Workspace Desktop Edition Help

Workspace Desktop Edition 8.5.1

11/22/2023

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Workspace Desktop Edition Help

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.

For other issues, check the FAQ below.

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out this article in the User's Guide.

Genesys Workspace Desktop Edition (Workspace) is a modular, customizable application that enables you to handle contact center interactions, monitor contact center and personal KPIs, and consult with your colleagues.

The Workspace Desktop Edition Help contains information about how to:

- Use the Windows and Views to handle customer interactions, according to your role in the contact center.
- Use the components, features, and controls that enable you to complete tasks, according to your role in the contact center. These are interface features and controls that are common to many of the Windows and Views.
- Launch Workspace.
- Use keyboard navigation and accessibility.
- Login.

Workspace Help

If you've already been through training and/or the *Workspace User's Guide*, you can use this Help document to remind you how to use a specific feature. You can access this Help document directly from the Workspace application Help menu, or by bookmarking this URL.

About This Help

The following topics explain some of the main features of Workspace Desktop:

About Workspace Desktop

- What can I do?
- Login
- Use
- Features
- Skype for Business

Contact Interactions

- Voice Calls
- Video Calls
- Callbacks
- Chats
- Email
- SMS and MMS

Call Tasks

- Conference Calls
- Transfer Calls
- Consultation Calls
- Recording Calls
- Calling inside your organization
- Forward Your Phone (see **My Channels**

Managing Your Status and Communications

- Manage your status
- Launch new interactions
- Manage channels
- My statistics & KPIs
- Contact center statistics

Managing Contacts

- Contact Directory
- Finding Contacts
- Contact Interaction History

Managing Interactions and History

- Workbins
- Interaction Search
- Interaction History

Manual Contact Assignment

My Interaction History

Workspace User's Guide

Check out the *Workspace User's Guide* for a complete set of detailed lessons on using all of the different features of Workspace.

Each lesson walks you step-by-step through every interface to show you how to use it.

Getting Started

The *Getting Started* lessons are a good place to begin your journey.

- Workspace Concepts
- Log In
- Main Window Basics
- Manage Your Status
- Forward Your Calls
- Find A Contact Or An Internal Target

Workspace Videos

Here are a handful of handy tip videos that you might find useful when you are using Workspace!

Main Window Overview

Link to video

Main Window Tips & Tricks

Link to video

Resizing the Main Window

Link to video

Using the Interaction Window

Link to video

Using Call Timers

Link to video

Making a Conference Call

Link to video

Instant call conference

Link to video

Conference call Action menus

Link to video

Starting a call consultation

Link to video

Consultation calls in detail

Link to video

Instant consultation call transfer

Link to video

Using standard response shortcut keywords

Link to video

Create hyperlink text (email & chat)

Link to video

Workspace Web Edition Training Videos

Workspace *Web Edition* is the browser-based version of Workspace. It does not have all the features and functionality of Workspace *Desktop Edition*; however, it shares most of the same basic functionality. You might find some of the videos on this page useful — just remember, not all the features you have in Workspace *Desktop Edition* are available in Workspace *Web Edition*, and also that Workspace *Web Edition* has a few features that you do not have in Workspace *Desktop Edition*.

Even more videos are available for the latest Cloud version of Workspace. The user interface is a little different, but you might find these videos instructive.

Troubleshooting and Frequently Asked Questions (FAQ)

I have a SIP Phone and I can't hear anything in my headset

If you do not hear anything in your headset, try the following:

- Verify that your headset is plugged in.
- Verify that the volume on your headset is turned up.
- Verify that you have not accidentally pressed a mute button on your headset.
- Test that your headset works with your operating system using the sound control panel or sound card interface.

If, after trying all these steps you still cannot hear anything in your headset, the problem might be with your network SIP. Ask your administrator to verify that SIP is working correctly on your network and that you have a functioning SIP Endpoint on your system, such as Genesys Softphone or Workspace SIP Endpoint.

If everything is working on your SIP network, ask your administrator to contact your company's Genesys Customer Care representative to help troubleshoot the issue.

How do I force close a case (stuck call)?

If you are on a call and are unable to close the Interaction window because the call has become stuck in the system, right-click the tab in the Interaction window that represents the call, and select **Force Close This Case** from the shortcut menu. You will be prompted to confirm that you want to force-close the call. If nothing happens, there might be something wrong with how your Genesys back end is set up; contact your administrator.

Why can't I hear a ringtone when I get a call or other interaction?

- Workspace must be set up by your administrator to play a sound (ringtone) when a new call or other interaction is received on your desktop.
- If you do not hear a ringtone, first make sure that you have set up your headset and/or speakers correctly according to your operating system instructions.
- If you still do not hear a ringtone, ask your supervisor or administrator to make sure that Workspace is set up properly and that a ringtone has been specified for every interaction type that you might handle.

My audio device is selected automatically in Workspace. I have a different preference. How do I change my audio device?

Your administrator configures and manages audio devices in Workspace. To change the audio device selection that was configured as default, you need to contact your administrator.

I keep missing calls

What do you do if your phone rings (or a chat or other interaction notification pops up) but before you can answer it, the call is automatically directed somewhere else? There is a problem with how your account or your company's system is set up. Ask your supervisor or administrator to contact Genesys Customer Care.

How do I change password?

- If this is your first time logging on, you might have to change your password. This happens automatically. A message box is displayed that walks you through the steps. If you are not sure about any of the prompts, your administrator or supervisor can provide you with the details.
- If you need to change your password, send a request to your supervisor requesting a change password email. You supervisor will reset your password, and you will receive a confirmation email. Follow the instructions in the email to change your password.

I keep clicking Hang up (release call) by accident

In some environments, there is no confirmation dialog after you click **Hang up**. That means as soon as you click **Hang up** the call ends. If you find that you are accidentally hanging up on customers when you intend to only put them on hold or transfer the call, ask your supervisor or administrator to set the **voice.prompt-for-end** Workspace option to **true** to resolve this issue.

Workspace is covering my other windows!

What do you do if the Workspace window is always on top of your other windows, making it impossible to access them? Open the **Main Menu** (the one with the little agent icon) and deselect the **Main Window Always on Top** option. For other Main Window Tips & Tricks, check out this video:

Link to video

What are Skills?

- Skills are things that you are good at, like product specialization or a language that you speak.
- When your supervisor sets up your account, she or he assigns skills and skill levels based on what you can do.
- Skills are used to direct calls to you. If someone calls about a something that you are specialized on, the call will be directed to you and others with the same skill on that product.

How can I find my Call Stats?

- Use the My Statistics tab to see your call activity, work time, and other reports.
- Use the Contact Center Statistics tab to see the list of statistics about the Routing Points, Queues, and other contact center objects.

How do I transfer, conference, or consult on my call?

Workspace lets you start a conference call with someone in your company, transfer your call to another agent or your team lead, or start a consultation call with another member of your team. The call controls at the top of the voice call interaction toolbar open the Team Communicator, a universal lookup tool and dialer, that lets you search for and dial other team members. You can also use the Team Communicator to call someone inside your organization.

What kind of calls and interactions does Workspace let me handle?

- The Functionality Overview topic introduces all the different ways that you can use Workspace Desktop to receive or make calls and other interactions, including:
- incoming and outgoing voice calls
- incoming chat interactions
- incoming and outgoing email interactions
- Outbound Campaign calls

I'm a Team Lead, what can I do with Workspace?

- Workspace has special features for those of you who are Team Leads and Supervisors. You can:
  - Monitor calls and chat (silently listen in)
  - Coach calls and chat (whisper coaching)
  - Barge-in to calls and chat (joining the call)
  - Assure the quality of email interactions

Why am I locked out of Workspace when I am not active on it for some time?

Workspace might be set up by your administrator to become locked and have your status set to **Not Ready** after a specific period of time during which neither your mouse nor keyboard are used. If you are locked out of Workspace, you must reauthenticate and reset your status to **Ready** to receive new interactions. For more information, refer to Inactivity Timeout.

How do I continue a chat interaction?

- Some environments have asynchronous chat available. This feature keeps chats open after the last agent leaves the session, and the agent can rejoin the session until the session is marked **Done**. This video demonstrates how asynchronous works if it is available in your environment:
  Link to video

Launching Workspace

Tip

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- Calls dropping.

For other issues, check the FAQ below.

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Before you launch Workspace, **make sure that your headset is plugged in** if you are using a softphone (a headset connected to your workstation).

Double-click the **Workspace** icon on your desktop to launch the application.

The Workspace Login Window is displayed. Enter your credentials and other login information. After you log in, you might have to set your status to **Ready**.

Headsets

When you log in to Workspace, the application is enabled for any headsets that are plugged into your workstation. If you want to use a different headset, exit Workspace, plug in the new headset, then relaunch Workspace.

Depending on the configuration of your environment, if you log in to a SIP Voice channel and your configured USB headset is not plugged in, you might be logged in to Workspace but not the SIP Voice channel. To complete login to the SIP Voice channel, plug in your USB headset.

Auto-update

When you launch the application, Workspace might automatically update. Depending on how your system is configured, you might have the opportunity to reject the update. If you do not accept the update, it will be offered to you again the next time that you login.

What do I do if I see: "Cannot start Workspace SIP Endpoint"

If you receive the error message "Cannot start Workspace SIP Endpoint", it is possible that the SIP Endpoint is not installed or was not installed correctly on your workstation.

To see if it is installed, go to the Windows **Start** menu and search for the **Workspace SIP Endpoint** application there. Try launching it from the **Start** menu. If it does not launch or you get the same error message, ask your administrator to review the installation of SIP Endpoint on your workstation. You can give them this link to the document that describes how to install it: https://docs.genesys.com/Documentation/IW/8.5.1/Dep/InstallingTheIWSIPEndpoint

If, after installing or reinstalling the SIP Endpoint you still get the error, please ask your administrator to contact Genesys Customer Care as there might be other issues with your installation, and they can help to troubleshoot the problem.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Log In
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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8. Login
9. Voice Consultation
10. Components, Features, and Controls

Keyboard Navigation and Accessibility

[**Modified:** 8.5.113.11]

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Workspace supports keyboard shortcuts and hotkey combinations for certain common functions. The Workspace keyboard shortcuts and hotkeys are configured by your administrator; this is to ensure that there is no conflict between Workspace and other applications that you use. Please ask your administrator for a list of the shortcuts and hotkeys that are configured for Workspace.

Shortcut and Hotkey Combinations

A shortcut is a combination of keys that you press to activate a certain function or behavior in a specific window or view. Your operating system might support shortcut keys for the following functions: 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.

Hotkeys are also combinations of keys that you press to perform certain functions; however, hotkeys are available to you no matter what window or application is active. For example, your administrator might configure a hotkey combination enabling you to answer a phone call (voice interaction) or reject an email interaction that has been routed to you; when the preview is displayed on your desktop, you can use the hotkey combination to perform the action without first having to switch to the interaction preview.

Important

Sometimes there might be a conflict between the keyboard shortcut that your administrator has configured for Workspace functionality and the keyboard shortcuts that control the Rich Text Editor that you use for email and other text-based interactions. If this is the case, navigate away from the text editor field before you use the shortcut. If you experience a shortcut conflict, notify your administrator to change the custom shortcut.

Menu item Access Keys

Windows *Access keys* are available for most menu items in Workspace.

Each supported menu item has an *underlined* letter or character.

To select a menu item, press the **Alt** key to open a menu in the active window, then press the letter or character that corresponds to the menu item.

Keyboard Navigation and Screen Readers

Workspace supports keyboard navigation for all features in the interaction windows. All features, functions, options, and menus are 100 percent navigable by keyboard.

Keyboard navigation enables agents who do not use a mouse, or who are using a device for accessibility that relies on keyboard navigation, to manipulate the desktop components.

> **Tip**
> Keyboard navigation enhances the productivity of any user.

Some screen-reader applications are not compatible with these navigation shortcuts, because the screen reader uses some of these keys for other purposes. When screen reader mode is on, use **Alt + N** to disable the keyboard navigation function.

Note: If you are already in screen-reader mode, all keyboard shortcuts are disabled, except for the **Alt +** ***n*** commands. Your system administrator turns screen-reader mode on and off.

Visual cues

The appearance of the Workspace component that you select changes as you move the focus from one component to another. For example, buttons change color and menus open with the current selection highlighted by color.

Basic Navigation

Two keyboard shortcuts enable you to navigate among components—for example, from one menu to the next or from one view of the interaction interface to the next:

- **Tab** key: Moves the focus to the next component (menu, field, button, view, and so on)
- **Shift + Tab** key combination: Moves the focus to the previous component (menu, field, button, view, and so on)

Beginning with version 8.5.113.11, Workspace enables you to enter tab characters in the email composition area of outgoing email interactions by pressing the **TAB** key. Now, to use the **TAB** key to step to the next control or field, you must first press **Ctrl-TAB** to step out of the text composition area. This feature might be disabled in environments configured for accessibility; if so, you will not be able to enter tab characters in the email composition area, but you can use the **TAB** key to move to the next control in the tab order.

When you use the **Tab** key to navigate, 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

The following table contains keyboard shortcuts that enable you to manipulate controls, such as menus, lists, and buttons, in the Workspace interface.

Workspace Keyboard Shortcuts

Shortcut	Description
LEFT ARROW	Move left in a menu bar or out of a submenu.
RIGHT ARROW	Move right in a menu bar or into a submenu.
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. For a button, execute the associated action. 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.

Workspace High Contrast Theme

[**Added:** 8.5.100.05]

Workspace enables visually-impaired agents to use a high contrast theme that compliments the Windows high contrast themes that are available from the Windows Personalization control panel. The Workspace high contrast theme follows Web Content Accessibility Guidelines (WCAG) 2.0 requirements with some limitations. The Workspace high contrast theme was tested against red/green and blue/yellow color deficit vision. The Workspace high contrast theme functions whether or not one of the Windows high contrast themes are in use.

The Workspace high contrast theme must be enabled by your administrator. If it is enabled for you,

you can access the high contrast theme from the Workspace **Main Menu** by selecting **Main Menu**>**Change Theme**>**High Contrast**. You must exit and relaunch Workspace to make the high contrast theme active.

> **Important**
> In the Email interaction view, rich text editing is not enabled when the High Contrast Theme is selected.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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Functionality Overview

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Functionality versus Components

Workspace comprises different functionality views that enable you to handle interactions, access your history, find contact information, access statistics, and so on. Each functionality view is composed of panes and windows that contain the components, features, and controls that are required to complete a task, such as handling an inbound voice interaction. Many of the component panes and windows are common to more than one view, and so are described separately in the Components, Features, and Controls section of this help document. In the Components, Features, and Controls section you will find:

- Agent Tools
- Statistics, Status, and Other Information
- Functions and Information for Contacts
- Functions and Information for Interactions

Functionality

The following are the different views that you use inside of Workspace to handle interactions, manage contacts, and complete other tasks:

Login: The first view that is displayed when you launch Workspace. It enables you to identify yourself and, if required, enter additional login data based on your role or the technical environment. To open the Login window, first launch the Workspace application.

Main Window: Enables you to manage your status, contacts, favorites, and settings; find existing interactions; access your KPIs and messages; and launch new interactions.

Statistics Gadget: Enables you to access your KPIs and contact center statistics in a permanent view. Statistics can be accessed in a ticker or in a static view.

Interaction Preview: Displays an interactive notification of a new inbound interaction. The notification is a preview that includes attached data that enables you to decide whether to accept or reject the interaction.

Voice channel

- Voice interaction: Enables you to access all of the information that is necessary to handle a voice interaction with a contact or an internal agent.
- Internal Voice Interaction: Enables you to start a voice interaction with an internal target.
- Voice Consultation: Enables you to consult with another agent about the current voice interaction, before you initiate a conference with the agent or transfer the call to the agent.
- Voice Recording: Enables you to record the current voice interaction with a contact or an internal target (for VoIP-/SIP-enabled agents only).
- Video Interaction: Enables you to add the video channel to your current voice call.
- Web Callback Interaction: Enables you to access the information that is necessary to handle a web callback voice interaction with a contact.

Other channels

- Chat Interaction: Enables you to access all of the information that is necessary to handle a chat interaction with a contact or an internal agent.
- Chat Consult: Enables you to consult with another agent about the current chat interaction before you initiate a conference with the agent or transfer to the agent.
- Email Interaction: Enables you to access all of the information that is necessary to handle inbound and outbound email interactions with a contact or internal agent, and how to handle QA review of outbound email interactions.
- SMS Interaction: Enables you to access all of the information that is necessary to handle an SMS interaction with a contact.
- Skype for Business Plugin: Enables you to access all of the information that is necessary to handle interactions with a contact in an environment that uses Skype for Business.
- Facebook Interaction: Enables you to access all of the information that is necessary to handle a Facebook interaction with a contact.
- TwitterInteraction: Enables you to access all of the information that is necessary to handle a Twitter interaction with a contact.
- RSS Interaction: Enables you to access all of the information that is necessary to handle an RSS interaction with a contact.
- Workitems: Enables you to access non-interactive media types, such as faxes.
- Internal IM: Enables you to send an Instant Message (IM) to another agent (internal target) or receive an IM from an internal target.

Outbound campaigns

- Outbound Campaign Tasks: Overview of the Outbound campaign types.

- Outbound Preview Calls: Enables you to request an outbound campaign interaction and access contact-related data before you make the call to the contact.
- Outbound Push Preview Calls: Enables you to receive automatically an outbound campaign interaction and access contact-related data before you make the call to the contact.
- Outbound Progressive and Predictive Calls: Enables you to receive outbound interactions that are dialed automatically by the system.
- Call Actions for Outbound Calls: Enables you to perform common call functions such as transferring a call or scheduling a callback.

Plug-in Support

Workspace supports Genesys plug-ins for a variety of extended media channels, including social-media channels such as Facebook and Twitter. Refer to the documentation that comes with your Genesys eServices plug-ins for information about how to install and use these media channels.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Getting Started
- Handling Interactions
- Basic Use-Case Summary

Related topics

- Components, Features, and Controls
- Team Communicator
- Keyboard Navigation and Accessibility

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Login

[**Modified:** 8.5.108.11, 8.5.112.08, 8.5.114.08, 8.5.138.04]

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Important

When you log in to Workspace, the application is enabled for any headsets that are plugged into your workstation. If you want to use a different headset, exit Workspace, plug in the new headset, then relaunch Workspace.

Tip

If you experience issues logging in to your account or connecting to any of the media channels, contact your system administrator or IT personnel for support. They can help you determine whether the issue is with your account, your connection, or the Genesys envioronment.

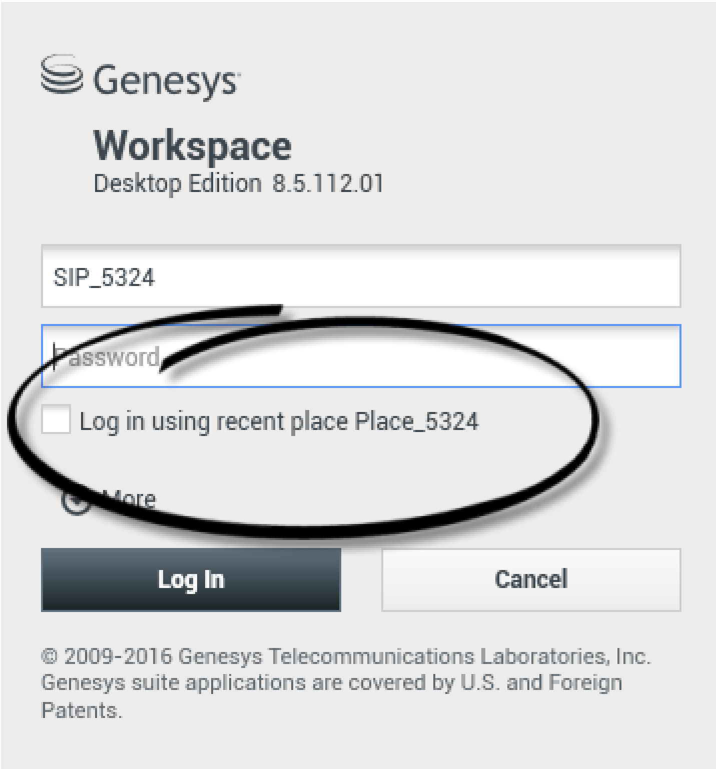
The Login view is the first view that is displayed when you launch Workspace. It enables you to identify yourself and, if required, enter additional login data, based on your role or the technical environment.

Before you start to use Workspace make sure that your phone set is working. For SIP enabled agents, plug in your USB headset.

Logging in is a two-step process—and the first time that you login you might also be required to change your password.

If you are an agent who does not always use the same phone set and workstation (sometimes referred to as roaming or hot-seating), you might have to enter extra information about your Place (phone number at your workstation) to make sure that when calls are directed to you, they ring on the phone where you are working instead of on the last phone that you logged in to.

Logging in to the Workspace application



After you have launched the Workspace application, the login view opens on your desktop to enable you to identify yourself to the system. If you do not know what information to enter in the login screen or if you have multiple accounts, each for a different purpose, contact your supervisor or administrator to determine what login information to use.

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 Changing Your Password).
3. Check **Log in using recent place** if you are using the same phone set and workstation that you used the last time you logged in.
4. If necessary, select your language from the Language drop-down list.
5. Click one of the following buttons:
   - **Log In** to authenticate yourself on the system.
   - **Cancel** to stop logging in and close the login view.

The login 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 view opens immediately after you click **Log In**.

If more information is required to authenticate you, the Advanced Login Parameters view is displayed.

Your account might be set up to specify your preferred language. To specify a different language preference, click **Language**, then select a language from the drop-down list.

More/Less Options

In the first login view, your account might be set up to specify additional options.

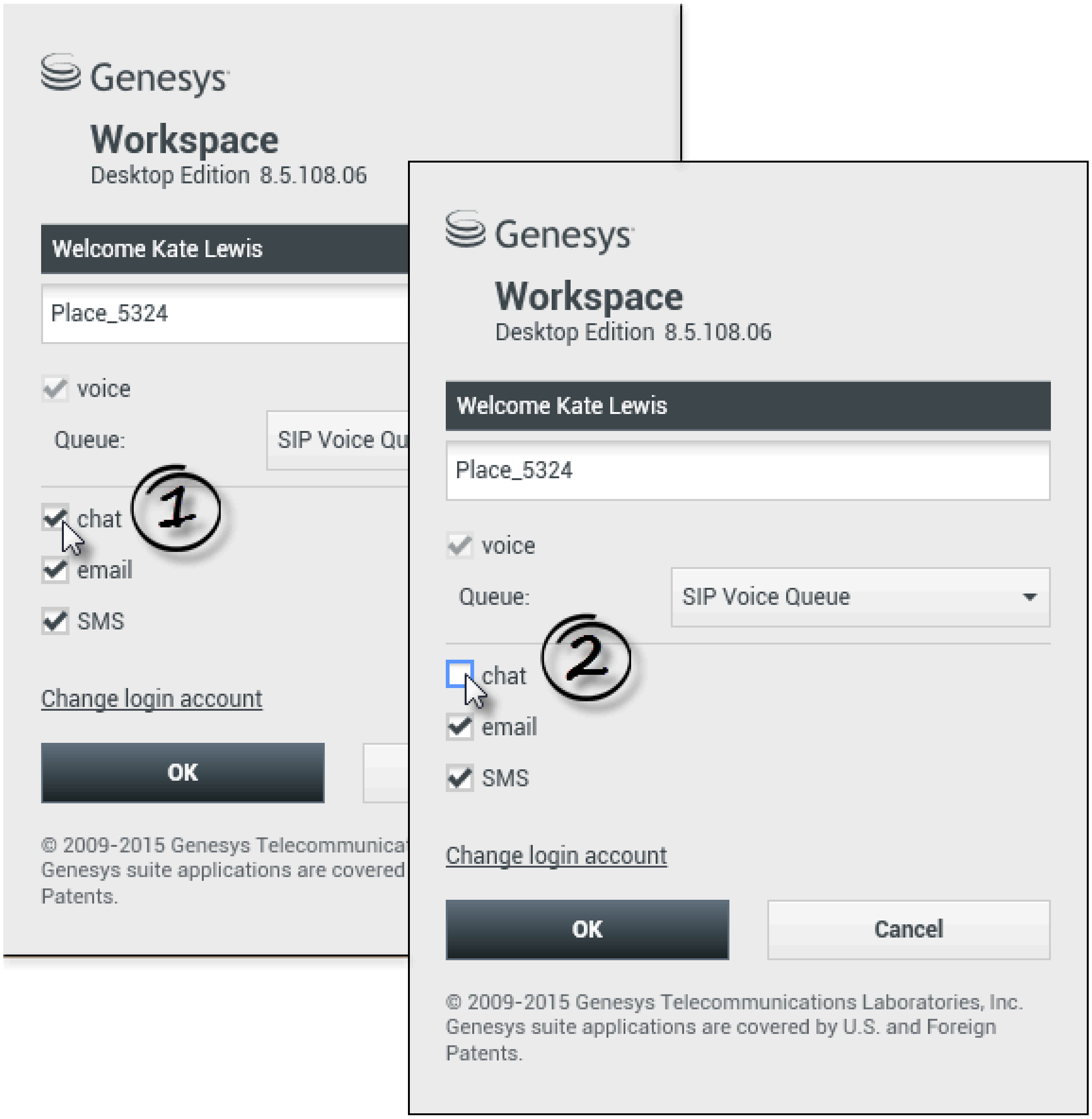
- To specify additional options, click **More**.
- To hide the additional options, click **Less**.

Options that your account might be configured to specify include the following:

- Name of the Workspace application.
- Name of the host that is running your configuration server.
- Port number of your configuration server. This port is normally 2020.

Contact your system administrator for more information about these options.

Defining Advanced Login Parameters



[**Modified:** 8.5.108.11, 8.5.138.04]

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 view opens immediately.

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

Additional information

If required, enter the following information:

1. Your Place
2. Your queue
3. Media channels that you want to use (Voice, IM, SMS, workitems such as faxes, and so on)
4. Optional phone number, if you are on a SIP Server system and login remotely.

Warning

If you previously logged in on a different workstation, or if you did not check **Log in using recent place** in the first login view, verify that you enter the correct place in the **Place** field. If the Place is incorrect, calls might be directed to a different phone set at a different workstation.

You might have the option to check and uncheck eServices media channels, such as chat, SMS, email, social media (for example, Facebook and Twitter), and workitems (such as fax).

Your administrator decides how your system behaves if you uncheck a media at login time.

Tip

Unchecking media channels that you will not use in your current session can save your company money and system bandwidth.

If you uncheck a media channel you will not be logged into that channel when Workspace starts. To use that channel later in your session, you must login to that channel manually from the My Channels view in the Main Window or the Global Status menu.

Completing the login process

After you have entered your additional parameters, do one of the following:

- Click **OK** to submit your information; the Main Window view opens.
- Click **Cancel** to close the System Parameters view and log out.
- Click **Change login account** to return to the first login view.

