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Workspace Desktop Edition User's Guide

Using Workbins

5/4/2025

Using Workbins

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 - 1.1 Using Workbins to Access Stored Interactions

In this lesson, you will learn how to access interactions that are stored in a workbin and belong to you, your place, your agent group, or your place group. A workbin is like a personal queue, in which you can store e-mail messages and other interactions that are to be handled later; however, unlike a queue, interactions that are stored in a workbin can be accessed in any order; they can be assigned to agents, places, agent groups, or place groups. Items that are stored in a workbin are owned by the owner of the workbin. Open interactions can be saved to a workbin for future processing or collaborative processing by the agent, place, agent group, or place group. Interactions can also be distributed to workbins by Universal Routing Server. This lesson contains the following section:

• Using Workbins to Access Stored Interactions

Using Workbins to Access Stored Interactions

Interactions can be routed to you, your place, your place group, or your agent group and stored in a workbin to be handled at any time.

Lesson:

Accessing and handling interactions that are stored in a workbin

• To use a workbin to open an interaction.

Prerequisites

- You are logged in to Interaction Workspace (see Lesson: Logging in to Interaction Workspace).
- You are the owner of the workbin in which the interaction is stored.

Start

1. To open the Workbin view from the Main Window, click the Workbins button (see the Workbins view in the Interaction Workspace Main Window figure).

🕕 🔻 Interaction Workspace		9 -	Log Out 🛛 🤕 🔻 🔔 🗖 🗙
Type name or number		Workspace Workbins	Contact Messages
My Workbins	in-progress		
□ Personal Workbins	G 🗟 🗳 ⊘ 👬 📑		
E-mails - Rejected QA Review (0)	From	Subject	Received
in-progress (2)	A_Mai@mail.dom	Personal loan rates inform	1/5/2012 7:21:43 PM
	RaviP@mail.dom	New account information	11/22/2010 7:14:23 PM
	<		• •

Workbins view in the Interaction Workspace Main Window

The Workbins view comprises three areas:

- Workbins Explorer--Enables you to select workbin folders from your personal workbins and your shared workbins
- Workbin view--Lists all the interactions that are stored in the selected workbins, and includes information about the status of the interaction; enables you to sort, search, and perform actions on interactions
- Workbin interaction information--Enables you to view the Details tab, the Notes tab, and the Case Data tab for the selected interaction (see the Workbins view in the Interaction Workspace Main Window with a selected draft interaction figure)
- 2. In the Workbins Explorer, select the workbin that contains the interaction that you want to open.
- 3. In the Workbin view, scroll through the list of interactions to find the specific interaction that you want to open (see the In Progress Workbin view in the Workbins view figure).

in-pro	gress		
	a 🏝 📀 💼 📑		
	From	Subject	Received
2	RaviP@mail.dom	New account information	11/22/2010 7:14:23 PM
٠			•

In Progress Workbin view in the Workbins view

4. To change the sorting order of the interactions, click the column headings in the table of interactions. Clicking the same column heading again reverses the sort order for that heading (see the Changed sorting order in the Workbin view figure).

draft-	-wb		
	-		
	10 🔺	Subject	Submitted
F	A_Mai@mail.dom	Re: New account informa	6/25/2012 4:07:22 PM
F	A_Mai@mail.dom		12/7/2011 7:08:47 PM
F	RaviP@mail.dom	Re: Follow up about your	5/29/2012 8:16:25 PM
F	RaviP@mail.dom	Re: Follow up about your	5/29/2012 8:19:26 PM

Changed sorting order in the Workbin view

5. Click the interaction that you want to handle when you find it in the Workbin view (see the Workbin view with a selected e-mail interaction figure).

draft	-wb		
	То	Subject	Submitted 🔺
-	A_Mai@mail.dom		12/7/2011 7:08:47 PM
F	RaviP@mail.dom	Re: Follow up about your	5/29/2012 8:16:25 PM
F	RaviP@mail.dom	Re: Follow up about your	5/29/2012 8:19:26 PM
-	A_Mai@mail.dom	Re: New account informa	6/25/2012 4:07:22 PM

Workbin view with a selected e-mail interaction

When you select an interaction, the following functionality becomes available for the interaction, depending on the interaction type:

- Open--Opens the interaction in an Interaction window (see Lesson: Handling an inbound e-mail interaction)
- Reply (for e-mail only)--Creates a reply and opens the interaction in an outbound E-Mail Interaction window (see Lesson: Replying to a inbound e-mail interaction)
- Reply All (for e-mail only)--Creates a reply and opens the interaction in an outbound E-Mail Interaction window and addresses the e-mail to the sender and all other recipients of the original email (see Lesson: Replying to a inbound e-mail interaction)
- Mark Done--Complete the interaction and close the interaction window; you might be configured to specify a disposition code before you can click Mark Done (see Lesson: Handling an inbound e-mail interaction and Assigning Disposition Codes)

End

Lesson:

Storing an interaction in your Draft workbin

• To use your Drafts workbin to store an outbound e-mail interaction to be completed at a later time by

you or another agent.

Prerequisites

- You are logged in to Interaction Workspace (see Lesson: Logging in to Interaction Workspace).
- You have accepted an inbound or transferred e-mail interaction (see Receiving and Handling an Inbound E-Mail Interaction) or you want to create a new outbound e-mail interaction (see Creating and Handling a New or Reply E-Mail Interaction).

Start

1. You can save a new outbound e-mail message or a reply outbound e-mail message (see Lesson: Replying to a inbound e-mail interaction) to your Draft workbin. To create new outbound e-mail, use the Team Communicator to find the contact, and select New E-Mail (see the New E-Mail option in the Team Communicator Action menu figure and Lesson: Using the Team Communicator feature to find a contact).

