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Workspace Desktop Edition Help

[Login](#)

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Login

The Login view is the first view that you see. It enables you to identify yourself and, if required, enter additional login data, based on your role or the technical environment.

Logging in is a two-step process:

1. (SIP only) Plug in your USB headset.
2. [Identify yourself to the system.](#)
3. [Define additional information about yourself](#), based on your role and the tasks that are assigned to you.

Step One

Logging In to the Interaction Workspace Application

After you have launched the Interaction Workspace application, the login view opens on your desktop.

1. Enter your user name in the User Name field.
2. Enter your password in the Password field. (Note: you might be required to change your password when you first login, at a specific interval, or for other security reasons. Refer to [Your Password Changing Your Password](#)).
3. If necessary, select your language from the Language drop-down list.
4. Do one of the following:
 - Log In to authenticate yourself on the system.
 - Cancel to stop logging in and close the login view.

This process identifies you to the system, so that the correct application is loaded onto your workstation. If no additional information is required, the [Main Window](#) or the [Gadget](#) view opens immediately after you click **Log In**. Otherwise, the [Advanced Login Parameters](#) view is displayed.

You might be configured to specify your preferred language. To specify a different language preference, select a language from the Language drop-down list.

More/Less Options

In the first login view, you might be configured to specify additional options.

- To specify additional options, click **More**.
- To hide the additional options, click **Less**.

Options that you might be configured to specify include the following:

- Name of the Interaction Workspace application.
- Name of the host that is running your configuration server.
- Port number of your configuration server. This port is normally 2020.
- **Keep recent place <Place Name>**. Check this box to use the same Place that was used most recently on the current workstation. You might have to use this option if you do not have a defined place configured for your login.

Contact your system administrator for more information about these options.

Step Two

Defining Advanced Login Parameters

After you have been authenticated and logged in, a new view might open on your desktop that enables you to specify additional information, based on the tasks that you want to perform. The contents of the view are defined by your administrator; they are specific to your role. However, if no additional information is required, the **Main Window** or the **Gadget** view opens immediately.

The Advanced Login Parameters view confirms your login and notifies you that you must select one or more channels and provide any additional login information that is specific to those channels.

1. Enter your information, according to your role, and the tasks that you want to perform. You might have to specify your place, your queue, your login, your password, and the channels that you want to use (Voice, IM, SMS, workitems such as faxes, and so on). You might also be required to enter an optional phone number, if you are on a SIP Server system and log in remotely.
2. Do one of the following:
 - Click **OK** to submit your information; the **Main Window** or the **Gadget** view opens.
 - Click **Cancel** to close the System Parameters view and log out.
 - Click **Change login account** to return to the first login view.

Remote Phone Number

If your company is using a SIP Server (VoIP), you might be configured to log in by using a remote phone number at which you can be reached if you are not logged in from a phone that is on the internal phone system of your company.

If you are logging in remotely, enter the remote phone number to which your calls will be routed in the Phone Number box in the Advanced Login Parameters view. The phone number in this field might already be configured for you.

USB Headset Detection

When you log in to a SIP Voice channel, Interaction Workspace checks to determine whether the USB

headset that you are configured to use is plugged in. If it is not, you will be logged in to Interaction Workspace but not into the SIP Voice channel. Make sure that you plug in your USB headset so that you can use the SIP Voice channel.

Interaction Workspace detects when your USB headset is plugged in or unplugged and will set your status accordingly. If your USB headset is not plugged in a **message** will be displayed.

The volume settings for your USB headset that you used the last time that you logged out are retained the next time that you log in. You can adjust the volume of your USB headset by using the volume control on the **Voice interaction** window.

Ready/Not Ready State

Your system administrator specifies what your **status** is for each channel when you log in. If you are configured to be Not Ready for one or more channels, your system administrator might specify a Not Ready Reason for the channel. To start receiving interactions on a Not Ready channel, you must change the status to **Ready**.

Changing Your Password

There are a number of reasons why you might have to or want to change your Interaction Workspace login password. For reasons that are related to the security of your company, your account might be configured so that your password expires automatically after a specified number of days. Your account might also be configured to require you to change your password after an **inactivity time-out**. For your personal security, your account might be configured with a temporary password when the account is assigned to you, and you might be required by your system administrator to change your temporary password before you can login to Interaction Workspace for the first time. You might also want to change your Interaction Workspace login password for other reasons—for example, your company might not have a specific policy about how often your password should be changed or you might have accidentally revealed your password to an unauthorized person.

In all of these scenarios, you use the Interaction Workspace Change Password dialog box to change your password. Consult with your system administrator about the specific password security policy that your company implements.

To manually change your password, from the **Main Menu**, select **Change Password**. The Change Password dialog box is displayed. Perform the following steps:

1. Enter your current password in the **Old Password** field.
2. Enter your new password in the **New Password** field.
3. Enter your new password again in the **Confirm Password** field.
4. Click **OK** to change your password or click **Cancel** to close the dialog box without changing your password. If you made any errors, after you click **OK** you will be asked to re-enter the information. If you entered all of the information correctly, your password is changed to the new password that you specified.

If you are required to change your password by your administrator, the Change Password dialog box is displayed automatically. Perform the following steps:

1. Enter your new password in the **New Password** field.
2. Enter your new password again in the **Confirm Password** field.
3. Click **OK** to change your password or click **Exit** to close the dialog box and quit Interaction Workspace without changing your password. If you made any errors, after you click **OK** you will be asked to re-enter the information. If you entered all of the information correctly, your password is changed to the new password that you specified.