list.

> **Important**
>
> Categories are initially set up by your Administrator however you can help improve the knowledge base by adding your own questions and answers and defining their categories.

# Using the History tab

## What is the user history and why would I use it?




Clicking on the **History** tab brings you to the user history. The user history allows you to see all the queries made by your customer using self-service in the **Current Session**. It can also display **All History** which shows you the entire history of the customer's queries over time.

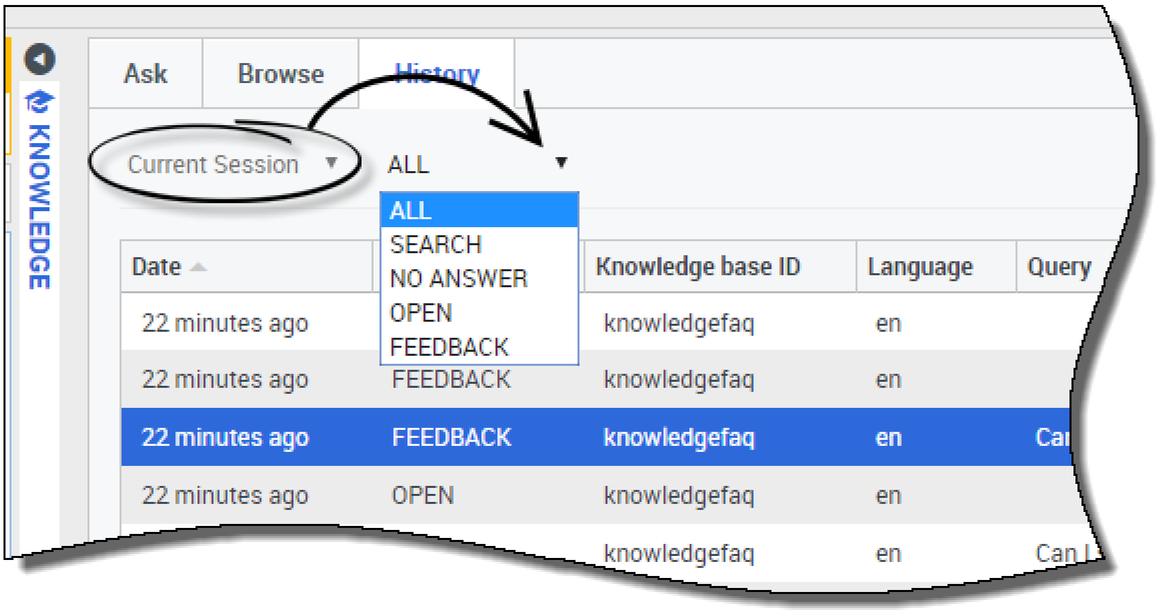
The main reason you would use this information is to give you a better understanding of the issue your customer is facing by providing you with the list of questions they have been asking the system. Also, by viewing the history you can see if this is a new issue or possibly a recurring one. The user history helps you quickly decipher things like these, making you well-prepared for your interaction.

The user history consists of two parts:

**1-**The History events table at the top

**2-**The details view at the bottom

## How do I see what the customer has already asked Knowledge Center?



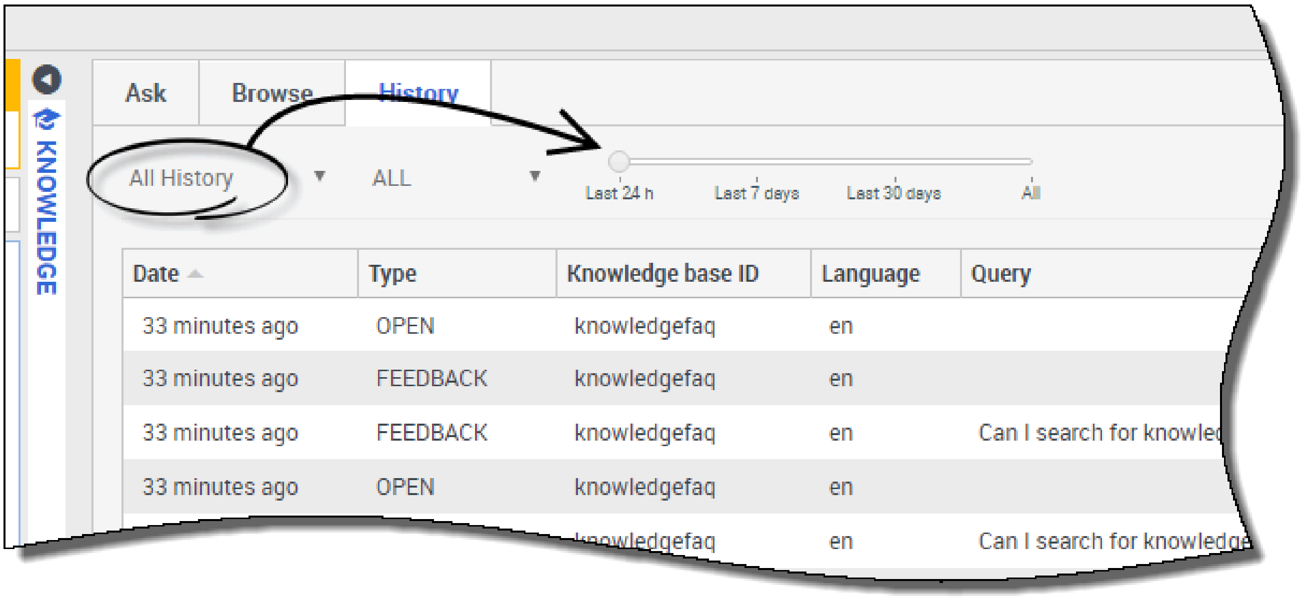

Viewing the **Current Session** enables you to view the current history of your customer's recent interactions with self-service. From here you can filter your view of their questions a number of ways:

- **ALL** - shows all events in the history
- **SEARCH** - shows only requests to find the answer (along with the results shown to customer)
- **NO ANSWER** - shows the questions the customer had where *no answer found* was returned
- **OPEN** - shows answers that were opened and reviewed by the customer
- **FEEDBACK** - shows positive and negative votes on the queries the customer made

### Important

The **Current Session** view is only available if your customer had been using self-service capabilities before contacting you for help. If they contacted you first, this option will not be active since there is no current session history to view.

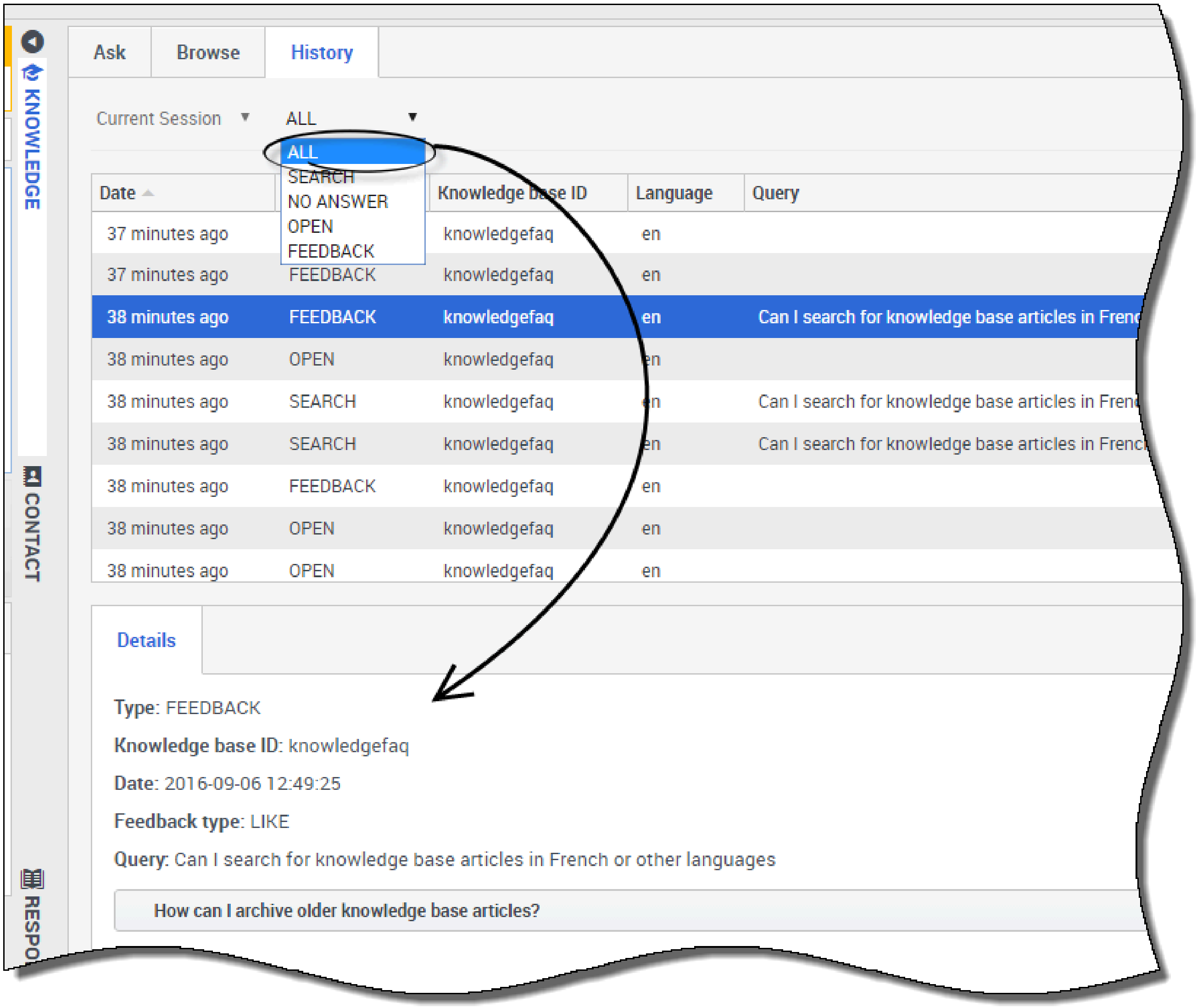
## Can I see a customer's whole inquiry history with Knowledge Center?




Viewing **All History** enables you to view your customer's entire interaction history with self-service. This option also provides you with the same way to filter as you can when viewing **Current Session**.

The added feature when viewing **All History** is that, from this view, you can also use the time line to view a specific range of time.

## What information is provided in the Details view?




When you click a history event in the history table, the bottom part of the view is updated to show the details of that event. The information provided depends on the type of event you've filtered on.

With the **ALL** filter selected, all information is shown.

With the **SEARCH** filter selected, the following information is shown:

- the date the event was recorded
- the question the customer asked
- the answer given to the customer

With the **NO ANSWER** filter selected, the following information is shown:

- the date the event was recorded
- the question the customer asked

With the **OPEN** filter selected, the following information is shown:

- the date the event was recorded
- answers the customer opened

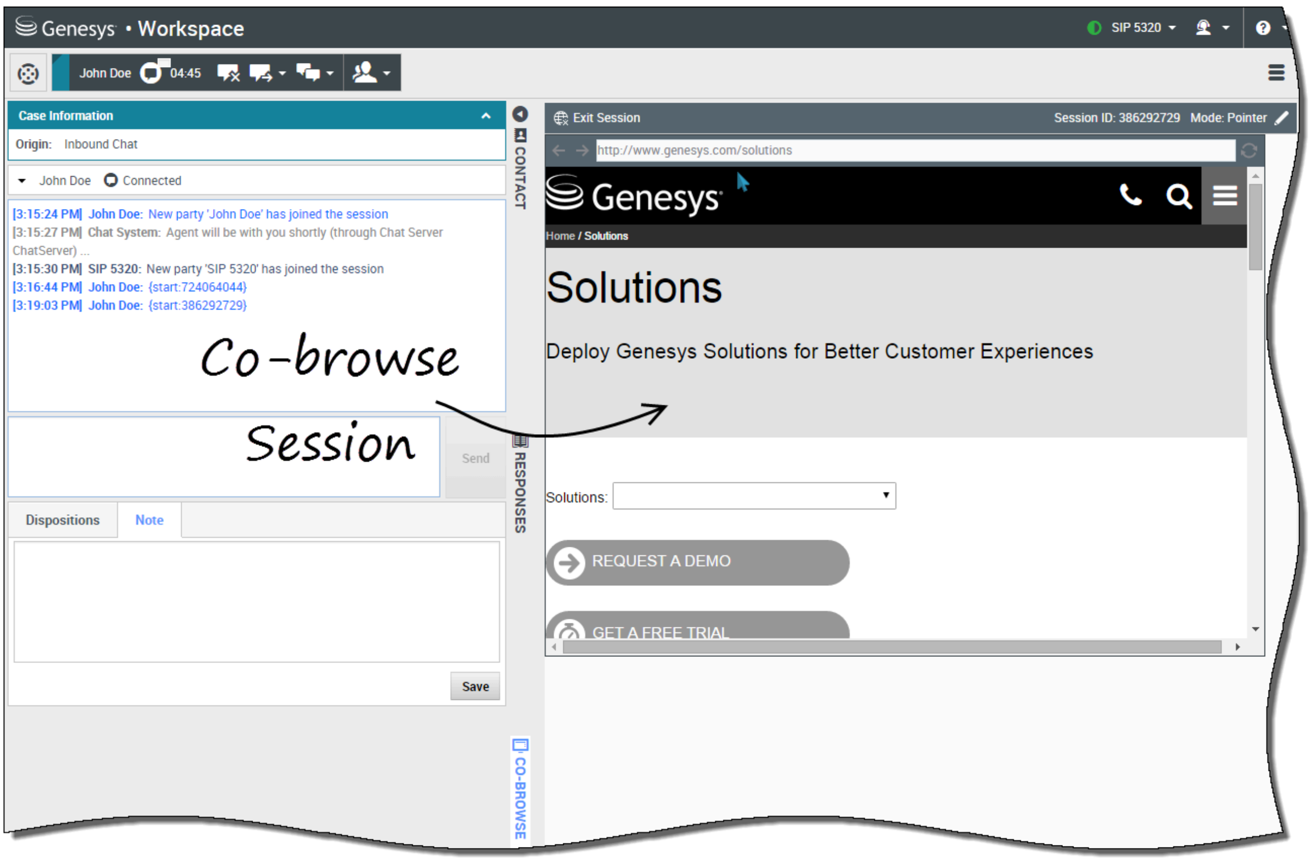
With the **FEEDBACK** filter selected, the following information is shown:

- the date the event was recorded
- the type of the feedback (positive or negative)
- the question the customer asked
- the answer the customer left feedback on

# Co-browse sessions

A Genesys Co-browse session lets you and a customer navigate the same web page at the same time. Unlike conventional screen-sharing applications where one party sees an image of the other party's browser, in a Genesys Co-browse session both you and the customer share the same instance of the web page.

## Start a Co-browse session

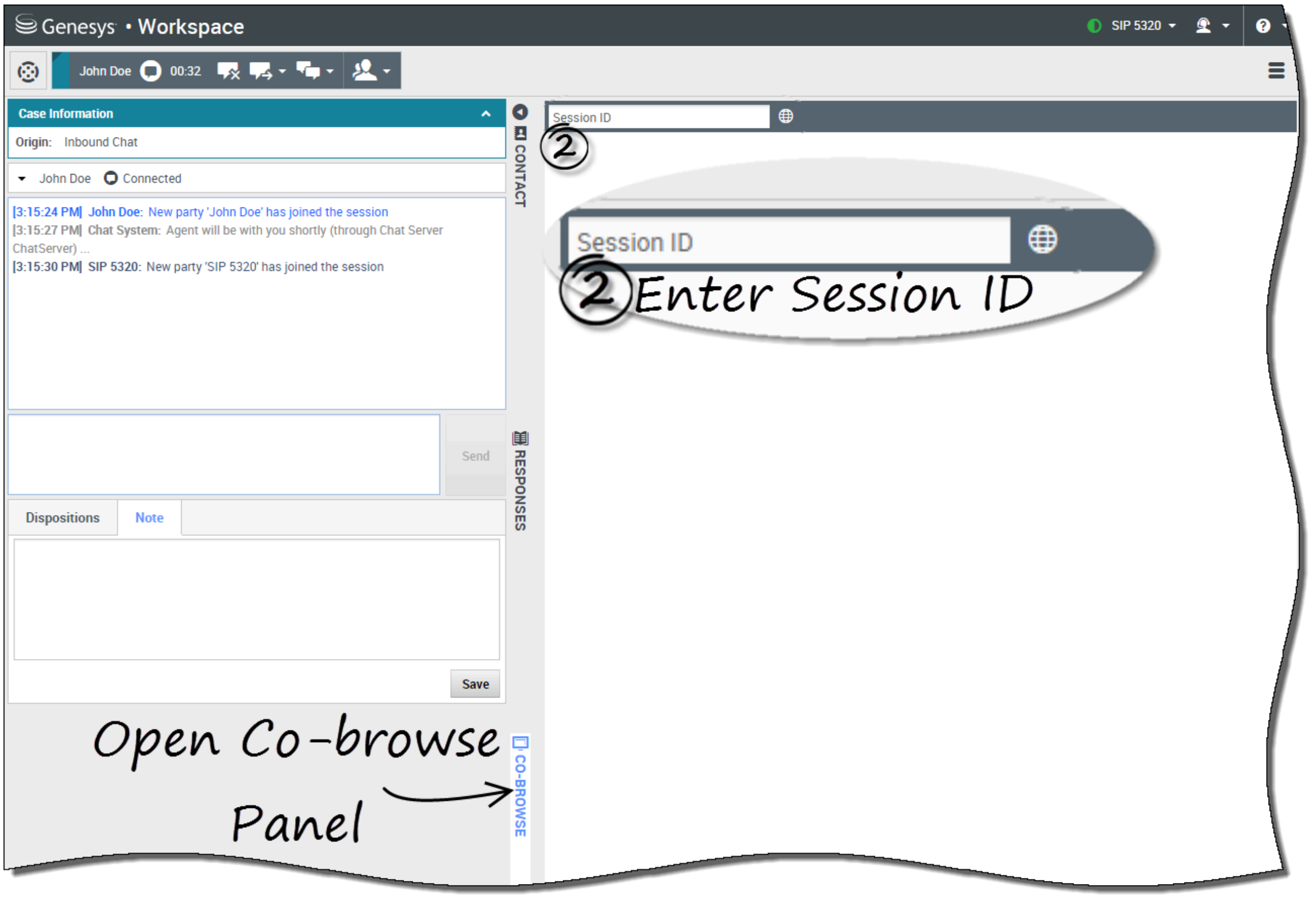



The customer *must* initiate a Co-browsing session. You cannot start a Co-browse session. Websites set up for Genesys Co-browse include a Co-browsing button that the customer must click to start a Co-browsing session.

Clicking the Co-browsing button will present the customer with a session ID. If you are engaged in chat with the customer, the Co-browse session will automatically start in your workspace. Once the Co-browsing session starts, you see a special message in chat—*{start:123123123}* for example, where *123123123* is the session ID.

**Note:** For security considerations, you will only see a placeholder of certain website elements.

## Start a Co-browse session using a session ID



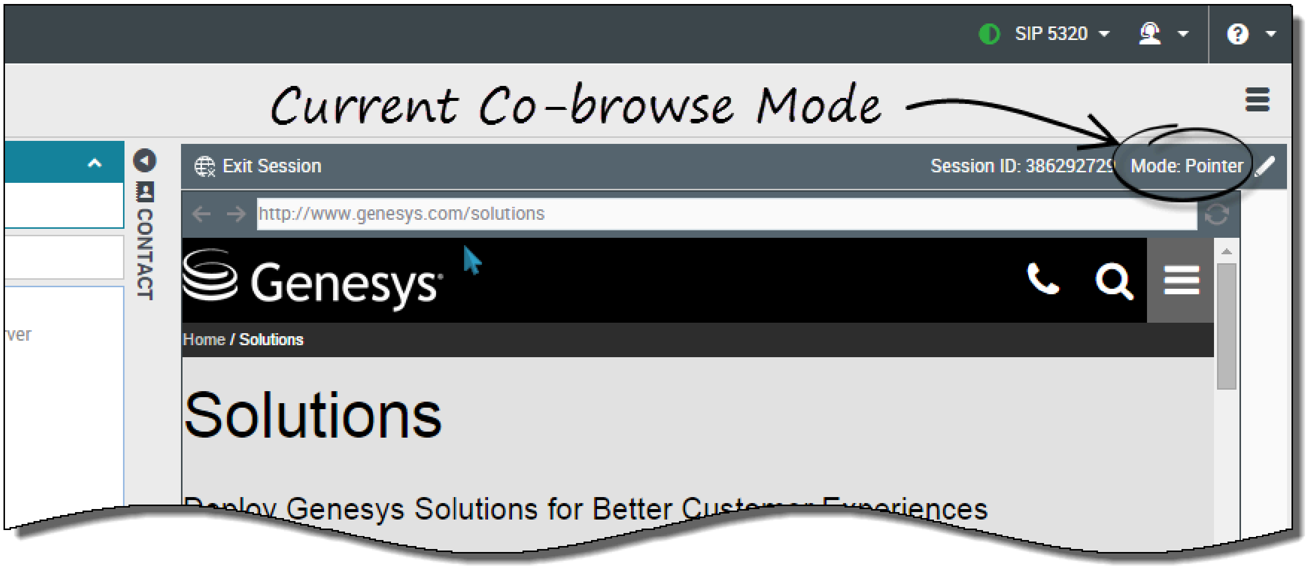

If you are on a call or a chat and your Co-browse session does not automatically start, you can use a session ID to start a Co-browsing session.

Get the session ID from the customer and enter it in the **Session ID** field, then click the globe icon.