•	Interaction Workspace		1
Avril		×	Wor
	Contact	•	
30	🕳 Avril Mai		1
3	Call		
	New E-mail (AMai@mail.dom)		
	New E-mail (mail@mail.com)		
\$	Add to Favorites		

Procedure: Using the Team Communicator feature to find a contact

2. Compose your new or reply e-mail interaction in the E-Mail Interaction window (see the New outbound E-Mail Interaction window figure).

Avril Mai - External - Interaction Workspace t	٦×
Avril Mai 😑 (01:48:30)	
Case Information	2
Origin: Outbound email	DONT/
✓ Avril Mai	ĝ
From: "Contact Center" <main@mcr.dev></main@mcr.dev>	
To A_Mai@mail.dom; Add Cc 🔻	
Subject: Account follow up	
HTML - Tahoma - 11 - B / U = 1 = 2 2 2	
Dear Ms. Mai,	- 22
Your account has been updated with the changes that you have requested.	SPO
	NSES
Disposition Code Note	
None	
Transferred	
O Accepted	

New outbound E-Mail Interaction window

3. To save the outbound e-mail interaction in your Draft workbin folder, click the Save in Draft Workbin button.

The interaction window closes, and the interaction is stored in your Draft workbin.

- 4. If you want to open the interaction later to continue to work on it, click the Workbins button on the Interaction Workspace Main Window (see the Workbins view in the Interaction Workspace Main Window with a selected draft interaction figure). The Workbins Explorer displays the number of interactions in each workbin, and your saved interaction is displayed in the Draft workbin. The Draft Workbin enables you to use the following functionality:
 - Find an interaction by scrolling through the list of interactions.
 - Change the sort order of interactions by clicking the interaction list column heads.
 - Open--Open the interaction in an inbound E-Mail Interaction window (see Lesson: Handling an inbound e-mail interaction).
 - Delete--Delete the interaction permanently from the Interaction Server database (if you have the correct permissions).
 - Details--View the sender and recipient information, subject, and contents of the selected interaction.
 - Use the Notepad to attach a note to the interaction history. See Managing Contact History
 - Case Data--View Case Information and Disposition Code for the current interaction

🌗 👻 Interaction Workspace			1	🔋 🕶 📔	Log Out	2 🔻 🖵 🕻	J×
Type name or number	0	V	Workspace	Workbins	Contact	Messages	5
My Workbins		draft-wb					1
Personal Workbins		🖆 🙀 🔥 📑					
E-mails - Rejected QA Review (0)		To 🔺 S	iubject		Submitted		
in-progress (2)		🖾 A_Mai@mail.dom R	e: New account	informa	6/25/2012	4:07:22 PM	
		🔽 A_Mai@mail.dom			12/7/2011	7:08:47 PM	
		RaviP@mail.dom R	te: Follow up abo	out your	5/29/2012	8:19:26 PM	_
		🔛 RaviP@mail.dom R	te: Follow up abo	out your	5/29/2012	8:16:25 PM	
		Details Note Case	e Data				
		Re: Follow up about you	r service call				
		From: main@mcr.dev To: RaviP@mail.dom State: Assigned to John Davi	is SIP - draft-wb	workbin	5/29/2	012 8:16:25 F	M
My Workbins		On 5/29/2012 8:08 PM, main	@mcr.dev wrote	e:		:	< III
My Team Workbins		Hello Mr. Pache,					
My Interactions Filters		I hope that you are satisfi	ied with the serv	vice that vo	u received h	VOUR	Ŧ

Workbins view in the Interaction Workspace Main Window with a selected draft interaction

5. If you want to hide or show column headings in the interaction list, right-click in the list and select the headings that you want to hide or show respectively (see the Interaction list column-heading contextual menu figure).

	draft	wb					
	👛 🛯	i i i i i i i i i i i i i i i i i i i					
ſ		То	Subject			Submitte	d
	F	A_Mai@mail.dom				10/2/001	1 7:08:47 PM
I	F	RaviP@mail.dom	Re: Follow	✓	TO D	2	2 8:16:25 PM
		RaviP@mail.dom	Re: Follow	~	Subject	2	2 8:19:26 PM
	F	A_Mai@mail.dom	Re: New a	7	Submitted		2 4:07:22 PM
				×	Submitted		
L							

Interaction list column-heading contextual menu

6. To show or hide the interaction information area, click the Show/Hide Details Panel button. The Draft workbin with the interaction information area hidden figure shows the Draft workbin in which the interaction-information area is hidden.

🌗 👻 Interaction Workspace			Ş 🗸	Log Out 🛛 🧟 👻 🔔 🗖 🗦
Type name or number	٩		Workspace Workbins	Contact Messages
My Workbins	1	draft-wb		
Personal Workbins		🛎 🖼 📸		
E-mails - Rejected OA Review (0)		To 🔺	Subject	Submitted
in-progress (2)		📨 A_Mai@mail.dom	Re: New account informa	6/25/2012 4:07:22 PM
		📨 A_Mai@mail.dom		12/7/2011 7:08:47 PM
		📨 RaviP@mail.dom	Re: Follow up about your	5/29/2012 8:19:26 PM
		🖾 RaviP@mail.dom	Re: Follow up about your	5/29/2012 8:16:25 PM
My Workbins				
My Team Workbins				
My Interaction Queues				

Draft workbin with the interaction information area hidden

 When you have finished handling all the interactions in the Draft workbin, the Draft folder in the Workbins Explorer shows 0 entries and the Draft workbin shows No items (see the Empty Draft workbin figure).

Workbins - Interaction Worksp	bace		_	۵×
My Workbins	draft-wb			
Personal Workbins draft-wb (0)				
E-mails - Rejected QA Rev	То	Subject	Submitted	
in-progress (3)		No items		
Empty Draft workbin				

End