Using different phones

[**Added:** 8.5.138.04]

In some environments, agents have more than one Place to choose from when specifying their Place during log in. For example, they might log in from their workstation in the office one day and from their home phone or mobile the next. If this is the set up in your environment, your administrator or supervisor will give you different Place names to use depending on what phone you are using to login to Workspace. Enter the Place in the **Place** field of the second login window.

Remote phone number

If your company is using a SIP Server (VoIP), your account 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 should 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

Make sure that you plug in your USB headset so that you can use the SIP Voice channel. When you log in to a SIP Voice channel, Workspace checks to determine whether the USB headset that your account is configured to use is plugged in. If it is not, you will be logged in to Workspace but not into the SIP Voice channel.

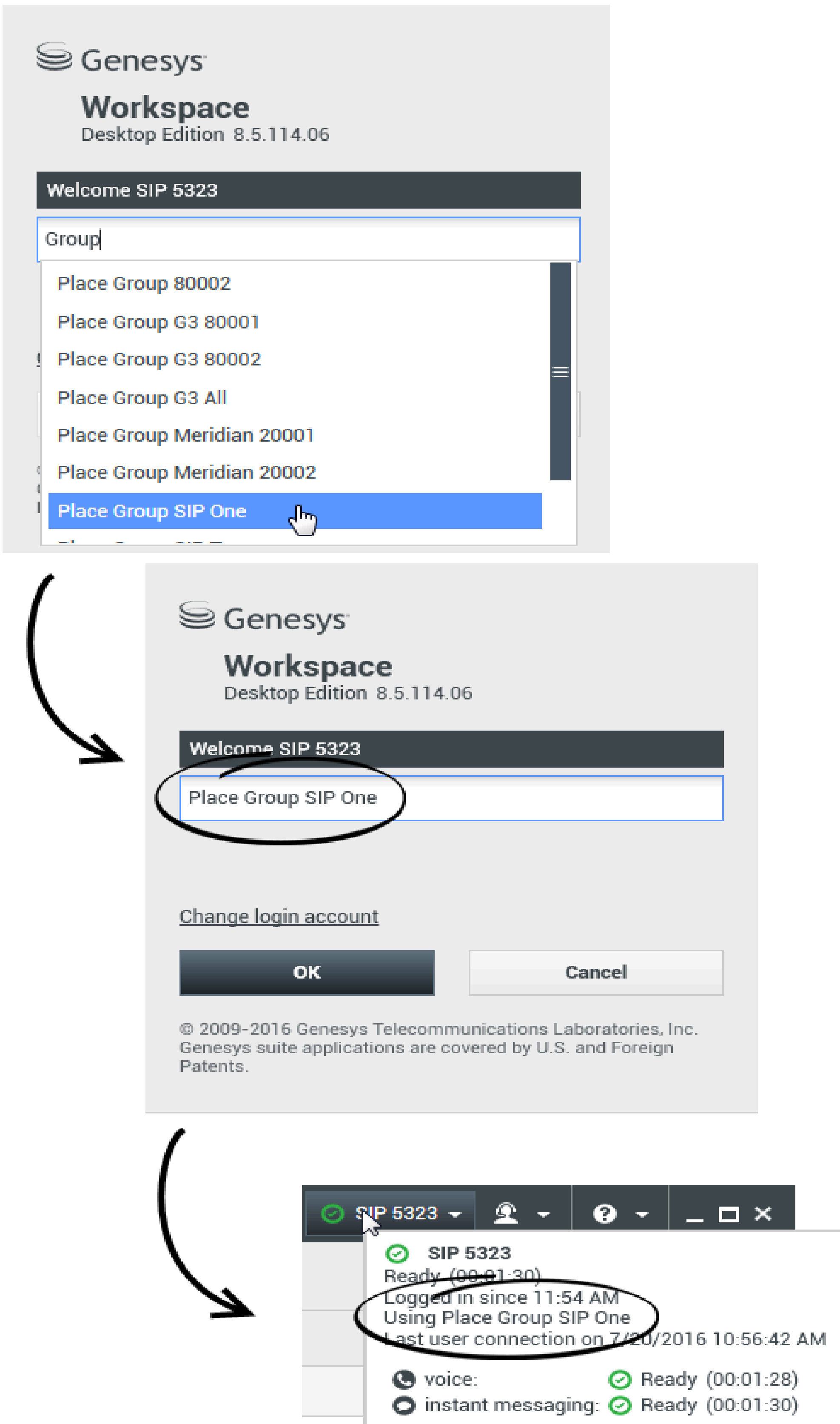
Workspace detects when your USB headset is plugged in or unplugged and will set your status accordingly. If your USB headset is not plugged in a warning message is displayed.

The volume settings for the USB headset that you used the last time 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 your account is 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.

Logging in to a Place Group


Genesys
Workspace
Desktop Edition 8.5.114.06
Welcome SIP 5323
Group
Place Group 80002
Place Group G3 80001
Place Group G3 80002
Place Group G3 All
Place Group Meridian 20001
Place Group Meridian 20002
Place Group SIP One
Genesys
Workspace
Desktop Edition 8.5.114.06
Welcome SIP 5323
Place Group SIP One
Change login account
OK
Cancel
© 2009-2016 Genesys Telecommunications Laboratories, Inc. Genesys suite applications are covered by U.S. and Foreign Patents.
SIP 5323
SIP 5323
Ready (00:01:30)
Logged in since 11:54 AM
Using Place Group SIP One
Last user connection on 7/20/2016 10:56:42 AM
voice: Ready (00:01:28)
instant messaging: Ready (00:01:30)

[**Added:** 8.5.114.08]

In some contact centers, agents and other workers share a pool of Places, called Place Groups, instead of each having their own Place.

If your contact center uses Place Groups, instead of entering your Place in the Login window, enter the name of your Place Group and a Place is selected for your automatically.

In the second (advanced) Login window, type the name of your Place Group.

If you can choose from more than one Place Group, type one or more words from the name of the Place Groups, such as "Group", into the **Place Group** search field to see a drop-down list off available Place Groups.

Select the name of the Place Group from the list then click **OK** to complete the login process.

When the Workspace Main Window is displayed, you can confirm which Place Group you are logged in on by hovering your mouse pointer over the **Status** menu.

You might have the option of entering *either* your Place or a Place Group name.

Changing Your Password

> **Tip**
> Consult with your system administrator about the specific password security policy that your company implements. If **Change Password** is not displayed, this feature is not enabled for you by your administrator. Ask your administrator or IT personnel about changing your password.

There are a number of reasons why you might have to or want to change your 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 Workspace for the first time. You might also want to change your 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, use the **Workspace Change Password** dialog box to change your password.

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 are asked to re-enter the information. If you entered all of the information correctly, your password is changed to the new specified password.

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 **Cancel** to close the dialog box without changing your password. If you made any errors, after you click **OK** you are asked to re-enter the information. If you entered all of the information correctly, your password is changed to the new specified password.

Remote and Virtual Desktop Environments

[**Added:** 8.5.109.16]

You might work in an environment that uses Virtual Desktop Infrastructure (VDI) to run Workspace. This means that when you start Workspace, the application 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 Workspace Standalone SIP Endpoint 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 Workspace Standalone SIP Endpoint automatically launches and the Workspace SIP Endpoint icon () is displayed in your system tray. Until you log in to Workspace, this icon is grey.

After you launch Workspace, the Workspace SIP Endpoint icon turns red () to indicate that it is active.

Troubleshooting Workspace SIP Endpoint

In the event that your Workspace environment loses connection to the Workspace SIP Endpoint, a message might be displayed asking you to start the Workspace SIP Endpoint application. You can start the Workspace SIP Endpoint by selecting the Workspace SIP Endpoint application in the **Start** menu of your workstation.

If you are instructed to do so, you can stop the Workspace SIP Endpoint by right-clicking on the icon in the system tray and then selecting **Exit** from the pop-up menu.

Login in a Single-Sign On Environment

If your system is configured to enable you to launch Workspace in a Single Sign-On environment, you do not have to login to Workspace. In a Single Sign-On environment, after you launch Workspace and the splash screen displays, the **Advanced Login Parameters** view or the Main Window is displayed. If the **Advanced Login Parameters** view is displayed, select one or more channels and provide any additional login information that is specific to those channels. You can now start using Workspace.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Log In
- Manage Your Status
- Main Window Basics

Related topics

- Launching Workspace
- My Channels tab
- Main Window

Top 10 pages

1. Workspace Desktop Edition Help
2. Main Window
3. My Status
4. Contact Directory
5. Workbins
6. Functionality Overview
7. My Messages
8. Login
9. Voice Consultation
10. Components, Features, and Controls

Main Window

[**Modified:** 8.5.104.15, 8.5.108.11, 8.5.109.16]

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The Main Window enables you to:

- Manage your status
- Manage your settings and preferences
- Launch new interactions by using the Team Communicator
- View your channels, history, statistics (KPIs) and contact center statistics in My Workspace
- Search for Interactions
- Manage contacts
- Access your workbins
- Manage your active interaction windows by using the Interaction Bar
- View your messages
- View and connect to your voicemail messages
- Accept or reject inbound interactions by using the Interaction Preview
- Start an Instant Message session
- Participate in an Outbound campaign

Main Window videos

The following videos introduce you to the Main Window and setting your status.

Main Window Overview

Link to video

Main Window Tips & Tricks

Link to video

Resizing the Main Window

Link to video

Manage Your Status

[**Modified:** 8.5.108.11]

Your status is includes whether you are ready to handle interactions, are on a break, or are working on after call tasks.

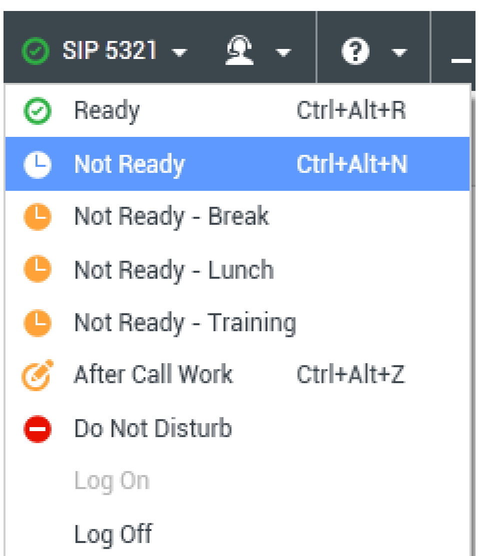
You can manage your status from two places in the Main Window:

- Global Status menu
- My Channels tab

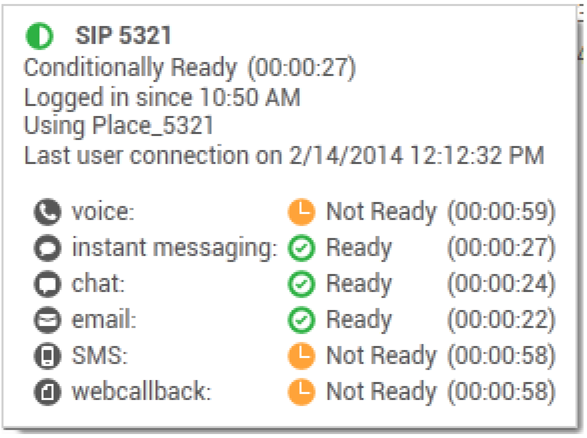
Global Status Menu

The title bar of the Main Window displays your global status icon and your logged in status. You can use the **Global Status** menu to log on and off of your channels.

Click the Global Status icon (see figure) on the Main Window title bar to open your **Global Status** menu.



Place the mouse pointer over the Global Status icon to view your status summary.



The status summary includes your login name, place, channels, and channel status.

If you are logged in to more than one channel, detailed status for each channel is displayed; otherwise, only your Ready state is displayed.

Your Ready status is also displayed in the My Channels tab of the Main Window. You can manage your status and forward interactions from the **My Channels** tab.

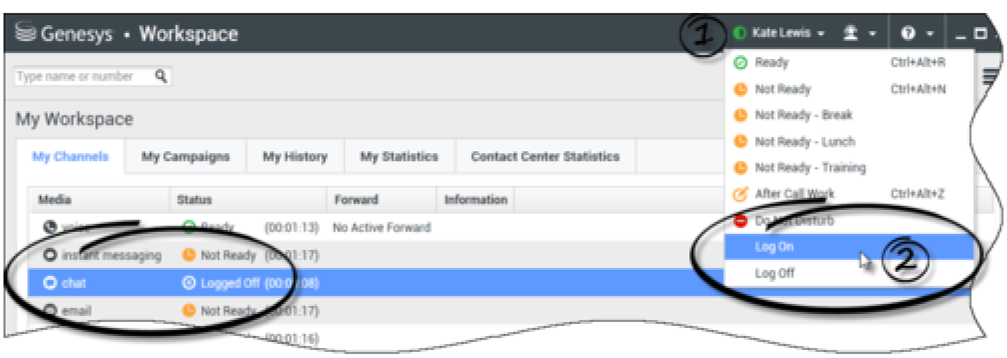
Not Ready Status

When you are handling an interaction, the system interrupts the display of the amount of time that you are in the current state.

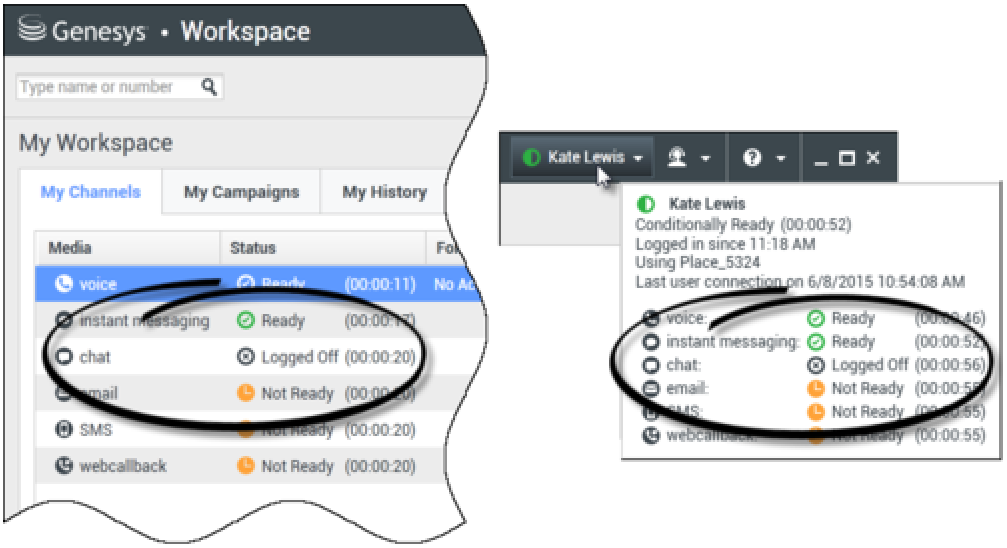
If, while you are handling an interaction for a given channel, you set your status to either **Not Ready**, **Not Ready** - *<reason>*, or **After Call Work** (ACW), the system does not display the amount of time that you are in that state until the interaction is complete. This feature enables your break or ACW time to be displayed according to recorded statistics.

Logoff/Logon Channels

[**Modified:** 8.5.108.11] You can use the **Global Status** menu to log on to all channels that are logged off, or to log off from all channels without logging out. You can use the My Channels tab to log on and log off individual channels (**Note:** This feature might not be available in your environment).



To see what channels are logged on or off, either open the **My Channels** tab or hover your mouse pointer over the **Global Status** icon.



Inactivity Timeout

Inactivity Timeout is a security feature that locks the Workspace windows on your workstation if you do not use your mouse or keyboard for a period of time that is defined by your administrator. You must authenticate to reactivate Workspace.

Locking your workstation

If you lock your workstation with or without first setting your status to **Not Ready**, your administrator might have set up your account to automatically change to **Not Ready**, with or without a reason.

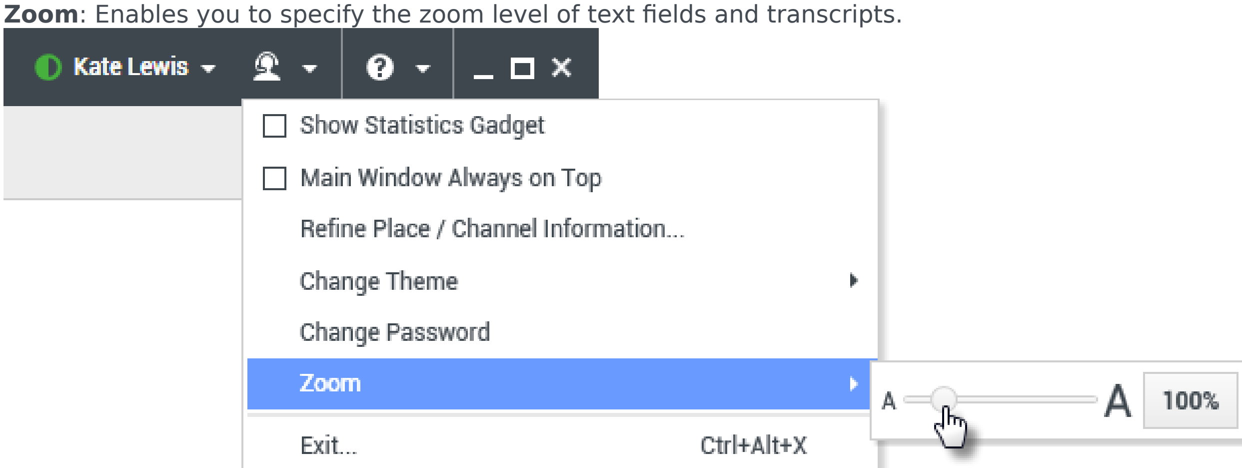
Manage Your Settings and Preferences

Click the Agent icon () to open the Main Menu. You control your settings and set your preferences from the Main Menu.

The **Main Menu** contains some or all of the following options, depending on how your account is configured by your system administrator:

- **Show Statistics Gadget**: Displays the Statistics Gadget view.
- **Main Window Always on Top**: Keeps the Main Window on top of any other window that opens on your desktop.
- **Auto-Hide the Main Window**: Hides the Main Window at the top of the display only when the Workspace Main Window is docked.

- **Refine Place** / **Channel information**: Displays the Advanced Login Parameters view to change your logged-in channel parameters.
- **Change Theme**: Selects a different predefined appearance from the **Theme** menu.
- **Zoom**: Enables you to specify the zoom level of text fields and transcripts.



The zoom feature applies to the following views:[**Added:** 8.5.109.16]

  - IM (text entry, transcript, and interaction data tooltip)
  - Chat (text entry, transcript, and interaction data tooltip)
  - Email (text entry and inbound email view)
  - SMS (text entry, transcript, and interaction data tooltip)
  - Interaction history (IM, Chat, Email, and SMS)
  - Standard responses
  - Social media (text entry only)

- **Check and Update**: Checks for updates to Workspace, and updates your software if an update is available.
- **Change Password**: Displays the Change Password dialog box.
- **Exit**: Logs off all channels and closes the application

Important

For visually impaired agents, your administrator can configure the system to make the Workspace High Contrast theme available to you in the **Change Theme** menu. This theme is designed to meet the requirements of the Web Content Accessibility Guidelines (WCAG) 2.0 requirements, with some limitations. This theme might already be available to you.

Click the Help icon () to launch this help document or click the Help drop-down menu to launch this help document or get information about Workspace.

Docking the Main Window

The Workspace Main Window can be used as either a floating toolbar or a docked toolbar. Your administrator must enable this feature.

There are three ways to dock the Workspace Main Window to the top of your display:

- Drag the Workspace Main Window to the top of your display and it will automatically become docked to the top of your desktop display area. If you want to move the Main Window to the top of your display without docking, hold the **Ctrl** key while dragging the window.
- Double-click the title bar.
- Click **Maximize**.

> **Important**
> If the docking feature has not been enabled for you, then double-clicking the title bar or clicking **Maximize** causes the Main Window to be maximized instead.

When the Main Window is docked, your effective desktop area is reduced by the height of the Main Window. Any open windows, including maximized windows, on your desktop are moved down to accommodate the Workspace Main Window. Pinned or floating mode interaction views do not affect the size of your desktop area.

When the Main Window is docked, the **Minimize** and **Maximize** buttons are disabled.

To undock the Main Window, click and drag it away from the top of your display. Your desktop area returns to full size and the Workspace Main Window returns to the size it was before you docked it.

> **Tip**
> The Workspace Main Window can be docked if other toolbars are already docked. The Workspace Main Window goes under the last docked toolbar.

Auto-hiding the Main Window

When the Workspace Main Window is docked you can choose to enable the auto-hide feature. Select **Auto-Hide the Main Window** from the **Main Menu** or from the Workspace menu in the System Tray.

In Auto-Hide Mode, the Workspace Main Window is hidden at the top of the display and the desktop area returns to full size when Workspace is not the active application.

To display the Workspace Main Window when it is hidden, do one of the following actions:

- Click the Workspace task button in the Task Bar.
- Move your mouse pointer to the top of your desktop display area; the Main Window is displayed; click it

to keep it displayed.

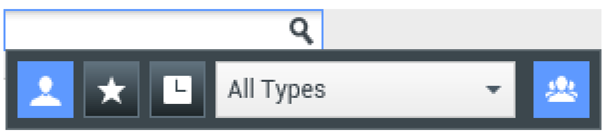
To disable the auto-hide feature, de-select **Auto-Hide the Main Window** from the **Main Menu** or from the Workspace menu in the System Tray.

Important

If another toolbar that is docked at the top of the screen and is already in auto-hide mode, you cannot enable the Workspace Main Window auto-hide mode. If you try to enable the auto-hide mode, the following message is displayed: "You cannot auto-hide the Main Window here. Another window is already in auto-hide mode on this edge of your display."

Team Communicator

The Main Window contains the Team Communicator Quick Search field. The **Quick Search** field is a universal lookup tool. It might be configured to provide Universal Contact Server lookup and Team lookup, or simply Team lookup. Use the Team Communicator to launch a new interaction.



Type a name or number in the search field to begin your search. When you click in the field, the Team Communicator toolbar is displayed. The toolbar enables you to search All, Favorites, and Recent contacts and internal targets; Workspace might be configured to store and display recent calls, including missed calls. It also enables you to filter by contact or internal-target type and to group or ungroup your search results.

Tip

You can also use the Contact Directory and the **Action** menu that is next to the name of a contact to call or email a contact.)

My Workspace

My Workspace is a tabbed view that enables you to view and manage your:

- Channel settings
- Campaigns
- History
- Statistics (KPIs)
- Contact center statistics

Click the **Access and use Workspace supporting views** button ( ) to display the **Supporting Views** menu, then select one of the following options to open the **My Workspace** view and activate one of these tabs:

- My Channels
- My Campaigns
- My History
- My Statistics
- Contact Center Statistics

The **My Workspace** view is displayed below the **Interaction Bar**. Click the tabs to view the different **My Workspace** views.

Interaction Search

[**Added:** 8.5.104.15] Workspace provides you with multiple ways to find interactions in your contact center interaction database.

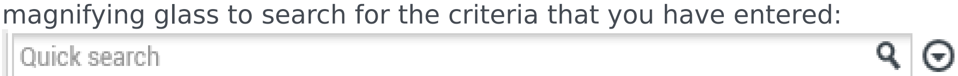
- If you know which contact you are searching for, use the Contact Directory to find the interactions exchanged with that contact
- If you were the agent who handled the interaction you can use the My History view to find the interactions that you have handled

However, sometimes you must find an interaction, but you no longer remember who the contact was, or whether it was handled by yourself or another agent. The Workspace Global Interaction Search feature enables you to use the **Interaction Search** view to look for interactions based on one or more criteria, including words in the body or transcript of the interaction.

To display the Interaction Search view, click the **Access and use Workspace supporting views** button ( ) to display the **Supporting Views** menu, then select **Interaction Search**. Use this feature to search for interactions. View details about the search results in the Details Panel.

Quick Search

To search the Interaction Database, type your search text for in the Quick Search field. Click the magnifying glass to search for the criteria that you have entered:



Click the **X** to clear the Quick Search field.

Quick Search combines a subset of search criteria selected by your administrator. It typically applies a "starts with" for each word of the criteria in any of the attributes selected by your administrator.

Search results are displayed in a grid. Click a result entry to display interaction details in the **Details** tab. You can also use the **Note** tab to view notes associated with the selected interaction and the **Case Data** tabs to view the interaction case information.

Advanced Search

Click the **Show/Hide Advanced Search** toggle button to show or hide () the advanced search feature.

The Advanced Search feature enables you to enter multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria that enable you to build a complex search based on multiple criteria such as Status, Subject, processing agent, date or date range, and interaction text.

Use the **Match Conditions** options to specify whether All or Any of the search conditions that you have specified are applied. Depending on the selected criteria the applied modifier affecting the search may change, for example, to "Matches" or "Equals".

Search results are displayed in a grid. Click a result entry to display interaction details in the **Details** tab. You can also use the **Note** tab to view notes associated with the selected interaction and the **Case Data** tabs to view the interaction case information.

Details Panel

The Details Panel includes the **Details**, **Note**, and **Case Data** tabs.

You can view interaction details in the **Details** tab for the *currently selected interaction* in the Details Panel by clicking the **Show Details Panel on Bottom/Hide Details Panel** toggle button:

The Details tab 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.

The **Note** tab enables you to view notes that are associated with the selected interaction.

The **Case Data** tab enables you to view the case information for the selected interaction.

Manage Your Contacts

Click the **Access and use Workspace supporting views** button () to display the **Supporting Views** menu, then select **Contact Directory** to open the Contact Directory. Use this feature to search for contacts. View details about the search results in the Details Panel.

Quick Search

To search the **Contact Directory**, type the name, phone number, or email address of a contact in the Quick Search field. Click the magnifying glass to search for the criteria that you have entered:

Click the **X** to clear the Quick Search field.

Quick Search is a *begins with* search.

Search results are displayed in a grid or list. Click the **Show Contacts in Grid View**/**Show Contacts in List View** toggle button to toggle back and forth between the two views of the Contact Directory:

Advanced Search

Click the **Show/Hide Advanced Search** toggle button to show or hide ( ) the advanced search feature.

The Advanced Search feature enables you to enter multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as names, email addresses, and phone numbers. It also contains drop-down lists with the following modifiers that determine how the criteria will affect the search: **Contains**, **Begins With**, and **Is**. Use the **Match Conditions** options to specify whether All or Any of the search conditions that you have specified are applied.

Search results are displayed in a grid or list. Click the **Show Contacts in Grid View**/**Show Contacts in List View** toggle button to toggle back and forth between the two views of the Contact Directory:

Details Panel

You can view contact information and contact history for the *currently selected contact* in the Details Panel by clicking the **Show Details Panel on Bottom**/**Hide Details Panel** toggle button:

Click the down-arrow to change the Details Panel Layout to display either below or to the right of the **Contact Directory**:

The Information tab displays basic information about the currently selected contact, including the following:

- General (Title, First Name, and Last Name)
- Phone Number(s)
- Email Address(es)

The contact **History** tab enables you to view and, if you are configured to do so, edit current and archived interactions that are associated with the currently selected contact.