You should now see the customer's browser. You do not need to navigate to the same page as the customer. Co-browse uses the session ID to make sure that you and the customer are viewing the same page. As soon as the session starts, the customer receives a notification on their screen that they have started a Co-browsing session.

**Note:** Genesys Co-browse does not support conference or transfer for chat and voice.

## Use Pointer Mode

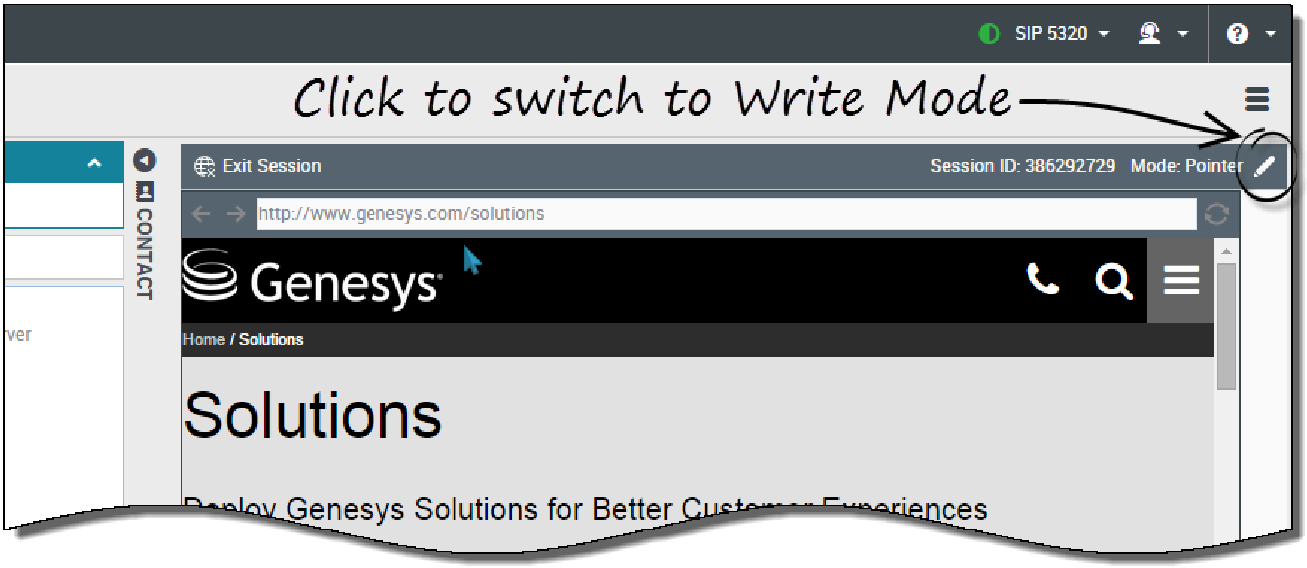



When you first join a Co-browse session, you are in *Pointer Mode*. You can see what the customer sees but you cannot perform any actions in their browser. You cannot navigate, input information, or submit forms.

You and the customer can see each other's mouse movements at all times and your mouse clicks create a red circle effect around your mouse pointer. Use the red circle effect to direct the customer to specific sections on the web page.

At any time, you can send a request to the customer to enable *Write Mode*.

## Switch to Write Mode




In Write Mode, both you and the customer can perform conventional user actions. Both of you can enter text and click buttons.

To switch to Write Mode, click the pencil icon at the top right corner of the Co-browse area. The customer is asked to approve the switch to Write Mode. Write Mode is enabled only if the customer approves. You receive a notification about the customer's response.

If the customer approves the switch to Write Mode, the pencil icon turns into a pointer icon.

> **Important**
> If Write Mode is disabled by administrators, you will not see the pencil icon.

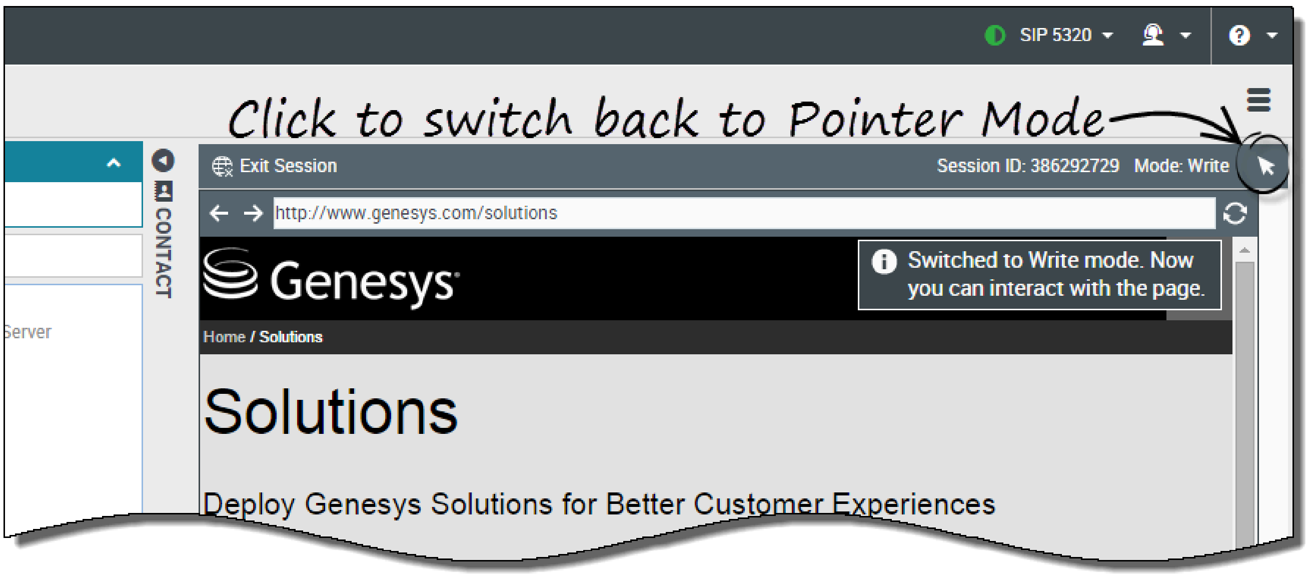
### In Write Mode, you can navigate by clicking links in the web page or by using the following navigation options in Workspace Web Edition:

- Click the back and forward arrows.
- Type a URL into the URL bar and press the **Enter** key.
- Click the refresh button to reload the page.

Administrators can limit which interactive elements are enabled for you in Write Mode. For example, administrators may choose to disable certain links. By default, all **Submit** buttons are deactivated for agents and nothing happens when you click one. Customers can always submit forms as if they were browsing normally.

**Important:** You can only co-browse while the customer is on your company's site. If the customer goes to another site, the co-browse session stops until they come back to your site.

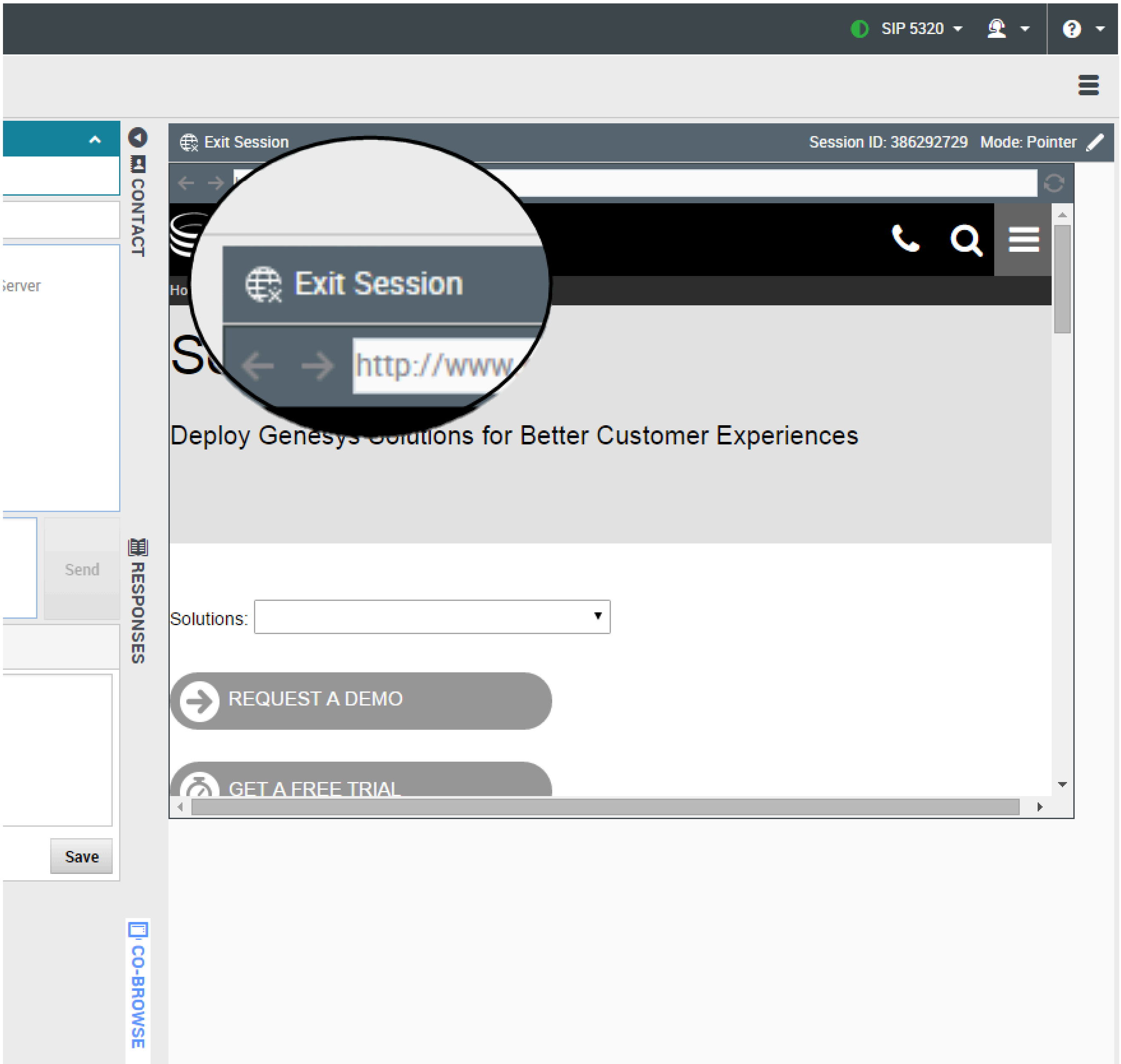
## Switch back to Pointer Mode




To switch to back to Pointer Mode, click the pointer icon at the top right corner of the Co-browse area.

The customer can also switch back to Pointer Mode at any time.

## Stop a Co-browse session

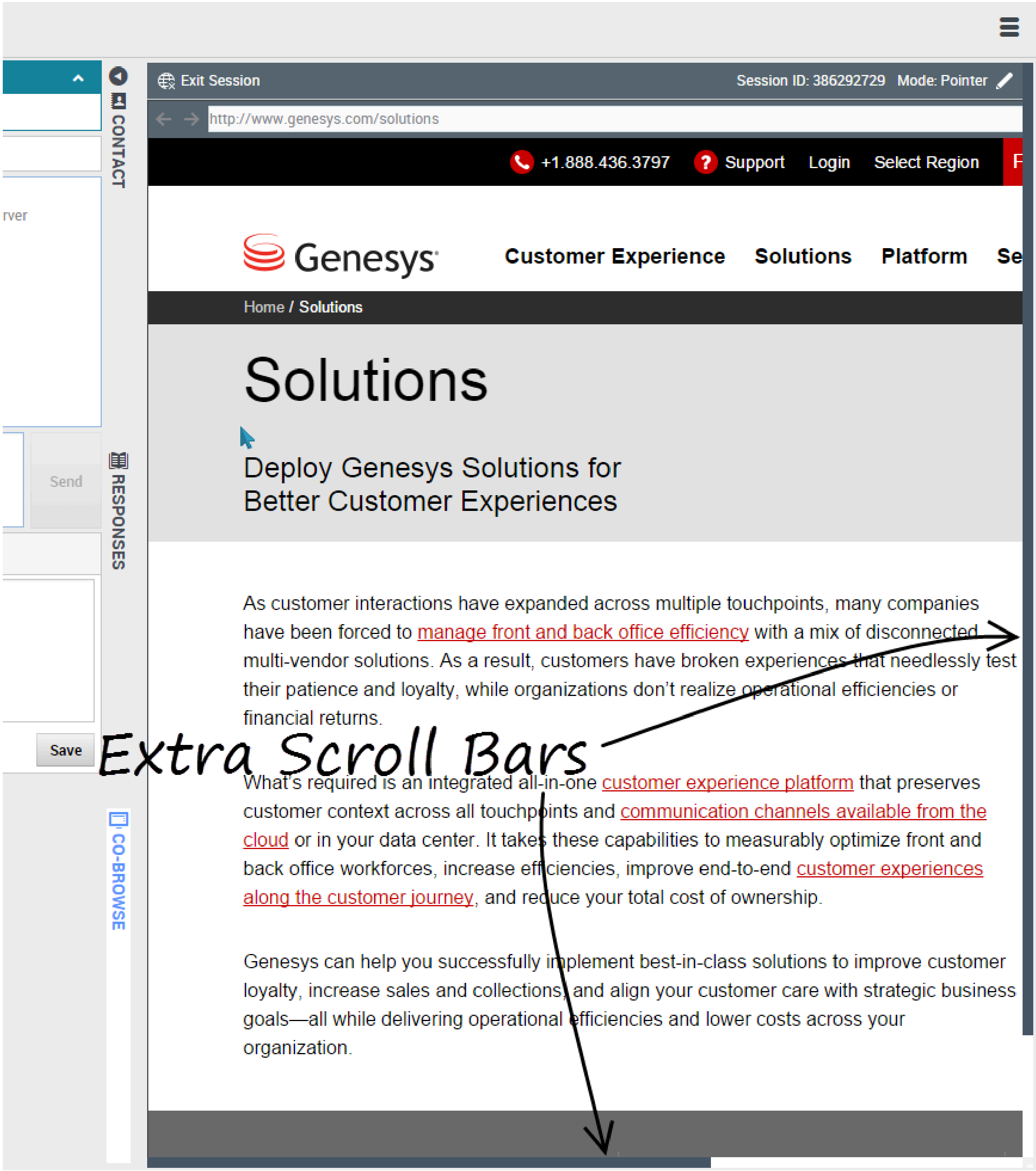



Once a Co-browse session starts, both you and the customer have the ability to end the session with the **Exit Session** button.

You can also end the Co-browsing session by ending your ongoing chat or call with the customer.

If the customer exits the session, you are notified and your browser no longer displays a view of the customer's browser. Likewise, if you exit the session, the customer receives a notification.

## Manage your virtual browser




The size of your virtual browser (a window on your computer that displays the customer's browser window) matches the actual size at the customer's end. Scroll bars appear to help you navigate the customer's browser if their window is bigger than your Workspace Web Edition Co-browse area.

## Data masking

Administrators can limit which fields are readable to you; asterisks (****) display anywhere that characters are masked. For example, administrators might choose to mask only the customer's password and social security number—or an entire page—from all agents.

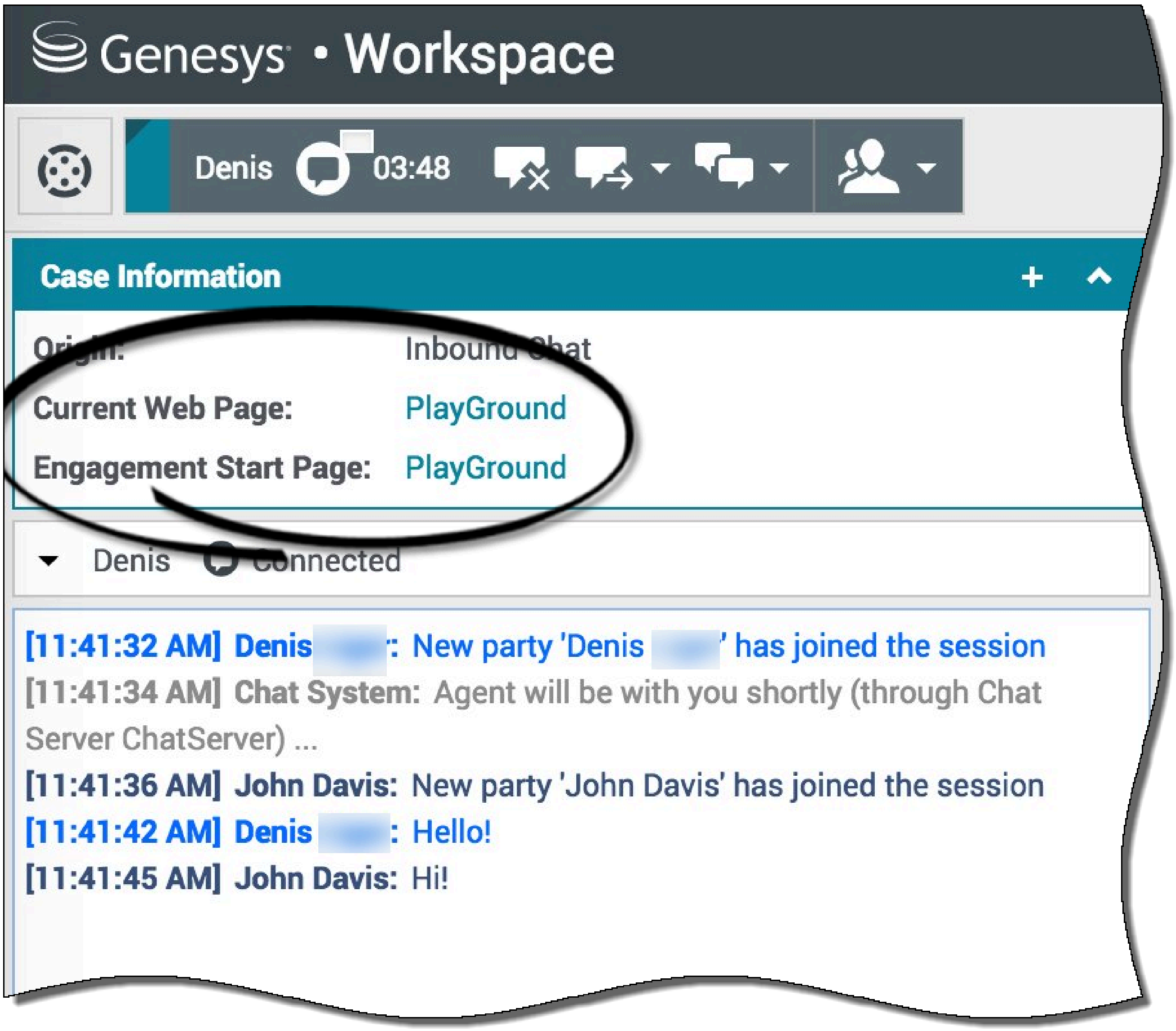
# Browser history

Workspace lets you to view a customer's browser history before you assist them, to see if they are searching randomly or for something specific.

**[+] Watch video: Viewing the Browser History of Your Customers**

Link to video

## How do I see which page my customer was on when invited to engage?

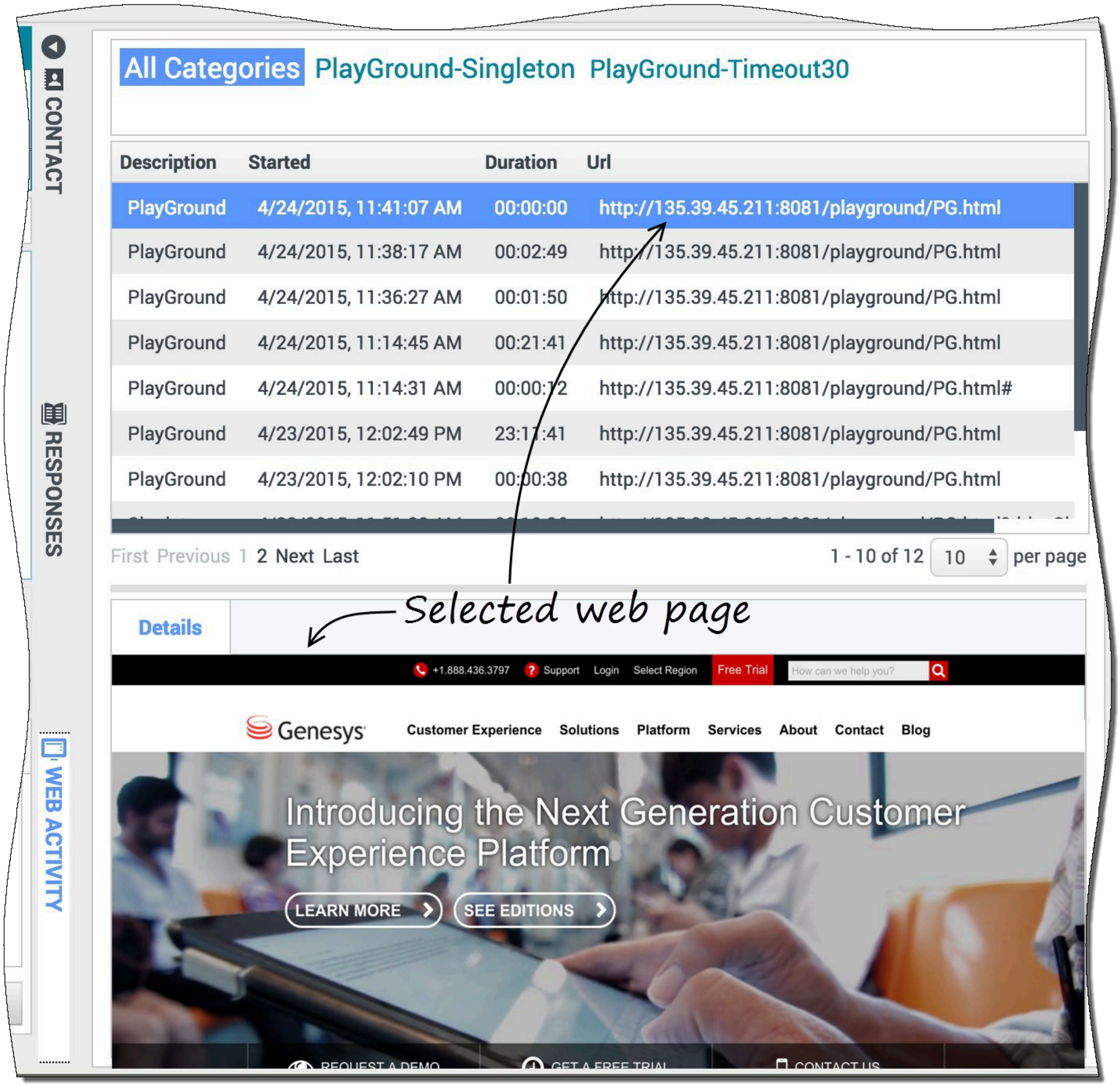



You can see the web page your customer was browsing when an engagement invite was sent to them, and also the page they are currently displaying.