Depending on what permissions are granted to you by your administrator, you might be enabled to edit one or more fields of the **Contact Information** view.

My Workbins

A workbin is like a personal queue, in which you can store email and other interactions that are to be handled later.

Click the **Access and use Workspace supporting views** button () to display the **Supporting Views** menu, then select one of the following workbin views:

- **My Workbins**: For all agents, a view of your personal workbins.
- **My Team Workbins**: For Team Leads (supervisors), a view of all of the workbins that belong to agents that you supervise.
- **My Interaction Queues**: For Team Leads (supervisors), a filtered view of your system queues.

To view another workbin, click 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 the configuration of your system. The default selected workbin is the first workbin in the list that is specified by your system administrator. Some of the workbins which might be configured for you include:

- **In-Progress**: Contains inbound email messages or other workitems that have not been processed.
- **Draft**: Contains outbound email messages that have been saved as draft.

To view details, notes, and case date about an interaction, 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, double-click it.

You can perform the following functions on selected interactions in workbins by using the **Workbin Actions buttons:**

- **Reply** ()
- **Reply All** ()
- **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** () — (if you have the correct permissions) Opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the selected interaction(s).

Click here for information about handling email interactions.

Manage Your Interactions

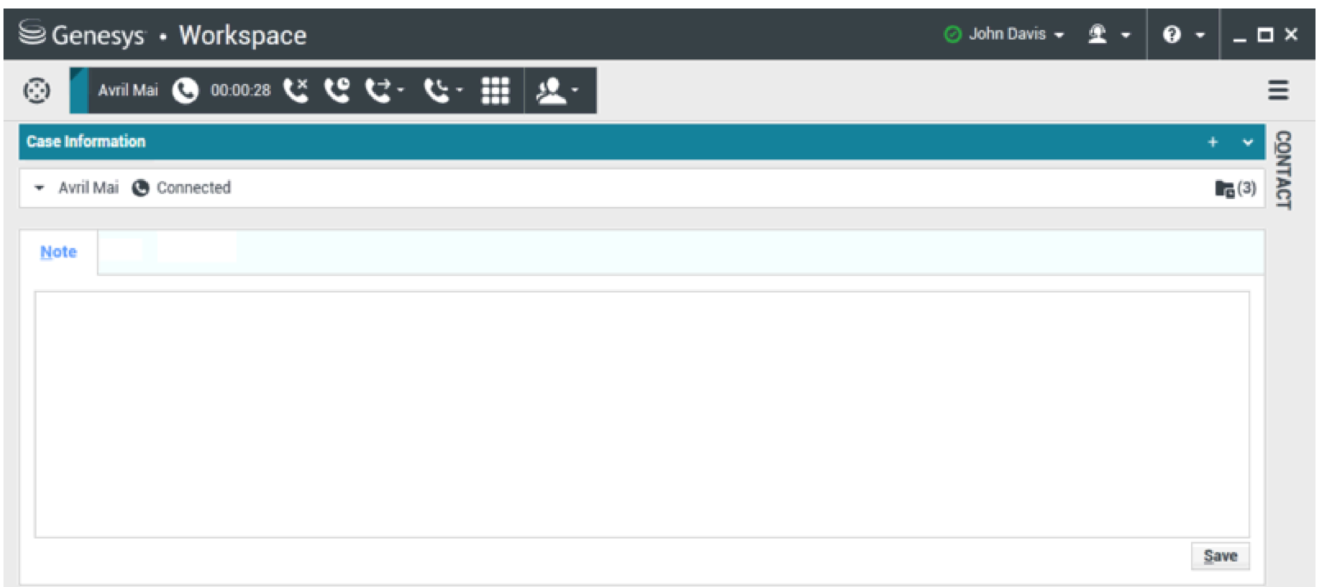
Interaction Bar

The **Interaction Bar** is displayed at the bottom of the Main Window whenever you have one or more active interactions. Each interaction is represented by a control bar and an Interaction Window. 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.

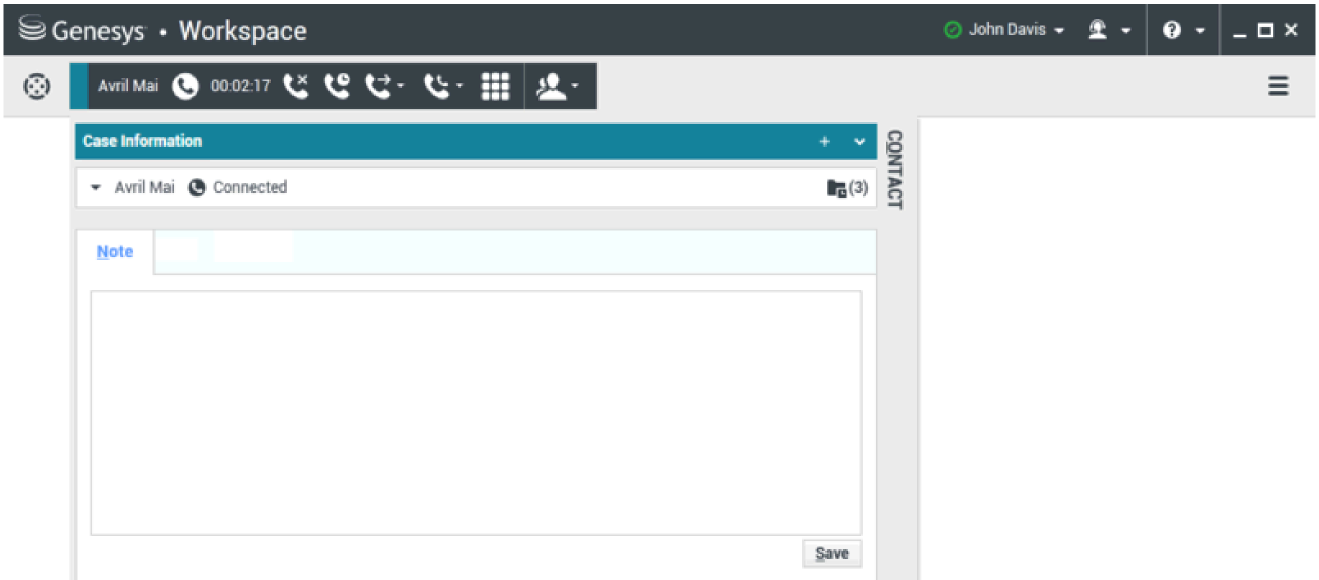
Click the small colored bar on the left of the interaction control, to toggle between pinned mode and floating mode. Each interaction can be set to pinned or floating mode independently.

In pinned mode, the interaction view is displayed in the Main Window below the Interaction Bar, and all other views, such as My Channels, are hidden. Contact view and Response view are accessible.



Link to video

In floating mode, the interaction view is displayed as a small view that is attached to the bottom of the Interaction Bar. If other interactions are currently open in pinned mode or if one the Workspace views, such as My Channels is currently displayed, they will appear dimmed behind the floating interaction view.



Link to video

When you have more than one active interaction, click the interaction to display it.

If you place your mouse pointer over an interaction in the Interaction Bar, two things occur:

- A Tooltip is displayed that summarizes the content of the interaction. It includes a summary of all the interactions that are involved in this thread, as well as any consultation interactions that are related to the interaction.
- The media icon in the interaction is a button that activates when you place your mouse pointer near it. If you click the media icon, Workspace switches to that interaction without opening the interaction view.

Entries in the Interaction Bar flash (or blink) when specific events occur that might require your immediate attention. Chat, SMS Session, and IM Interactions flash when a new message is received.

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

Tip

Your system might be configured so that all interaction control bars are automatically collapsed in the **Interaction Bar**. This might be done to enable you to see a third party application or other content in the Main Window before or during the handling of an interaction. To display an interaction view for a collapsed interaction, click the control bar. **Added:** 8.5.106.19

Interaction Window

You can use the Interaction Window to handle interactions, such as a voice call or a chat. Each interaction type has its own interaction window.

- Voice Interaction: Enables you to view all of the information that is necessary to handle a voice interaction with a contact or an internal agent.
- Web Callback Interaction: Enables you to view the information that is necessary to handle a web callback voice interaction with a contact.
- Chat Interaction: Enables you to view all of the information that is necessary to handle a chat interaction with a contact or an internal agent.
- Email Interaction: Enables you to view all of the information that is necessary to handle inbound and outbound email interactions with a contact or internal agent, and how to handle QA review of outbound email interactions.
- SMS Interaction: Enables you to view all of the information that is necessary to handle an SMS interaction with a contact.
- Workitems: Enables you to view non-interactive media types, such as faxes.

This video shows you how to manage the display of the interaction, the contact information and history, and the standard responses in the Interaction Window.

Link to video

View Your Messages

[**Modified:** 8.5.100.05]

The message display is a scrollable list of changes to the status of various network components, such as Contact Server, Statistics Server, Interaction Server (for chat, email, and workitems), and your Voice switch. You can also view messages that are broadcast to you.

Click the **Access and use Workspace supporting views** button () to display the **Supporting Views** menu, then select **My Messages** to open the My Messages view which displays a list of messages from your system administrator or supervisor.

Workspace might be configured by your administrator to display the number of unread broadcast messages by using a "message waiting indicator" (6) both on the **Access and use Workspace**

supporting views button (☰) and in the **Supporting Views** menu (see View and Connect to Your Voicemail Messages for more information.

View and Connect to Your Voicemail Messages

[**Added:** 8.5.100.05]

If your system is configured to enable you to use Workspace to retrieve your voicemail messages, a "messages waiting indicator" (6) is displayed on the **Access and use Workspace supporting views** button (☰).

Click (☰) to display the **Supporting Views** menu. Your voicemail boxes are displayed in the menu. If you have voicemail messages that you have not played, a "messages waiting indicator" (6) is displayed beside the name of the voicemail box.

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.

The message waiting indicator displays the total of all unplayed and unread messages in your voicemail boxes and the **My Messages** view.

> **Tip**
> If you hover your mouse pointer over the message waiting indicator, a tooltip is displayed that lists the number of messages in each of your voicemail boxes and the **My Messages** view.

For information about using your voicemail boxes, refer to Connecting to your Voicemail Messages in the *Workspace 8.5.1 User's Guide*.

Interaction Preview

If a new interaction arrives at your workstation, you are notified by the Interaction Preview interactive notification, unless you are configured for auto-answer. The preview includes attached data that enables you to decide whether to accept or reject the interaction.

Instant Message

Start an Instant Message session with an internal target

Outbound Campaign

Participate in an Outbound campaign

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- My Channels tab
- Team Communicator
- Contact Directory

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Statistics Gadget

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Statistics can be viewed either in the Main Window by selecting the **My Statistics** tab or the **Contact Center Statistics** tab in your Workspace, or by using the Statistics Gadget.

Important

The Statistics Gadget might not be enabled in your environment.

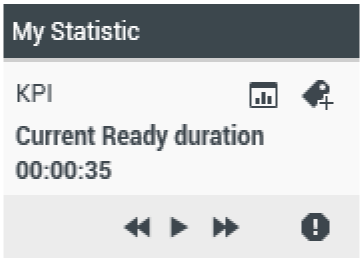
The Statistics Gadget displays statistics in two ways:

- A statistics ticker
- A tagged statistic view

The advantage of the Statistics Gadget is that you can view your KPIs and contact center statistics continuously without opening your Workspace and clicking back and forth between tabs.

To show or hide the Statistics Gadget, select **Show Statistics Gadget** from the **Main Menu** in the Main Window.

The Statistics Gadget displays configured statistics in a ticking region. Each statistic is displayed for a specified period, then the next statistic is displayed.



Use the **Back**, **Stop**/**Play**, and **Forward** buttons on the control panel to scroll manually through the statistics that you are configured to view. The buttons are displayed if you are configured to view more than one contact center statistic or KPI.

Alert icons are displayed in the bottom right corner if the statistics are in a warning state or an error state. The background color of the ticker also changes to indicate warning state.

Click the **Alert** icon on the control panel to display only the statistics that are in warning state or error state.

Click the **Tag** button () to display the current statistics in a static Tagged Statistics view.

Click the **Untag** button () to close the Tagged Statistics view.

You can view your KPIs either as text or as a graph. Click the **Graph View** button () to view the statistic as a graph. Click the **Text View** button () to view the statistic as a graph.

You can tag more than one statistic at a time. The Tagged Statistics view expands to accommodate multiple statistics in a single view.

Click the **Up** and **Down** buttons to scroll up or down to view other tagged statistics.

Statistics Gadget Menu

To display the **Statistics Gadget Menu**, place your mouse pointer over the Statistics Gadget. Click the **Menu** button () to open the menu.

- **Hide My Statistics/Show My Statistics**: Shows only the contact center statistics, or shows both My Statistics and the contact center statistics
- **Hide Contact Center Statistics/Show Contact Center Statistics**: Shows only My Statistics or shows both My Statistics and the contact center statistics
- **Always on Top**: Keeps the Statistics Gadget on top of all other windows
- **Show My Statistics on Main Menu**: Opens My Workspace on the Main Window and shows the My Statistics tab
- **Hide Contact Center Statistics on Main Menu**: Opens My Workspace on the Main Window and shows the contact center-statistics tab
- **Close Statistics Gadget**: Closes the Statistics Gadget (including the Tagged Statistics stack)

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- View KPIs And Statistics
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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Interaction Preview

[**Modified:** 8.5.116.10]

> ## Tip
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Interaction Preview displays an interactive notification that enables you to preview a new inbound interaction. The preview includes attached data that enables you to decide whether to accept or reject the interaction. The Case Data that is displayed in your Interaction Preview depends on the items configured by your system administrator.

When a new inbound interaction is routed to your workstation an interactive Interaction Preview appears in the bottom right corner of your display. Depending on how your system is configured, the preview might contain some or all of the following information about the interaction:

- Reason for the interaction
- Type
- Contact type/Segment (for example, Gold)
- Priority
- Contact name, number, or other information
- Origin or Queue
- Time in queue (duration)

Use Cases

There are three ways that your account might be configured:

- Display an interaction preview of an inbound interaction with manual answer
- Auto-answer an inbound interaction without an interaction preview
- Auto-answer an inbound interaction with an interaction preview

An interaction preview is displayed for each of the following interaction types (unless your account is configured to auto-answer an inbound interaction without preview):

- Voice/VoIP/Outbound ()
- Outbound Push-preview ()

- E-Mail ()
- Chat ()
- SMS ()
- Webcallback ()
- IM ()
- Workitem ()
- Facebook ()
- Twitter ()
- RSS ()

Voice/VoIP/Outbound

For a regular inbound call, if your account is not configured for auto-answer, your phone set rings; you can preview the call, before accepting or rejecting it, by reviewing the information provided by an Interaction Preview. If you reject the call, it is sent to another agent, routing point, or queue.

For an inbound call on a VoIP/SIP system, you receive notification of the call. You can choose to view a call summary before accepting or rejecting the call. If you accept the interaction, the call arrives on your phone set, with or without preview for ringing. If you reject the call it is sent to another agent, routing point, or queue.

There are four modes of Outbound campaign calls. Some modes will enable you to preview a call, while others are auto-dialed and connected. Refer to Outbound Campaigns Overview for more information about Outbound campaign calls.

E-Mail, Chat, SMS, IM, Workitems

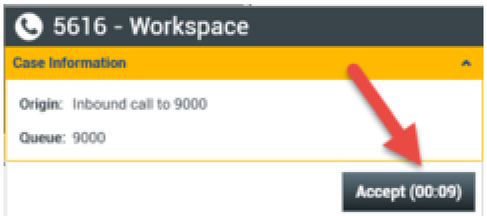
For a regular inbound interaction, if your account is not configured for auto-answer, an interaction preview is displayed on your desktop; you can preview the interaction by reviewing the preview information before you accept or reject the interaction. If you reject the interaction, it is sent to another agent, routing point, or queue.

Auto-Answer with Preview

[**Added:** 8.5.105.12] If your account is configured for auto-answer, an interaction preview might be displayed if your account is configured to enable you to preview the case information before the interaction is auto-answered. In this case, when you receive an auto-answer interaction, the Interaction Preview is displayed on your desktop. A timer that counts down the number of seconds until you are connected to the contact is displayed in the **Accept** button (refer to the following figure). You can click **Accept** before the timer runs out or wait for the timer to run out.

> Important

This feature does not apply to SIP Preview type of interactive notification.



The **Reject** button might also be displayed if your administrator wants you to have the option of rejecting an interaction before it is auto-answered.

SIP Preview

If your account is set up to use SIP Preview, an Interactive Notification is displayed on your desktop that lets you see the Case Data for the call without the call being delivered to your workstation until you click **Accept**. Therefore, if you reject a SIP Preview interactive notification or if the preview timeout expires, the call is never delivered to your workstation.

Accepting or Rejecting the Interaction

Depending on how your system is configured, you might have some or all of the following choices when an Interaction Preview is displayed on your desktop:

- **Accept**—Open the interaction in an interaction view.
- **Reject**—Return the interaction to another agent, routing point, or queue.

Tip

Your system might be configured to give the focus to the Interaction Preview window, interrupting your current activity.

Working on Multiple Interactions at the Same Time

[**Added:** 8.5.116.10]

You might be allowed to work on more than one interaction at the same time. Your administrator might set up your system so that new interactions interrupt the current interaction that you are working on, or your administrator might set up Workspace so that when you accept a new interaction while you are working on another interaction, the new interaction opens in the background and your current interaction keeps the focus.

This behavior might be set up differently for each of your media channels. For example, a newly accepted email interaction might appear in the background and newly accepted voice interactions might receive the focus.

Tip

- Newly created outbound/outgoing interactions always receive the focus.
- When interactions are accepted, but are displayed in the background, your reporting/focus time calculations might not begin until you select the interaction window and give it the focus.

Screen Reader Behavior

[**Added:** 8.5.101.14]

If you are using a screen reader, your system might be configured to give the focus to the Interaction Preview window. In this scenario, your screen reader will automatically read the window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. If your system is not configured to give focus to the Interaction Preview window, and you want the screen reader to read the Interaction Preview window, you must use screen navigation.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handling Interactions
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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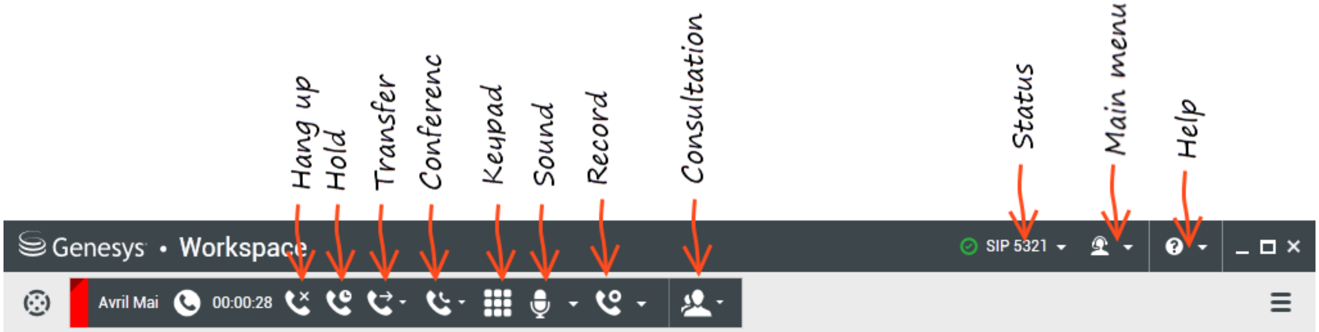
Voice Interaction

[**Modified:** 8.5.111.21, 8.5.117.18, 8.5.118.10]

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The Voice Interaction window enables you to view all of the information that is necessary to handle a voice interaction with a contact or an internal target.



The Voice Interaction Window enables you to handle a voice interaction with an internal target. You can communicate with other agents or internal targets by using the Team Communicator toolbar in the Main Window view, or from the Voice Interaction view while you are handling an active call with a Contact.

Click the links below to learn more about handling calls, setting up consultations, recording your calls, and more:

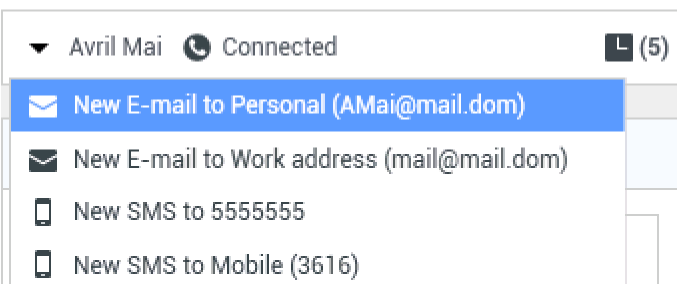
- Voice Interaction: Enables you to view the information that is necessary to handle a voice interaction with a contact or internal agent.
- Internal Voice Interaction: Enables you to start a voice interaction with an internal target.
- Voice Consult: Enables you to consult with another agent about the current voice interaction. Voice consultations that are started from an active interaction enable your internal target to view case data, contact information, and history. The target agent can choose not to accept your consultation request. You can also transfer or conference your call to an Active Consultation.
- Voice Recording:Enables you to record the current voice interaction with a contact or an internal target (for VoIP-/SIP-enabled agents only).
- Video Interaction: Enables you to send and receive a video stream as part of a voice call.

Overview: The Voice Interaction Window

Voice interactions can be started by using the Team Communicator, or by selecting **Call** from the **Contact Directory**. During an IM, chat, or email interaction, you can also use the **Action** menu next to the party name, and then select **Call**.

The Voice Interaction window enables you to handle many call-related tasks, including:

- Starting a consultation and transferring or conferencing the call to an internal target or with a contact. **Note:** If you want to initiate an internal voice interaction to speak to another agent *without* transferring or conferencing the external call, use the Team Communicator.
- Viewing and managing contact history.
- Viewing and managing contact information. Your account might be configured to let you assign an interaction with an unknown contact to a known contact in the contact database by using the Manual Contact Assignment feature [**Modified:** 8.5.117.18].
- Solving stuck calls.
- Recording calls (VoIP/SIP only).
- Adjusting microphone and speaker volume (for Workspace SIP Endpoint or Genesys Softphone).
- Reading a standard response.
- Blending the interaction with other media (such as email, voice, and SMS) by using the Party Action menu.



The contents that are displayed to you in this view depend on your role and on the case information that is available about the contact.

This view is composed of many atomic views that together provide all of the features that you need to handle a voice interaction. You can use this view to:

- View the status of the call.
- End the call, hold the call, and send DTMF.

VoIP-/SIP-enabled Agents

For VoIP-/SIP-enabled agents, additional call actions are available.

The VoIP/SIP call actions enable you to:

- Record the call.
- Mute the microphone.
- Unmute the microphone.
- Mute the speaker (for Workspace SIP Endpoint or Genesys Softphone).
- Unmute the speaker (for Workspace SIP Endpoint or Genesys Softphone).
- Adjust the microphone volume (for Workspace SIP Endpoint or Genesys Softphone).
- Adjust the speaker volume (for Workspace SIP Endpoint or Genesys Softphone).
- Accept a video stream as part of a voice call.
- Set a disposition code.
- Select Mark Done for the current interaction.
- Use the Note to attach a note to the call history.
- View Case Data (attached data) for the current call.
- View the history of the current call.
- View contact information and history.Your account might be configured to let you assign an interaction with an unknown contact to a known contact in the contact database by using the Manual Contact Assignment feature [**Modified:** 8.5.117.18].
- Hide or display the controls and information about the current interaction by clicking the collapse/ expand Interaction View button:
  - **Collapse**:
  - **Expand**:
- Start a voice consultation with an internal target or contact and transfer or conference the call.
- Start an Instant Messaging (IM) consultation that passes contextual information to the IM internal target. After you initiate an IM consultation session, you can transition the IM session to a voice consultation. **Note:** Your administrator might have added custom views to enhance your use of the Voice Interaction view.

The Call status area of the Voice Interaction view

The Call status area of the Voice Interaction view provides the contact's phone number or name, or the internal target's extension or name, and the status of the call. Possible call statuses might include the following:

- **Connected**: You are actively talking to the contact or internal target.
- **Ended**: The call has been ended by either you or the contact.
- **On Hold**: The call is in a state where the contact is unable to hear you, and you are not able to hear the contact when they are on hold.
- **Establishing**: You are trying to connect to an internal target or queue for a voice consultation.
- **Establishing on hold**: The call is put on hold before the internal target answers, so that the internal target will be on hold when the call is answered.

Call Actions

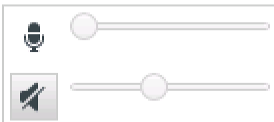
Call actions are standard controls for voice interactions. Workspace enables you to perform the following call actions:

- **End Call**: Click **End Call** () to disconnect the call.
- **Hold Call**: Click **Hold** () to place the active call on hold. If a call is on hold, you cannot hear the contact and the contact cannot hear you.
- **Resume Call**: Click **Resume Call** () to reconnect to a call that is on hold. You will be able to hear the contact, and the contact will be able to hear you.
- **Instant Call Transfer**: Click **Instant Call Transfer** () to redirect the current voice interaction to a contact, an internal target, or an Agent or Agent Group voicemail () ([**Added:** 8.5.118.10]) that you select by using the Team Communicator.
- **Instant Call Conference**: Click **Instant Call Conference** () to start a voice conference instantly with the current voice interaction and a contact or internal target that you select by using the Team Communicator.
- **Send DTMF**: You can attach numerical data to a call by entering dual-tone multi-frequency (DTMF) digits into the call case history. Click the keypad button () to open the DTMF keypad, then type numbers into the number field or click the keypad numbers to enter numbers.
- **Mute the Microphone**: (For VoIP-/SIP-enabled agents working with Workspace SIP Endpoint or Genesys Softphone) The party to whom you are connected cannot hear you when the microphone in your headset or on your workstation is muted. There are two ways to access the Mute the Microphone button. Either click **Mute microphone** () on the Volume Properties control, or click to open the Volume Properties control menu, and then click **Mute the microphone** next to the Microphone Volume control. When your microphone is muted, a small red circle with a slash is displayed next to the

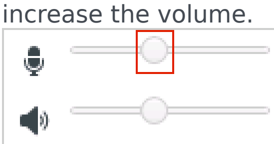
microphone icon.

{

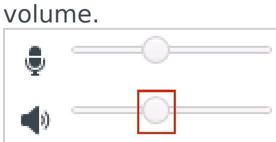
- **Mute the Speaker**: (For VoIP-/SIP-enabled agents working with Workspace SIP Endpoint or Genesys Softphone) To access the Mute the Speaker button, click to open the Volume Properties control menu, and click then **Mute the speaker** next to the Speaker Volume control. When your speaker is muted, a small red circle with a slash is displayed next to the speaker icon.



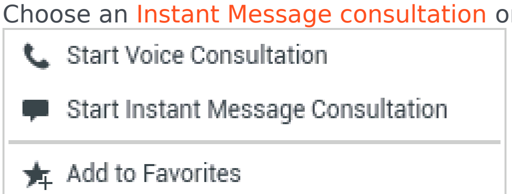
- **Adjust Microphone Volume**: (For VoIP-/SIP-enabled agents working with Workspace SIP Endpoint or Genesys Softphone) To access the Microphone volume control, click to open the Volume Properties control menu, and then move the Volume control slider left to decrease the volume and right to increase the volume.