The current customer's case information is visible on the left side of the active-interaction window.

The name of the web page your customer was browsing when an engagement invite was sent to them is labeled **Engagement Start Page**, and the name of their current page is displayed right above it.

## How do I view a list of the web pages my customer has been browsing?



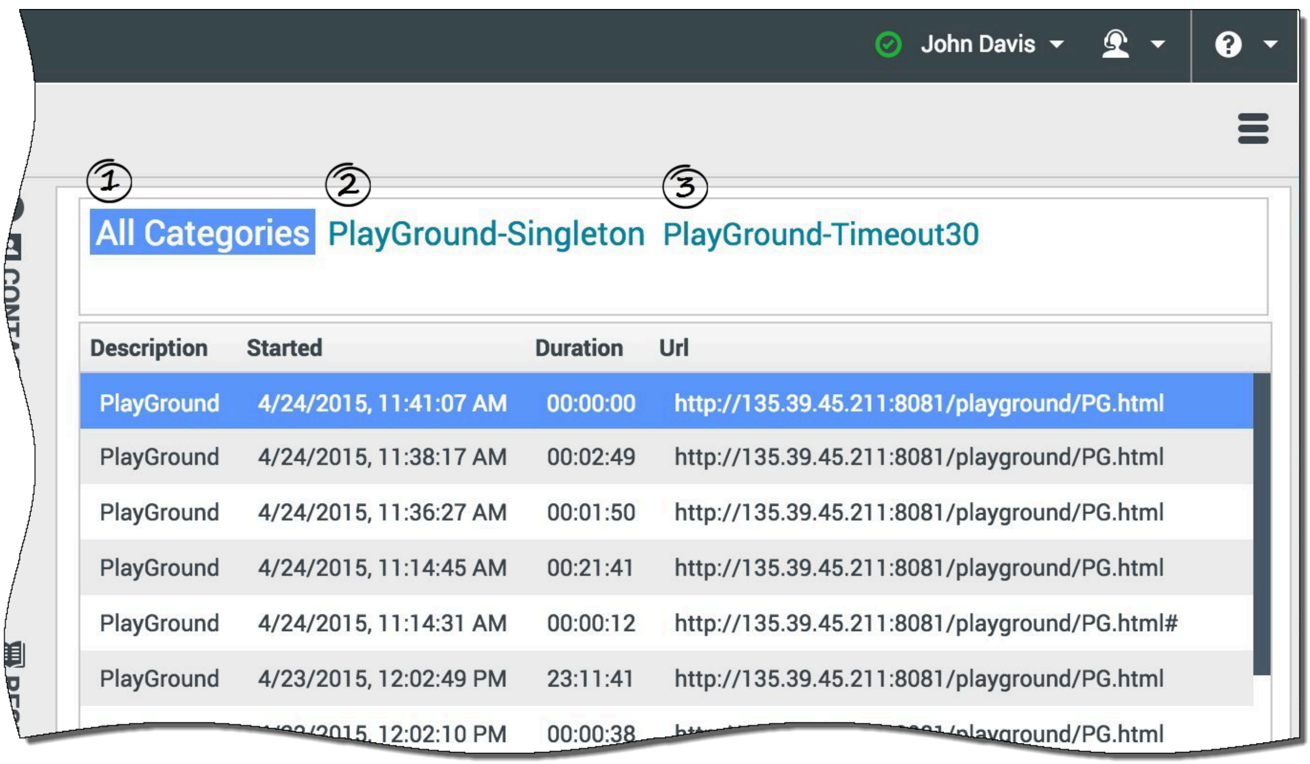

You can see a list of the web pages your customer has been browsing during their current visit, as well as the contents of the currently selected web page.

To access the Web Activity view, select the vertical **WEB ACTIVITY** tab on the active-interaction window.

You now see, on the upper right side of your window, a list of the web pages your customer has been viewing during their current visit. On the lower right of your window, you can see the contents of the currently selected web page.

> **Important**
> If your customer has signed in to your website, you may not be able to view the contents of the web pages they have been browsing.

## How do I filter the list of web pages?




You can filter the web page list by selecting a category.

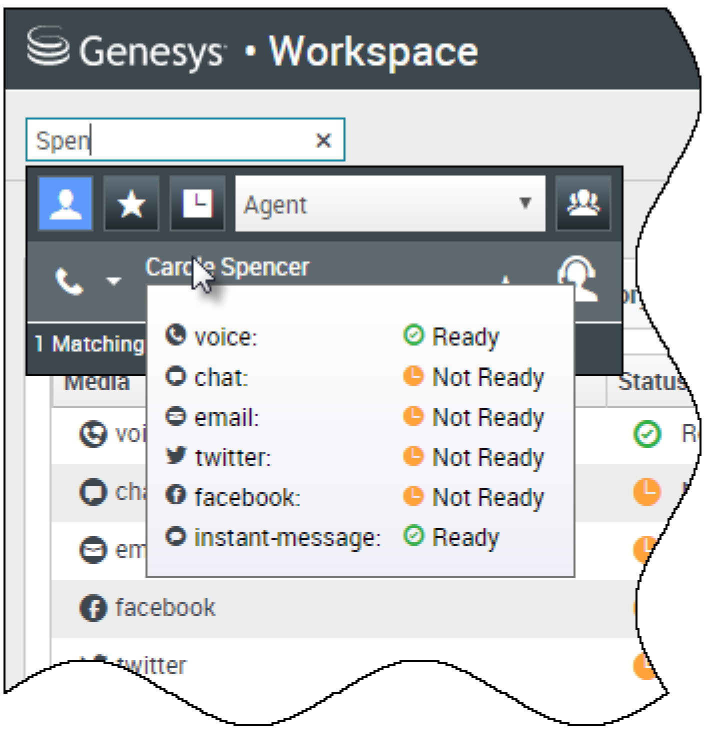
Above the list of web pages, there is an area of highlighted text that tells you that you are displaying web pages in all categories.

Click the categories listed next to it to filter out all of the pages that are not in that category.

# Internal interactions

Internal interactions are communications between you and other people inside your company. They are typically internal-only, such as consultations, transfers, instant messages (IMs), and messages from your system or administrators, but can also be conferences that involve the customer. Your supervisor might also use barge-ins or agent monitoring to listen silently or communicate with you and/or the customer.

## How do I contact people in my company?

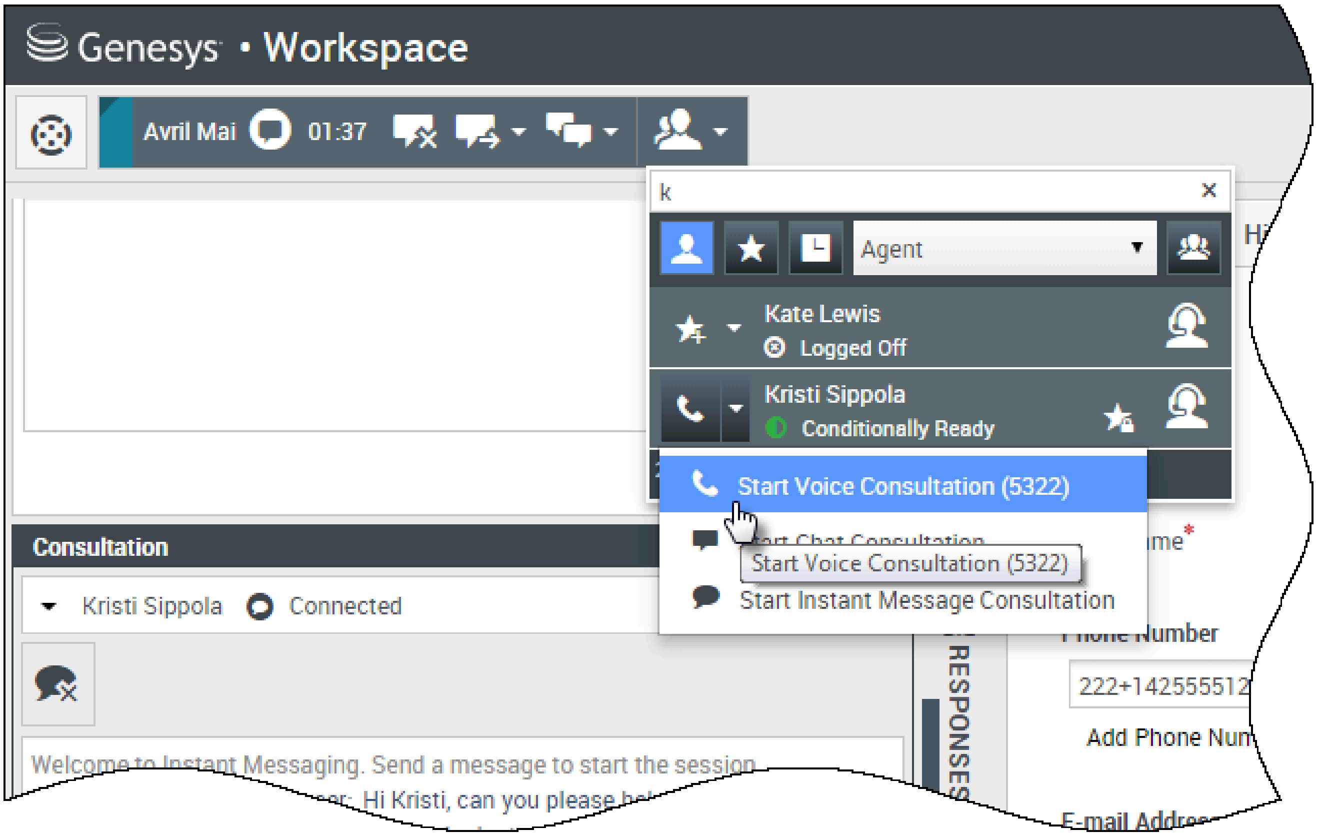



The Team Communicator tool lets you search through your company directory for an agent, supervisor (team lead), agent group, or other target that you want to call, consult with, or transfer to. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

Type in the name of the person that you want to call, then hover your mouse pointer over their name in the list of search results. A pop-up is displayed that lets you know whether that person is ready to take a call, is on a break, is busy, or is logged off.

If the person is available, use the action menu to call them. If not, try a different channel, such as Instant Message, or try again later.

# How do I start a consultation?




A consultation lets you discuss an active call, email, chat, or workitem with another team member. It's different from a conference because the customer is not connected to the session.

 starts a consultation.

Search your list of team members to find the person or internal target (an agent group, a routing point, or a skill) you want to consult with and select the type of consultation you want. Once connected, you can monitor the status and use the controls as you would for any other interaction.

## Some things to keep in mind:

- Either party can end the consultation, but ending the consultation does not end your interaction with the customer.
- If you end the session with the customer, the consultation remains active.
- Consultations are private — the customer can't see or hear your discussions.

- The team member can see the case and contact information and, if any, the chat transcript.
- To close an active chat, both you and the consulted team member must mark it done .

If you are on a call and start a voice consultation, the original call is put on hold while you consult with your selected team member.

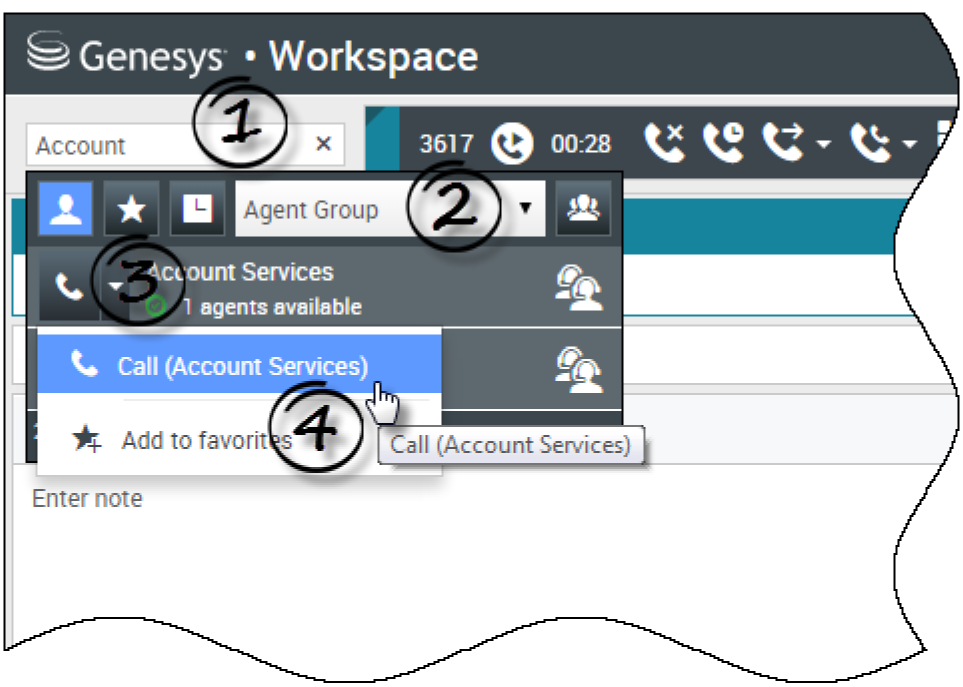
- resumes the original call (and also allows you to toggle between the two calls).
- ends the consultation and resumes the original call from hold.

If you start a chat or IM consultation, a new window opens where you can send private messages to the team member. You can also start multiple consultations. For example, you can start a voice consultation while an IM consultation is in progress.

Prior to a conference or transfer, you can consult with your team member by selecting **Consult** in the toolbar. After the consultation request is sent, the initial call is put on hold.

While in a consultation, you can also complete a conference or transfer between your team member and your customer. To do this, select **Instant Call Transfer** ( ) or **Instant Call Conference** ( ), and select the same button beside the desired team member's name.

## How do I call an Agent Group



In some contact centers, agents are assigned to specific groups. For example, some agents in a company might speak different languages, have particular product expertise, or have a higher level of security clearance. These are all specialties that might be associated with an agent's group.

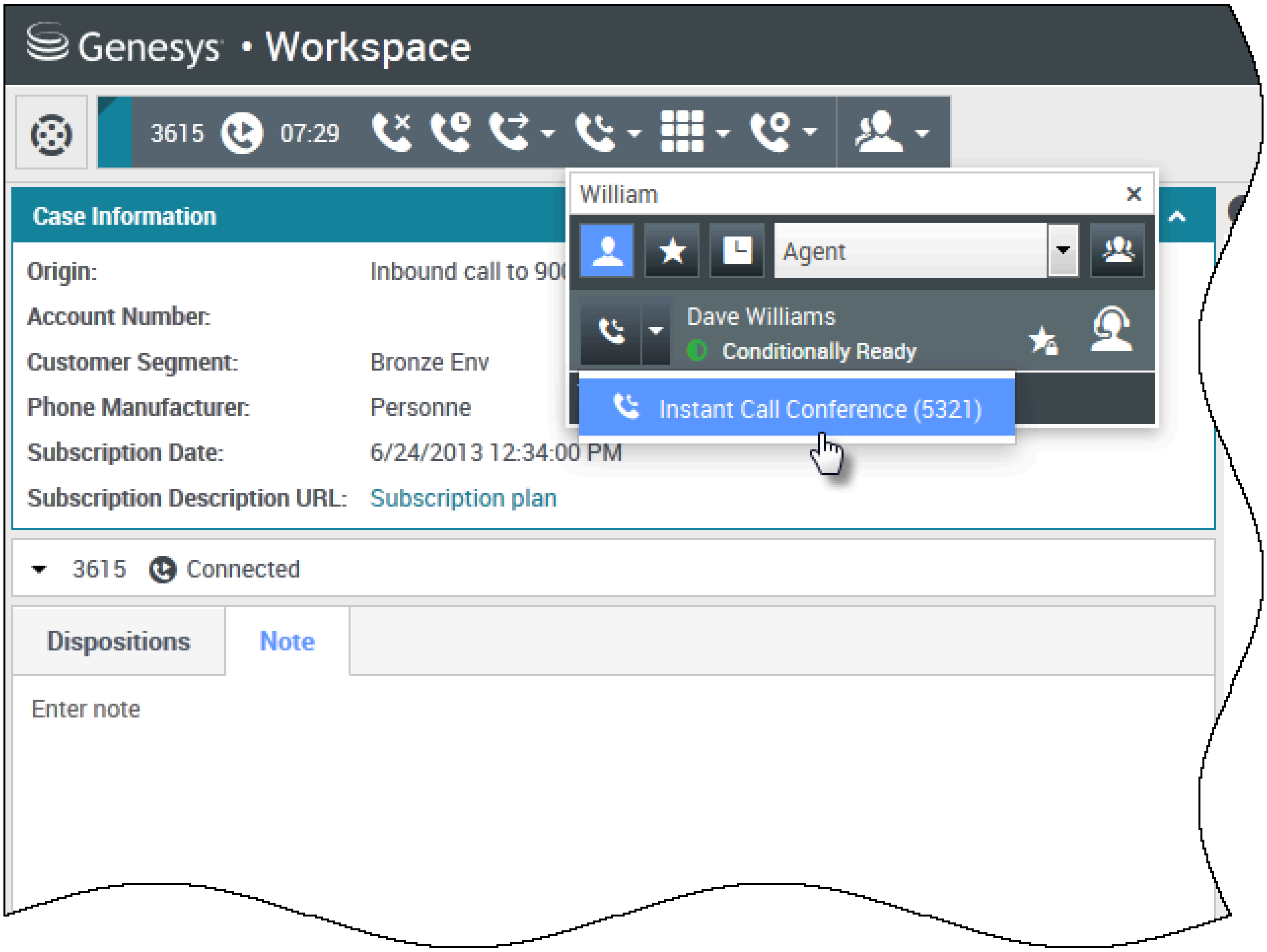
If your administrator has enabled this capability, you can enter the name of the agent group instead of the name of an agent when looking for a team member. Click the **Action Menu** drop-down list that is displayed next to the name of the agent group that you want to call.

Sometimes, no one in the agent group is available to take the call. If your administrator has set up Workspace to display the number of available agents in the agent group, then you will see a message underneath the group name that tells you how many agents are available. If there are no agents available, you might have to wait to make the call.

### Important

In some scenarios, the agent group availability information might be 10 to 30 seconds behind.

# How do I start a conference?




Starting a conference allows you to add another person to your current call or chat. It's different from a consultation because the customer is also connected to the session.

 starts a conference when working in voice.

 starts a conference when working in chat.

Search your list of internal targets to find the person, agent group, routing point, interaction queue, or skill that you want to add and then select the conference channel you are requesting. The conference begins as soon as they accept the request. (When sending a conference request to an agent group, the agent availability information might be 10 to 30 seconds behind, so you might have to wait to see if an agent is available to join the conference.)

## Some things to keep in mind:

- You can always consult with a team member before adding them to a conference.
- In a voice conference, the person you added can choose to release the call. This disconnects them from the conference, but your call with the customer continues.
- If you disconnect from the call but the person you added to the conference is still connected, the call continues without you. Your system might be set up to end the conference after you disconnect if the person that you added is not part of your company.
- Everyone connected to the conference can see or hear what the other parties are discussing, unless you remove or selectively mute a participant.
- Your account might be configured to remove a party from a conference. Select the **Party Action** menu on the Voice Interaction view and select **Drop from conference** to remove that party from the conference.

A team member can select **Leave** to drop from the conference.

## How do I transfer an interaction to another team member?

Link to video

You can transfer a call, email, or chat to another team member instantly, or you can consult with them first. For example, you could put the current call on hold while you talk to another team member to see if they will accept the transfer.

 transfers a voice call.

 transfers a chat.

 transfers an inbound email.

### Some things to keep in mind:

- The Case information of the interaction might be displayed to you, the person you transfer to, and your administrator.
- If your transfer request is not accepted, you must manually take your contact off hold.
- If there are no agents available, you might have to wait to transfer the call. (When transferring to an agent group, the agent availability information might be 10 to 30 seconds behind, so you might have to wait to transfer if there are no agents showing as available.)
- If the transfer target is busy (not Ready or logged off), you can transfer to voicemail if this feature is available.

Watch the video to see how a transfer works.

## How do I send an Instant Message?

### Link to video

The Workspace Instant Message (IM) channel lets you send and receive Instant Messages (IM) with your team. If this feature is available in your environment, it will be available through your voice channel.

To send an IM, find the team member and select **Send Instant Message**. Type a message and hit **Send**. If the person accepts, you can message back and forth.

 ends the IM session.