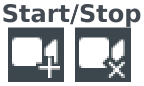
- **Adjust Speaker Volume**: (For VoIP-/SIP-enabled agents working with Workspace SIP Endpoint or Genesys Softphone) To access the Speaker Volume control, click to open the Volume Properties control menu, and then move the Volume control slider left to decrease the volume and right to increase the volume.



- **Start Consultation**: Start a consultation with an internal target or a contact (). The target can choose not to accept the request. The target can end the consultation. You can end the consultation or you can transfer or conference your current interaction to or with the consultation target.
Choose an Instant Message consultation or a Voice consultation.



- **Start/Stop Video**: Add/Remove a video stream to your current voice call.



- **Schedule Callback**: Click **Schedule Callback** () to open the **New Callback** dialog box. Refer to the Genesys Callback article. [**Added:** 8.5.111.21]

- **Mark Done**: Complete a call and close the Voice Interaction window by clicking **Mark Done** (). Your environment might be configured to require you to specify a disposition code before you can click **Mark Done**. Your environment might also be configured to automatically change your status from **After Call Work** to **Ready**, **Not Ready**, or some other value, when you click **Mark Done**, or you might have to manually set your status to **Ready**, or some other value, after you complete your after call work.

Call Timers

Link to video

[**Modified:** 8.5.111.21] The Interaction Bar contains call controls to enable you to complete call actions such as putting the call on hold and retrieving the call. It also contains a timer that tells you how long you have been handling the call.

When you place a call on hold, a new timer might be displayed that tells you how long the call has been on hold, and a progress bar might also be displayed. The progress bar changes from green to yellow to red as time goes by. If the progress bar changes to red, the call has 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. If you hover your mouse pointer over the hold timer, the call duration and hold time are displayed in a tool tip (if this feature is enabled for you).

After a call but before you click **Done**, a timer displays showing you how long it takes for you to complete your After Call Work. If you hover your mouse pointer over the After Call timer, the call duration and After Call Work time are displayed in a tool tip (if this feature is enabled for you).

Contact Information and History

Use the **Show/Hide Information view menu** button to show or hide contact information and contact history for the current contact.

The **Contact Information** view enables you to view and edit contact information. If the current contact is already in the Contact database, their information is displayed in this view. Use the fields to add or modify contact information. For more information about the **Information** view, refer to the Contact Directory article.

The **Contact History** view enables you to view information about past interactions with the current contact if the contact is already in the Contact database. Use the search tools to find specific interactions. For more information about the Contact History view, refer to the Contact History article.

If there are in progress or recent interactions for the current contact, the number of interactions is displayed in the connection status area of the interaction.

Force Closing a Case (Stuck Call)

If you are on a call and are unable to close the Interaction window because the call has become stuck in the system, right-click the tab in the Interaction window that represents the call, and select **Force Close This Case** from the shortcut menu. You will be prompted to confirm that you want to force-close the call.

Troubleshooting Remote and Virtual Desktop Environments

[**Added:** 8.5.109.16]

You might work in an environment that uses Virtual Desktop Infrastructure (VDI) 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.

If the you are unable to make or receive calls and the Workspace SIP Endpoint icon () is grey instead of red, you might have to restart the Workspace Standalone SIP Endpoint application.

For more information, refer to Remote and Virtual Desktop Environments in the *Login* article.

Communicating with Another Agent

The Voice Interaction Window enables you to handle a call to another agent or internal target. To open this window, in the Main Window, use the Team Communicator to find an internal-target agent and start a call.

In the **Internal Target Action** menu, select **Call <target name>**, where <target name> might be an agent, a skill, an agent group, or queue. If the internal target accepts your invitation, the status in the Voice Interaction Window changes to **Connected. You can now talk to the internal target.**

You have access to the same controls and functionality when you are talking to an internal target as when you are talking to a contact. You can do the following:

- Check the call status.
- Perform call actions, such as ending the call, putting the call on hold, sending DTMF, or transferring/conferencing the call. For VoIP-/SIP-enabled agents, the following additional call actions are available: record the call, mute and unmute the call, and adjust the microphone and speaker volumes. Refer to Voice Interactions for a list of additional actions and limitations.
- View the call history.
- Set a disposition code.

Your system might be set up to let you call the voicemail of another agent or an agent group. If this feature is available to you, the Voicemail icon () is displayed in the Team Communicator search results when you search for an agent or agent group. Select the voicemail target in the same way that you select a voice call, IM, or email interaction. [**Added:** 8.5.118.10]

Communicating with Another Agent While Handling an Active Interaction

Workspace enables you to handle more than one Voice interaction simultaneously. For example, you can put an active call on hold and launch a new voice interaction. This is done, typically, to consult with another agent or internal target to whom you do not intend to transfer or conference the active call.

While you are on an active call, use the Team Communicator toolbar in the Main Window to launch a new voice interaction.

You can also initiate an IM session with an internal target from the active call. IM sessions that are started from an active call enable the internal target to view case data and contact information and history. You can transition an internal IM session to a voice-consultation call.

If you start a new voice interaction, the original active call is put on hold, and you are connected to the internal target. To resume the original call, click the **Resume Call** button on the original voice interaction window.

While the original call is on hold, you can connect to the internal-target call. The standard call actions are available.

Voice Consultation

[**Modified:** 8.5.103.10, 8.5.109.16]

The Voice Consult functionality enables you to consult with an internal target or a contact about the current Voice interaction.

During the consultation, you can transfer to the target or start a conference with the target. The target can choose not to accept your consultation, transfer, or conference request, and can choose to end the consultation. Voice consultations that are started from an active interaction enable the internal target to view case data, contact information, and history.

The following video demonstrates how to start a call consultation.

Link to video

Starting a Voice Consultation

The Voice Interaction view enables you to start a consultation with an internal target or a contact about your current voice call.

Click the **Start a Consultation** button ().

Use the Team Communicator to find an internal target or a contact.

In the **Action** menu, click:

- **Start Voice Consultation**—Start a voice consultation with an internal target or a contact.

  After the consultation request is initiated, the contact or internal target is put on hold, and the consultation request call is presented to the consultation target. The **Call Status** indicators that are next to the name of the party show whether the contact or internal is on hold, and indicates when the consultation request changes from **Establishing** to **Connected**.

  The following video demonstrates consultation calls in detail.

  Link to video

  Or,

- **Start Voice Consultation (Transfer)**: Initiate a voice interaction to talk to the transfer target prior to transferring the call to the internal target or another contact.
- **Start Voice Consultation (Conference)**: Initiate a voice interaction to talk to the consultation target prior to conferencing the call to the internal target or another contact.

Notes:

- You can also choose to start an Instant Message Consultation from the **Action** menu. Click **Start Instant Message Consultation** to display the Instant Message view in the current interaction window. Send a message to send an invitation to the consultation target.
- Depending on how your system is configured, when you end the call with the consultation target you might automatically be reconnected with the contact who was on hold or you might have to manually reconnect the call by clicking `Resume` (). The manual reconnect feature enables you to make another consultation call without being reconnected and having to put the contact on hold again. [**Added:** 8.5.103.10]

Transferring a Voice Interaction

Link to video

To talk to the transfer target prior to transferring the call to the internal target or another contact, click the consultation button in the toolbar, and from the Team Communicator **Action** menu select the following option:

Start Voice Consultation (or, **Start Voice Consultation (Transfer)**, depending on the type of environment you have).

After the consultation request is initiated, the contact or internal target is put on hold, and the call is presented to the consultation target. Check the **Call Status** indicators next to the name of the party to determine whether the contact or internal target is on hold and to determine when the consultation request changes from **Establishing** to **Connected**.

After your target accepts the consultation, you are connected and you and the transfer target can speak to each other. The contact remains on hold.

The video demonstrates how to instantly transfer a consultation call.

Completing the Transfer

To complete the transfer, click the **Instant Transfer** button () from the main voice interaction, select the consultation target from the Team Communicator, and click **Instant Call Transfer**. The contact or internal target is connected to the transfer target, and the voice-call status changes to **Ended** in the Voice Interaction view.

You can perform any of the following functions by using the Voice Consult toolbar:

- Alternate (toggle) between the contact or internal target and the transfer target by clicking **Resume Call** (). The other party is put on hold until you toggle back or complete the transfer.
- End the call to the consultation target and resume the call with the Contact or internal target ().
- Send dual tone multi frequency (DTMF) to the transfer target by using the DTMF keypad ().
- For VoIP-/SIP-enabled agents, the following additional call actions are available: record the call, mute and unmute the call, and adjust the microphone and speaker volumes. Refer to Voice Interactions for a list of additional actions and limitations.

Once the transfer is completed, close the Voice Interaction window by clicking **Mark Done** (). You might be configured to specify a disposition code before you can click **Mark Done**.

Note: You choose to change the transfer to a conference by clicking the **Instant Conference** button (), selecting the consultation target from the Team Communicator, and clicking **Instant Voice Conference**.

Refer to Completing the Conference.

Starting a Voice Conference

Link to video

To talk to the conference target prior to conferencing the call to the internal target or another contact, click the **Consultation** button in the toolbar, and from the Team Communicator **Action** menu select the following option:

Start Voice Consultation (or **Start Voice Consultation (Conference)**, depending on the type of configuration that you have).

> After the consultation request is initiated, the contact or internal target is put on hold, and the call is presented to the consultation target. Look at the Call Status indicators next to the name of the party to determine whether the contact or internal is on hold and to determine when the consultation request changes from Establishing to Connected.

Completing the Conference

After your target accepts the consultation, to complete the Conference, click the **Instant Conference** button (), select the consultation target from the Team Communicator, and click **Instant Call Conference**. The contact or internal target is connected to the transfer target to conference the call to the target. The contact or internal target is connected to the conference target.

The following video demonstrates how to make an instant call conference while handling a call.

Link to video

You can perform any of the following functions by using the Voice Consult toolbar:

- Alternate (toggle) between the contact or internal target and the conference target by clicking **Resume Call** (). The other party is put on hold until you toggle back or complete the conference.
- End the call to the conference target and resume the call with the Contact or internal target ().
- Send dual tone multi frequency (DTMF) to the conference target by using the DTMF keypad ().
- For VoIP-/SIP-enabled agents, the following additional call actions are available: record the call, mute and unmute the call, and adjust the microphone and speaker volumes. Refer to Voice Interactions for a list of additional actions and limitations.

The following video demonstrates the Action menus that can be used during a conference call.

Link to video

Note: You can choose to change the conference to a transfer by clicking the **Instant Transfer** button (), selecting the consultation target from the Team Communicator, and clicking **Instant Voice Transfer**. Refer to thetransfer article for more information.

After the conference is established, you can perform the following actions:

- Suspend and reinstate listening.
- Remove a party from the conference.
- Use the Note to attach a note to the call history.
- Complete the call by clicking **End Call** ().
- Close the Voice Interaction window by clicking **Mark Done** (). You might be configured to specify a disposition code before you can click **Mark Done**.
- For VoIP-/SIP-enabled agents, the following additional call actions are available: record the call, mute and unmute the call, and adjust the microphone and speaker volumes. Refer to Voice Interactions for a list of additional actions and limitations.

Suspend and Reinstate Listening

[**Modified:** 8.5.109.16] You might be configured to suspend and reinstate listening by parties in a conference. Click the **Party Action** menu on the Voice Interaction view and select **Suspend From Conference** to suspend that party from the conference. The party cannot hear what the other parties say, nor talk in the conference until he or she is reinstated to the conference.

When a party is suspended from a conference, the word **Suspended** is displayed next to his or her name in the **Party Action** menu and the Call Conference button () changes to the Call Conference Suspended icon ().

To reinstate the suspended part to the conference, click the **Party Action** menu on the Voice Interaction view and select **Reinstate To Conference** to allow the party to hear what the other parties are saying and talk to both parties.

Removing a Party from the Conference

You might be configured to remove a party from a conference. Click the **Party Action** menu on the Voice Interaction view and select **Delete From Conference** to remove that party from the conference. You can still talk to the party who was not removed from the conference.

Voice Recording

The Voice 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 voice recording, emergency recording and controlled call recording. Your system administrator configures the type of voice recording that is supported in your environment.

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

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

In addition, your account might also be configured for automatic or system-guided recording. If this is the case, you receive a notification when a recording is in progress.

Call recording enables you to perform the following functions from the Voice Interaction window and the Main Window Interaction Bar:

- **Record the call'*: Click*** *Record the Call* () to record a call.
- **Stop recording the call**: Click **Stop Recording the Call** () to stop recording a call that you are currently recording.
- **Pause recording the call**: Click **Pause Recording the Call** () to pause recording a call that you are currently recording.
- **Resume recording the call: Click** 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 blue.

If you place your mouse pointer over the call icon, a Tooltip is displayed to indicate both that the call is being recorded and the current length of time of the recording.

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

Video Interaction

The **Video Interaction** window is a floating view that enables you to view an inbound video stream from a contact or other target. The video stream might come from a mobile device or a computer that is equipped with a webcam. If you have a video camera as part of your system, you can send a video stream to the contact.

The **Video Interaction** window enables you to view both video streams simultaneously, or only the inbound video stream.

- **Start Video**: Click **Start Video** to connect to the video stream during a voice call that also has a video component. This button is displayed in the **Interaction Bar** only if the call has a video component.

- **Stop Video**: Click **Stop Video** to close the **Video Interaction** window. This does not end the call, it only stops the video stream from being displayed and stops sending your video stream to the contact.

In the **Interaction Bar**, use the button **Start/Stop Video** enable to display or hide the video window.

The following buttons enable you to control the video stream:

- **Start Video stream**/**Stop Video Stream**: Click / to start or stop the video stream component of a video-enabled voice call. Use this feature to put the video "on hold". This has no effect on the voice call. The video stream sends a message to your contact that says "On Hold". If you put the voice call on hold, the video call is also put on hold.

- **Hold call**/**Resume call**: Click to put the call on hold and resume the call. The call status changes to **On Hold**, and then back to **Connected** when you resume the call. When you put the call on hold, the video stream is also put on hold. You and the contact can no longer see each other's video streams. A "Video on Hold" message is displayed to the contact.

- Click / to show or hide in the Video Interaction window the thumbnail view of your video stream.

- **Toggle Video**: Click to switch between the view of the Video Interaction window between the inbound video stream and the video stream from your webcam.

You can resize the Video Interaction window by clicking and dragging the edges of the window. Workspace remembers the size and position of the last Video Interaction window that you used.

When you end the voice call, the video stream also ends and the Video Interaction window is closed.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle A Voice Call
- Blend Different Media Into A Single Conversation
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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Callback Interactions

[**Modified:** 8.5.111.21]

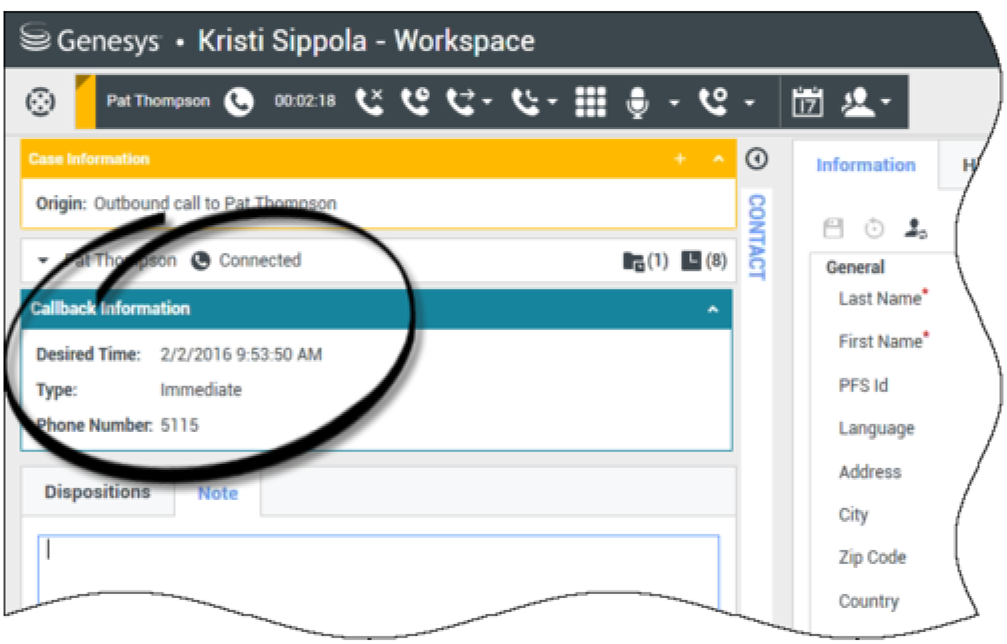
> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Workspace supports two types of Callback: Genesys Callback and Web Callback. Genesys Callback is provided as an integrated service through Genesys Mobile Services (GMS) component. Web Callback is provided as a separate channel through eServices and is being phased out.

Genesys Callback

[**Added:** 8.5.111.21]

Callback interactions are received on the voice channel. A callback is an interaction that has been requested by a contact either through your company website, a mobile phone, or your company's IVR. You are notified by an interaction notification that a callback is directed to you. You handle a callback like any other voice call.



Callback Types

Your system might support one or more of these callback types:

- **Immediate**, **Delayed**, or **Scheduled**: Your contact requests a callback and you get an interaction notification which you can accept or reject. The Callback Information view shows you data gathered from your company IVR as well as the callback type, the desired time, phone number, and other information such as instructions for you.
- **Delayed (Agent Preview)**: Your contact requests a callback, your company's system directs it to you at the requested time and you can view a preview before you accept or reject the call. The preview information is configured by your administrator. The Callback Information view shows you data gathered from your company IVR as well as the callback type, the desired time, phone number, and other information such as instructions for you.

If your status is Ready on the Voice channel, new callback requests can be routed to you. When a callback interaction is routed to you, a new Interaction Notification is displayed. Click **Accept** to answer the Callback interaction. Click **Reject** to return the Callback to another agent, routing point, or queue. If you do nothing, the interaction will be returned to another agent, routing point, or queue.

Call Actions

Call actions are standard controls for outbound interactions. Workspace enables you to perform the following call actions:

- **Party Action Menu**: In the call-status area, click the down arrow that is beside the name of the contact to start a different interaction type with the contact, such as an email interaction, if the contact has additional channel information available in the contact database.
- **End Call**: Click **End Call** ( ) to disconnect the call.
- **Hold Call**: Click **Hold** ( ) to place the active call on hold. If a call is on hold, you cannot hear the contact, and the contact cannot hear you.
- **Resume Call**: Click **Resume Call** ( ) to reconnect to a call that is on hold. You will be able to hear the contact, and the contact will be able to hear you.
- **Instant Call Transfer**: Click **Instant Call Transfer** ( ) to redirect the current outbound interaction to a contact or internal target that you select by using the Team Communicator.
- **Instant Call Conference**: Click **Instant Call Conference** ( ) to start a voice conference instantly with the current outbound interaction and a contact or internal target that you select by using the Team Communicator.
- **Send DTMF**: You can attach numerical data to a call by entering dual-tone multifrequency (DTMF) digits into the call case history. Click the keypad button ( ) to open the DTMF keypad. Type numbers into the number field, or click the keypad numbers to enter numbers.
- **Reschedule a Callback**: Click **Reschedule a Callback** ( ) to reschedule a callback (for example, if

the contact is too busy to respond now) for a different date and/or time.

- **Start Consultation**: Start a voice consultation with an internal target or a contact (). The target can choose not to accept the request. The target can end the consultation. You can end the consultation, or you can transfer or conference your current interaction to or with the consultation target.
- **Mark Done**: Complete a call and close the Voice Interaction window by clicking **Mark Done** (). You might be configured to specify a disposition code before you can click **Mark Done**.

Dispositions

Use the Dispositions view to assign a disposition code to an ongoing or terminated interaction, to qualify the outcome of the interaction.

Note

Use the Note to attach a note to the call history.

Web Callback

The Web Callback Interaction window is similar to the Voice Interaction window. It enables you to access all of the information that is necessary to handle a voice interaction with a contact who has requested a callback from your company web page.

Web Callback enables you to preview the web-callback interaction before you connect the call manually.

If your status is **Ready** on the Web Callback channel, new callback requests can be routed to you. When a web-callback interaction is routed to you, a new Interaction Notification is displayed. Click **Accept** to display the Web **Callback Interaction Preview**. Use the **Web Callback Interaction Preview** to make an outgoing voice call. Click **Reject** to direct the record to another agent, routing point, or queue. If you do nothing, the interaction will be directed to another agent, routing point, or queue.

Using the Web Callback Interaction Preview

The Web Callback Interaction Preview is a special version of the Voice Interaction view. More detailed information about voice interaction controls can be found here.

The **Web Callback Interaction Preview** enables you to view information about a web-callback interaction before you connect to the contact. The **Web Callback Interaction Preview** contains the following features and functionality:

- **Case Information**: Summary information about the interaction. The content of this area is specified by your administrator. It might contain information that the contact has entered into your company web page, the phone number of the contact, and so on.
- **Call Preview Actions** (toolbar): Actions that you can perform, including starting the call, marking the call as **Done**, and scheduling a different time for the callback.
- **Callback Information**: Specific information about the record. The content of this area is specified by your administrator. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the interaction.
- **Contact**: The Contact Directory view enables you to manage contact information.
- **Responses**: The Responses view enables you to access a database of prewritten standard responses for your interactions. You can read these responses to the contact during a phone interaction.

Call Preview Actions

Call-preview actions are standard controls for web-callback interactions. Workspace enables you to perform the following call-preview actions:

- **Call the Contact**: Click **Call** ( ) to connect to the contact and display the **Web Callback Interaction** view.
- **Done**: Click **Done** ( ) to mark the call as Done. You can do this instead of calling the contact or after you have called the contact.
- **Schedule a Callback**: Click **Schedule a Callback** ( ) to reschedule a callback to a different time than the time that was requested by the contact (for example, if the contact does not answer their phone, the contact's line is busy, the contact is not available to take the call, or you get the contact's answering machine).

Handling a Web Callback Interaction

If you click **Call** on the **Web Callback Preview**, the **Web Callback Preview** window is updated to display the **Call Status** and **Call Actions** of the **Web Callback Interaction** window.

Call Status

The call-status area of the **Web Callback Interaction** window provides the contact's phone number or name and the status of the call. Possible call statuses might include the following:

- **Connected**: You are actively talking to the contact or internal target.
- **On Hold**: The call is in a state in which the contact is unable to hear you and you are not able to hear the contact when the contact is on hold.
- **Ready to Call**: Your system is ready to connect the call to the contact. This is the default status if you or the other party end the call.

Call Actions

Call actions are standard controls for outbound interactions. Workspace enables you to perform the following call actions:

- **Party Action Menu**: In the call-status area, click the down arrow that is beside the name of the contact to start a different interaction type with the contact, such as an email interaction, if the contact has additional channel information available in the contact database.
- **End Call**: Click **End Call** () to disconnect the call.
- **Hold Call**: Click **Hold** () to place the active call on hold. If a call is on hold, you cannot hear the contact, and the contact cannot hear you.
- **Resume Call**: Click **Resume Call** () to reconnect to a call that is on hold. You will be able to hear the contact, and the contact will be able to hear you.
- **Instant Call Transfer**: Click **Instant Call Transfer** () to redirect the current outbound interaction to a contact or internal target that you select by using the Team Communicator.
- **Instant Call Conference**: Click **Instant Call Conference** () to start a voice conference instantly with the current outbound interaction and a contact or internal target that you select by using the Team Communicator.
- **Send DTMF**: You can attach numerical data to a call by entering dual-tone multifrequency (DTMF) digits into the call case history. Click the keypad button () to open the DTMF keypad. Type numbers into the number field, or click the keypad numbers to enter numbers.
- **Reschedule a Callback**: Click **Reschedule a Callback** () to reschedule a callback (for example, if the contact is too busy to respond now) for a different date and/or time.
- **Start Consultation**: Start a voice consultation with an internal target or a contact (). The target can choose not to accept the request. The target can end the consultation. You can end the consultation, or you can transfer or conference your current interaction to or with the consultation target.
- **Mark Done**: Complete a call and close the Voice Interaction window by clicking **Mark Done** (). You might be configured to specify a disposition code before you can click **Mark Done**.

Dispositions

Use the Dispositions view to assign a disposition code to an ongoing or terminated interaction, to qualify the outcome of the interaction.

Note

Use the Note to attach a note to the call history.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle a Voice Call
- Handle Callback Interactions
- Handle Web Callback Interactions

Related topics

- Voice Interactions
- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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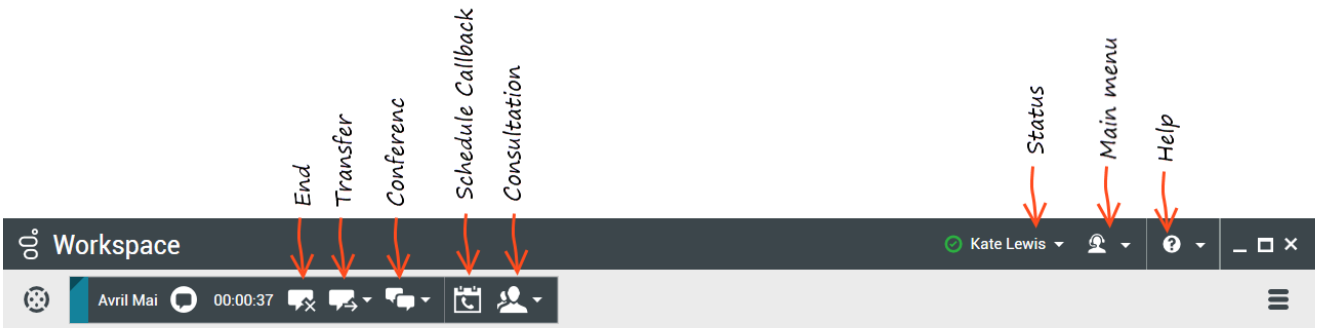
Chat Interaction

[**Modified:** 8.5.115.17, 8.5.113.11, 8.5.111.21, 8.5.117.18, 8.5.121.03, 8.5.122.08, 8.5.128.07, 8.5.142.05]

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Chat is real-time two-way communication between you and your contact through your computer.



Use the **Zoom** control in the **Main Menu** (refer to Manage your settings and preferences) to change the size of the text in this view. This feature might not be available in your environment. [**Added:** 8.5.109.16]

Chat tasks enable you to handle chat interactions with contacts and internal targets. Click the links below to learn more:

- Chat Interaction: Enables you to access all of the information that is necessary to handle a chat interaction with a contact.
- Chat Consultation: Enables you to consult with another agent about the current chat interaction. Chat consultations that are started from an active interaction enable your internal target to view case data, contact information, and history, as well as the live transcript of the communication with the external contact. The target agent can choose not to accept your consultation request. You can also transfer or conference your call from an Active Consultation to the consultation target.
- Altocloud Chat Interaction: Enables you to view the details of a contact's visit to your company website before and after they initiated a web chat interaction. This usually happens when your contact clicks a web chat widget, requests a quote, or requests more information.