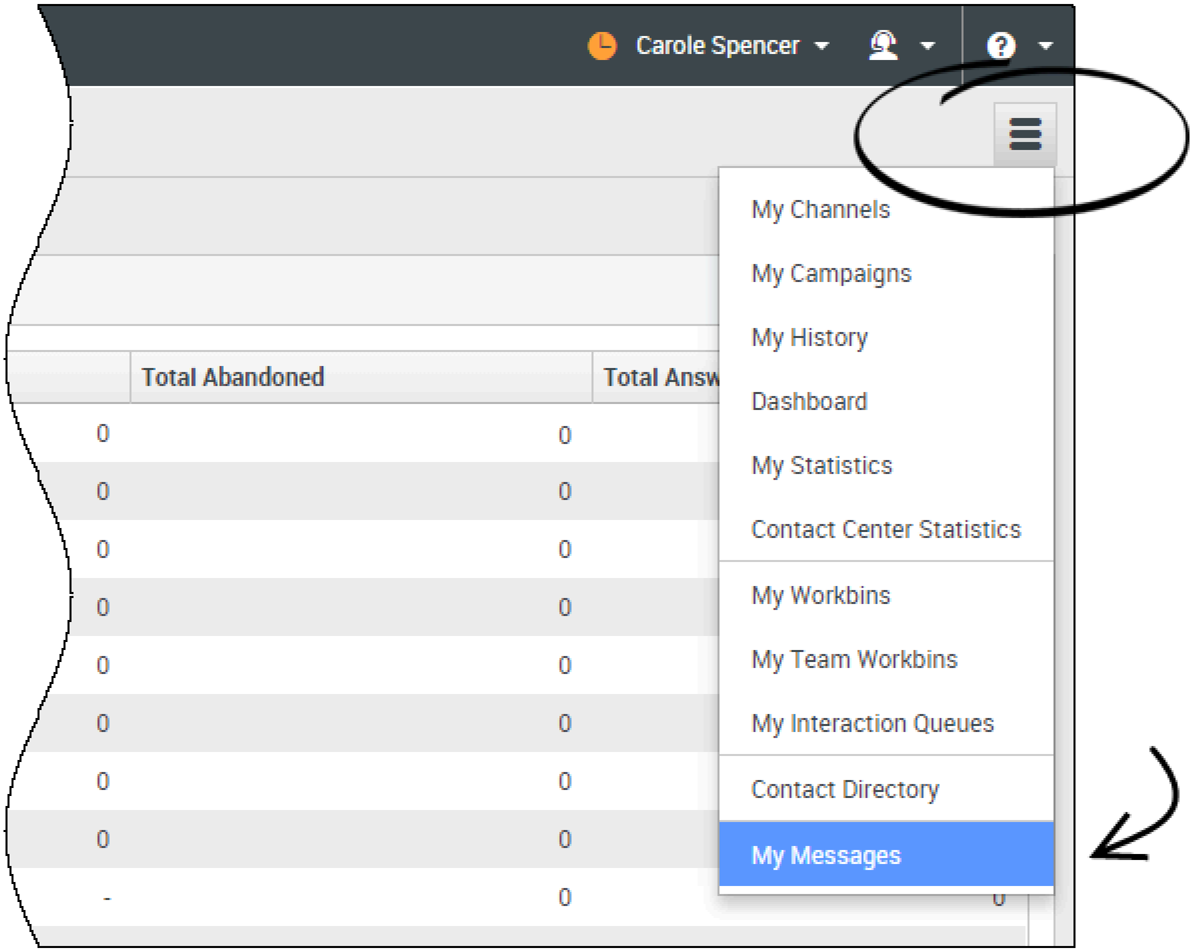
 closes the window.

## How do I receive an Instant Message?

### Link to video

Watch the video to see how to answer an Instant Message request from one of your coworkers.

## How do I read my messages?




You might receive messages from the Genesys system.

When a new message arrives, you'll see a preview notification (you might also hear a sound/tone play).

Common messages include:

- System-based messages (such as when a switch, channel, or contact server is out of service)
- Voicemails (if enabled)

You can view most messages on the **My Messages** page. In the Main View, click the **Access and use Workspace supporting views** button (), then select **My Messages**. The most recent messages are displayed on top, with a color and a status to indicate the priority.

If you have voicemail messages, you'll see an indicator beside the mailbox, like this: .

To call your voicemail box select it from the **Supporting Views** menu (☰). A new internal interaction is launched. Use the keypad to enter your authentication information.

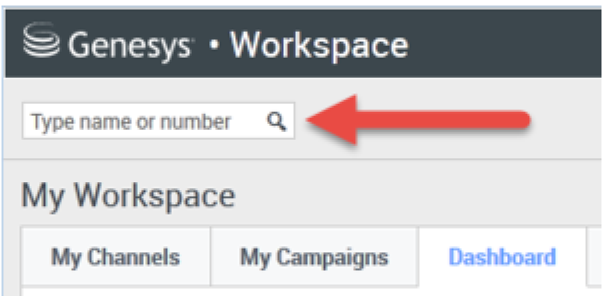
**Tip:** If you hover your mouse pointer over the message waiting indicator, you can see the number of messages in each of your voicemail boxes.

# Team Communicator

## How do I start a call or an email message?

To start a voice call or an email interaction, just click in the Team Communicator and start typing information about who you want to call or email. The Team Communicator is a feature that lets you to find someone in your company's directory (an internal target) or someone from outside your company (like a contact) who has their information stored in the contact directory.

You can enter a name, part of a name, a phone number, or an email address into the Team Communicator field and immediately start a call or email message to that person. Your administrator might set up your system to restrict whom you can search for.




Main Window Team Communicator. Use this to type in names, phone numbers, and email addresses.

Watch video: Finding a Contact

Link to video

You might be dealing with a customer who has an issue that you need help to resolve. Just use the Team Communicator to start a voice call with the person in your company or outside your company who can help you.

The Team Communicator is part of the Main View, and it is also available in the following views Interaction windows (for transfer, conference, and consultation actions):

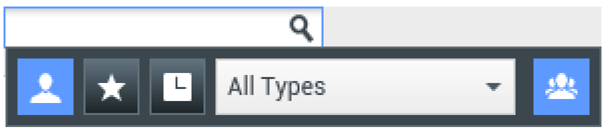
- Voice
- Chat
- E-mail
- Facebook
- Twitter

Type a name or number in the Team Communicator text field to begin your search. When you click in the field, the Team Communicator toolbar is displayed. The toolbar enables you to search All, your Favorite, Corporate Favorite, or Recent contacts and internal targets. It also enables you to filter by contact or internal-target type and to group or ungroup your search results.

# In the Main View

## How do I use the Team Communicator in the Main View?

The Main View contains the Team Communicator **Quick Search** field. The **Quick Search** field is a universal-lookup tool. The tool can search both the contact database and the internal-target directory. Your system administrator might have configured it to provide universal contact lookup or simply to provide internal-target lookup.



The Team Communicator, for starting calls, emails, transfers, conferences, and consultations

### Starting a call or email

When you select Team Communicator, a toolbar is displayed. Enter a name, telephone number, or other keywords in the field to begin your search. As you type, the Team Communicator suggests known agents, contacts, and other resources.

Click the name of the person that you want to contact from the results list.

You can still start an interaction with someone who is not in your company database by typing in the full telephone number or email address and then clicking the Call or Email button in the Action Menu beside the name or email address.

The toolbar enables you to filter your search results of contacts and internal targets by types of calls or contacts:

- Search all contacts ()
- Search favorite contacts ()
- Search recent contacts ()

It also enables you to filter by contact or internal-target type, and to group or ungroup () your search results by category or type.

Your system might be set up to alert you if you have missed a call.

Click in the Team Communicator text field to open the Team Communicator. If you have a missed call, the **Show and search recent** () button is orange. Click the button to display the list of missed calls. A small downward pointing outlined arrow icon is displayed beside the number of the party who called you. If you hover your mouse pointer over the contact entry, a tooltip displays the missed call information, including date, time, and known contact details.

In the Team Communicator, a contact who has called recently has one of three small arrows displayed beside the contact's name.

- — A solid downward pointing arrow indicates an answered call
- — An upward pointing arrow indicates an outbound call to the contact
- — An outlined downward pointing arrow indicates a missed call

To get details about the call, whether answered, missed, or outbound, hover your mouse pointer over the contact name or number.

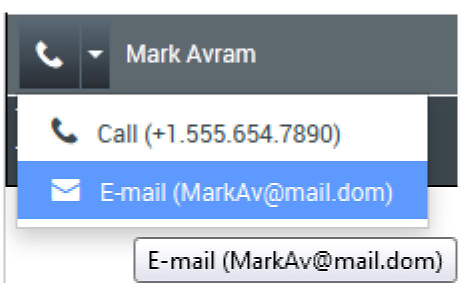
When you close the Team Communicator, or if you switch the filter to All contacts or Favorite contacts, the **Recent** button changes back to white if you have viewed your recent calls and missed calls or if you have called back all of your missed calls.

## Calling and Emailing

You use the Team Communicator to make a new voice call or email interaction.

### Starting a New Interaction

To launch a new interaction (external or internal interaction), use the Team Communicator to find and select a target or contact. Enter the name of an internal target (agent, skill, agent group, or Routing Point) or a contact name, telephone number, or email address in the universal-lookup field.




As you type, Workspace Web Edition searches the internal target and contact databases and lists potential contacts and internal targets.

From the list, you can:

- Select the kind of interaction you want to launch, voice or outbound email.

You can use the Controls in Team Communicator to do the following:

- Filter and sort the list of search results.
- Perform actions on a selected contact for calling.

Watch video: Starting a new email

Link to video

Watch video: Making a new voice call

Link to video

# Filter/Sort Your Results

## Filtering and Sorting the List of Search Results

The Team Communicator search is a “keyword” search that checks each field of the contact database for the word or words (name, telephone number, or other criteria) you provide in the search field. Each field of the database is searched by using a “starts-with” search for the keywords you provide.

Results are returned in a list that is sorted according to the scoring rules. In most cases, you can refine the search results by using the filtering features of the list view. For example, you can filter your search results so that only agents or queues are displayed.

Result types might include the following:

- All types
- Agent
- Agent Group
- Routing Point
- Skill
- Contact
- Interaction Queue

Select the **Sorting by Category** icon () to arrange the search results by category. You can collapse categories by selecting the arrow displayed beside the name of the category.

Below the **Quick Search** field are four controls you can use to list previous contacts quickly.

From left to right, the buttons are the following:

-  **Search All** — Select from all matching internal targets and contacts. Does not affect the sort order.
-  **Show and Search my Corporate Favorites** — Click to show only contacts/internal targets that

you have flagged as corporate favorites. Sort is by category or type.

- **Show and Search my Recent Contacts/Targets** — Select from the last 1 to 10 contacts/internal targets you have directly dialed,emailed, or monitored. Sort is by date.
- **Filter by Type** — Select the type to search, including Agent, Contact, Routing Point, Skill, Queue, Interaction Queue, and Agent Group.
- **Sorting by Category/Sorting by Type** — Select to sort by category or type.

# Using Favorites

## How do I use Personal and Corporate Favorites?

A favorite is someone with whom you interact frequently.

The Workspace Team Communicator enables you to mark contacts and internal targets (like other agents, your supervisors (team leads), or call routing) as your personal favorites. This is useful if you have a supervisor that you need to contact regularly for help about specific types of customer issues or a routing point to which you must regularly direct certain types of inquiries.

You can also "unfavorite" (remove) a contact or target from the list of favorites when you no longer need to quickly find them.

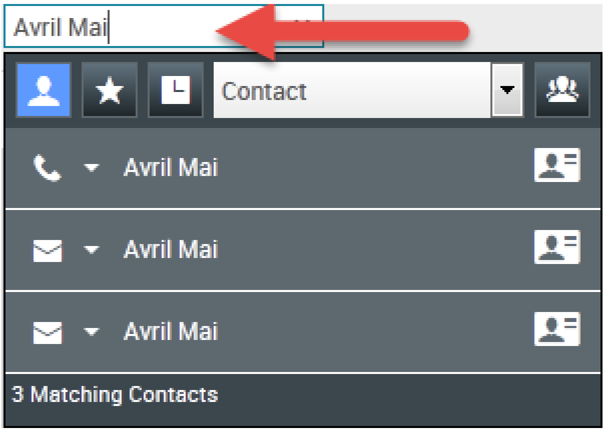
Your administrator might also have chosen for you specific targets as "corporate favorites". In Team Communicator, corporate favorites are marked by a locked star icon (). This means that you cannot "unfavorite" (remove) them from the list of favorites. Your administrator might designate corporate favorites for you that change based on your role in the company or by the contact with whom you are currently interacting.

The favorites that you choose are marked by a white star ().

### Choosing Personal Favorites

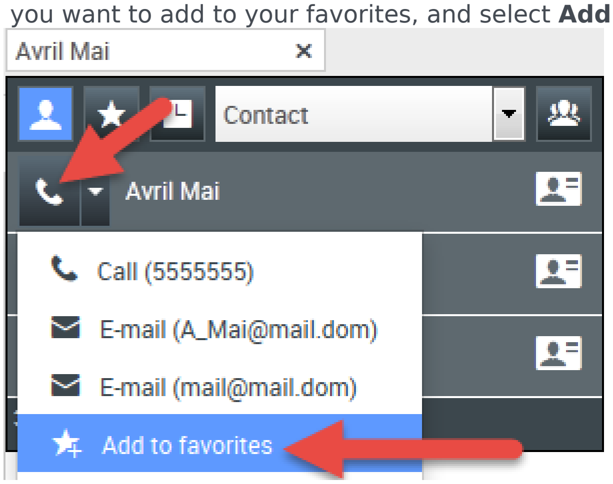
To help you to find contacts and internal targets quickly, use the **Action Menu** in the Team Communicator next to the name of the contact or target. Follow these steps:

1. Find the internal target or contact in the Team Communicator.



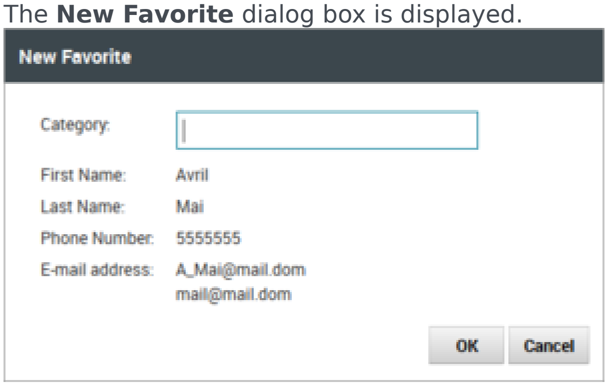

Type in the name, phone number, or email address of the target you want to find

2. Click to open the **Action Menu** that is displayed beside the name of the internal target or contact that you want to add to your favorites, and select **Add to Favorites**.



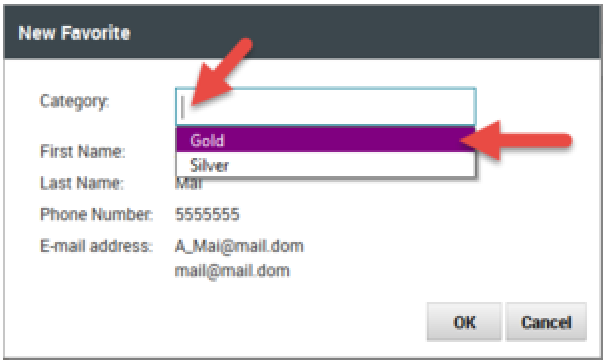

Click Add to Favourites

The **New Favorite** dialog box is displayed.



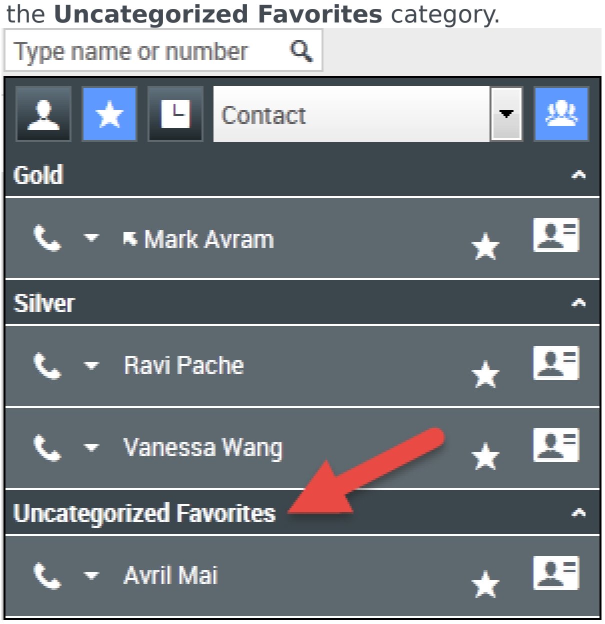

The New Favorite dialog box

- If you want, use the **Category** drop-down list to define a new category for your favorite, or select from a list of existing categories.



(Optional) Choose or create a category for your new favorite

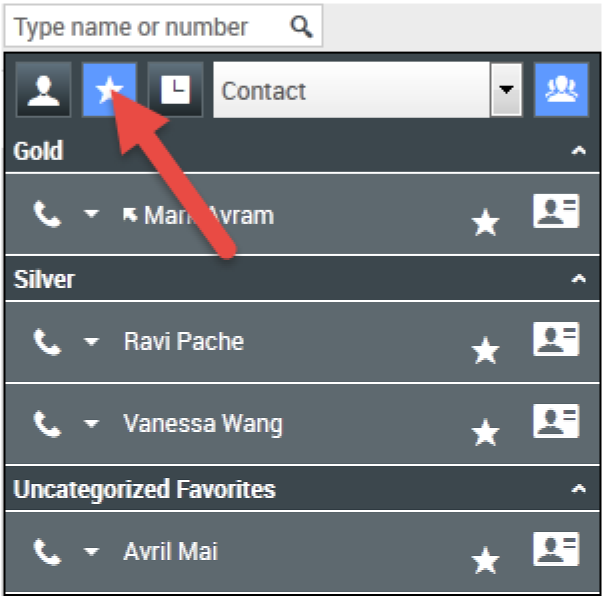
- Click **OK** to add the internal target or contact as a favorite. If you did not choose a category, and you choose to view favorites by category in the Team Communicator, the new favorite is listed in the **Uncategorized Favorites** category.



Viewing favorites by category

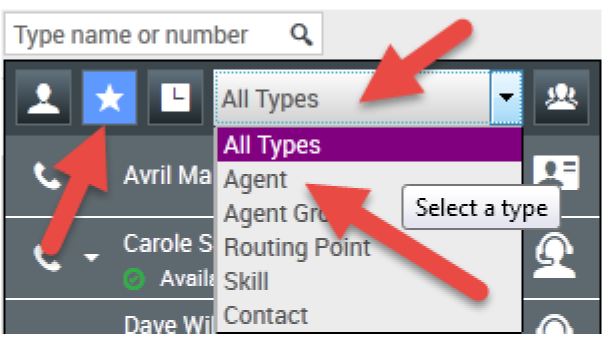
## Viewing and Managing Your Favorites

When you want to see the complete list of your personal and corporate favorites, click in the Team Communicator search field, then click the **Favorites** filter button (see the figure below).



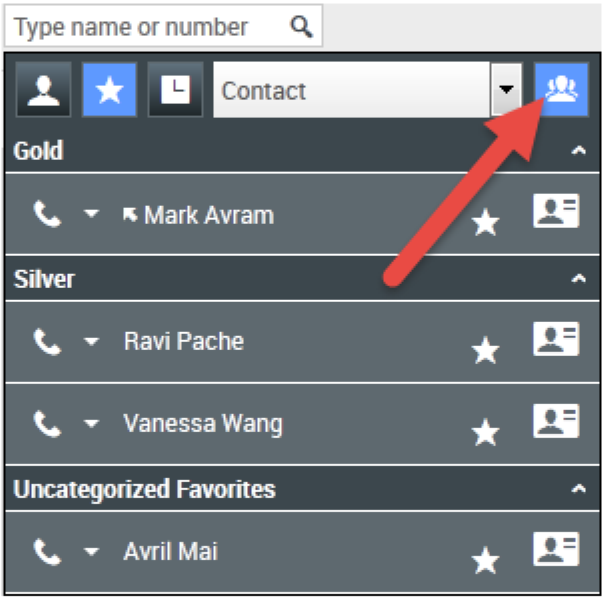

Click the Favorites filter button to see your personal and corporate favorites

Use the Type filter drop-down list to change the types of contacts and targets are listed in the Team Communicator. You can view just agents, contacts, agent groups, routing points, or skills, or you can view all types of targets.




Click the Favorites filter button to see your personal and corporate favourites, then filter by type using the Type drop-down list

Use the Sorting by Category button to arrange the list of favorites into their designated categories. Any favorites that have not been assigned to a category are listed in the **Uncategorized Favorites** category.



Click the Favorites filter button to see your personal and corporate favourites, then click the **Sort by Category** button to list favorites by category

## Important

A favorite that you created by directly dialing a contact will appear only in Favorite search and in your list of recent calls if you previously called the person. If you do not apply the Favorites filter to your search, only the following object types are searched: Agent, Contact, Routing Point, Skill, Queue, Interaction Queue, and Agent Group.