Important

In the event that there is a problem in your contact center and connection to the servers that handle your interactions is lost, some functionality might be temporarily not available or you might lose the interaction with your contact. Workspace displays system messages that inform you about the status of each of your available media channels.

The Chat Interaction Window

[**Modified:** 8.5.108.11]

During a chat session, your contact enters text in a chat interface, usually on your company's website, and the text that he or she enters is displayed in the Workspace Chat interaction view. The text that your contact types appears both on your chat window and on your contact's chat window.

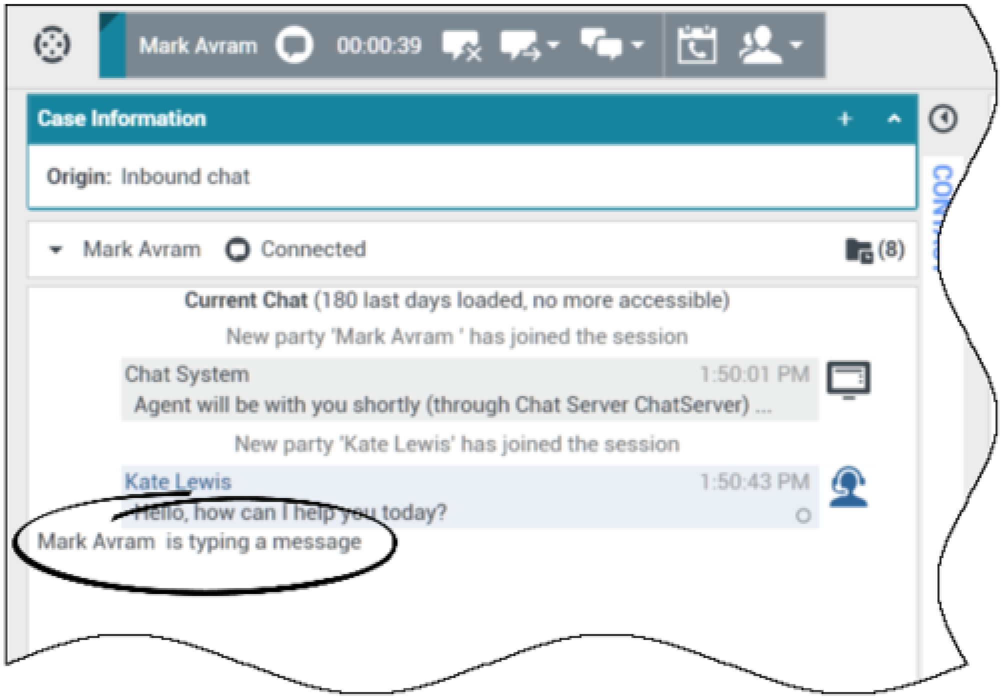
You can read the text that your contact sends to you, and you can respond to the contact by typing in the chat text area and clicking **Send** to send what you type to the chat interface that the contact is using. Next to your message in the transcript, a circle icon (the tooltip reads "The contact has not read this message yet."), might be displayed to indicate that the contact has not read this message yet. When the circle disappears, you know that your message has been read by the contact.

The Workspace Chat interaction interface maintains the transcript (a scrolling list of the written correspondence between you and your contact) of the chat — it might also include chat from other people in your company if you conference the chat or if the chat session is transferred to you.

Tip

The appearance of the chat transcript in your organization's environment might be different from what is shown in the screen shots in this Help document.

When your contact is typing in their chat interface, a small notice appears next to the contact's name in the chat transcript to notify you that they are typing. Your system might be configured to display what the contact is entering before they send it (refer to the following figure).



Be careful not to respond to what the contact is typing before they have sent it to you!

> ## Tip
> If you are set up to use Genesys Altocloud you can access the **Altocloud** tab. Refer to this topic to find out about Altocloud.

Why is the Chat Interaction bar flashing?

[**Added:** 8.5.113.11]

While your are handling a chat interaction, sometimes you change your focus to another interaction, such as a chat with a different contact, a phone call, or an email, or you might start using another application and its windows block the Workspace windows.

In these situations you might notice that the Chat Interaction bar in the Interaction Bar begins to flash yellow and that the Workspace icon in the task bar also flashes yellow.

This flashing notifies you that something has changed. Here are some of the reasons that the chat interaction might flash in the Interaction Bar:

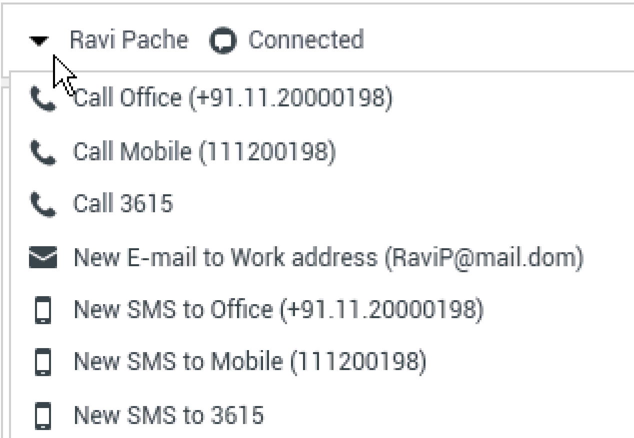
- The pending response has reached the warning stage.
- Another agent has joined or left the chat (such as your supervisor or someone involved in a consultation).
- The contact has left the chat.

- The chat session is about to timeout due to inactivity by you and your contact.
- The chat session has timed out due to inactivity by you and your contact.
- The chat session is about to close because the contact has disconnected. Your administrator might specify that chat interactions close automatically after a contact disconnects. They might also specify a timer before the chat closes to let you finish after call work. Once a chat closes, you cannot add a disposition or a note. [**Added:** 8.5.128.07]

Chat Interaction Window Actions

The Chat Interaction window enables you to handle many chat-related tasks, which include the following:

- Send a response to the contact.
- View the Chat response pending indicator () that enables you to determine when a response from you is pending.
- Push one or more URLs to your contact (open web pages automatically on the contact's desktop).
- Receive files and images from your contact. [**Added:** 8.5.115.17]
- Transfer files and images to your contact. [**Added:** 8.5.115.17]
- Instant-transfer the chat by clicking the **Chat Transfer** () button.
- Instant-conference the chat by clicking the **Chat Instant Conference** () button.
- Select **Done** for the current interaction.
- Set a disposition code.
- Use the Note to attach a note to the interaction history.
- View Case Data (attached data) for the current interaction.
- Start a consultation:
  - Voice (internal targets and contacts).
  - IM (an internal target only).
  - Chat (an internal target only).
- Call the sender, if there is a phone number in the contact database. You can also click a phone number in the Chat transcript to launch a call.
- Email the sender, if there is an email address in the contact database. You can also click an email address in the Chat transcript to launch an email message.
- Schedule a Callback by clicking the **Schedule Callback** () button to open the **New Callback** dialog box. Refer to Genesys Callback. [**Added:** 8.5.111.21]
- Blend the interaction with other media (such as email, voice, and SMS) by using the **Party Actions** menu.



- View and manage contact history.
- View and manage contact information. Your account might be configured to let you assign an interaction with an unknown contact to a known contact in the contact database by using the Manual Contact Assignment feature [**Modified:** 8.5.117.18].
- Hide or display the controls and information about the current interaction by clicking the collapse/expand **Interaction View** button:
  - **Collapse**:
  - **Expand**:
- Use a standard response.

Handling a Chat Interaction

When you accept a chat interaction, the **Chat Interaction** window is displayed.

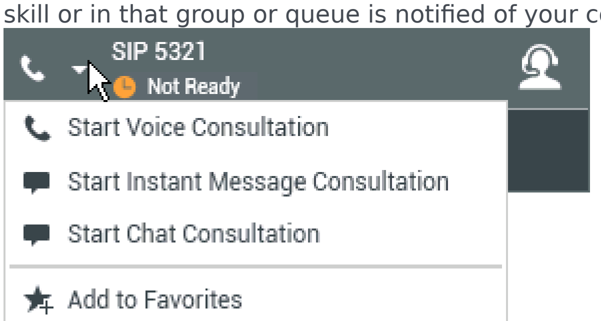
The name of the contact and the elapsed time of the interaction are displayed in the **Chat Interaction** bar.

Connection-status information is displayed next to the Party Action menu. Use the Party Action menu to call the contact if the contact's phone number is available from your contact database.

If there are in-progress or recent interactions for the current contact, the number of interactions is displayed beside the connection status of the interaction.

The **Chat Toolbar** enables you to perform the following actions:

- **End Chat**: Click **End Chat** () to stop the current chat interaction.
- **Instant Chat Transfer**: Click **Instant Chat Transfer** () to redirect (transfer) the current chat interaction to an internal target by using the Team Communicator.

- **Instant Chat Conference**: Click **Instant Chat Conference** () to share (conference) the current chat interaction with an internal target by using the Team Communicator. To conference with an agent group, a skill, or an interaction queue, enter the name of the skill, group, or queue, and an available agent with that skill or in that group or queue is notified of your conference request.
- **Consultation**: Click **Start Consultation** () to start an IM, voice, or chat consultation with an internal target or a contact by using the Team Communicator. To consult with an agent group, a skill, or an interaction queue, choose the name of the skill, group, or queue, and an available agent with that skill or in that group or queue is notified of your consultation request.


- **Mark Done**: Complete a chat session and close the Chat Interaction window by clicking **Mark Done** () for the current interaction. You might be configured to specify a disposition code before you can click **Mark Done**. The **Mark Done** button is displayed after the Chat interaction is ended.

Chat Transcript Area

The Chat Transcript area displays the contents of the chat messages that you exchange with your contact as well as system information, such as the names of participants as they join and leave the chat session, and the time of each event and message. System and message content is color-coded by participant, to enable you to distinguish the owner of each message visually. You can select and copy text from the chat transcript.

Your account might be configured to have a nickname (pseudonym) displayed as your participant name instead of your real name or your user name. A nickname might be a generic name for all agents in your group, or it might be a unique identifier for you. If you are configured to have a nickname, your nickname is displayed to the contact in the contact's chat transcript and in your chat transcript.

Tip

After a certain period of inactivity, your chat session might timeout and the interaction will be ended by the system. Messages about the timeout are displayed in the transcript area and might be saved as part of the chat in the interaction history. [**Added:** 8.5.115.17]

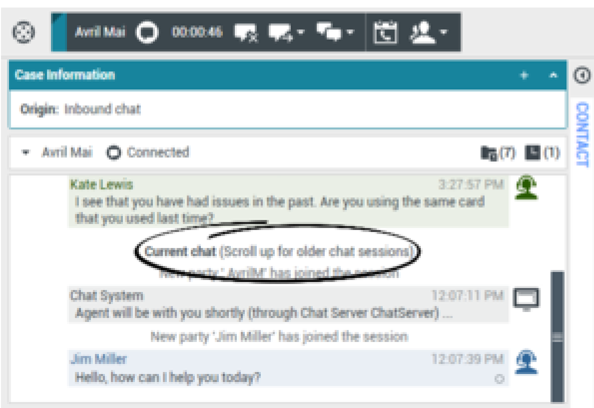
Chat History

[**Added:** 8.5.122.08]

Sometimes while you are chatting with a contact, you want to view earlier chat interactions with the contact, particularly if you are working on an ongoing issue with the contact. For example, sometimes a contact might disconnect from a chat interaction because the chat timed out or they lost connection on their device before the session was complete. When they reconnect, it is important to have the earlier session for reference so that you do not ask for information that they have already provided.

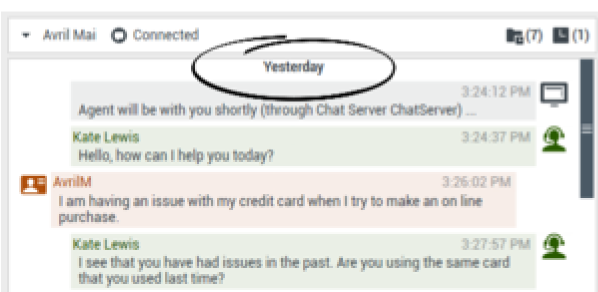
You can access the entire history of interactions with a contact by clicking the History tab in the Contact Information and History view of the interaction window.

Your account might be configured so that older chat interactions with the contact are displayed, in chronological order, directly above the current chat interaction. If your account is set up for this feature, in the transcript there will be text above the current chat session indicating where the current chat begins and a message informing you that to access older chat sessions you must scroll up. It might take a few seconds for older chat sessions to load and be displayed in the chat transcript.



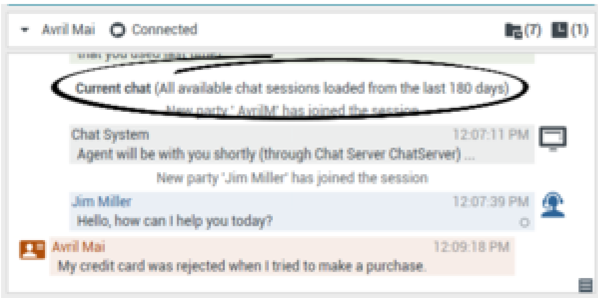
Current Chat notification.

When you scroll up, each older chat session is divided by a day, for example **Yesterday** or **November 29**, to make it easier for you to find a specific session.



Older Chat notification.

Once all the older chat sessions have loaded a notice is displayed informing you from how long ago older chat sessions are available.



Older Chat notification after all old chats have loaded.

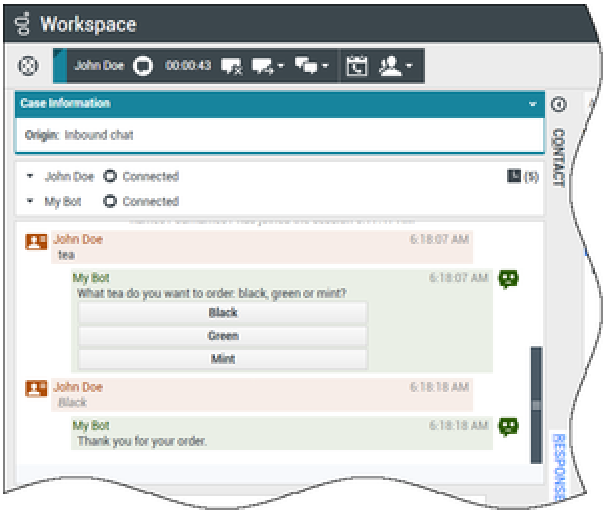
Chat Bot Rich Media messages

[**Added: 8.5.142.05]** In some Genesys Environments chat bots might be used to automatically interact with your organization's contacts. Chat bots are programs that send information to contacts through a chat widget when a contact visits your organization's website. Chat bots often handle the initial exchange with a contact to determine whether or not the chat should be redirected to a live agent as a new Chat interaction. Chat bots might also participate in an active chat session. Chat bots can use Rich Media such as Quick Replies and Offer templates. Offer templates can include images or video organized as a list, a selection list, or a carousel. Offer templates might leverage Mark Down capabilities to enhance the appearance of the chat bot message.

To help you know what the contact typed or which selections from Rich Media they might have made while interacting with the chat bot, the transcript of the interaction between the contact and the chat bot is included in that transcript when you accept a Chat interaction that was initiated through a chat bot. You cannot interact with the Rich Media or make selections yourself. This section gives you an idea of what to expect from a chat bot transcript. Use the transcript to know what the contact is looking for so that you do not have to repeat the questions that were asked by the chat bot.

Quick Replies

Chat bots might present your contact with a set of "quick reply" buttons that let the contact choose a reply rather than typing a reply. The chat transcript will contain the standard question posed by the chat bot and the text of the quick reply button clicked by the contact. Click the image to review an example of a quick reply.



n example of a quick reply.

The bot presented the contact with three options for ordering tea, **Black**, **Green**, and **Mint**. The contact selected **Black**.

Contact actions

Chat bots can display descriptive text, pictures, videos, selection lists, and selection buttons, such as **Buy now**, to contacts. If your company uses offer/information templates to enable contact actions, such as clicking a button or selecting an item from a list, the chat transcript will contain the content that was presented to the contact along with text telling you what the contact did. For example, if the contact clicked the **Buy now** button, the transcript might say **The contact clicked Buy now**.

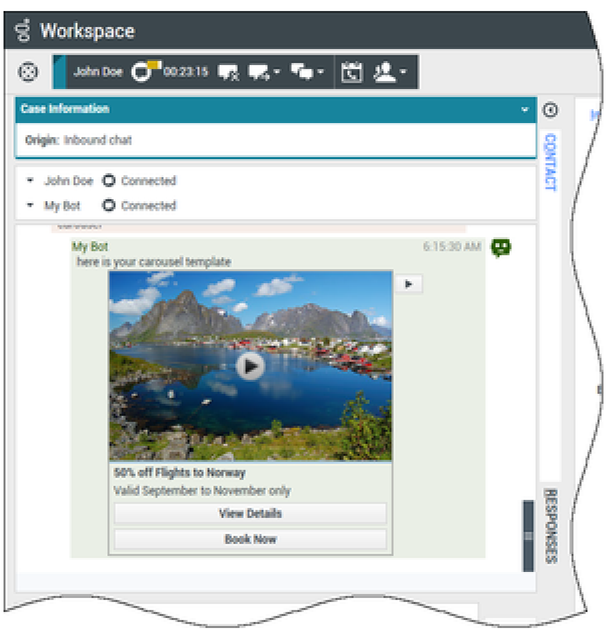
When a contact clicks on a button, list item, or other element, a corresponding action is executed. For example, additional information is displayed or an order placement is initiated. Often actions might send text back to the contact. All this information and the actions taken are displayed to you.

Click the image to review an example of an offer/information template and how a contact action is displayed.

Example of an offer template.

The bot presented three different travel options with radio buttons to choose one. The contact chose **Thailand**.

If a carousel offer template was displayed to the contact, the forward and backward navigation buttons display next to the templates that enable you to page back and forth through the displayed templates. This is called a carousel template because clicking the navigation buttons simulates flipping through a carousel of images or videos. Click the image to review an example of a carousel template.

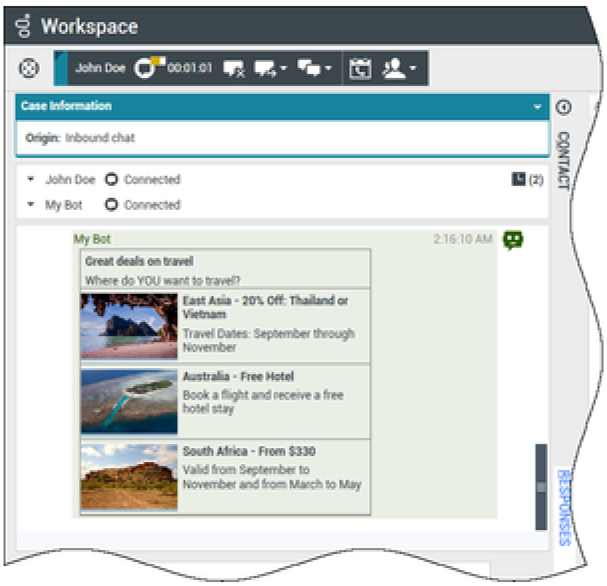


Example of a media carousel template.

In this example, the contact navigates through the carousel until they find an offer of interest. In the example image, the buttons below the video of Norway enables the contact to either get more details about the offer or book the offer immediately.

Lists

Chat bots might present your contact with a list of items, such as sales offers, that the contact can review. Some lists are for information only, others might have selections set up by your administrator. The transcript will include the list that was displayed to the contact, including any images or other media, and any selections they might have made. Click the image to review an example of a list of items presented to a contact.



Example of rich media list template.

Markdown Templates

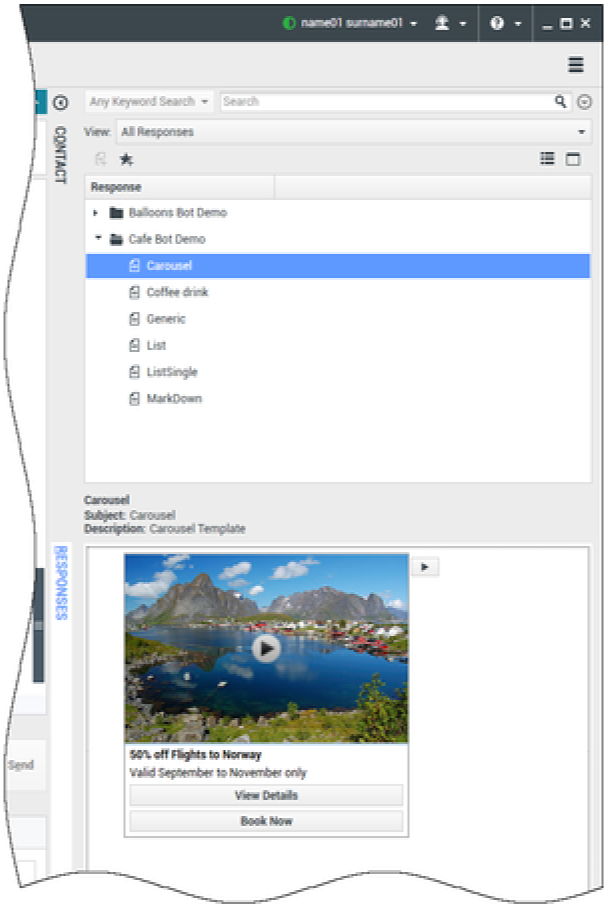
Rich Media uses text markdown to enable your organization to format bot content. Click the image to review some of the different ways that text can be formatted for presentation to contacts.

Example of a mark down template.

This example presents a display image, headings, bold text, bulleted and numbered lists, hyperlinks, and an embedded image.

Rich Media in the Responses tab

All the different rich media types can also be viewed in the **Responses** tab if your administrator sets them up. You cannot transfer Rich Media from the **Responses** tab into the chat text field. They are view-only. Click the image to review an example of a carousel template in the **Responses** tab.



Example of rich media in the Responses tab.

URLs and Security

[**Added:** 8.5.121.03] Sometimes URLs (links to websites) are sent to you by a contact. URLs in the Chat transcript are always displayed as the actual address. Contacts cannot send you a disguised URL in an attempt to direct you to a malicious website. You will be able to read the URL before clicking on it. If you hover your mouse pointer over the URL, a tooltip is displayed that lets you access the address.

Receive Files from Contacts

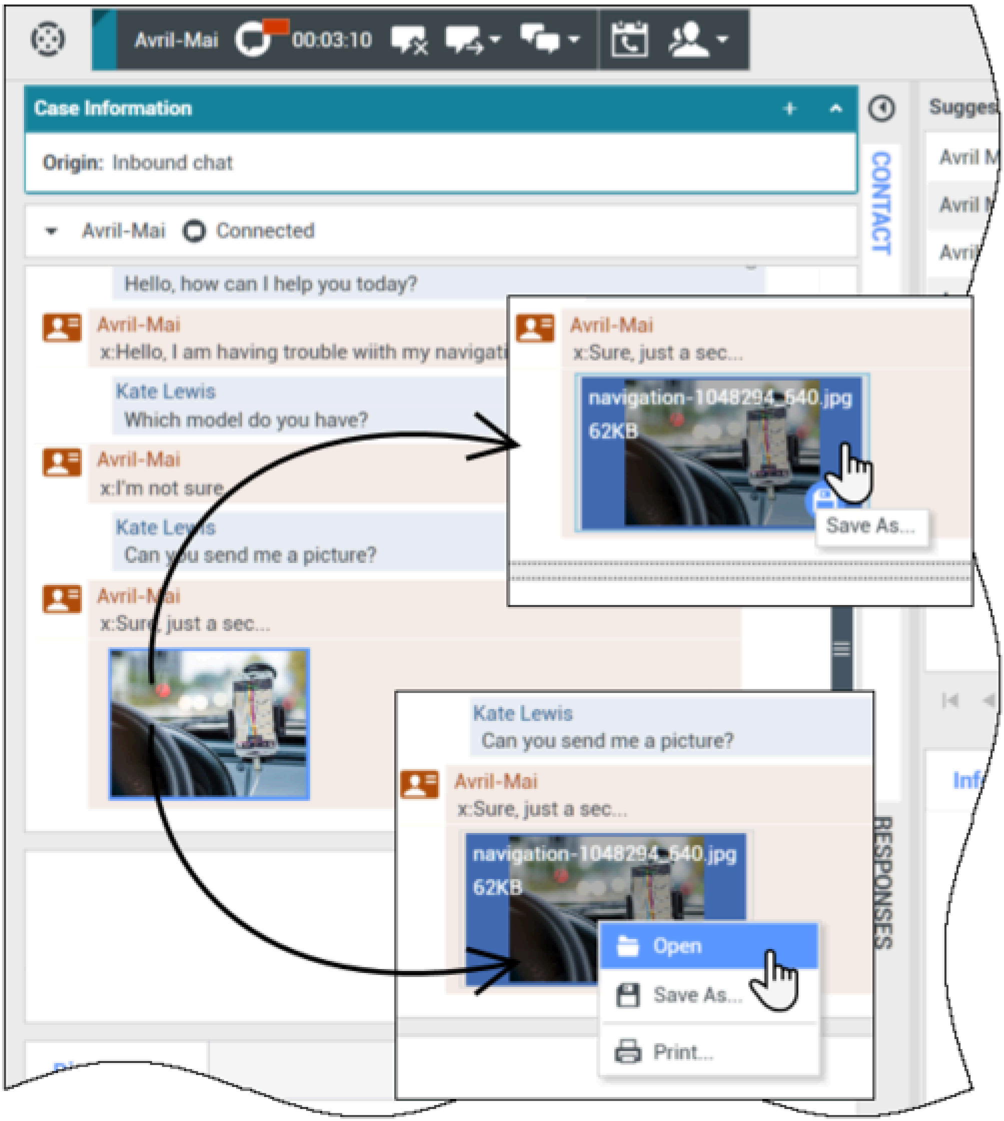
[**Added:** 8.5.115.17]

Your account might be set up to let you receive files, including PDFs, .doc, images, and other types, from your contact as an attachment to the chat interaction.

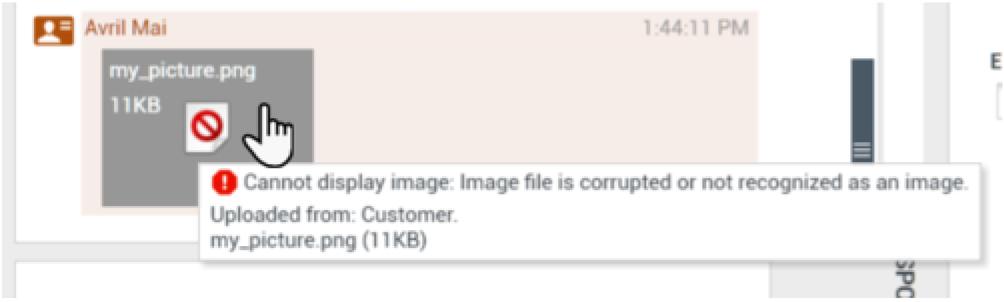
The received file is displayed as a thumbnail or as an icon that corresponds to the file type in the chat transcript.