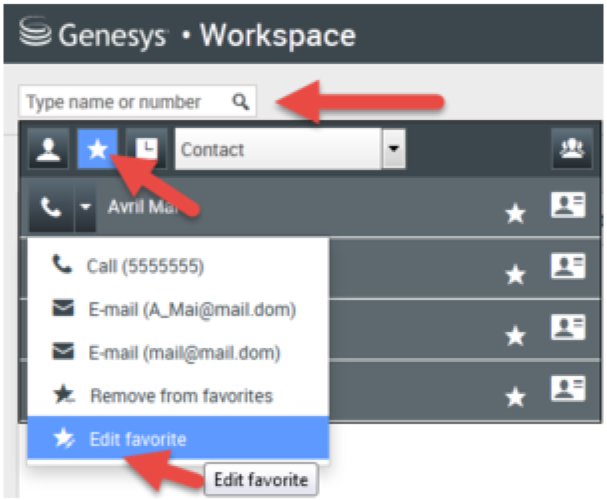
You can edit a favorite to add, remove, or change a category. Select **Edit Favorite** () from the **Action Menu** to display and use the **Edit Favorite** dialog box.

You can remove an internal target or a contact from your list of favorites by selecting **Remove from Favorites** () from the **Action Menu**.

## Editing the Category of a Personal Favorite

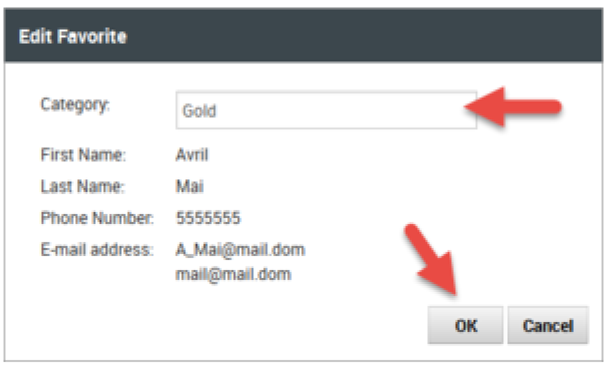
When you want to add, remove, or change the category that you have assigned to a favorite contact or other target, you can use the Team Communicator to edit the category.

First, use Team Communicator to find the favorite either by entering the name in the search field and/or by clicking the **Favorites** button (). Next, open the **Action Menu** next to the name of the contact or other target and select the **Edit favorite** option.



Find the favorite you want to edit then use the Action Menu to select Edit favorite

The Edit Favorite dialog box is displayed. Make the change to the category by editing the content of the Category field. You can modify the category, delete the category, or change the category.



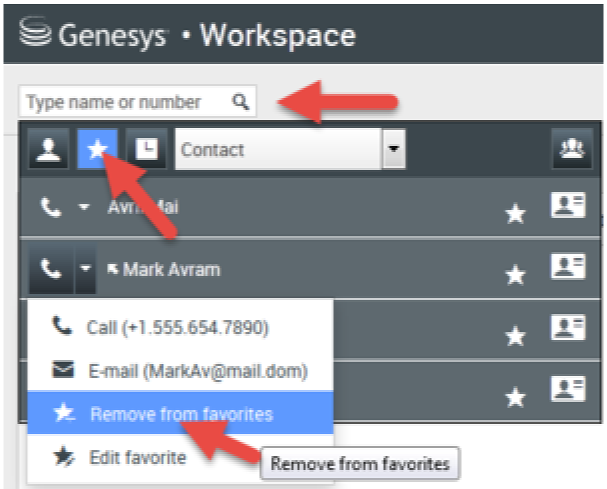
Edit favorite

Click **OK** when you are done to save the modification.

## Removing a Personal Favorite

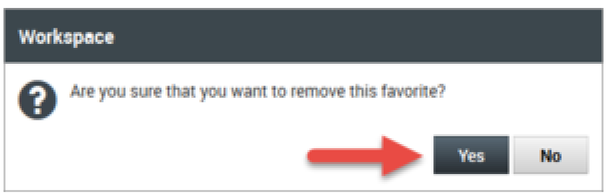
When you no longer want a contact or other target that you have added as a favorite to be on your list of favorites, you can use the Team Communicator to remove the favorite.

First, use Team Communicator to find the favorite either by entering the name in the search field and/or by clicking the **Favorites** button (). Next, open the **Action Menu** next to the name of the contact or other target and select the **Remove favorite** option.



Find the favorite you want to remove then use the Action Menu to select Remove favorite

A confirmation dialog box is displayed when you choose **Remove favorite**. Click **Yes** if you are sure that you want to remove this contact or target from your list of personal favorites. Click **No** to keep the contact or target on your list of personal favorites.



This confirmation message request that you confirm that you really want to remove the selected favorite from your list of favorites

## Important

- You cannot edit or remove corporate favorites. These favorites are controlled by your administrator.
- If you added a target as a personal favorite and then your administrator adds this same target as a corporate favorite, that target will be designated as a corporate favorite in the flat view, and as both a Personal Favorite and Corporate Favorite in the categorized view.

# Outbound campaigns

As an agent, you might work on campaigns (for example, collections, telemarketing, or fundraising) where you make outbound calls to contacts. You can view and manage your campaigns from the **My Campaigns** tab.

## What types of campaigns are available?

### You might be working with one of the following campaign types:

- Preview campaigns, in which you manually request (or *pull*) a number to dial from the system.
- Progressive or Predictive campaigns, in which the system automatically connects you to a contact.
- Push-Preview campaigns, in which the system automatically sends you a record to preview, then you click to connect the call.

## Video Tutorial: Outbound Campaigns

Here are four tutorial videos that give you a quick overview of being an agent in an Outbound Campaign. The first video introduces Outbound Campaigns, the second demonstrates Predictive and Progressive (automatic) campaigns, the third demonstrates Preview (manual) campaigns, and the fourth demonstrates Push-Preview (semi-automatic) campaigns.

- Overview

**[+] Show video: Outbound Campaign Overview**

Link to video

- Automatic record retrieval (and scheduling a callback)

**[+] Show video: Automatic Mode**

Link to video

- Manual record retrieval

**[+] Show video: Manual Mode**

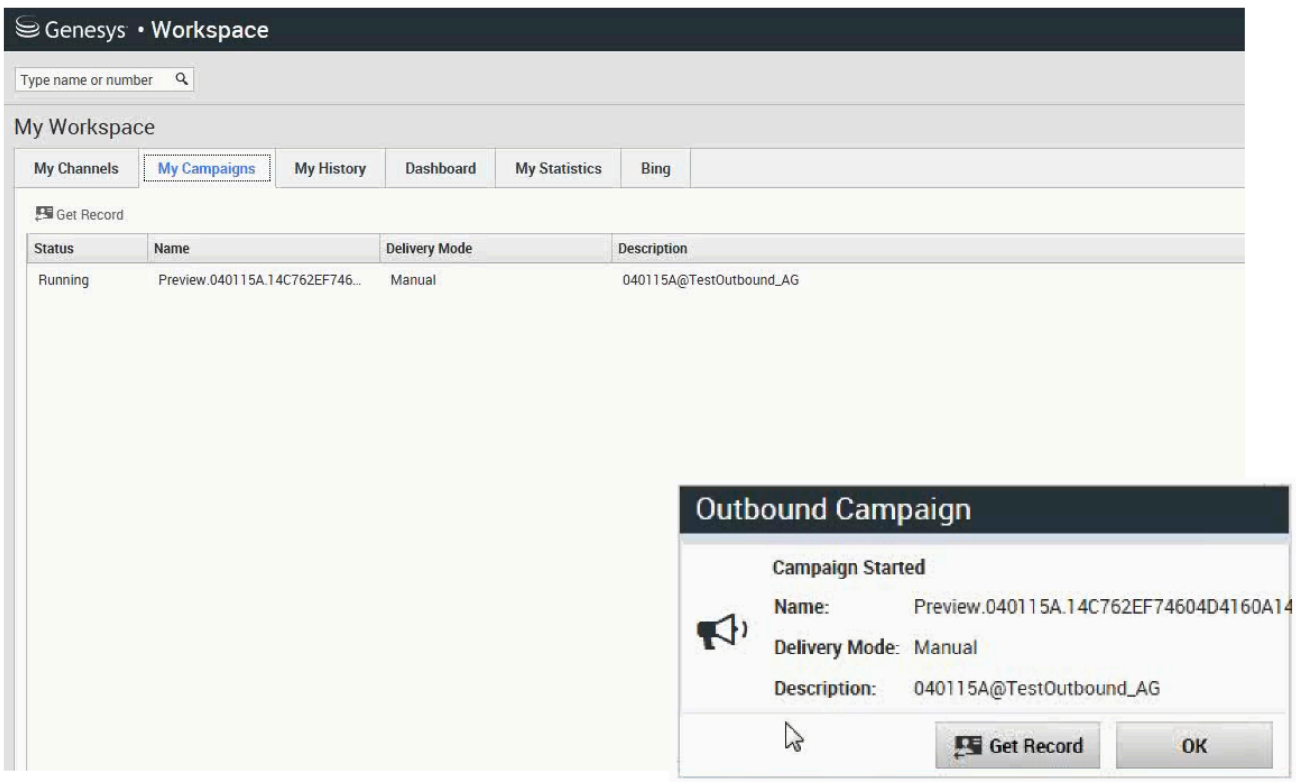
Link to video

| | |
|---|---|

- Semi-automatic record retrieval

| | |
|---|---|
| | **[+] Show video: Semi-automatic Mode**<br>Link to video |

## How do I work with Preview campaigns?




In campaigns using Preview dialing mode, you request a record from the system and then dial the contact. You can preview the case information and other details *before* you start the call. You must be in a **Ready** status to receive interactions.

You'll get a pop-up notification each time an administrator loads or starts a new campaign. When you get the Campaign Started pop-up, you can choose:

- **Get Record** to retrieve a contact record from the campaign list.
- **OK** to join the campaign. (With this option you'll have to retrieve a record manually. Go to **My Campaigns**, select the campaign you want to use, and select **Get Record**.)

When you have previewed the record, use:

 to call the contact. When the call is connected, you can monitor the call status and use the standard voice call controls to manage the call.

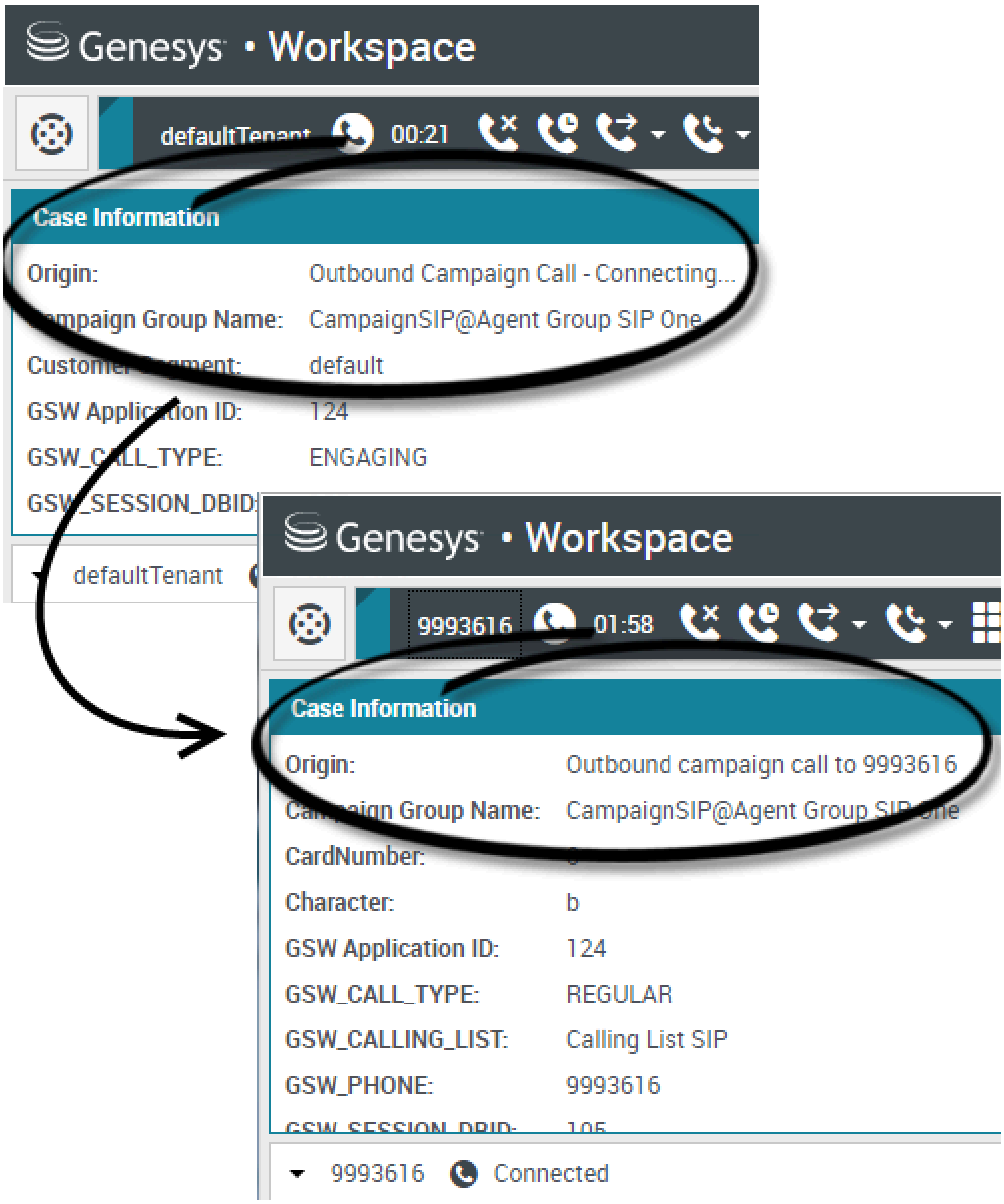
 to decline the record. You can then choose **Call this contact later** to return the record to the campaign list or **Do not call this contact** to remove the contact from the campaign list.

 to stop receiving records(**Done and Stop**).

To start receiving records again, go to **My Campaigns**, select the campaign you want to use, and select **Get Record**.

If asked, select the caller ID details you want to use.

## How do I work with Progressive and Predictive campaigns?




In campaigns using Progressive and Predictive dialing modes, you are connected automatically to outbound calls.

You'll get a pop-up notification each time an administrator loads or starts a new campaign. When you get the Campaign Started pop-up, click **OK** to join the campaign.

If your status is Ready, either you are automatically connected to the call, or a new interaction preview appears and you can then **Accept** to connect the call, or **Reject** to return the record to the top of the calling list. If you do nothing, the interaction goes back to the top of the calling list.

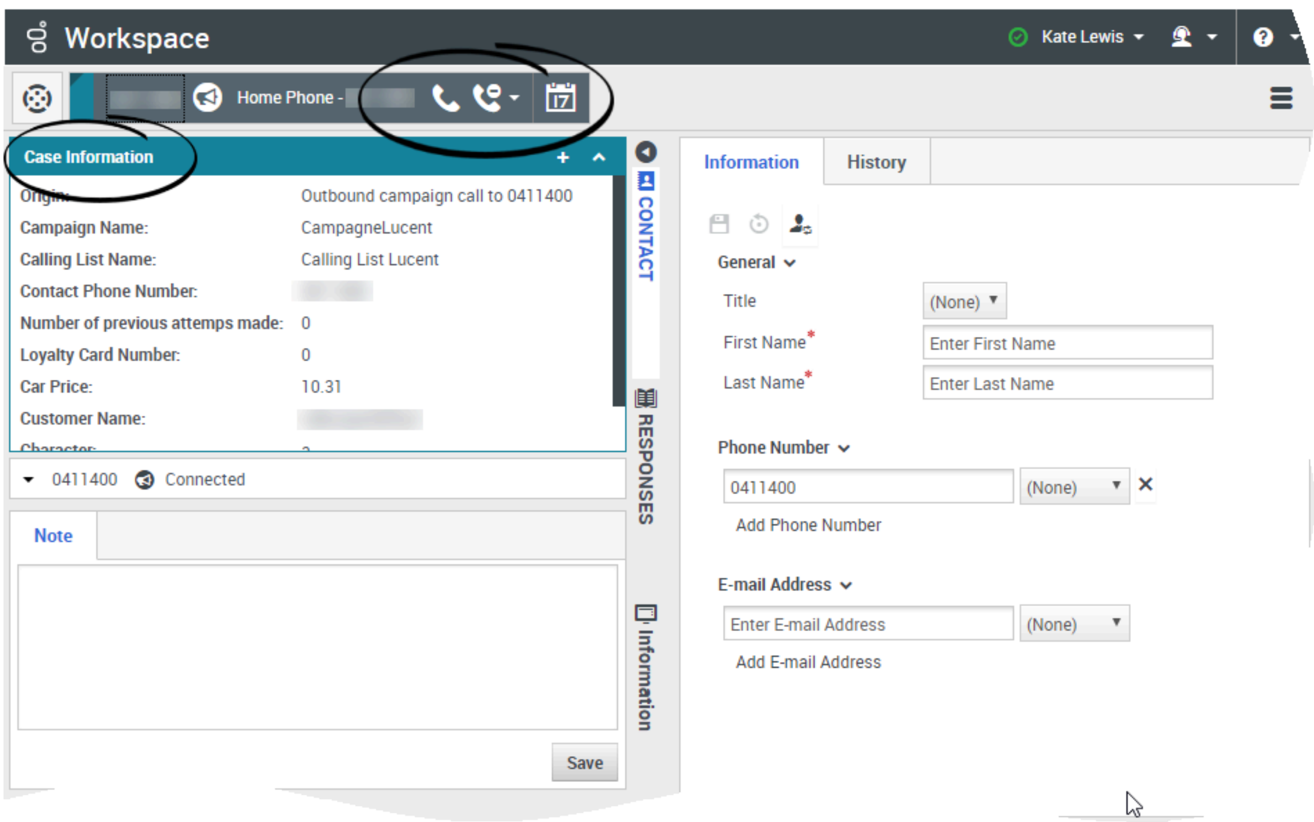
When you accept the call the contact or customer is not yet on the line. In the pop-up notification and in the call **Case Information** areas, you will see that the **Origin** of the call is `Outbound Campaign Call - Connecting...`

As soon as the person answers the phone and the call is connected, the **Origin** of the call changes to `Outbound campaign call to <name or number of contact>`. Information about the call might be added to the **Case Information** area.

When you're connected to the contact, you can view the campaign call information, the Call Status, and the available Call Actions. Use the standard call controls to manage the call.

**Note:** In some environments, you might not be connected to the outbound call until after the contact has answered the phone. In this case, you will not see that the **Origin** of the call is `Outbound Campaign Call - Connecting...`, instead it will immediately show you the name and or number of the contact.

## How do I work with Push-Preview campaigns?




In campaigns using Push-Preview dialing mode,a record is delivered to your desktop automatically from the system and then you dial the contact. You can preview the case information and other details *before* you start the call. You must be in a **Ready** status to receive records.

## Important

In the **My Channels** tab, Push Preview is a separate channel from Voice. You must set the **outboundpreview** channel to **Ready** to receive records.

You'll get a pop-up notification each time an administrator loads or starts a new campaign. When you get the Campaign Started pop-up, click **OK** to join the campaign.

If your status is Ready, a new interaction preview appears. You can then **Accept** to connect the call, or **Reject** to return the record to the top of the calling list. If you do nothing, the interaction goes back to the top of the calling list.

When you have previewed the record, use:

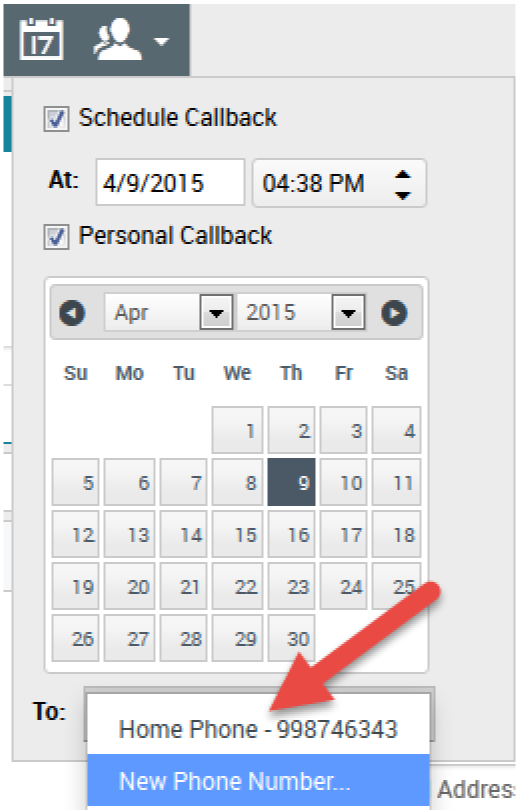
 to call the contact. When the call is connected, you can monitor the call status and use the standard voice call controls to manage the call.

 to decline the record. You can then choose **Call this contact later** to return the record to the campaign list or **Do not call this contact** to remove the contact from the campaign list.

 to close a record.

If asked, select the caller ID details you want to use.

# How do I schedule callbacks for a campaign?




During a campaign, you might not be able to reach the contact or they might request to be called back at another specific date and time. You can schedule a callback at any time while you are handling an Outbound campaign call, even after the call has ended.

 opens the **Schedule Callback** window, where you can set a date, time, and even a different phone number for the callback. You can also specify whether the callback is personal (you will handle the callback) or whether any available agent will handle the callback.

**Tip:** During Preview campaigns, you might be able to use this feature to postpone a preview call before the call is dialed.

When you've set the desired properties for the callback, the Schedule Callback button changes to  to indicate that a callback is scheduled. You can then end the call.

If you need to make changes to a scheduled call back, you can open the Schedule Callback window and make changes to the settings.

To cancel a scheduled callback, clear the **Schedule Callback** box. This must be done *before* closing the Outbound Record or the Interaction Preview.

When a rescheduled callback is directed to your workstation, an interaction preview is displayed as usual. The only difference is that the Case Information includes an indication in the **Origin** field that the call is a **Callback** or a **Personal Callback**.

**Note:** You might see an error message displayed in the Workspace interface when you try to mark done an Outbound interaction that you have rescheduled. This can happen if the specified rescheduled date and time are invalid (for example, you might have set the rescheduled date and time in the past). You must fix any errors or cancel the reschedule first before you can mark the interaction done.

# Supervising agents

Some workers at contact centers are designated to be Team Leads or Supervisors. In this role, it is your responsibility to ensure that the agents that you supervise are successful.

## The Supervisor Role

As a supervisor, your account might be set up to enable you to perform different tasks to manage and support your team, assist with interactions, manage in-progress interactions and queues.

Supervisor tasks include the following:

### 1. Monitor, Coach, and Barge-in

Workspace enables you to monitor, coach, and/or barge-in to voice and/or chat interactions that are being handled by the agents that you supervise.

Depending on how your environment is set up, you might be set up to monitor individual agents or calls. If you are set up to monitor agents, then if an agent transfers a call, the monitoring of the call ends. If you are set up to monitor calls, then you continue to monitor the call as it moves through your company's system.

#### Overview

You can monitor their performance on voice calls and chat interactions, coach them on voice calls and chat interactions as part of their training or to help with a difficult-to-handle contact, or join (barge-in to) a voice call or chat interaction to help the contact directly.

You select which agent to monitor by using the Team Communicator. You might also have the option of monitoring interaction queues (Routing Points); you select Routing Points by DN from Team Communicator.

> **Tip**
>
> - You can monitor only one agent at a time on the voice channel.
> - You can monitor several agents simultaneously on the chat channel.
> - If an agent that you want to monitor is logged in to both the voice and chat channels, you can monitor that agent on both channels.
> - You might be set up to monitor calls that are routed to an IVR if you are monitoring routing points.

When the agent whom you are monitoring accepts an interaction, an interaction notification is displayed on your desktop. If you accept the interaction, an interaction window is displayed on your desktop, and you are connected to the voice call or chat interaction.

If you are monitoring the agent, neither the agent nor the contact can hear you or are aware of your presence unless the agent's account is configured to notify the agent when he or she is being monitored (an icon is displayed in the Voice interaction window), or he or she might be configured to be monitored without his or her knowledge.

If you are coaching an agent during a voice call, the agent can hear you, but the contact cannot. If you are coaching an agent during a chat interaction, the agent can see your chat messages, but the contact cannot.

You can choose to join (barge-in to) a call or chat interaction.

Workspace enables you to switch from certain team supervision modes to others.

## 2. Agent State

The **My Agents** dashboard lets you view and manage the state of the agents that you supervise. You can log out agents or change their status to Ready or Not Ready.

### Overview

A common thing for agents to do is to forget to logoff of media channels at the end of the day or when they are on an extended not ready state, for example for meetings or lunch. If your agent accounts are set to auto answer calls, this behavior can result in interactions being accepted by an agent's unattended workstation. You can monitor the states of all the agents that you supervise and change them to ensure the best customer experience. You can log agents off globally from all logged on channels.

Agents might also forget to change their state to Ready or to Not Ready. The **My Agents** view lets you view and change agent state for each channel.

## 3. Email QA Review

Workspace enables you to review outbound email interactions created by agents that you supervise, lead, or review, for Quality Assurance (QA) purposes. If you are a reviewer, outbound email interactions are directed to you before being sent to a customer. As a reviewer, your account might be set up to direct outbound email interactions to you, or you might have to retrieve outbound email interactions from a workbin.

## 4. Workbin and Queue Management

You can open, mark done, delete, and move in-progress interactions that are stored in the workbins of your team members and in interaction queues that you manage.

# How do I monitor my agents?

When you monitor a selected agent who is in the group of agents that you supervise, an interaction preview window tells you that the selected agent is handling a voice or chat interaction. You can monitor the next interaction of an agent. Your account might also be set up to let you monitor the current voice interaction of an agent.

You can start monitoring an agent in your group by using the Team Communicator to find the agent. In the **Action Menu**, select **Monitor Agent** ( ).

You can end monitoring an agent by using the Team Communicator and selecting **Stop Monitoring** in the **Action Menu** ( ).

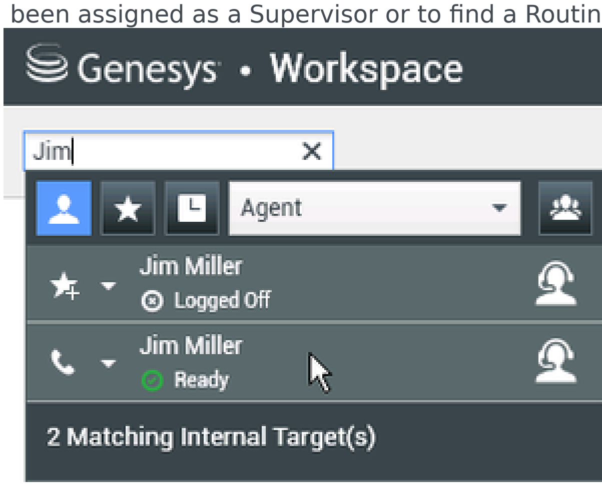
You can stop monitoring the current interaction by clicking **End Monitoring** ( ) in the Call Actions toolbar in the interaction window.

## Monitoring a Voice Interaction

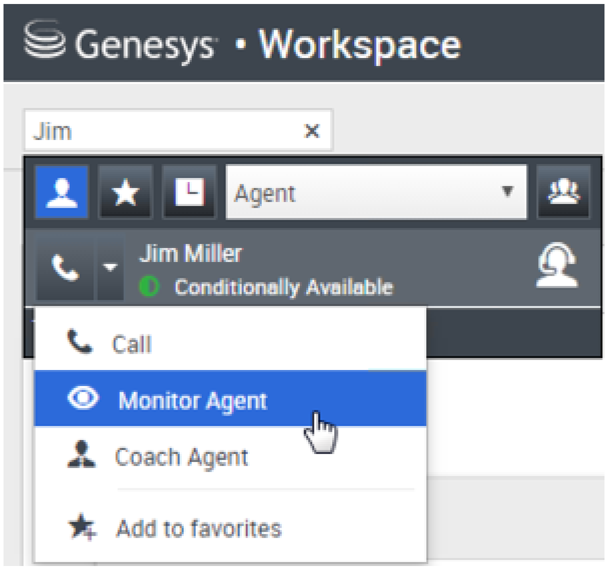
Monitoring an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact without the agent or contact being aware that you are listening. Agents can be configured to be notified when they are being monitored. You can monitor the current or next voice interaction of an agent.

> **Tip**
> You can monitor only one voice agent at a time.

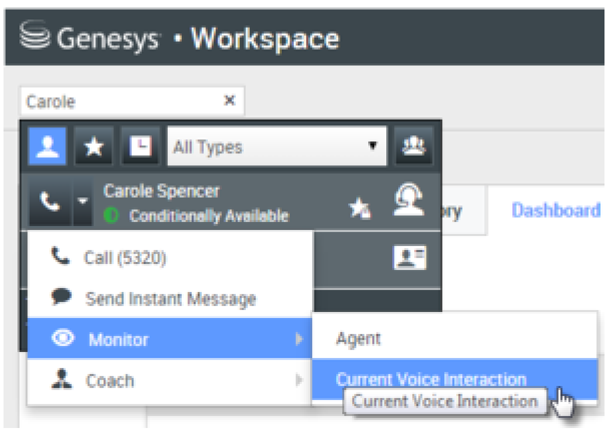
1. Use the Team Communicator in the Main Window to find an agent in the agent group to which you have been assigned as a Supervisor or to find a Routing Point.



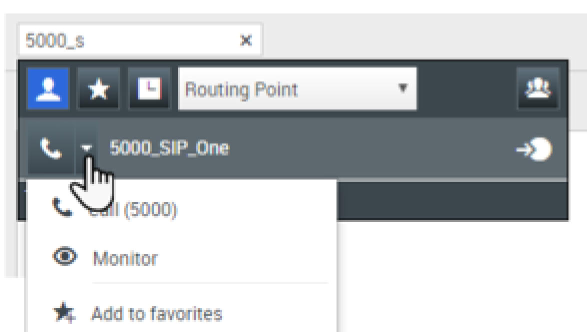

2. Open the **Action Menu** for the agent whom you want to monitor and select **Monitor Agent**.




Or, to monitor the next interaction if your account is set up to let you monitor the current or next interaction, open the **Action Menu** for the agent whom you want to monitor and select **Monitor**, then select **Agent**. To monitor the current interaction (if your account is set up for this feature), open the **Action Menu** for the agent whom you want to monitor and select **Monitor**, then select **Current Voice Interactions**.

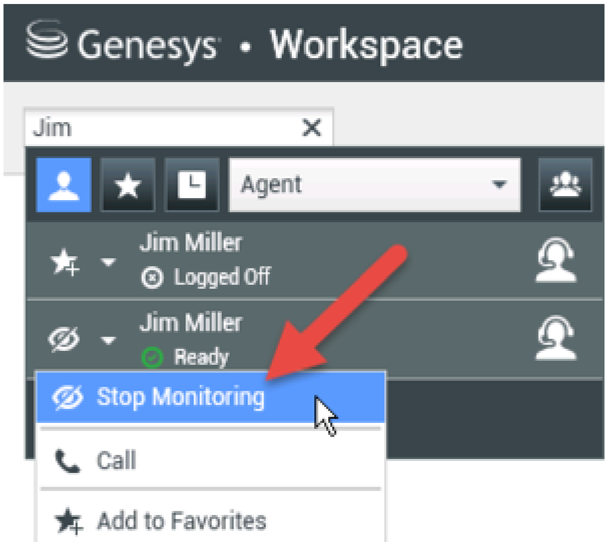



Or, to monitor calls on a Routing Point if your account is set up to let you monitor the next interaction on a Routing Point, open the **Action Menu** for the Routing Point that you want to monitor and select **Monitor**.

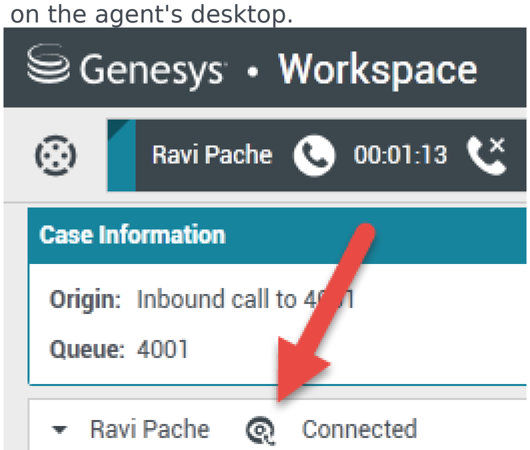



A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the selected agent.

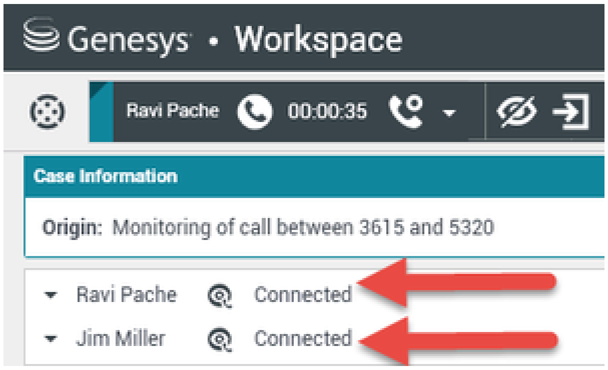
In the Team Communicator, the **Action Menu** for the agent (or Routing Point) whom you are monitoring changes to the **Stop Monitoring** button.




3. When the monitored agent accepts a voice interaction, a notification is displayed on your desktop. Click **Accept** to begin monitoring the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. Neither the contact nor the agent can hear you, but you can hear both parties.
If you do not click **Accept**, the notification is dismissed automatically.
In some environments, if the agent is already handling an interaction when you start monitoring, you immediately start monitoring the call.
If the account of the monitored agent is configured so that the agent is notified when he or she is being monitored, an eye icon is displayed next to the party-interaction icon in the Voice Interaction window on the agent's desktop.




The same icon is displayed in the Voice Interaction Monitoring window on your desktop next to the party **Action** menu.

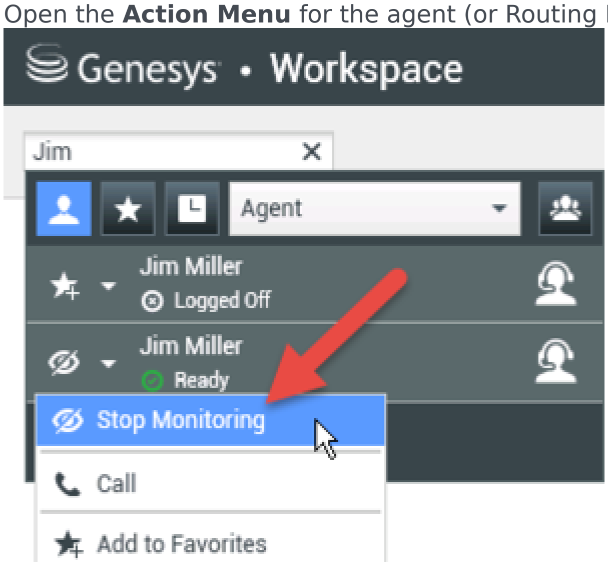



4. During a monitoring session, you can perform the following actions from the Voice Interaction Monitoring window:

   - End Monitoring—Click **End Monitoring** () in the Supervisor controls of the **Call Actions** toolbar to end the monitoring session.
   - Barge-in—Click **Barge-in** () in the Supervisor controls of the **Call Actions** toolbar to join the monitored call. Both parties will be able to hear you. You can switch back to monitoring by clicking **End the Call** () in the **Call Actions** toolbar.

   If you stopped monitoring, you are disconnected from the call. The monitoring-indicator icon is removed from the Voice Interaction window of the agent.
   If the agent ends the call while you are still monitoring the agent, the monitoring session ends automatically.

5. Click **Done** to close the Voice Interaction Monitoring window and mark the interaction as **Done**.
6. To stop monitoring the agent, use the Team Communicator to find the agent (or Routing Point) whom you are monitoring.
7. Open the **Action Menu** for the agent (or Routing Point), and select **Stop Monitoring**.

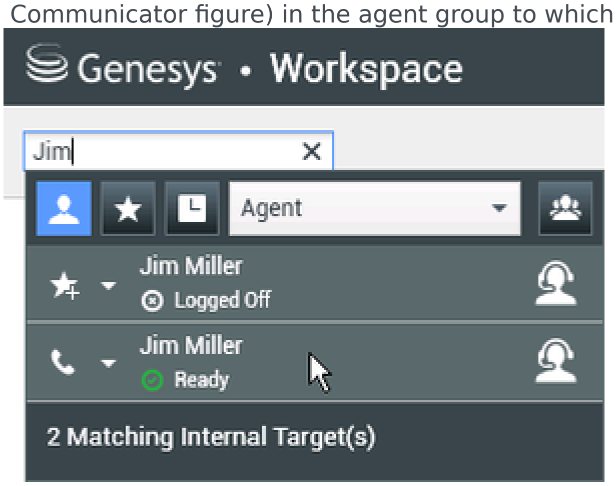



A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

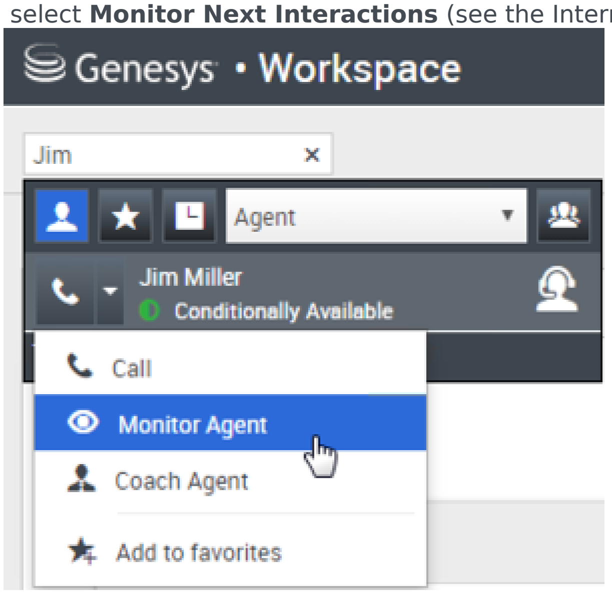
## Monitoring a Chat Interaction

Monitoring an agent who is handling an interaction means that you can read a chat interaction between an agent and a contact without the agent or contact being aware that you are reading the interaction. Agent accounts can be configured to notify agents when they are being monitored. You can monitor the next interaction of an agent.

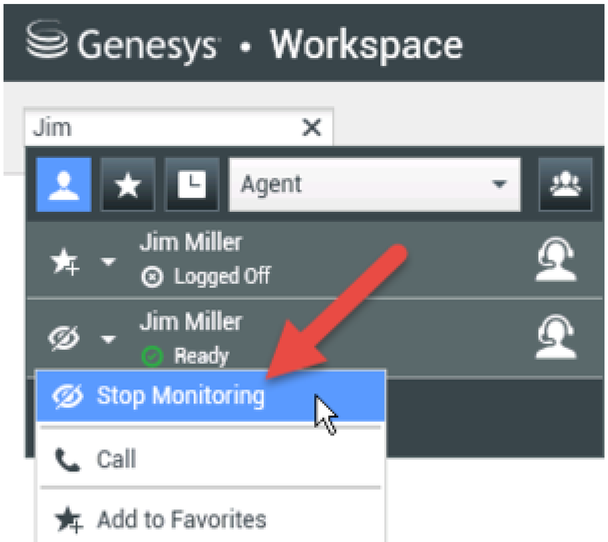
1. Use the Team Communicator in the Main Window to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



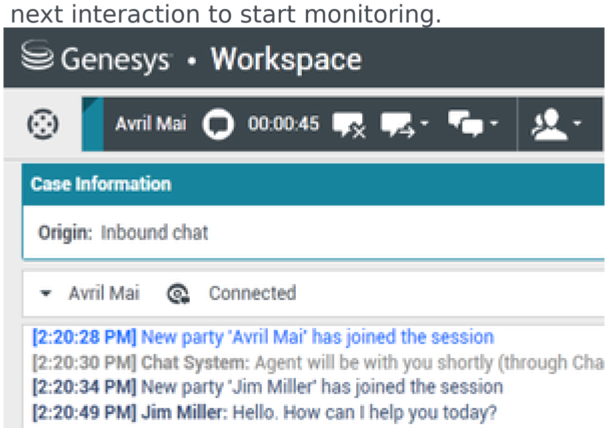

2. To monitor the next interaction, open the **Action Menu** for the agent whom you want to monitor and select **Monitor Next Interactions** (see the Internal Target Action Menu figure).



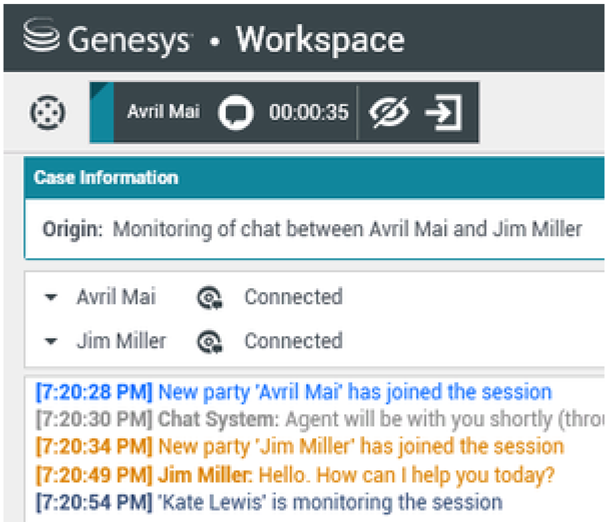

A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the selected agent. In the Team Communicator, the **Action Menu** for the agent whom you are monitoring changes to the **Stop Monitoring** button.



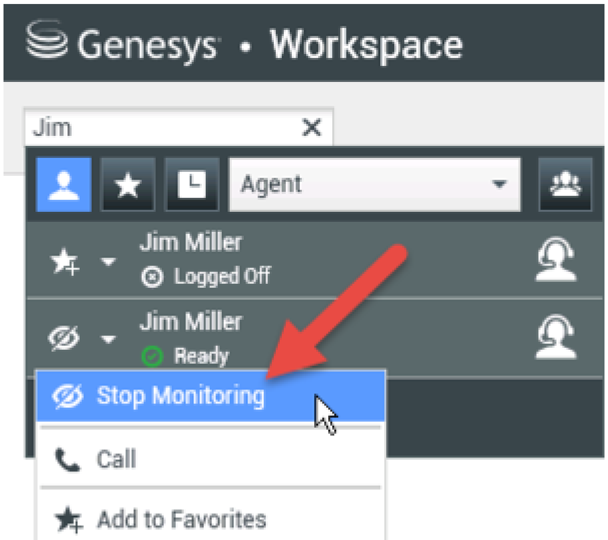

3. When the monitored agent accepts a chat interaction, a notification is displayed on your desktop. Click **Accept** to begin monitoring the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript, but you cannot send any text to the contact or the agent.
 If you do not click **Accept**, the notification will be dismissed automatically.
 If the agent is already handling an interaction when you start monitoring, you will have to wait for the next interaction to start monitoring.




The same icon is displayed in the Chat Interaction Monitoring window on your desktop next to the party **Action** menu.