Double-click a file icon to open the file. If you click the **Save** button you might be able to save the file to your workstation or network.

In some environments, you can right-click the thumbnail/icon to display a menu to enable you to open, save, or print the file. If more than one file has been received, you have the opportunity to save the one that you clicked, or save all (including the files that you transferred). If the file is displayed as an icon instead of a thumbnail, you can select the icon, then press **Space** to download the file.



If there is a problem with the transferred file, the following **Cannot display image** icon and tooltip are displayed. You might have to ask the sender to verify that they sent the correct file and then ask him or her to resend it.



Chat Message Area

The Chat Message entry area enables you to enter, preview, and spell-check your message before you send it to your contact.

Chat message composition area.

The Chat Message entry area enables you to perform the following actions:

- Type text.
- Paste, copy, and select text by using the context menu.
- Insert and push a URL.
- View the standard response library, and insert a response in the email interaction, or automatically insert a response by typing a pre-defined shortcut keyword.
- Verify the spelling of the content of your message.
  If you try to send a message that contains a misspelled word, your system might be configured to display a warning dialog box that asks you to confirm that you want to send the message without correcting the potential misspelled words. Click **Yes** to send the message anyway, or click **No** to return to the message and correct the misspelled words. [**Added:** 8.5.105.12]

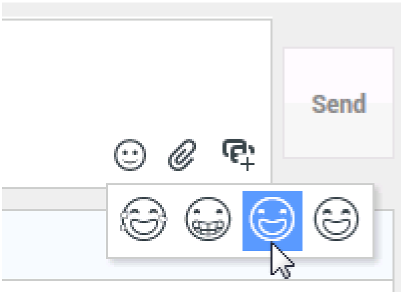
Send Emojis to Contacts

[**Added:** 8.5.115.17]

Your account might be set up to let you send emojis (*emoticons* or *smileys*) to your contact as part of the chat interaction text. Emojis are little faces and other symbols that you can use to let your contact know how you are feeling or to help them to know when something is good, funny, bad, or sad. Ask your supervisor or administrator about when to use emojis.

To add an emoji to your chat interaction:

1. Click the **Choose an emoji** button (☺) that appears next to the **Send** button to display the menu of emojis that you can send.



Example of how to choose an emoji.

2. Click an emoji.
3. Click **Send**.

Transfer Files to Contacts

[**Added:** 8.5.115.17]

Your account might be set up to let you send files, including PDFs, .doc, images, and other types, to your contact as an attachment to the chat interaction.

There are two possible modes that might be enabled for this feature:

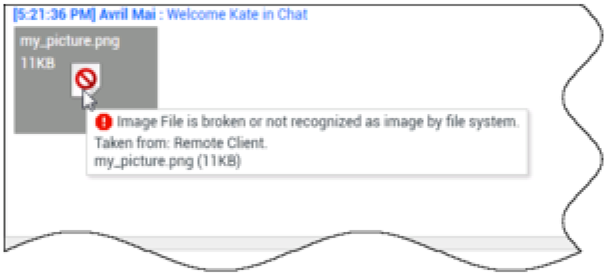
1. Attach a file from your workstation or network. Click **Add Attachments** to open the **Open File** window. Click **Send** to transfer the file. You can also drag a file to the message composition area.
2. Attach a file from the Responses tab. Double-click a response that contains an attachment or click **Insert Standard Response Text** to add the file as an attachment. Click **Send** to transfer the file.

Before or after you transfer the file, your account might be enabled for file actions. One or more of the following actions might be available to you:

- Save
- Save all (including files that have been transferred to you)
- Delete (remove from the list of files to be sent)
- Delete all
- Print

To perform these actions, click the filename to display a drop-down menu. If the file is displayed as an icon instead of a thumbnail, you can also select the icon and then press **Space** to download the file.

If there is a problem with the transferred file, the following icon and "File broken or not recognized as an image by file system" tooltip and tooltip are displayed. Check that you sent the correct file and then resend it.

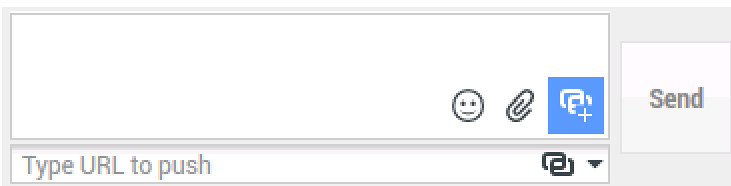


Broken file icon and tooltip.

Push a URL to a Contact

[**Modified:** 8.5.115.17]

Click the **Show the Push URL area** button () to open the Push URL area.



Chat Push URL view.

Use this area to enter and test a URL before you push (send) it to your contact.

Type or paste a URL in the Push URL Area text field, or select a previously sent URL by selecting it from the drop-down list.

To verify that the URL is correct, click **Check URL** () to open the URL in a web browser on your desktop.

Warning

Incorrectly typed URLs often point to websites that contain inappropriate content. If you send a customer to the wrong website, it might damage the reputation of your company and/or threaten your position in your company.

Click **Send** to push the URL to your contact. The following text and an active URL link are displayed in the Chat Transcript area of the chat window or browser of your contact:

Please navigate to the link: <*url*>

You can access the history of URLs that you have sent to contacts. Click the down arrow in the Push URL field to open a menu from which you can select a previous URL. Alternately, you can start typing a URL that you have used before, and Workspace auto-suggests URLs from your history that match the text you enter.

Pending Response Indicator

When you receive a message from your contact, a timer is started. The timer is displayed in the interaction-type icon: (). The duration of the timer is specified by your administrator. The timer indicates that you have a pending response to your contact.

The pending response indicator is displayed as part of the interaction-type icon () in the Chat interaction window.

The color of the pending response indicator begins as green. If you have not responded by a specific time interval, the indicator changes to yellow. If you still have not responded by a second time interval, the indicator changes to red and begins to flash. If the accessibility profile is active, you will hear a rising tone pulse to indicate that the response indicator is active. The higher the pitch, the closer to red status.

If you have a pending response, and the Chat Interaction window is not the active window, the Workspace task icon begins to flash in the Windows taskbar, regardless of the condition that is displayed by the pending response indicator. If the accessibility profile is active, the interaction rings periodically as the pending response indicator progresses.

If you place your mouse pointer over any flashing item, a preview of the interaction is displayed and the flashing stops. The preview displays the latest message from the contact.

Transferring a Chat Session

To transfer a chat session that you have accepted, perform the following steps:

1. Click the **Instant Chat Transfer** () button. The Team Communicator is displayed.
2. Choose a transfer target.
3. Select **Instant Chat Transfer**.

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

If the target rejects the interaction, an error message informs you that the target has rejected the interaction.

Conferencing a Chat Session

To invite another party to join your chat session, perform the following steps:

1. Click the **Instant Chat Conference** () button. The Team Communicator is displayed.
2. Choose a conference target.
3. Select **Instant Chat Conference**.

An invitation is sent to the selected target.

If the target accepts the invitation, the target is added to your chat session. The target can access the chat transcript and is able to send messages to you and your contact simultaneously. Anything that you or your contact send during the conference is also displayed to the target. If you end the session, the ownership of the session is transferred to the conference target.

If the target rejects the invitation, a system message is displayed in the Chat Interaction window to inform you that the conference invitation has been rejected.

How do I continue a chat interaction?

Link to video

Some environments have asynchronous chat available. This feature keeps chats open after the last agent leaves the session, and the agent can rejoin the session until the session is marked **Done**. This video shows you how it works if it is available in your environment.

Chat Consultation

The chat consultation functionality enables you to consult with an internal target about the current chat interaction without initiating a *conference* with the internal target.

Overview: Starting a Chat Consultation

To invite another party to consult with you about your chat session:

1. Click the **Start Consultation** () button. The Team Communicator is displayed.
2. Choose a consultation target. To consult with an agent group or skill, choose the name of the skill or group, and an available agent with that skill or in that group or interaction queue is notified of your consultation request.
3. Select **Start Chat Consultation** from the **Action** menu.
   An invitation is sent to the target.

   If the target accepts the invitation, a new chat interaction with the target is added to your Chat

Interaction window, below your first interaction.

If the target rejects the invitation, a system message is displayed at the top of the Chat Interaction window to inform you that the conference invitation has been rejected.

4. Either you or your target can end the chat consultation. Ending the chat consultation does not end your chat interaction with your contact.

Use the new chat interaction to send chat messages to your target without your contact viewing what you type or what your target responds.

The target can view the chat transcript between you and your contact.

If you click **End** () to end the session with your contact, the session with your consultation target also ends.

Both you and your target must click **Done** () to close the interaction.

Note: If you have a pending response, and the Chat Interaction window is not the active window, it begins to flash in the Windows taskbar, regardless of the condition that is displayed by the pending-response indicator.

You can also launch an Instant Messaging (IM) session or voice call with another agent to consult about the chat session.

You can transition your chat, IM, or voice consultation into a transfer to or conference with your consultation target.

Tip

The consultation part of a chat interaction is not considered as a standalone interaction in your activity history. It is owned by the original contact interaction, not your history. The consultation part of the transcript of a contact interaction does not show up in the **Contact History** nor the **My History** views.

My History reports the contact-related interactions where the logged in agent engaged with the contact. Agents who are consulted are not considered as engaged with the contact and as a consequence are not marked as ‘interaction owner’; therefore, this interaction does not show up in the **My History** of this agent.

For example: contact engaged with Agent1 – Agent1 consults Agent2, you will have:

- 1 New entry in My History of Agent1 – does not contain consultation transcript with Agent2
- No entry in My History of Agent2

Transfer to Consultation Target

You can transfer your active chat interaction to your consultation target.

1. Click the **Instant Chat Transfer** () button. The Team Communicator is displayed.
2. Under **Active Consultations**, choose the active consultation target as your transfer target.
3. In the **Action** menu, select **Instant Chat Transfer**.

The contact is connected to the transfer target, and the Chat Interaction window on your desktop closes.

Conference with Consultation Target

You can conference your active chat interaction to your consultation target.

1. Click the **Instant Chat Conference** () button. The Team Communicator is displayed.
2. Under **Active Consultations**, choose the active consultation target as your conference target.
3. In the **Action** menu, select **Instant Chat Conference**.

The consultation target is added to your chat interaction. The Chat Interaction window displays the entire transcript of the chat session between you and the contact.

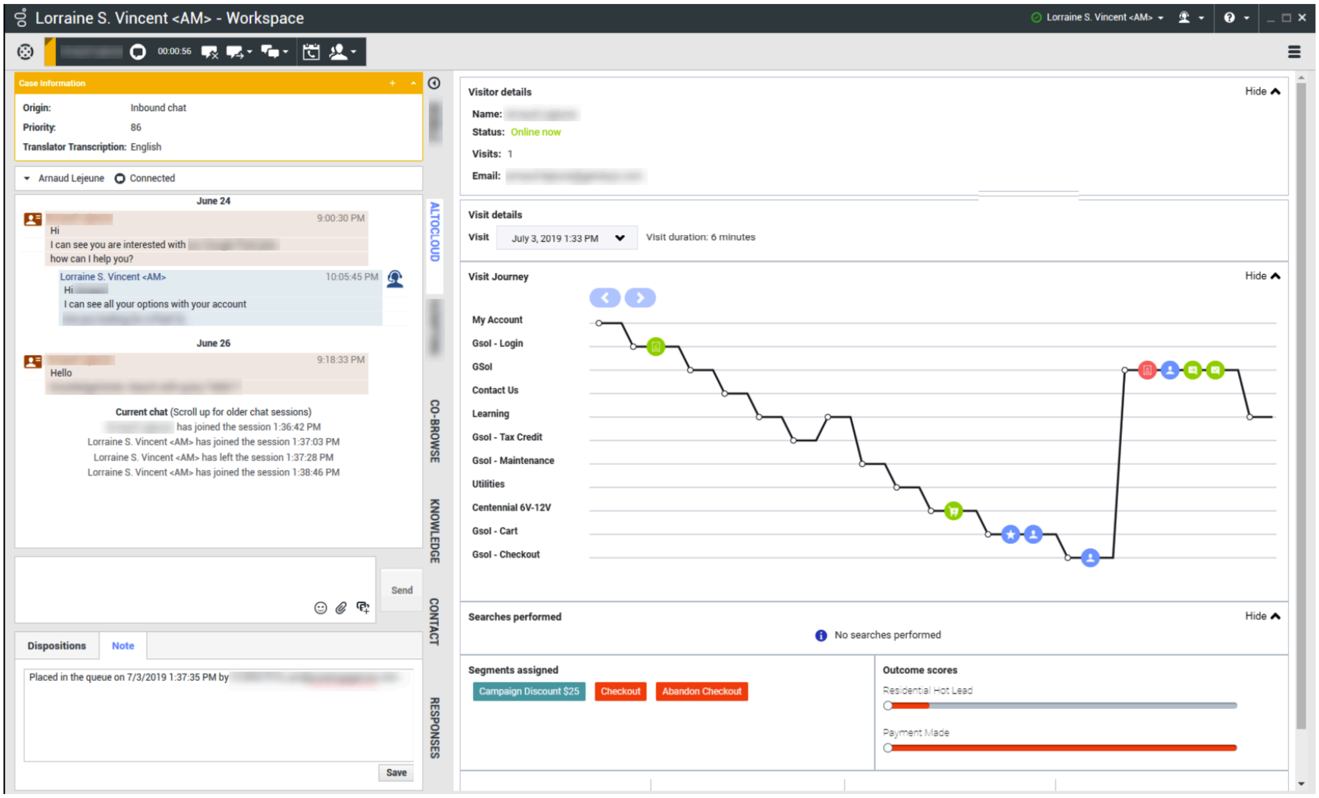
You, the contact, and the consultation target can each access the messages that are sent by the others.

If the conference target does not accept your request, the conference request is released.

During the chat conference, you can perform the following actions:

- In the **Action** menu next to the name of the connected party, you can choose **Delete From Conference** to remove the party from the conference.
- Click **End** () to end the session with your contact—the session between your consultation target and the contact continues.

Altocloud Chat Interaction



If you are set up to use the Genesys Altocloud plugin the **Altocloud** tab is displayed in the Chat interaction window.

Use the **Altocloud** tab to view the details of a contact's visit to your company website before and after they initiated a web chat interaction. This usually happens when your contact clicks a web chat widget, requests a quote, or requests more information.

The *Genesys Altocloud Agent's Guide* contains all the information that you, as an agent, need to understand and use the contents of the **Altocloud** tab.

Get Started

- Get started
- A visitor's experience
- Engage About journey analytics in Genesys Engage (Workspace)

Using the Altocloud tab

- Visitor details
- Visit details

- Customer journey map
- Segments assigned
- Outcome scores

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle A Chat Interaction
- Handle A Chat Consultation
- Transfer A Chat Interaction
- Conference A Chat Interaction
- Handle an Altocloud Chat Interaction
- Blend Different Media Into A Single Conversation
- Main Window Basics
- Workspace Windows and Views

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

Top 10 pages

1. Workspace Desktop Edition Help
2. Main Window
3. My Status
4. Contact Directory
5. Workbins
6. Functionality Overview
7. My Messages
8. Login
9. Voice Consultation
10. Components, Features, and Controls

Email Tasks Overview

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The Email Interaction window enables you to access all of the information that is necessary to handle email interactions with a contact. Click the links below to learn more:

- Handling inbound email interactions.
- Handling outbound email interactions.

If you are a supervisor or Team Lead, you might be responsible for QA Review of Email Interactions.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle An Email Interaction
- Blend Different Media Into A Single Conversation
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Inbound Email
- Outbound Email
- QA Review of Email

Top 10 pages

1. Workspace Desktop Edition Help
2. Main Window
3. My Status
4. Contact Directory

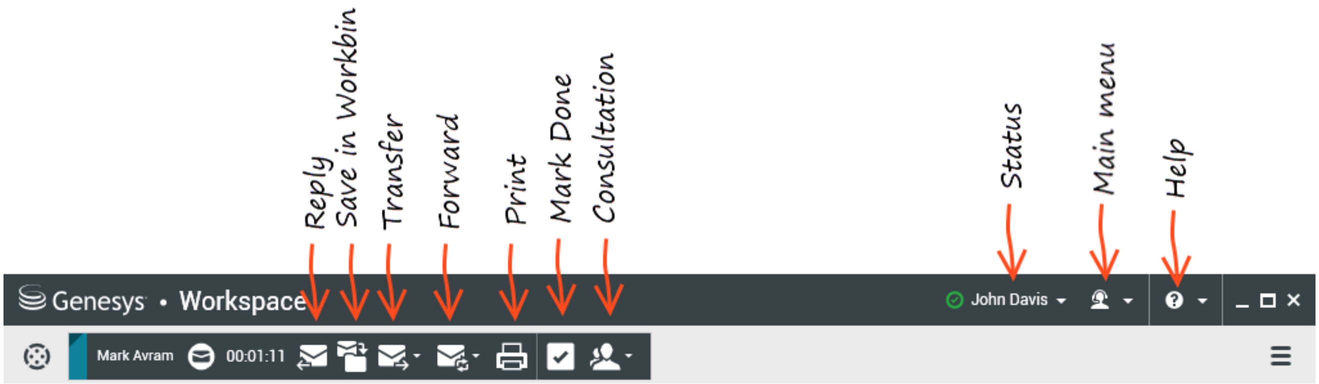
5. Workbins
6. Functionality Overview
7. My Messages
8. Login
9. Voice Consultation
10. Components, Features, and Controls

Inbound Email

[**Modified:** 8.5.113.11, 8.5.111.21, 8.5.117.18, 8.5.121.03]

> ### Tip
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The Inbound Email Interaction window enables you to handle many email-related tasks.



Use the **Zoom** control in the **Main Menu** (refer to Manage your settings and preferences) to change the size of the text in this view. This feature might not be available in your environment. [**Added:** 8.5.109.16]

> ### Important
> In the event that there is a problem in your contact center and connection to the servers that handle your interactions is lost, some functionality might be temporarily unavailable or you might lose the interaction with your contact. Workspace displays system messages that inform you about the status of each of your available media channels.

The Inbound Email Interaction Window

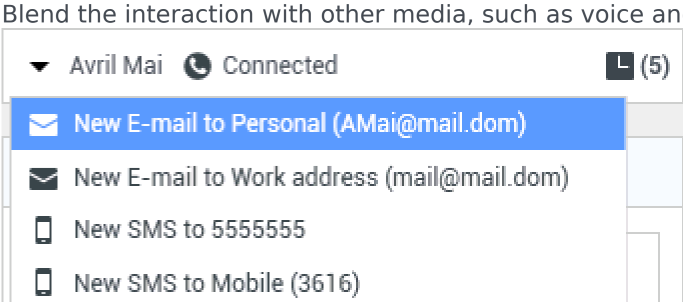
The Inbound Email Interaction window enables you to handle many email-related tasks, including the following:

- Reply or Reply All to the email.

- Review and save attached image files (for text and HTML formatted email interactions) and in-line images (for HTML formatted email interactions).
- Transfer (forward) the email.
- Forward the email to an External Resource.
- Select **Done** for the current interaction.
- Start a Voice Consultation with an internal target or with a contact.
- Start an IM Consultation (Instant Message) with an internal target.
- Set a disposition code.
- Save the email in a workbin for later handling.
- Use the Note to attach a note to the interaction history.
- Review Case Data (attached data) for the current interaction.
- Call the sender if there is a phone number in the contact database.
- Review and manage contact history. Open and handle email interactions from the contact history.
- Review and manage contact information. Your account might be set up to let you assign an interaction with an unknown contact to an existing contact in the contact database by using the Manual Contact Assignment feature [**Modified:** 8.5.117.18].
- Hide or display the controls and information about the current interaction by clicking the Hide/show Interaction view button:

Collapse	
Expand	

- Access the standard response library, if you decide to call the sender instead of replying to the email.
- Print the current email interaction.
- Schedule a Callback by clicking **Schedule Callback** () to open the **New Callback** dialog box. Refer to Genesys Callback. [**Added:** 8.5.111.21]
- Blend the interaction with other media, such as voice and SMS, by using the **Party Actions** menu.



Media blending

If there are in-progress or recent interactions for the current contact, the number of interactions is displayed beside the **In-progress Interactions** and **Recent Interactions** buttons.

Tip

In some environments, you might have to set a disposition code before you transfer or forward an email interaction.

URLs and Security

[**Added:** 8.5.121.03] Sometimes URLs (links to websites) are sent to you by a contact. URLs in the inbound email interaction view might be plain text or they might be HTML formatted text. You can read the URL before clicking it by hovering your mouse pointer over the URL to display a tooltip that lets you review the address.

Warning

To avoid opening malicious web links, review hyperlinks using the tooltip before you click them.

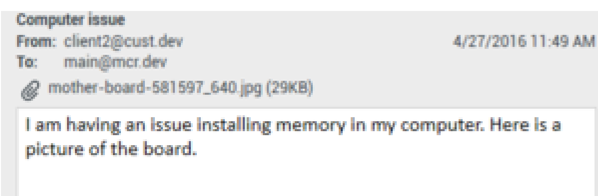
Inserted and Attached Images

[**Added:** 8.5.113.11]

Sometimes your contact includes images as part of their email interaction.

If your contact inserted the image into the body of the email interaction, it is displayed along with the other email content. You can save the image to a local or network drive by right-clicking on it and selecting **Save image as** from the context menu.

If the image is sent as an attachment, it is displayed beside a paperclip icon above the body of the email interaction.



The paperclip icon indicates the email interaction has an attachment

Actions for Attached Files

Right-click the name of the attached file to perform the following functions:

- **Open** — Opens the file in the default application for the file type.
- **Save As** — Save the file to a local or network drive.

- **Print** — Print the contents of the file to a printer that you specify.
- **Save All** — Save all attachments to a local or network drive.

Transferring an Inbound Email Interaction

To transfer an email interaction that you have accepted, click the **Transfer** () button. The Team Communicator is displayed. Choose a transfer target. Select **E-Mail 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 rejected the interaction.

Forwarding an Inbound Email Interaction to an External Resource

[**Modified:** 8.5.113.11, 8.5.104.15]

Workspace supports two types of email forwarding. Most companies will use one type or the other, depending on their business processes.

- **Forward** — The typical use case is that you forward an email and ask a question about it, then you use the answer that you receive to complete your response to your contact.
- **Forward as an Attachment** — The typical use case is that you want someone else to write the response to the email.

Forward

[**Added:** 8.5.113.11]

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 sometimes called in-line forwarding. A forwarded inbound email is copied into a new email interaction. The new email has a note with the date and contact name 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. Agents may or may not wait for an answer to this forward, depending upon your corporate policies and processes.

To forward the email quoted in-line in your email, click **Forward** () on the active inbound email window toolbar.

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

- Start typing a name or other contact information in the address field. The Team Communicator opens and enables you to choose a target. 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 to display the Contact Search view. Use this view to perform a search of the Contact Directory for targets. The Contact Search view can also be used to add **Cc** (carbon copy) targets.

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 email body area, above the quoted content from the email that you are forwarding.

To send the forwarded inbound email in-line to the targets, click **Complete Forward Ctrl+Return** (). The interaction window closes on your desktop and the email is forwarded to the in-box of the external resource. Click **Cancel Forward** if you want to close the Forward Email view without forwarding the email interaction.

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.

Forward as an Attachment

[**Modified:** 8.5.113.11]

(Formerly called *Forward to an External Resource)*

Workspace enables you to forward active inbound email interactions to an external resource (someone in your company directory that is outside of the control of the Genesys environment — for example, your back office) by selecting an email address in Team Communicator, either by manually entering the address or by selecting it from a searched Contact or a Corporate or Personal Favorite. You can configure agents to be able to add additional information about the forwarded interaction in a dedicated text box.

Depending on the Business Process that your company uses, you might keep the ownership of the interaction after you forward it, and be responsible for closing the interaction.

To forward the email as an attachment to an external resource, click **Forward as an Attachment** () on the active inbound email window toolbar. Depending on how your system is set up, this action might open the Team Communicator or it might display the Forward Email as an Attachment interaction view.

> ### Tip
> Your system might not be set up for all the features of Forward email. For example, the Team Communicator might not open, or the Forward Email as an Attachment interaction view might not be displayed. You might be restricted to a single **To** target, **Cc** might not be enabled, or the Instructions field might not be available.

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

- Start typing a name or other contact information in the address field. The Team Communicator opens and enables you to choose a target. Click **Add Email Address** to enter the email address of the target in the address field. If your environment is se 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.

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, click in the text box below the **To** and **Cc** fields and enter your message.

To forward the inbound email as an attachment to the targets, click **Complete Forward as an Attachment** (). The interaction window closes on your desktop and the email is forwarded to the in-box of the external resource. Click **Cancel Forward as an Attachment** if you want to close the Forward as an Attachment view without forwarding the email interaction.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle An Email Interaction
- Blend Different Media Into A Single Conversation
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Outbound Email
- QA Review of Email

Top 10 pages

1. Workspace Desktop Edition Help
2. Main Window
3. My Status
4. Contact Directory

5. Workbins
6. Functionality Overview
7. My Messages
8. Login
9. Voice Consultation
10. Components, Features, and Controls

Outbound Email

[**Modified:** 8.5.113.11, 8.5.118.10, 8.5.127.06]

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Outbound email interactions can be generated in several different ways:

- From an Inbound Email Interaction window, by clicking:
  - **Reply** ()
  - **Reply All** ()
- By using the Team Communicator to find a contact and selecting **New E-Mail**.
- By selecting **Create a New E-Mail** from the Contact Directory.
- By replying to an inbound email from the Workbins view.
- By replying to an inbound email from the Contact History.
- During a voice, chat, or workitem interaction, by clicking the **Party Actions** menu of a connected party and selecting **New E-mail**.

Use the **Zoom** control in the **Main Menu** (refer to Manage your settings and preferences) to change the size of the text in this view. *This feature might not be available in your environment*. [**Added:** 8.5.109.16]

Important

In the event that there is a problem in your contact center and connection to the servers that handle your interactions is lost, some functionality might be temporarily unavailable or you might lose the interaction with your contact. Workspace displays system messages that inform you about the status of each of your available media channels.

Tip

When you reply to an inbound email interaction, Workspace might be set up to have the contents of the original email interaction included in the body of the reply email

> interaction.