4. During a monitoring session, you can perform the following actions from the Chat Interaction Monitoring window:
   - End Monitoring—Click **End Monitoring** ( ) in the Supervisor controls of the **Call Actions** toolbar to end the monitoring session.
   - Barge-in—Click **Barge-in** ( ) in the Supervisor controls of the **Call Actions** toolbar to join the monitored chat session. Both parties will be able to see your messages. You can switch back to monitoring by clicking **End Chat** ( ) in the **Call Actions** toolbar.
   - Coach via voice—Select **Coach via Voice** from the agent party **Action** menu. A voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent.
   - Coach via chat—Select **Coach via Chat** from the agent party **Action** menu. A chat session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by sending chat messages to the agent.
     If you stopped monitoring, you are disconnected from the chat session. The monitoring indicator icon is removed from the Chat Interaction window of the agent.
     If the agent ends the chat session while you are still monitoring the agent, your monitoring session ends automatically.
5. Click **Done** to close the Chat Interaction Monitoring window and mark the interaction as **Done**.
6. To stop monitoring the agent, use the Team Communicator to find the agent whom you are monitoring.
7. Open the **Action Menu** for the agent and select **Stop Monitoring** (see the Internal Target Action Menu figure).




A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

## How do I coach my agents?

When you coach a selected agent who is in the group that you supervise, an interaction preview window tells you that the selected agent is handling a voice or chat interaction.

You can start coaching an agent in your group by using the Team Communicator to find the agent. In the **Action Menu**, select **Coach Agent** (). Your account might also be set up to let you coach the current voice interaction of an agent.

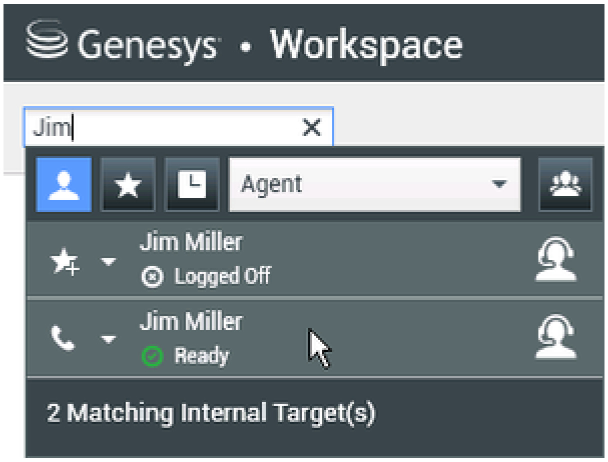
You can end coaching an agent by using the Team Communicator and selecting **Stop Coaching** from the **Action Menu** ().

You can end coaching the current interaction by selecting **End Coaching** () in the Call Actions toolbar in the interaction window.

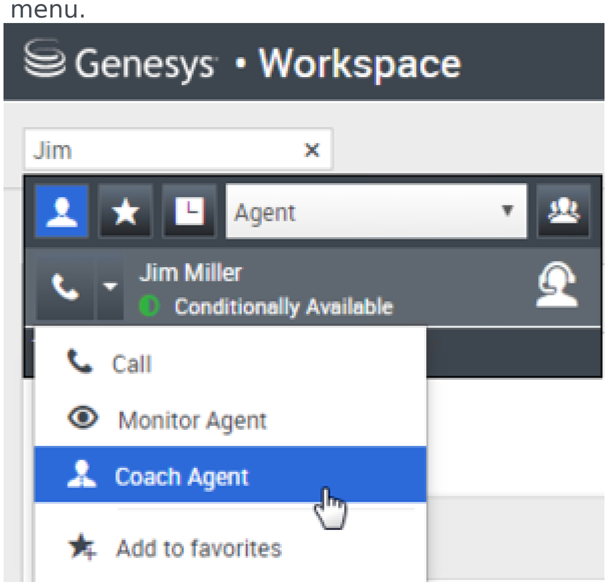
### Coaching a Voice Interaction

Coaching an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact and speak to that agent without the contact being aware that you are listening and speaking to the agent. You can coach the current or next voice interaction of an agent.

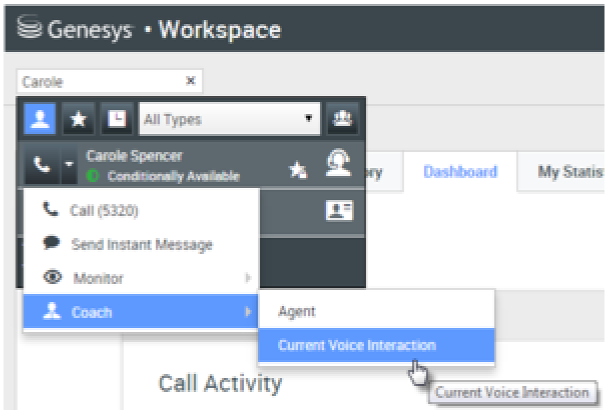
1. Use the Team Communicator in the Main Window to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



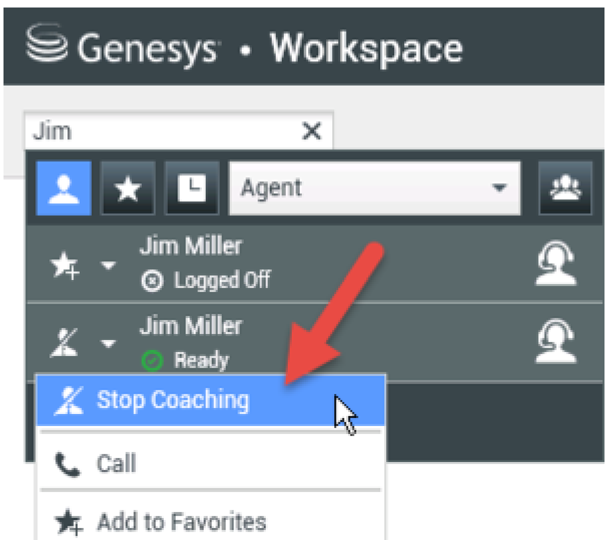

2. Open the **Action Menu** for the agent whom you want to coach and select **Coach Agent** (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the **Coach** menu.



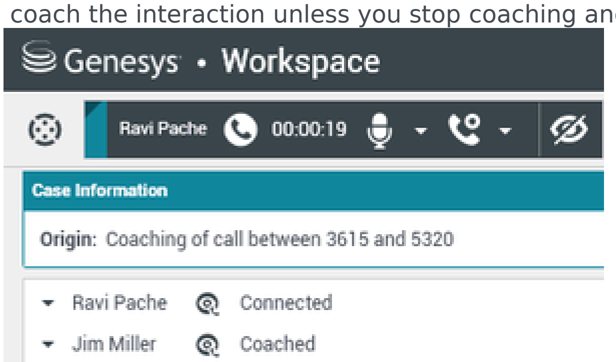

Or, to coach the next voice interaction if your account is set up to let you coach the current or next voice interaction, open the **Action Menu** for the agent whom you want to coach and select **Coach**, then select **Agent**. To coach the current interaction (if your account is set up for this feature), open the **Action Menu** for the agent whom you want to coach and select **Coach**, then select **Current Voice Interactions**.




A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent.
In the Team Communicator, the **Action Menu** for the agent whom you are coaching changes to the **Stop Coaching** button.




3. When the coached agent accepts a voice interaction, a notification is displayed on your desktop. Click **Accept** to begin coaching the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. You can hear the agent and the agent can hear you, but the contact can hear only the agent.
If you do not click **Accept**, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent.

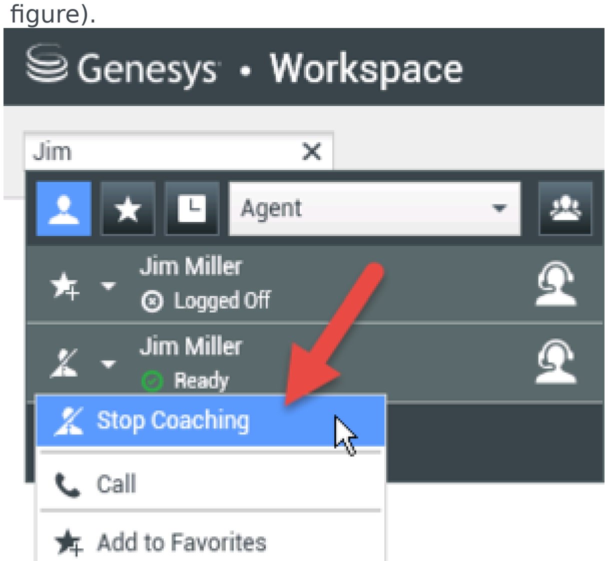


4. During a coaching session, you can perform the following actions from the Voice Interaction Coaching window:

   - End Monitoring—Click **End Monitoring** () in the Supervisor controls of the **Call Actions** toolbar to end the coaching session.

   If you stopped coaching, you are disconnected from the call.
   If the agent ends the call while you are still coaching the agent, your coaching session ends automatically.

5. Click **Done** to close the Voice Interaction Coaching window and mark the interaction as **Done**.
6. To stop coaching the agent, use the Team Communicator to find the agent whom you are coaching.
7. Open the **Action Menu** for the agent and select **Stop Coaching** (see the Internal Target Action Menu figure).

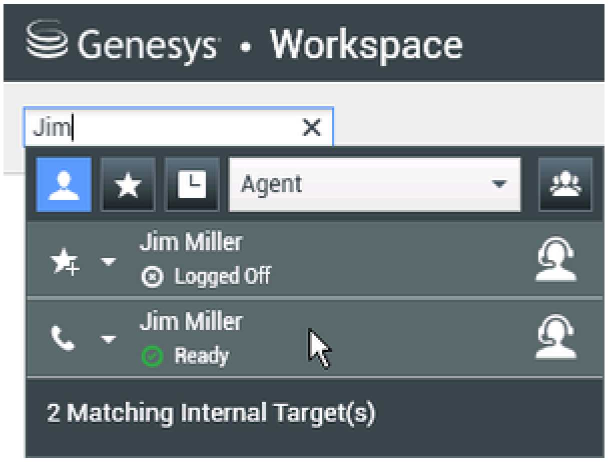



   A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

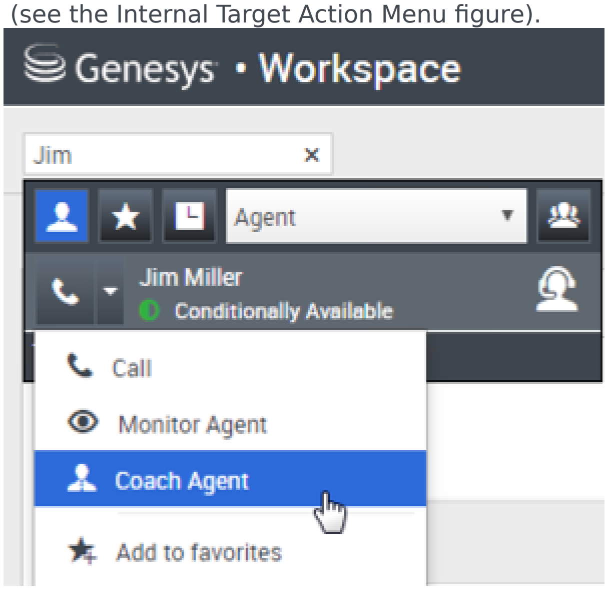
## Coaching a Chat Interaction

Coaching an agent who is handling an interaction means that you can read the transcript of the interaction between an agent and a contact and send chat messages to the agent without the contact being aware that you are reading the transcript and communicating with the agent. You can coach the next chat interaction of an agent.

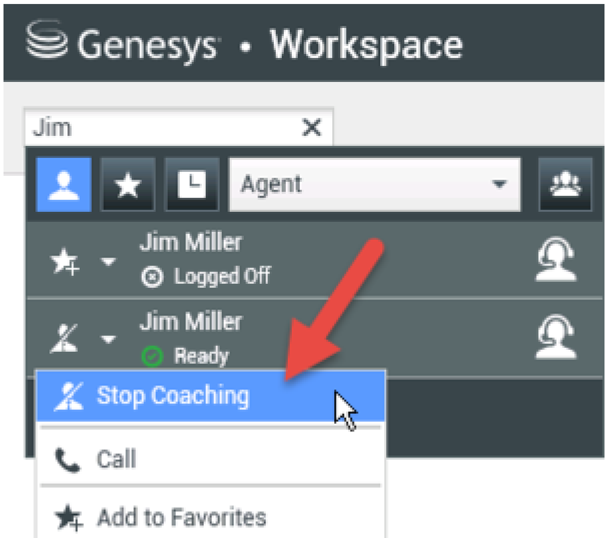
1. Use the Team Communicator in the Main Window to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



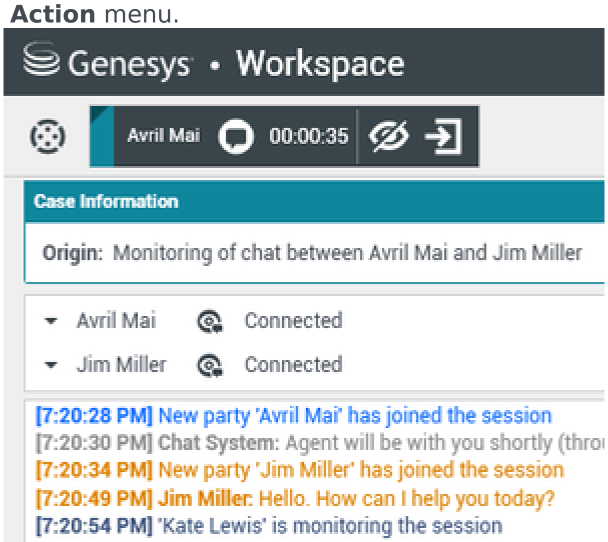

2. Open the **Action Menu** for the agent whom you want to coach and select **Coach next interactions** (see the Internal Target Action Menu figure).




A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent.
In the Team Communicator, the **Action Menu** for the agent whom you are coaching changes to the **Stop Coaching** button.




3. When the coached agent accepts a chat interaction, a notification is displayed on your desktop. Click **Accept** to begin coaching the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript and send private chat messages to the agent without the contact seeing your messages.
If you do not click **Accept**, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent.
The eye icon is displayed in the Chat Interaction Coaching window on your desktop next to the party **Action** menu.




4. During a coaching session, you can perform the following actions from the Chat Interaction Coaching window:

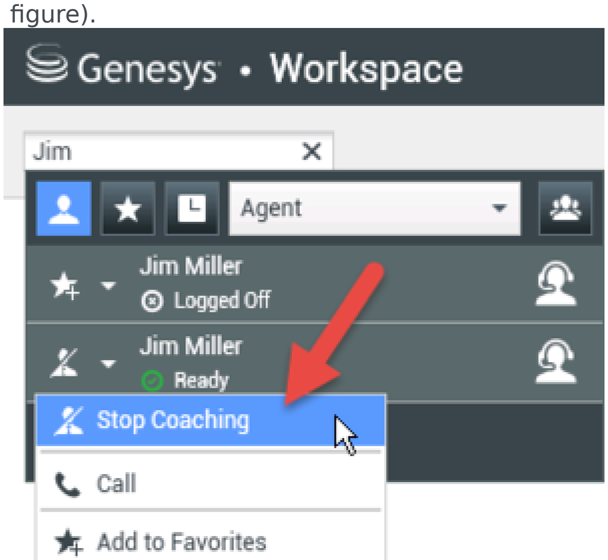
 - End Monitoring—Click **End Monitoring** () in the Supervisor controls of the **Call Actions** toolbar to end the coaching session.
 - Barge-in—Click **Barge-in** () in the Supervisor controls of the **Call Actions** toolbar to join the monitored chat session. Both parties will be able to see your messages. Your coaching session ends

when you barge-in to the chat.
Click **Done** to close the coaching session in the window and mark the coaching interaction as **Done**. You can switch to monitoring the chat session (see *Monitoring a Chat Interaction* in the **Monitor** tab) by clicking **End Chat** ( ) in the **Call Actions** toolbar.

- Coach via voice—Select **Coach via Voice** from the agent party **Action** menu. An voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent.

If you stopped coaching, you are disconnected from the chat session.
If the agent ends the chat session while you are still coaching the agent, your coaching session ends automatically.

5. Click **Done** to close the Chat Interaction Coaching window and mark the interaction as **Done**.
6. To end coaching the agent, use the Team Communicator to find the agent whom you are coaching.
7. Open the **Action Menu** for the agent and select **Stop Coaching** (see the Internal Target Action Menu figure).




A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

## How do I Barge-in on my agent's call?

When you barge-in (join) to an active interaction, you must already be monitoring the interaction.

To barge-in to an active interaction that you are monitoring, click **Barge-in** ( ) in the Supervision toolbar. **Barge-in** is a simple button if you are supervising a single channel interaction (voice or chat).

## How do I switch my Agent Monitoring Mode?

Workspace enables you to switch from certain supervision modes to others. During the monitoring, coaching, or barge-in of an interaction, you can switch from one supervision mode to another. The following transitions are supported:

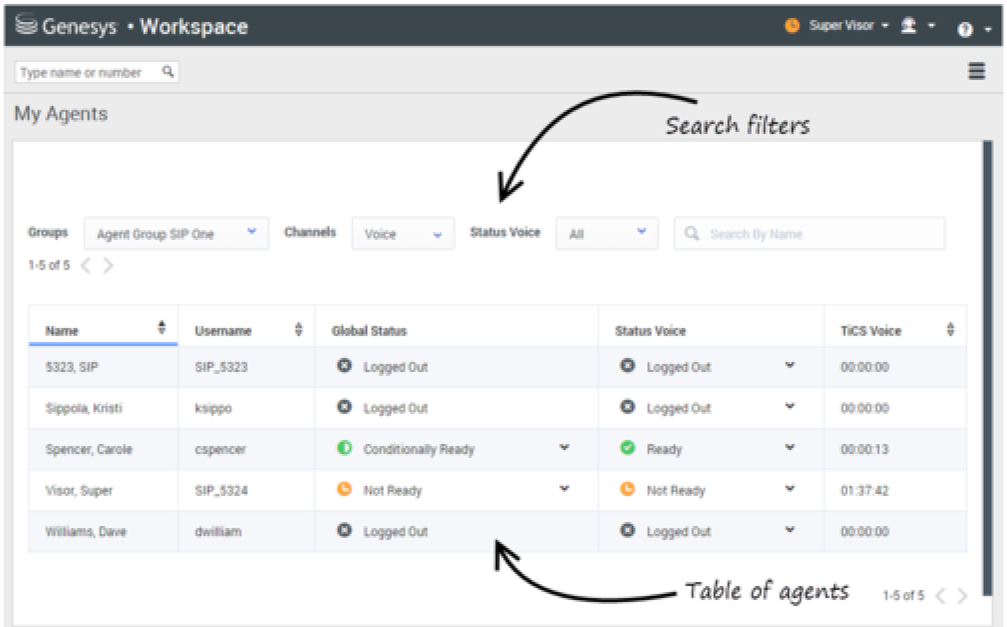
- Monitoring to barge-in—Click **Barge-in** () in the `Supervision` bar.
- Coaching to barge-in (chat only)—Click **Barge-in** ( in the `Supervision` bar.
- Coaching to monitoring (chat only)—Click **End Chat** ().
- Barge-in to monitoring—Click **End Call** () or **End Chat** () in the Interaction toolbar to return to monitoring.
- Use **End Monitoring** () in the Interaction toolbar to end monitoring.

## How do I manage the State of my agents?

The **My Agents** view lets you view and control the ready state and logged in state of all of the agents that you manage.

> **Important**
> If an agent is located on another switch than the supervisor, the **My Agents** tab does not allow a supervisor to perform any operations on the agent, including monitoring and changing DN state.

Open **My Agents** from the Supporting Views menu.




This view has two parts, the filters and the table of agents. Use the filters to find agents by **Group**, **Channel**, **Status**, and first and/or last name.

In the table of agents, click a status to change it, for example from **Ready** to **Not Ready**. To set an agent to Ready or Not Ready on more than one channel, you must manage each channel separately.

To log an agent out of all channels, select **Log Out** from the **Global Status** column.

If an agent is Ready on one or more channels, but in a different state on one or more other channels, their global status displays as **Conditionally Ready**.