The Outbound Email Interaction window

The Outbound Email Interaction window enables you to handle many email-related tasks, including the following:

- Save the email interaction in a workbin for later handling.
- Attach one or more selected files to the email interaction. **Note:** Workspace might be configured to restrict the types of files that you attach. If you select a restricted file-type, an error message is displayed to inform you that your company does not permit the attachment of that file type (for example, `.exe`, `.bat`, `.jar`, `.js`, and others).
- Insert images into the body of HTML formatted email interactions.
- Delete the email interaction without sending it.
- Start a Voice Consultation with an internal target or with a contact.
- Start an IM Consultation with an internal target.
- Select the sender from the **From** drop-down list of addresses from which you are allowed to send email.
- Select an alternate email address for the recipient by clicking **To:** to open the Contact Search view.
- Add one or more Carbon Copy (CC) recipients.
- Add one or more Blind Carbon Copy (BCC) recipients.
- Call the recipient if there is a phone number in the contact database.
- Send the recipient an Instant Message (IM) if the recipient is an internal target.
- Set a disposition code.
- Use the Note to attach a note to the interaction history.
- Review Case Data (attached data) for the current interaction.
- Review and manage contact history. Open email interactions from the contact history and put them back.
- Review and manage contact information. Your account might also be set up to assign an unknown interaction to a contact in the contact database by using the Manual Contact Assignment feature.
- Hide or display the controls and information about the current interaction by clicking the collapse/expand Interaction View button:

Collapse	
Expand	

- Access the standard response library, and insert a response in the email interaction, or automatically insert a response by typing a pre-defined shortcut keyword.

- Print the current email interaction.
- Specify or change the email subject.
- Write a reply or new email interaction.
- Switch between a text-only and an HTML-formatted email interaction.
- Specify fonts, text styles, and paragraph formats for an HTML-formatted email interaction.
- Choose which language is used for the spelling-check function.
- Send the email interaction to the recipient.

> **Tip**
> Your account might be configured to have your email interactions reviewed before they are sent to your contacts; or, your account might be configured to review the outbound email interactions of other agents.

- Send an interim reply email interaction by clicking the **Send** button, and select **Interim Send** from the drop-down menu.

> **Tip**
> Your account might be configured to have signatures inserted automatically into new email interactions. You cannot change your signature, it is defined by your administrator.

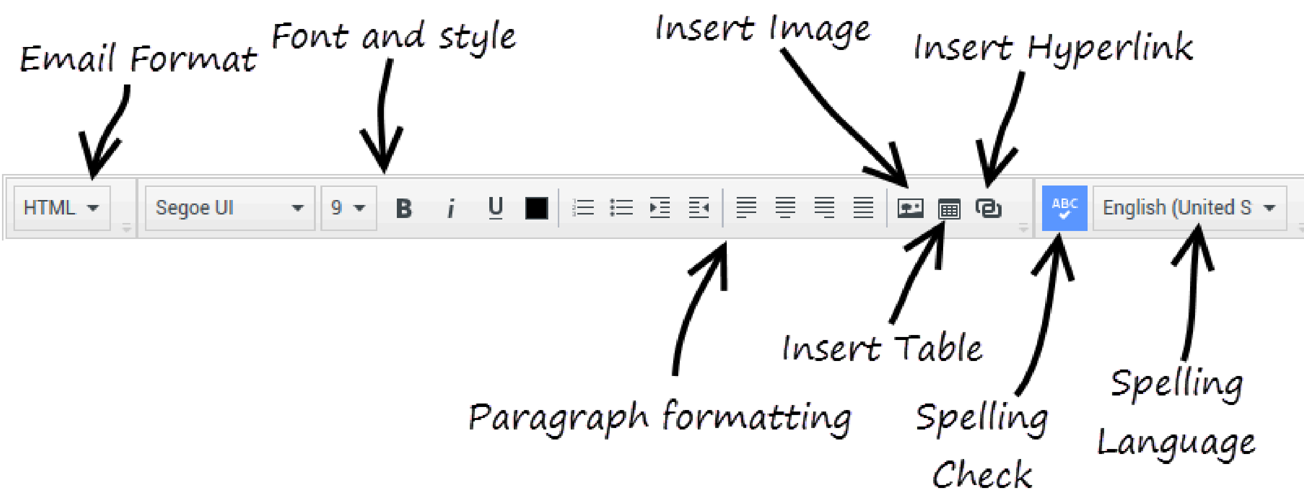
Sending an Outbound Email

Outbound email interactions can be composed as either text-only or HTML-formatted. An HTML-formatted email interaction enables you to specify the appearance of the content and add HTML-formatted responses from the Standard Response Library. Text-only email does not support HTML-formatted standard responses; however, some HTML-formatted standard responses contain text-only components that can be inserted.

> **Important**
> In some environments, for security purposes, you might not be able to add or edit email addresses in the To, Cc, or Bcc fields of reply email interactions, and you might not have the ability to add Cc and Bcc address fields to a new outgoing email interaction.

Create a new outbound email interaction

The outbound email interaction view provides a toolbar to help you format the email and add images, tables, and hyperlinks. Some of these buttons might not be available in your environment.



When you reply to an inbound email interaction or create a new outgoing email interaction:

1. First confirm that you have specified one or more recipients by typing a recipient's email address in the **To** field, or by selecting a recipient from the Team Communicator. You can add additional recipients by using the **Add Cc** menu.
2. Next, enter the subject of the email interaction in the **Subject** field.
3. Verify that your **Check Spelling** language is correct.
4. If you are sending an HTML-formatted email interaction, choose a font, font size, and style for the main body of your email interaction. You can set different fonts, font sizes, and colors by selecting individual characters, words, or blocks of text and specifying different options for the selected text.
   Format individual paragraphs by selecting them and then using the paragraph format buttons to specify the Numbered, Bulleted, Indented, Right-aligned, Centered, Left-aligned, or Block paragraph format.
5. Compose your email interaction by typing in the composition area (Body Content area), or by clicking an insertion point in the composition area and inserting a response from the Standard Response Library. Right-click in the composition area to use the Cut, Copy, and Paste editing tools.
   Beginning with version 8.5.113.11, Workspace enables you to enter TABs in the email composition area of outgoing email interactions by pressing the **TAB** key. Therefore, to use the **TAB** key to step to the next control or field, you must first press **Ctrl-TAB** to step out of the text composition area. This feature might be disabled in environments set up for accessibility; if so, you will not be able to enter TABs in the email composition area, but you can use the **TAB** key to move to the next control in the tab order.
6. A red wavy line appears below each word that is not in the spelling-check dictionary that you have specified. Right-click the misspelled word to correct it or to add the word to your personal dictionary. You can also choose to ignore once (**Ignore**) or always ignore (**Ignore All**) the spelling.
   - If you try to send a message that contains misspelled words, your system might be set up to display a warning dialog box that asks you to confirm that you want to send the message without correcting the potential misspelled words. Click **Yes** to send the message anyway, or click **No** to return to the message and correct the misspelled words. [**Added:** 8.5.105.12]
7. Some agents might have to write emails in more than one language. Some languages use left-to-right reading script and some use right-to-left reading script. If this feature is enabled for you, click in or select the text that you want to reverse the direction of, then click one of the following buttons in the text edit toolbar to change the reading direction of the text:

- ¶◂ — Set text to right-to-left reading direction.
- ▸¶ — Set text to left-to-right reading direction.

  Watch this video about changing text direction.
  Link to video

  [**Added:** 8.5.127.06]

8. Insert in-line images (HTML format only) by clicking **Insert Image** () or by copying an image and pasting it at the insertion point in the body of the email interaction. [**Added:** 8.5.113.11]
   - After you have inserted an image, you can resize it by dragging on the corners or edges.
   - Dragging on the corners maintains the relative width and height of the image. Dragging on the edges distorts the image.
   - If you make an image smaller, the size of the image file that you send is reduced. This is useful if the image that you want to send is greater than the size you are allowed to send.
   - If you make an image larger, the quality of the image will not be as good and the size of the file increases.
9. You can insert hyperlinks into the body of an email. Refer to Creating and managing hyperlinks for more information about creating, editing, and deleting hyperlinks.
10. Specify a disposition code, if required.
11. When your email interaction is complete, you can perform any of the following actions:
    - Click **Save in Draft Workbin** () to store it in a workbin for further processing or review.
    - Click **Send** () to send your email interaction to the specified recipient(s). The Email Interaction window is closed and the inbound email interaction is marked as Done.
    - Click the **Send** button, and select **Interim Send** from the drop-down menu, if you want to send an interim reply email interaction. The Email Interaction window remains open and the inbound email interaction is not marked done.
    - If you do not want to save or send the email interaction, click **Delete** ().

Creating and managing hyperlinks

[**Added:** 8.5.118.10]

The outgoing email composition area automatically detects URL hyperlinks (links to websites) when you type them into your email interaction and press Space, Enter, or Return on your keyboard. If the URL that you enter is not valid, a hyperlink is not created. The format for URLs is defined by your administrator; if you are trying to type a URL and it is not converted to a hyperlink, consult with your administrator about the format they have defined.

If your email interaction is HTML formatted, Workspace provides two other ways to create hyperlinks by using the **Insert Hyperlink** dialog box. Open this dialog box by performing one of the following actions:

1. Right-click at the insertion point and select **Insert Hyperlink** from the contextual menu.
2. Click the **Hyperlink** button ().

The **Insert Hyperlink** dialog box has two fields:

- **Text to Display** — Enter text in this field if you want display text rather than the URL to be displayed as a hyperlink. For example, if you want to add a hyperlink for your company website, you can add the name of your company to this field, then the name of your company will be a clickable link in the outgoing email. This is particularly useful when you are creating a hyperlink with a very long URL and you do not want the whole URL to display in the email message. If you leave this field blank, the whole URL is displayed for the hyperlink text.
- **Address** — Enter the fully qualified URL, including `http://` or `https://`.

After you have inserted a hyperlink into your email interaction, you can manage it by right-clicking it and selecting one of the following options from the contextual menu:

- **Edit hyperlink** — Opens the **Edit Hyperlink** dialog box.
- **Open hyperlink** — Opens the target of the hyperlink in a new browser window or tab. This enables you to verify the URL before you send it to your contact.
- **Remove hyperlink** — Converts the hyperlink to text. **Note:** if the hyperlink did not have display text and if you press Space, Enter, or Return immediately after you convert the URL to text, it will be converted to a URL again.

You can also open the **Edit Hyperlink** dialog box by placing the cursor on the display text or URL and clicking the **Hyperlink** button in the toolbar. Or to edit the display text of a hyperlink, place the cursor in the display text and edit the text as you would edit normal text.

To open the URL in a new browser window or tab, Ctrl-Click the hyperlink.

To remove a hyperlink from a URL, place the cursor at the end of the URL and press Delete. To remove a hyperlink from display text, place the cursor at the end of the display text and press Delete.

Watch video: *Create hyperlink text (email & chat)*

Link to video

Email Quality Assurance (QA) Review

Your account might be set up to have your outbound email interactions sent to your team lead or supervisor for a QA review before the email interaction is sent to your contact. If you are a QA reviewer, the review process is described here.

Your QA reviewer might return the email interaction to you to be updated, or the reviewer might accept the email interaction and allow it to be sent. The review process might require more than one iteration.

Email interactions that are sent for review might be directed to the reviewer or stored in a workbin that is specifically for reviews. The reviewed email interaction might be returned to you directly or stored in a workbin that is specifically for email interactions that are to be updated or reworked.

If your administrator has configured the status of the review to be displayed, it is displayed in the **Case Information** for the interaction, so that you know whether you have to update the email interaction content. If the status is **Rejected** (or some other disposition that is defined by your system administrator), the email interaction was not sent to the contact.

The reviewer might update the content of the email interaction, or the reviewer might add instructions for you in the Note view.

After you have completed the updates to the email interaction, click **Send** to deliver the email interaction back to the reviewer for approval or rejection.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle An Email Interaction
- Blend Different Media Into A Single Conversation
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Inbound Email
- QA Review of Email

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QA Review of Email

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Your system administrator defines the review process in your contact center. Agents might be set up for mandatory review or they might have to request review. There are many ways that an administrator might define the routing of reviewed email interactions; for example, email interactions for review might be routed directly to a reviewer, team lead, or supervisor, or they might be routed to a workbin.

Your might be set up 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 emails are directed to you prior to being sent to a contact.

As a reviewer, you might receive email interactions for review by an interaction preview or you might retrieve outbound email interactions from a workbin.

When an email interaction for review is directed to you, an interaction preview is displayed on your desktop. Click **Accept** to display the interaction; Click **Reject** to return the interaction to the queue.

The Interaction Preview window displays the **Case Information** view. The **Origin** field specifies the sender of the interaction and indicates that it is for review. You might access and edit the **QA Review Status** field. It contains attached data that specifies the status of the review. When you first receive it, the status might be **Unknown** or **For Review**, depending on how your administrator has set up your system. There might be other information about the priority of the interaction or the business area to which it belongs.

If you accept the email interaction for review, the interaction window is displayed on your desktop. The **Case Information** view is displayed in the Interaction window. The **Origin** field specifies the sender of the interaction and indicates that it is for review. The **QA Review Status** field is editable. It contains attached data that specifies the status of the review. The **Party Status** area displays the email monitoring icon () to indicate that the agent is under review. The **Interim Send** button is not available for review email interactions.

You can review the interaction and provide feedback to the agent who originated the outbound email interaction. Depending on the policy of your organization, you might provide feedback by directly editing the content of the email interaction, or you might add notes for the agent in the Note view, or you might discuss the content with the agent verbally. In the Review E-mail Interaction window, you can do the following:

- Update the **Review Status** in the **Case Information** view (if you are configured to do so by your administrator)
- Edit the content of the email interaction

- Set a Disposition
- Add text to the **Note** tab
- Use other standard E-mail Interaction window functions

If your account is set up to set the status of the review, your **Send** button might contain a drop-down menu that enables you to select an action to occur when the interaction is sent. You can send the message as Approved to the contact, or return it to the agent as Rejected. Your administrator might have configured different "rejection reasons" from which you can choose.

Otherwise, when your review is complete, set the status in the **Case Information** area to one of the states that are configured by your administrator. For example, the following states might be available:

- **Accepted**: The email interaction is sent to the contact when you click **Send**.
- **Rejected**: The email interaction is sent back to the agent or to a workbin that contains reviewed interactions when you click **Send**.
- **Unknown**: The email interaction is sent back to the review queue or to a review workbin when you click **Send**.

If you specified **Rejected**, the QA Review Status in the **Case Information** is updated to **Rejected** and the interaction is returned to the originating agent.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle An Email Interaction
- Blend Different Media Into A Single Conversation
- Main Window Basics
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- Basic Use-Case Summary

Related topics

- Inbound Email
- Outbound Email

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SMS and MMS Interactions

[**Modified:** 8.5.111.21, 8.5.110.13, 8.5.117.18, 8.5.121.03]

> ## Tip
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Short Message Service (SMS) is a text-messaging component of voice and Internet communication. SMS enables the exchange of text messages between you and a contact through your computer. Typically, a contact will send you SMS from a mobile device, a web interface, or an email client.

By definition, SMS are *short messages*. Workspace supports 160 characters per message. If you attempt to send a message that is longer than the character limit, additional messages are sent to accommodate your entire message.

Multimedia Message Service (MMS) is a multi-media component of voice and Internet communication. In Workspace, MMS enables you to receive images sent to your organization from a mobile device, a web interface, or an email client. Images are displayed to you as thumbnails. To access the image full-size, double-click it or right-click it and select **Open** from the context menu. It opens in the default application specified in the Windows operating system. If you have been granted the correct permissions, you can save an image by clicking the **Save** icon on the image or by right-clicking on it and selecting **Save** from the context menu. [**Added:** 8.5.110.13]

Workspace supports the following SMS modes:

- **Page**: You receive a single inbound SMS to which you can send a response or that you can handle in other ways. You can also receive images from a contact.
- **Session**: You receive an inbound SMS that starts a chat session with a contact. SMS Session is non–real-time two-way communication between you and your contact through your computer.

If there are in-progress or recent interactions for the current contact, the number of interactions is displayed beside the connection status of the interaction.

Use the **Zoom** control in the **Main Menu** (refer to Manage your settings and preferences) to change the size of the text in this view. This feature might not be available in your environment. [**Added:** 8.5.109.16]

> ## Important
> In the event that there is a network problem in your organization and connection to the servers that handle your interactions is lost, some functionality might be temporarily unavailable or you might lose the interaction with your contact. Workspace displays system messages that inform you about the status of

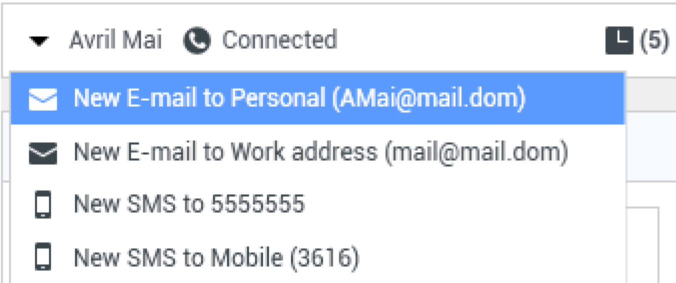
each of your available media channels.

SMS Page Mode

In SMS Page Mode, a single SMS or image is received on your desktop. You can respond to the SMS or handle it in other ways, similar to the way that email interactions are handled. You are not connected in real-time to your contact. The text that your contact types appears both on your SMS Session window and on your contact's device. The text that you enter and send from the SMS Session window is displayed on the contact's device.

The SMS Page Interaction window enables you to handle many SMS-related tasks, which include the following:

- Send a response to the contact. As soon as you click **Send**, the SMS Page Interaction window closes and the interaction is automatically marked as Done.
- Open an image thumbnail in the default image viewing application on your workstation.
- Click **Instant Chat Transfer** () to instantly transfer the SMS.
- Select **Done** for the current interaction. This action closes the interaction window without sending a response.
- Set a disposition code.
- Use the Note to attach a note to the interaction history.
- Review case data (attached data) for the current interaction.
- Start a consultation by clicking **Start a Consultation** ():
  - Voice (internal targets and contacts).
  - IM (an internal target only).
- Call the sender, if there is a phone number in the contact database. You can also click a phone number in the SMS transcript to launch a call.
- E-mail the sender, if there is an email address in the contact database. You can also click an email address in the SMS transcript to launch an email.
- Schedule a Callback by clicking **Schedule Callback** () to open the **New Callback** dialog box. Refer to Genesys Callback. [**Added:** 8.5.111.21]
- Blend the interaction with other media (such as email, voice, and SMS) by using the **Party Actions** menu.



- Review and manage contact history.
- Review and manage contact information. Your account might be set up to let you assign an interaction with an unknown contact to a known contact in the contact database by using the Manual Contact Assignment feature [**Modified:** 8.5.117.18].
- Hide or display the controls and information about the current interaction by clicking the collapse/ expand Interaction View button:

Collapse	
Expand	

- Use a standard response.

Handling an SMS Page Interaction

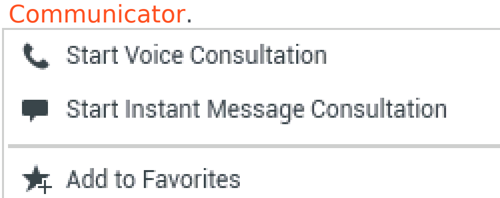
When you accept an SMS Page interaction, the SMS Page Interaction window is displayed.

The name of the contact, the originating phone number, and the elapsed time of the interaction are displayed at the top.

Connection-status information is displayed next to the contact drop-down menu. Use the contact drop-down menu to call the contact, if the contact's phone number is available from your contact database.

The SMS toolbar is above the SMS Transcript area. Use the SMS toolbar to do the following:

- Instantly transfer the SMS by clicking **Instant SMS Transfer** () to redirect (transfer) the current SMS interaction to an internal target by using the Team Communicator.
- Start a consultation with another resource in your organization by clicking **Start Consultation** () to start an IM or voice consultation with an internal target or a contact by using the Team Communicator.



SMS Consultation Menu

- Schedule a Callback by clicking **Schedule Callback** () to open the **New Callback** dialog box. Refer to Genesys Callback. [**Added:** 8.5.111.21]
- Mark the interaction as Done. You complete the interaction and close the SMS Page Interaction window by clicking **Done** () for the current interaction. Your account might be set up to require you to specify a disposition code before you can click **Mark Done**. The **Mark Done** button is displayed as soon as the SMS Page interaction is displayed.

SMS Session Mode

During an SMS session, you and your contact exchange a series of SMS messages. You enter text in the SMS Session Window interface, and the window maintains a scrolling list of the messages from you and your contact. There is no typing notification during an SMS Session because you are not connected in real-time to your contact. The text that your contact types appears both on your SMS Session window and on your contact's device. The text that you enter and send from the SMS Session window is displayed on the contact's device.

Unlike Page Mode, you maintain ownership of the interaction until you click **Done** or until the timer for the exchange times-out. The time-out interval is configured by your administrator. If no SMS are exchanged for a specified time interval, the session ends. Click **Done** to close the session.

The SMS Session Interaction window simulates a chat interaction. It enables you to handle many SMS Session-related tasks, which include the following:

- Send a response to the contact.
- Click **Instant Chat Transfer** () to instantly transfer the SMS.
- Select **Done** for the current interaction.
- Set a disposition code.
- Use the Note to attach a note to the interaction history.
- Review Case Data (attached data) for the current interaction.
- Start a consultation by clicking **Start a Consultation** ():
    - Voice (internal targets and contacts).
    - IM (an internal target only).
- Call the sender if there is a phone number in the contact database. You can also click a phone number in the SMS transcript to launch a call.
- E-mail the sender if there is an email address in the contact database. You can also click an email address in the SMS transcript to launch an email.
- Schedule a Callback by clicking **Schedule Callback** () to open the **New Callback** dialog box. Refer to Genesys Callback. [**Added:** 8.5.111.21]
- Review and manage contact history.

- Review and manage contact information. Your account might be configured to let you assign an interaction with an unknown contact to a known contact in the contact database by using the Manual Contact Assignment feature [**Modified:** 8.5.117.18].
- Use a standard response.

Handling an SMS Session Interaction

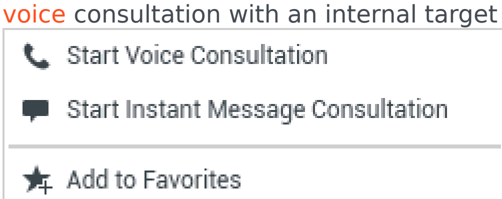
When you accept an SMS Session interaction, the SMS Session Interaction window is displayed.

The name of the contact, the originating phone number, and the elapsed time of the interaction are displayed.

Connection-status information is displayed along with the **Party Actions** drop-down menu. Use the **Party Actions** drop-down menu to call the contact if the contact's phone number is available from your contact database.

The SMS Session toolbar is above the SMS Transcript area. Use the SMS Session toolbar to do the following:

- Instantly transfer the SMS to another resource by clicking **Instant SMS Transfer** () to redirect (transfer) the current SMS interaction to an internal target by using the Team Communicator.
- Consult another resource in your organization by clicking **Start Consultation** () to start an IM or voice consultation with an internal target or a contact by using the Team Communicator.



- Schedule a Callback interaction by clicking **Schedule Callback** () to open the **New Callback** dialog box. Refer to Genesys Callback. [**Added:** 8.5.111.21]
- Click **Done** () to complete the interaction and close the SMS Session Interaction window for the current interaction. Your account might be set up to require you to specify a disposition code before you can click **Done**. The **Done** button is displayed as soon as the SMS Session interaction is displayed.

SMS Transcript Area

The SMS Transcript area displays the contents of the SMS messages that you exchange with your contact as well as system information, such as the names of participants as they join and leave the session, and the time of each event and message. System and message content is color-coded by participant, to enable you to distinguish the owner of each message visually. You can select and copy text from the SMS transcript.

If the SMS contains a phone number or an email address, you can click it to launch a voice or email interaction, respectively.

URLs and Security

[**Added:** 8.5.121.03] Sometimes URLs (links to websites) are sent to you by a contact. URLs in the SMS transcript are always displayed as the actual address. Contacts cannot send you a disguised URL in an attempt to direct you to a malicious website. You will be able to read the URL before clicking on it. If you hover your mouse pointer over the URL, a tooltip is displayed that lets you review the address.

SMS Message Area

The SMS Message entry area enables you to enter, preview, and check the spelling of your message before you send it to your contact. The SMS Message entry area enables you to perform the following actions:

- Type text
- Paste, copy, and select text by using the context menu
- Access the standard response library, and insert a response in the email interaction, or automatically insert a response by typing a pre-defined shortcut keyword.
- Verify the spelling of the content of your message.

If you try to send a message that contains misspelled words, your system might be configured to display a warning dialog box that asks you to confirm that you want to send the message without correcting the potential misspelled words. Click **Yes** to send the message anyway, or click **No** to return to the message and correct the misspelled words. [**Added:** 8.5.105.12]

Transferring an SMS Session

To transfer an SMS or an SMS Session that you have accepted, perform the following steps:

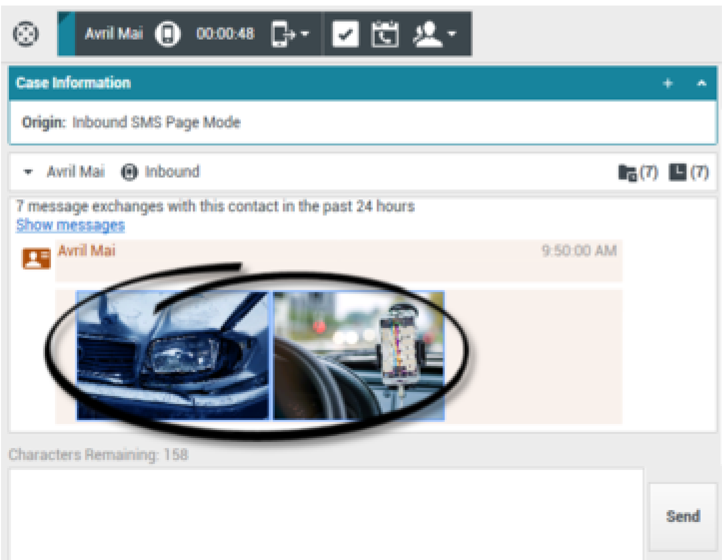
1. Click the **Instant SMS Transfer** () button. The Team Communicator is displayed.
2. Choose a transfer target.
3. Select **Instant SMS Transfer**.

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

If the target rejects the interaction, an error message informs you that the target has rejected the interaction.

Handling an MMS Image Interaction

[**Added:** 8.5.110.13] When you accept an MMS interaction the SMS Page mode Interaction window is displayed. It contains a thumbnail image for each of the received images and any text sent by the contact.



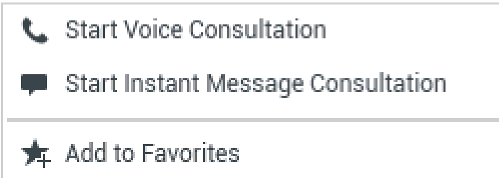
You can reply to the sender as an SMS text message. You cannot send an image to a contact.

The name of the contact, the originating phone number, and the elapsed time of the interaction are displayed at the top.

Connection-status information is displayed next to the contact drop-down menu. Use the contact drop-down menu to call the contact, if the contact's phone number is available from your contact database.