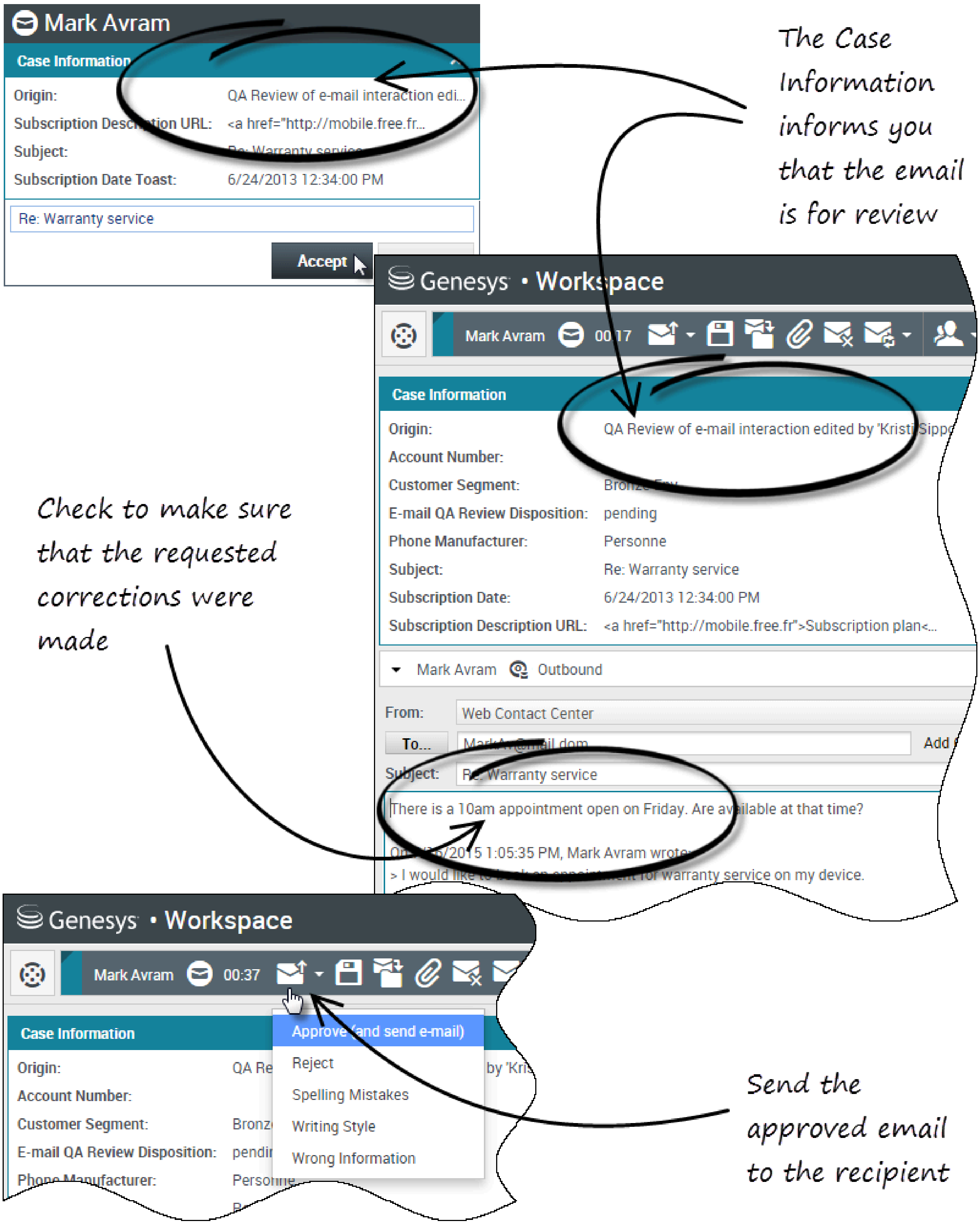
## How do I review an outbound email?


Mark Avram
Case Information
Origin: QA Review of e-mail interaction edi...
Subscription Description URL: <a href="http://mobile.free.fr...
Subject:
Subscription Date Toast: 6/24/2013 12:34:00 PM
Re: Warranty service
Accept
Reject
The Case Information informs you that the email is for review
Genesys • Workspace
Mark Avram 01:48
Case Information
Origin: QA Review of e-mail interaction edited by 'Kristi Sippola'
Account Number:
Customer Segment:
E-mail QA Review Disposition: pending
Dispositions
Note
rect spelling and specify day of week for appointment
Use a Disposition, the Note tab, or the Send icon to provide feedback about rejected emails
Genesys • Workspace
Mark Avram 03:05
> I would like to book an appointment f
>
> M. Avram
Approve (and send e-mail)
Reject
Spelling Mistakes
Writing Style
Wrong Information
Send a rejected email back to an agent to be corrected

Outbound emails are directed to reviewers before they are sent to a contact. In this example, there is problem with the email and it must be returned to the agent to be fixed.

1. When an email interaction for review is directed to you, an interaction preview window opens. The Case Information indicate that the email is for QA review. In this example, the "Origin" field contains the text: "QA Review of email interaction...". Click **Accept** to display the interaction. The email interaction is displayed on your desktop.
   - The Case Information view might be set up to provide you with information about who wrote the email.
   - The Email Review icon () is displayed next to the name of the contact to whom the email interaction will be sent once it is approved.
2. Review the content that the agent wrote in the email composition area. You can choose to fix any issues yourself, or send it back to the original agent to fix. Depending on the policy at your company, you might provide feedback by directly editing the content of the email interaction, or you might add notes for the agent, or you might discuss the content with the agent verbally. Other actions available to you include:
   - Save changes that you made to the email interaction
   - Move the email to a workbin to save the email in your draft email workbin to process later
   - Attach a file to the email
   - Delete the email
   - Start a consultation
3. Email interactions that are sent to you for review have a drop-down menu on the Send button. The contents of this menu are set up by your administrator and so might be different than in this example. Click to open the menu. Since a problem was found this email is being returned to the agent to fix. In this example, the administrator has set up different Reject Reasons which will be included in the Case Information when the interaction is returned to the agent. Clicke of the "Reject" options to send the email back to the original agent.
4. Now you're ready to approve the email.

## How do I approve a fixed outbound email?


Mark Avram
Case Information
Origin:
QA Review of e-mail interaction edi...
Subscription Description URL:
<a href="http://mobile.free.fr...
Subject:
Subscription Date Toast:
6/24/2013 12:34:00 PM
Re: Warranty service
Accept
The Case Information informs you that the email is for review
Genesys • Workspace
Mark Avram
Case Information
Origin:
QA Review of e-mail interaction edited by 'Kristi Sippo
Account Number:
Customer Segment:
E-mail QA Review Disposition:
pending
Phone Manufacturer:
Personne
Subject:
Re: Warranty service
Subscription Date:
6/24/2013 12:34:00 PM
Subscription Description URL:
<a href="http://mobile.free.fr">Subscription plan<...
Mark Avram
Outbound
From:
Web Contact Center
To...
Subject:
There is a 10am appointment open on Friday. Are available at that time?
Check to make sure that the requested corrections were made
Genesys • Workspace
Mark Avram
00:37
Case Information
Approve (and send e-mail)
Reject
Spelling Mistakes
Writing Style
Wrong Information
Origin:
Account Number:
Customer Segment:
E-mail QA Review Disposition:
Phone Manufacturer:
Send the approved email to the recipient

If you are a reviewer, outbound emails are directed to you before they are sent to a contact. In this example, the agent has fixed an earlier identified problem, and the email is directed to you to review.

1. When an email interaction for review is directed to you, an interaction preview is displayed on your desktop. The Case Information will indicate that the email is for QA review. In this example, the "Origin" field contains the text: "QA Review of email interaction...". Click **Accept** to display the interaction. The email interaction is displayed on your desktop.
   - The Case Information view might be set up to provide you with information about who wrote the email.
   - The Email Review icon () is displayed next to the name of the contact to whom the email interaction will be sent once it is approved.
2. Review the content that the agent wrote in the email composition area. You can choose to fix any issues yourself, or send it back to the original agent to fix.
3. Assuming that the email is now okay to send to the contact, click the Send icon to open the menu. Since the email is now ready to send to the contact, select the option that represents Accept. In this example, the administrator has added the **Approve (and send email)** option to the menu.

## How do I use the My Team Workbins?

You can perform the following functions on selected interactions in workbins by using the **Workbin Actions** buttons (the available actions depend on the type of interaction that you have selected):

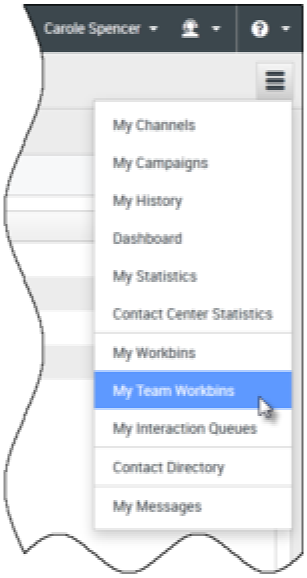
- **Open**
- **Mark Done**
- **Delete** — if you have the correct permissions
- **Move to Queue** — if you have the correct permissions
- **Move to Workbin** — if you have the correct permissions
- **Edit Case Information** — opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the selected interaction(s).

You can also control-click and/or shift-click items in a workbin to select more than one item. With multiple items selected you can move them to a queue, move them to another workbin, mark them as **Done**, or update the case information for all of them in the Case Data tab.

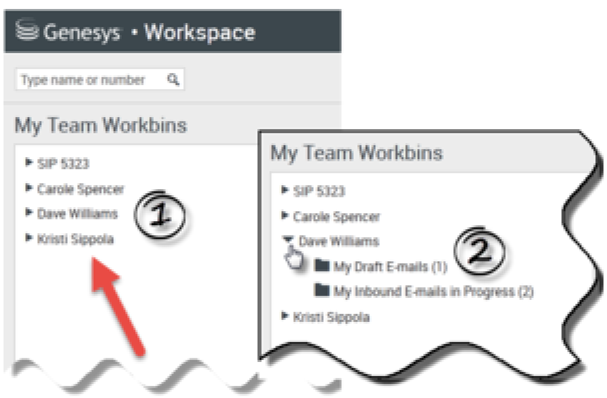
Link to video

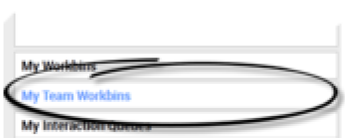
### Accessing and Using My Team Workbins

Choose **My Team Workbins** from the **Supporting Views** menu.



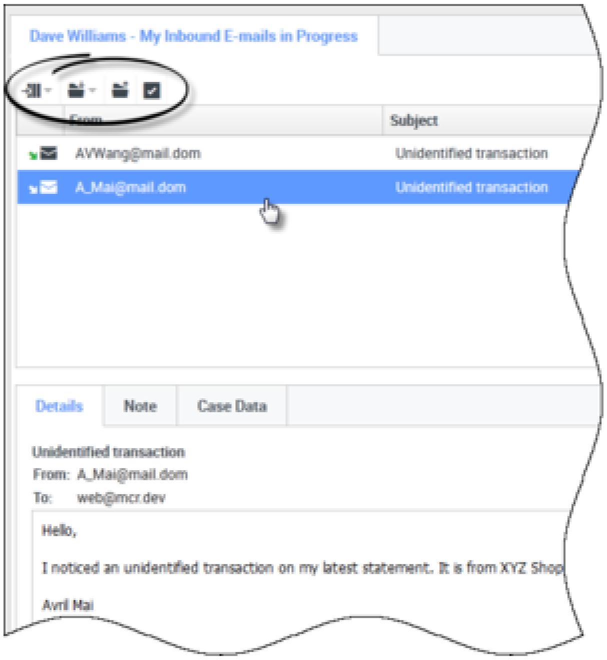

The **My Team Workbins** view contains an expandable list of all of the agents that you supervise who have workbins. If you click the agent name or the arrow next to the name of one of your agents the view expands to show you the workbins for that agent and the number of interactions stored in each.




To view and manage the interactions that are stored in the agent's workbin, click the name of the workbin. The list of interactions stored in the workbin is displayed for you in the panel to the right of the workbin list.

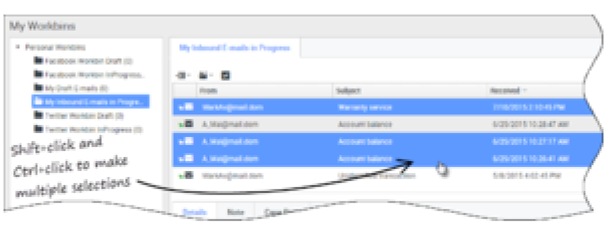
When you select an interaction in a workbin or an Interaction Queue, the contents, notes, and case data are displayed in tabs at the bottom of the Workbin view. Controls are displayed at the top of the Workbin view that let you perform actions on the interaction that you selected.




The following actions might be available to you, depending on how your system is set up by your administrator or what interaction type you have selected:

- **Open**
- **Mark Done**
- **Delete**
- **Move to Queue**
- **Move to Workbin**
- **Edit Case Information** Opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the selected interaction(s).

You can Ctrl-click and/or Shift-click items in a workbins to select more than one item. With multiple items selected you can move them to a Queue, move them to another Workbin, mark them as **Done**, or update the Case Information for all of them in the Case Data tab.



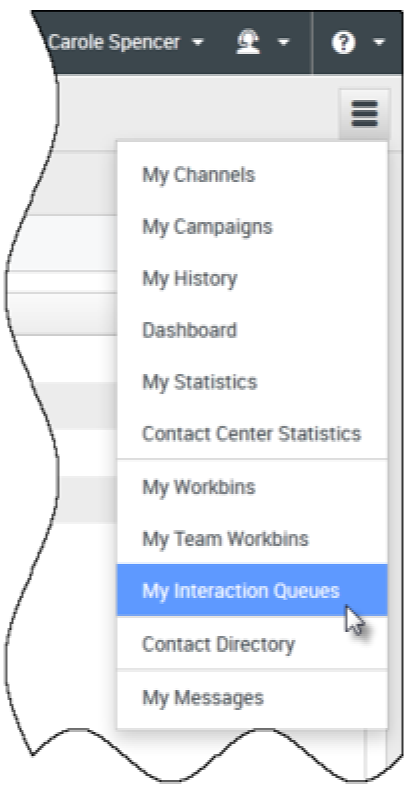
# How do I manage My Interaction Queues?

You can perform the following functions on selected interactions in interaction queues by using the **Interaction Queues Actions** buttons (the available actions depend on the type of interaction that you have selected):

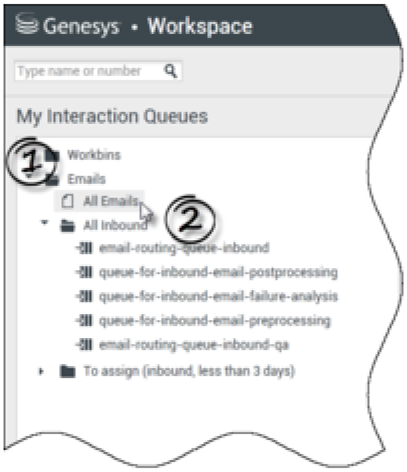
- **Open** — opens the selected interaction in the Workspace interaction view.
- **Mark Done** — marks the interaction as Done and move it from the queue.
- **Delete** — deletes the selected interaction
- **Move to Queue** — moves the interaction to a different interaction queue
- **Move to Workbin** — moves the interaction to one of the queues of one of the agents that you supervise, or to one of your own workbins
- **Edit Case Information** — opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the selected interaction(s).

## Accessing and Using Interaction Queues

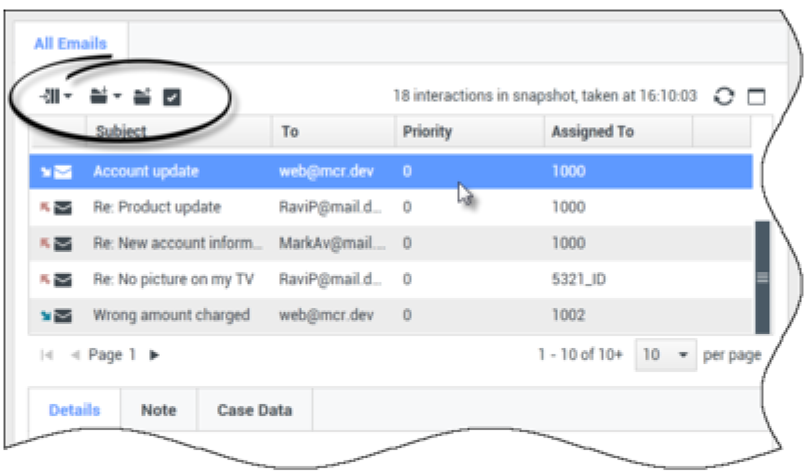
Choose **My Interaction Queues** from the **Supporting Views** menu.




The **My Interaction Queues** view contains an expandable list of all of the interaction queues that your account is set up to manage. Interaction queues might be grouped by type in folders. If you click the folder name or the arrow next to the name of the folders, the view expands to show you the queues in that folder. Click a queue to view its contents. The list of interactions stored in the queue are displayed for you in the panel to the right of the queue list.




When you select an interaction in an interaction queue, the contents, notes, and case data are displayed in tabs at the bottom of the interaction queue list view. Controls are displayed at the top of the interaction queue view that let you perform actions on the interaction that you selected.

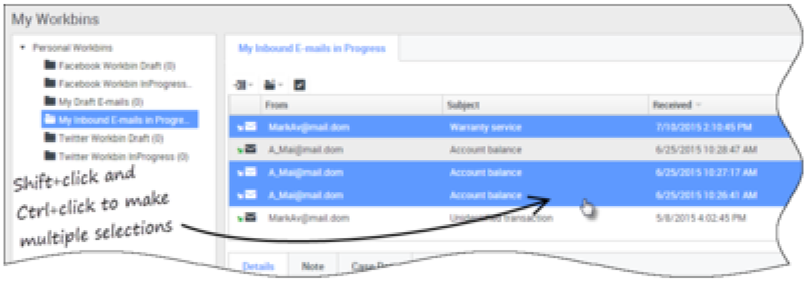



The following actions might be available to you, depending on how your system is set up by your administrator or what interaction type you have selected:

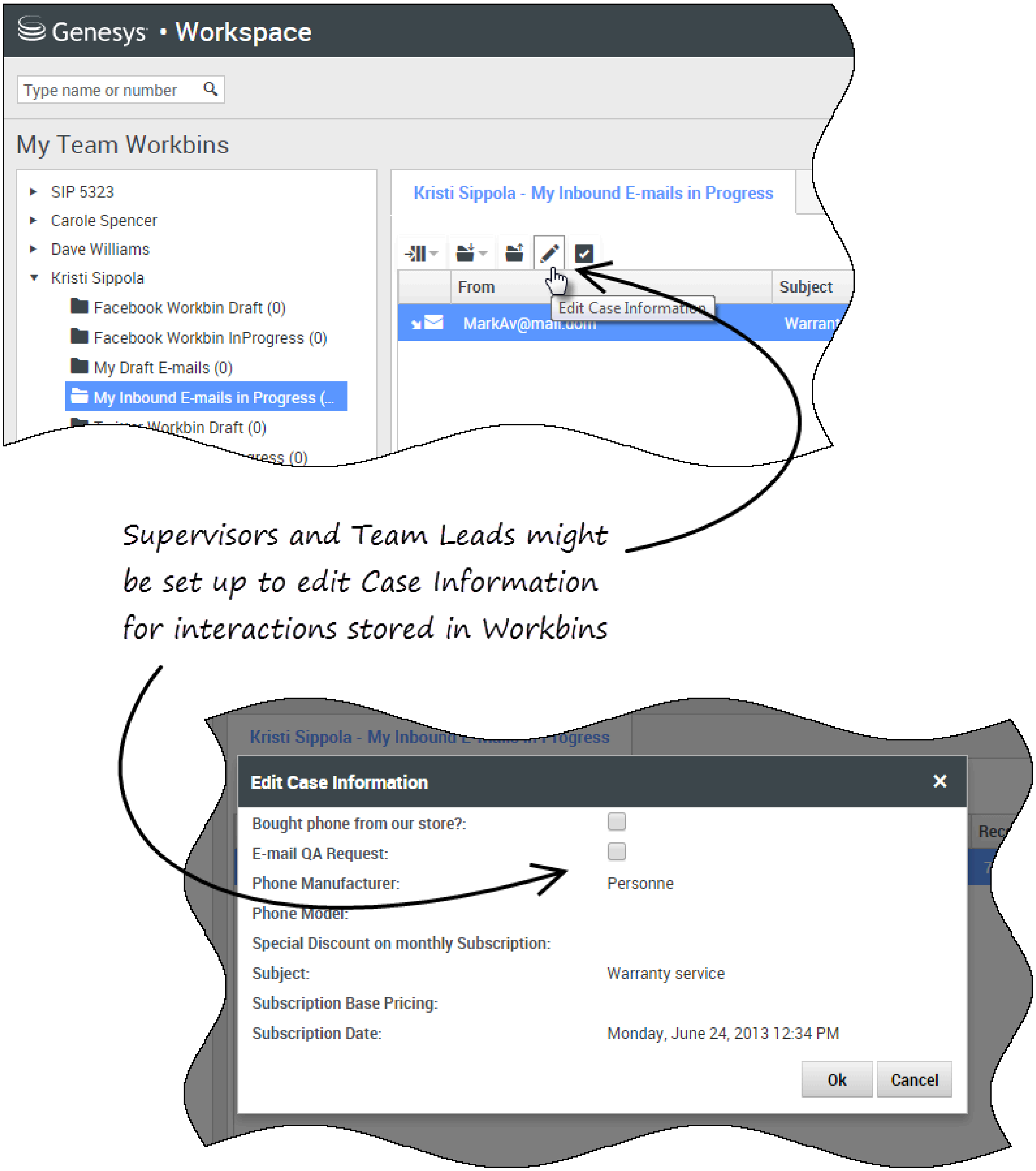
- **Open**
- **Mark Done**
- **Delete**
- **Move to Queue**
- **Move to Workbin**
- **Edit Case Information** — opens the Edit Case Information window to enable you to edit the content

of the Case Data tab for the selected interaction(s).

You can Ctrl-click and/or Shift-click items in a Queue to select more than one item. With multiple items selected you can move them to another Queue, move them to a Workbin, mark them as **Done**, or update the Case Information for all of them in the Case Data tab.



## How do I edit Case Information for interactions in Workbins and Queues?



Supervisors and Team Leads might be set up to edit Case Information for interactions that are stored in a Workbin or Queue. Select an interaction to enable the Edit Case Information icon. Click the icon to open the Edit Case Information dialog box. The editing features of this dialog box work the same as the editing features of the Case Information area of an interaction window.

You can edit case information for multiple interactions by selecting two or more interactions. The following rules apply to editing the case information of multiple interactions:

- The Edit Case Information dialog box displays a mix of all of the case information fields that are available in all of the selected interactions.
- Only the common editable fields, check boxes, and menus of the selected interactions are displayed with the edit icon.
- If an editable item has the same value for all of the selected interactions, that value is displayed in the editable field.
- If an editable item has different values for one or more of the selected interactions, the field is displayed as blank.