The SMS toolbar is above the SMS Transcript area. Use the SMS toolbar to do the following:

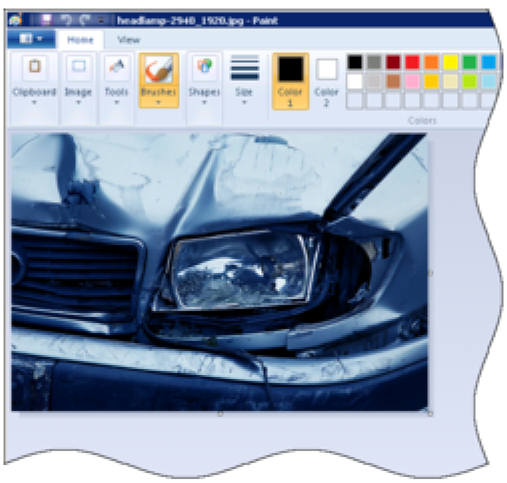
- Instantly transfer the SMS by clicking **Instant SMS Transfer** ( ) to redirect (transfer) the current SMS interaction to an internal target by using the Team Communicator.
- Consult another resource in your organization by clicking **Start Consultation** ( ) to start an IM or voice consultation with an internal target or a contact by using the Team Communicator.



- Schedule a Callback interaction by clicking **Schedule Callback** ( ) to open the **New Callback** dialog box. Refer to Genesys Callback. [**Added:** 8.5.111.21]
- Mark the interaction as Done to complete the interaction and close the SMS Page Interaction window by clicking **Done** ( ) for the current interaction. Your account might be set up to require you to specify a disposition code before you can click **Done**. The **Done** button is displayed as soon as the SMS Page interaction is displayed.

To review an image, double-click an image thumbnail or right-click an image thumbnail and select **Open** from the context menu to open the image in the default image viewing application on your workstation.

To save an image (if you have the correct permissions), click the **Save** icon on the image or right-click the image and select **Save** from the context menu.



Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle An SMS or MMS Interaction
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

Top 10 pages

1. Workspace Desktop Edition Help
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Workitems

[**Modified:** 8.5.111.21, 8.5.117.18]

> ## Tip
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Workitems are documents that might be directed to you for handling. They include numerous non-interactive media types, such as faxes, that you might have to access while you are handling interactions of another type, such as email.

The Workitem Interaction window enables you to handle tasks that are related to workitems, including the following:

- Transfer (forward) the workitem
- Mark the current interaction as Done
- Start a Voice Consultation with an internal target or with a contact
- Start an IM Consultation with an internal target
- Store it in a workbin for further processing or review
- Open an in-progress workitem from a workbin or Queue in the History view.
- Set a disposition code
- Use the Note to attach a note to the interaction history
- Review Case Information (attached data) for the current interaction
- Call the sender if there is a phone number in the contact database
- Send the recipient an Instant Message (IM) if the recipient is an internal target
- E-mail the sender if there is an email address in the contact database
- Schedule a Callback interaction by clicking **Schedule Callback** () to open the **New Callback** dialog box. Refer to Genesys Callback. [**Added:** 8.5.111.21]
- Review and manage contact history
- Review and manage contact information. Your account might be configured to let you assign an interaction with an unknown contact to a known contact in the contact database by using the Manual Contact Assignment feature [**Modified:** 8.5.117.18].
- Hide or display the controls and information about the current interaction by clicking the collapse/expand Interaction View button:

Collapse	

Expand	

- Access the standard response library if you decide to call the sender to discuss the workitem contents

If there are in-progress or recent interactions for the current contact, the number of interactions is displayed beside the connection status of the interaction.

Transferring a Workitem

To transfer a workitem that you have accepted, click the **Workitem Transfer** () button. The Team Communicator 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.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle A Workitem Interaction
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

Top 10 pages

1. Workspace Desktop Edition Help
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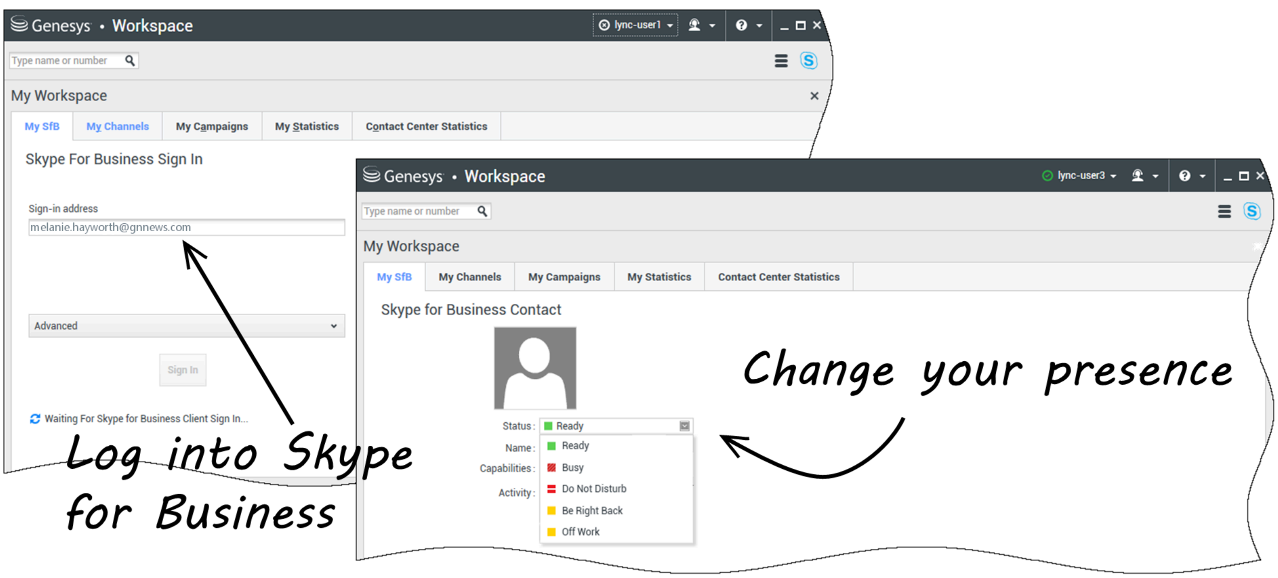
7. My Messages
8. Login
9. Voice Consultation
10. Components, Features, and Controls

Using Workspace Plugin for Skype for Business

Important

For this version of the Workspace Plugin for Skype for Business, Genesys supports Microsoft Lync 2013 and Skype for Business Server.

Logging into Workspace Desktop Edition to Access Skype for Business



When you log into Workspace Desktop Edition, the **My SfB** tab is displayed in your **My Workspace** view. Sign in to Skype for Business with your Skype for Business username and password.

Tip

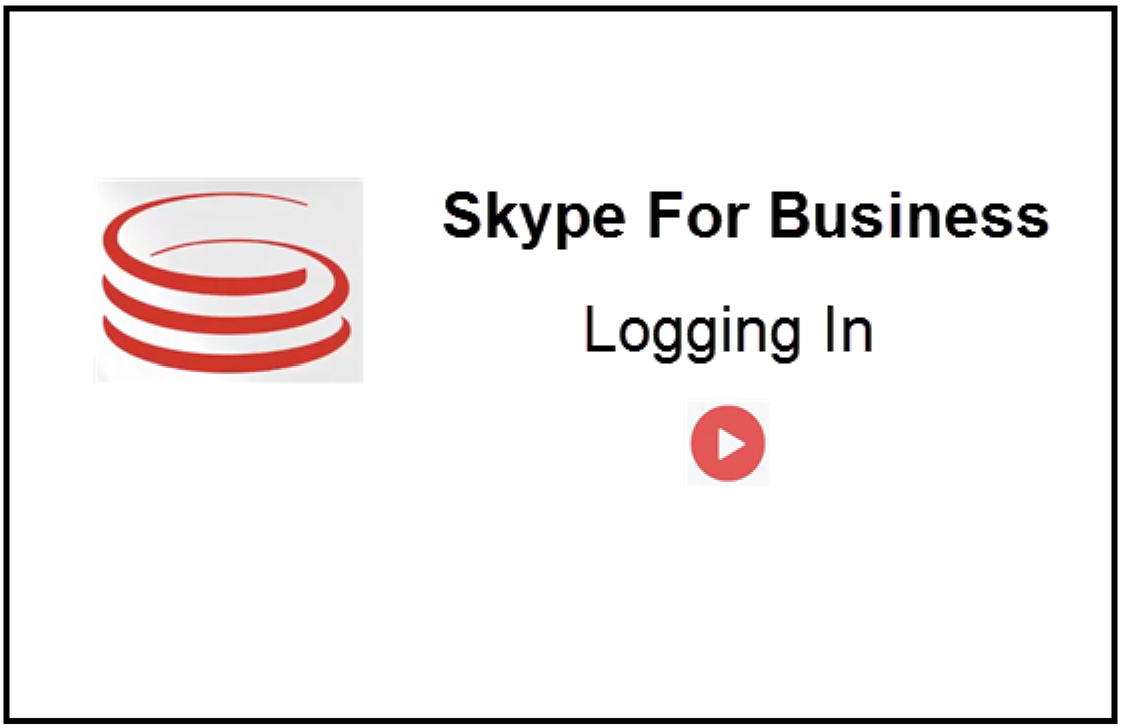
If you want to automatically log into Skype for Business the next time you log into your desktop, select **Remember Password**.

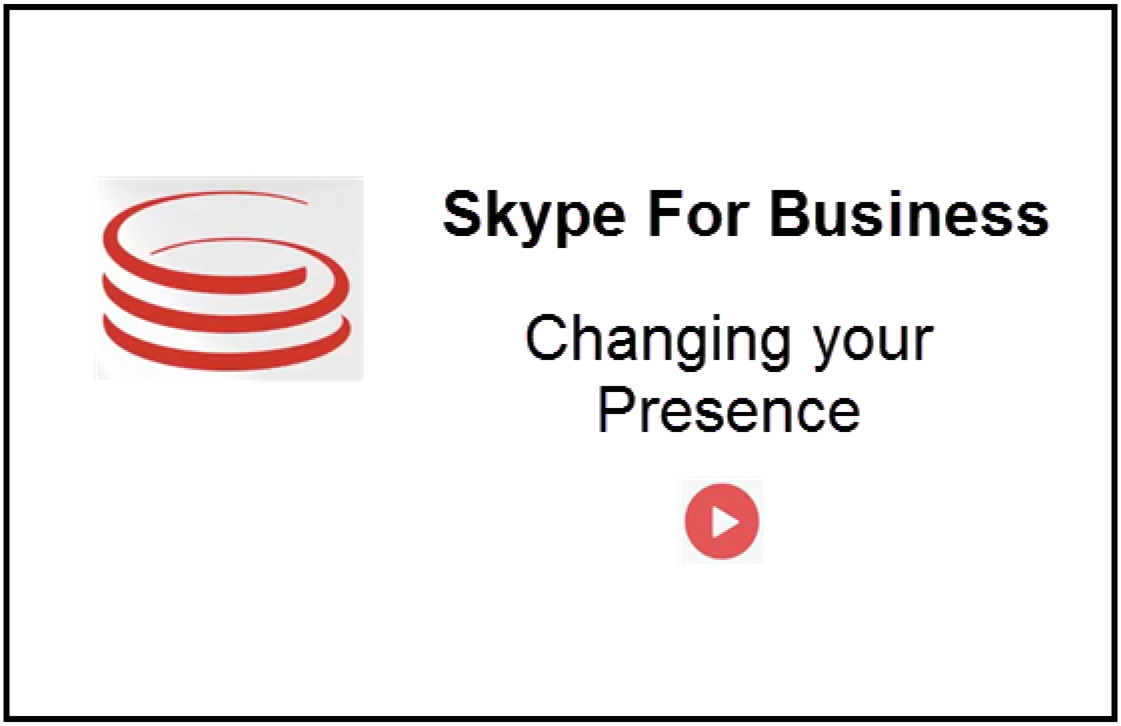
You can now control your Skype for Business presence on this tab.

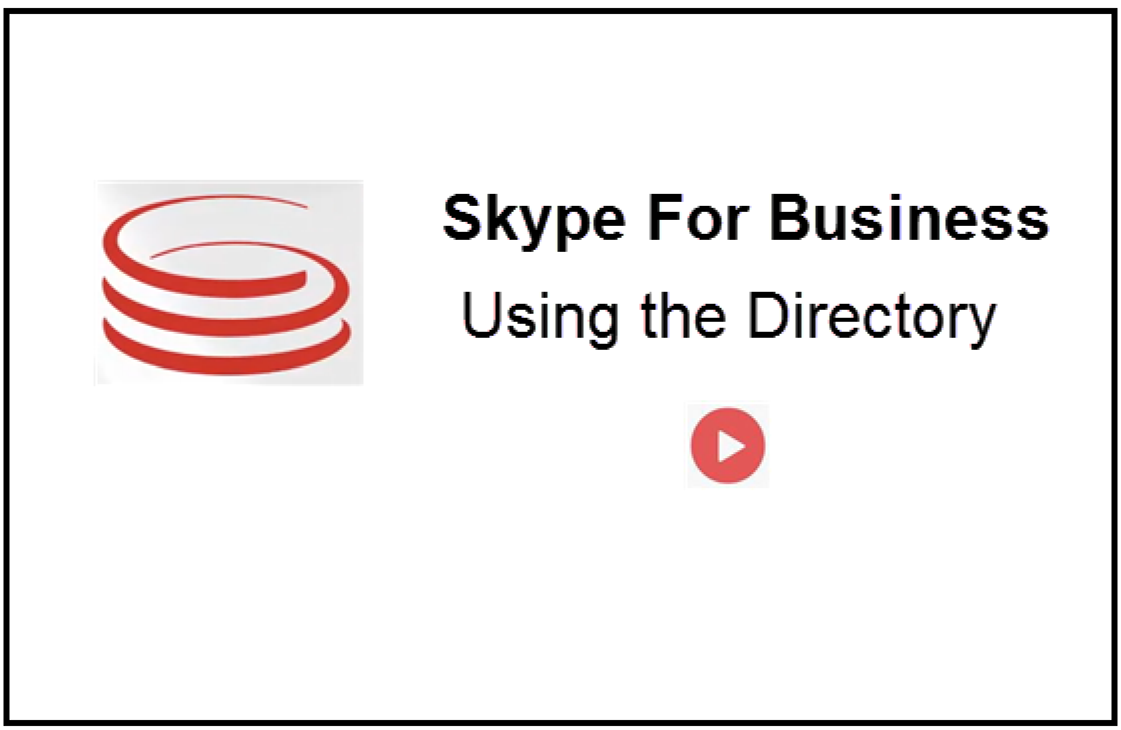
Warning

While you can change the presence status that is shown to your Skype for Business coworkers, this is advisory only. The Genesys software will continue to route interactions to you, unless you change your status from the main Workspace Desktop toolbar.

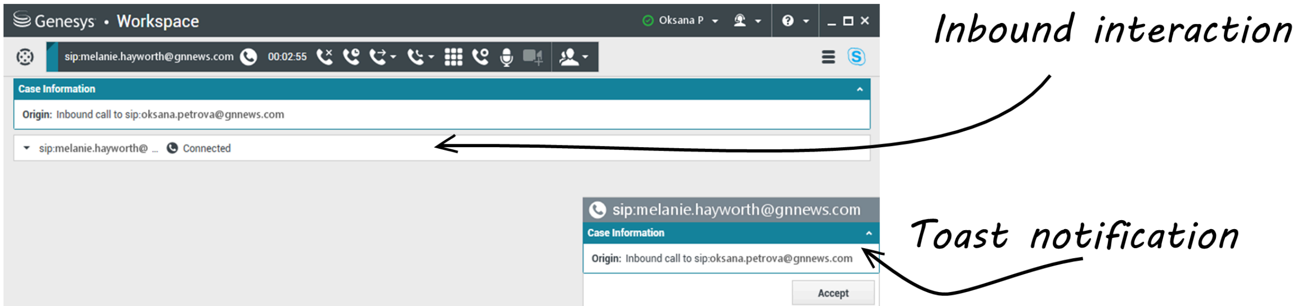
Watch these videos:




Skype For Business
Changing your Presence


Skype For Business
Using the Directory

Accepting or Rejecting Interactions



When a new inbound Skype for Business interaction is sent to your workstation, a toast notification is displayed at the bottom right-hand corner of your desktop.

You can:

- **Accept** — Open the interaction in the Workspace Desktop window.
- **Reject** — Decline the interaction. (Only visible if the interaction is sent through a Route Point)

If you do not accept the toast notification, it times out, and the interaction is not established.

If you accept the toast notification, the inbound interaction view is displayed.

IM Interactions

When you are in an Instant Messaging (IM) interaction and require additional information, you have the following options:

- IM Conferencing: You can add another agent to an existing IM interaction.
- IM Transferring: You can transfer an IM interaction to another agent.
- IM Consultation: You can consult with another agent.
- Escalating to Voice: You can escalate an IM interaction to a voice interaction. Once you have escalated an IM interaction to a voice interaction, you can escalate it again to video, if the customer has already activated video. You cannot escalate to video directly from an IM interaction.
- You save and restore an IM transcript.

IM Conferencing

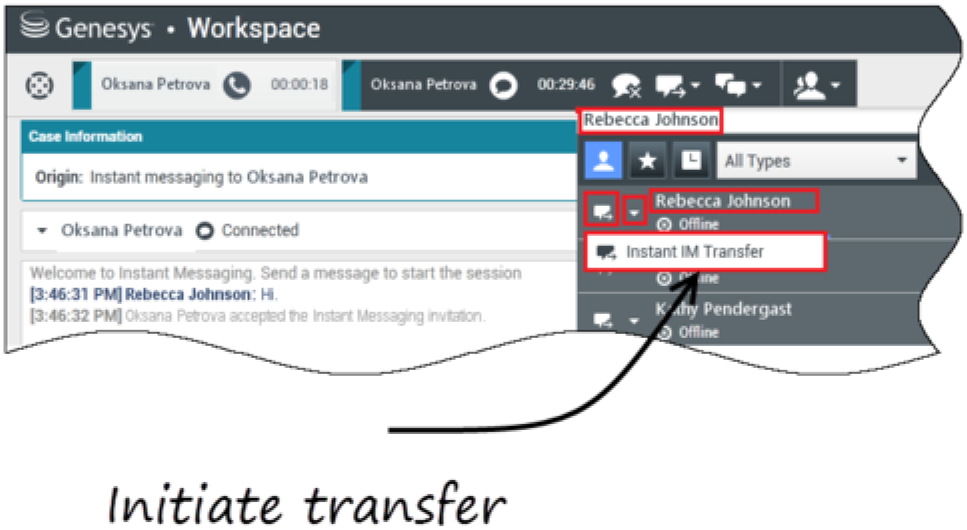
You can add another agent to an existing IM interaction. Select **Instant IM Conference**, and type the agent's name or contact URI into the text box. When you find the agent's name from the list, select **Instant IM Conference**, or the icon next to the agent's name.

The other agent receives a toast notification. The other agent can either accept or reject the interaction.

Now you can exchange IM messages with all parties in the conference.

When you are finished with the IM conference, you can remove either yourself or the other agent from the IM.

IM Transferring



You can transfer an existing IM interaction to another destination (agent, queue, route point, etc). Select **Instant IM Transfer**, and type the agent's name or contact URI into the text box. You can also find the agent's name from the list of all agents. Select the Action menu or the icon next to the agent's name.

The other agent receives a toast notification and can either accept or reject the interaction.

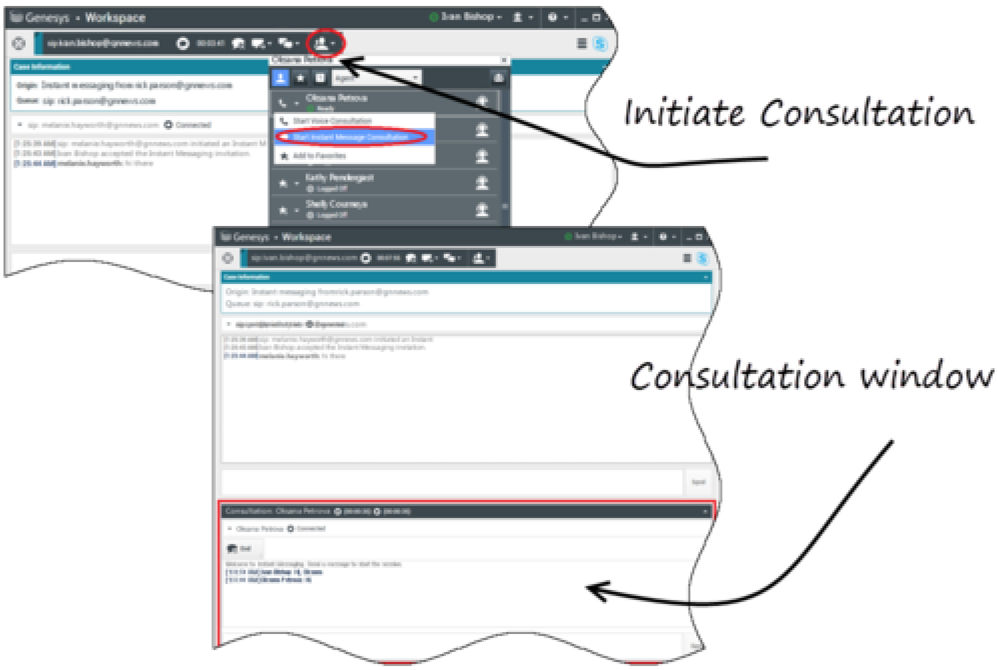
IM Consultation

Link to video

You can consult with another agent on an existing IM interaction. Select **Start a Consultation**, type the agent's name or contact URI into the text box, and select **Start Instant Message Consultation** from the Action menu.

A consultation IM window opens below the existing IM window. Type your IM message in the text field and press **Send**. A toast notification is displayed on the selected user site. The consultation IM is established when the agent accepts the toast notification for consultation IM.

You can now exchange messages with the other agent before returning to the conversation with your



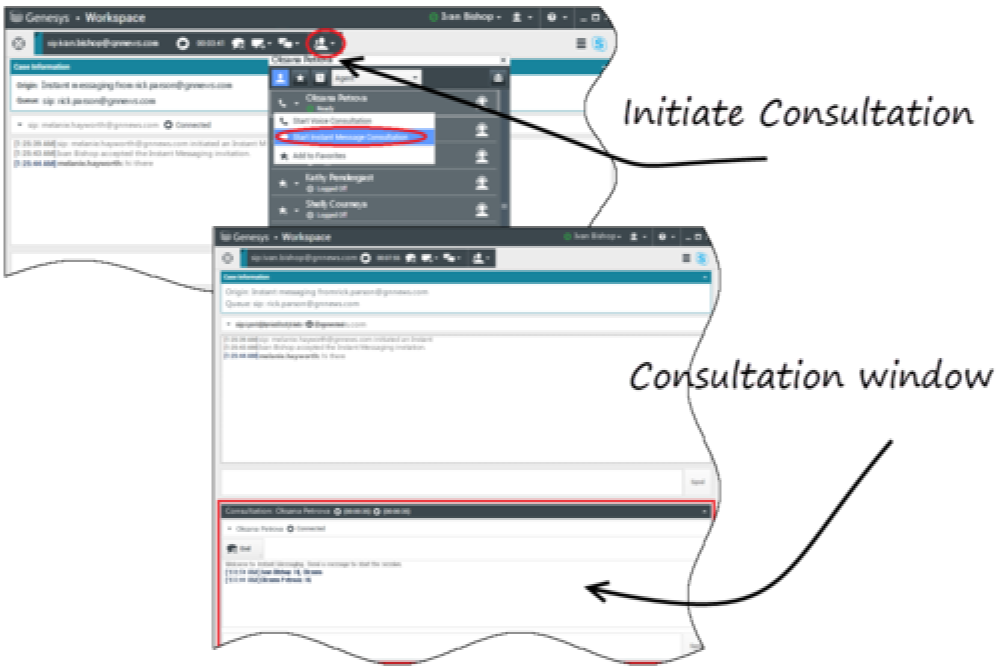
customer.

Escalating to Voice

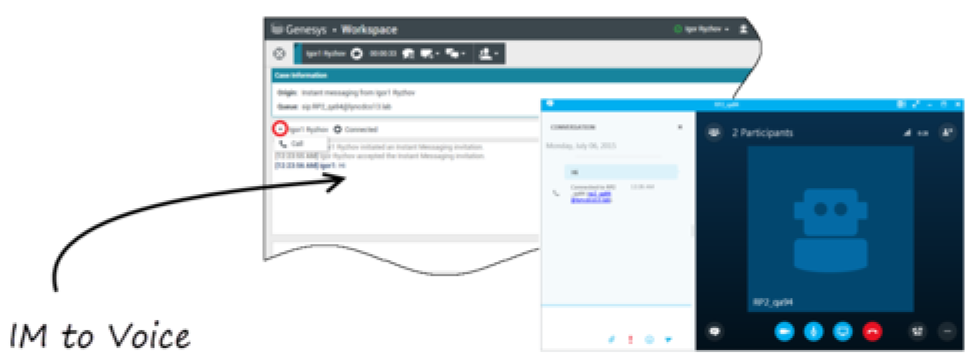
Link to video

Your customer might need to escalate the conversation from IM to voice or vice versa. The customer uses their Skype for Business client to initiate a voice call or an IM interaction to you. By default, the voice escalation call is auto-answered. However, an agent can answer the call manually if the **interaction-workspace\lync.voice-escalation-auto-answer** option is set to `false`.

Or, you might need to escalate the conversation from IM to voice or vice versa. Use your Workspace Desktop to initiate a voice call or an IM interaction to your customer.


Initiate Consultation
Consultation window


Voice to IM


IM to Voice

Voice Interactions

When you are in a voice interaction and require additional information, you have the following options

- Voice Conferencing: You can add another agent to an existing voice interaction.
- Voice Transferring: You can transfer a voice interaction to another agent.
- Voice Consultation: You can pause a voice interaction while you consult with another agent.
- Escalating to Video: You can escalate a voice interaction to a video interaction, if the customer has already activated video. You, as the agent receiving the call, cannot choose unilaterally to escalate to video. Only the originator of the call can escalate to video.

Voice Conferencing

You can add another agent to an existing voice interaction. Select **Instant Voice Conference**, and type the agent's name or contact URI into the text box. When you find the agent's name from the list, select **Instant Voice Conference**, or the icon next to the agent's name. The other agent receives a toast notification. The other agent can either accept or reject the interaction. You, the customer, and the other agent are placed into a three-way conference. When you are finished with the voice conference, you can remove either yourself or the other agent from the voice conference.

Voice Transferring

You can transfer an existing voice interaction to another destination (agent, queue, route point, etc). Select **Instant Voice Transfer**, and type the agent's name or contact URI into the text box. You can also find the agent's name from the list of all agents. Select the Action menu or the icon next to the agent's name. The other agent receives a toast notification and can either accept or reject the interaction.

Voice Consultation

You can consult with another agent on an existing voice interaction. Select **Start a Consultation**, type the agent's name or contact URI into the text box, and select **Initialize a Voice Consultation** from the Action menu. The voice consultation is established when the agent accepts the toast notification for the voice consultation. Your main conversation will be on hold. If you were on a video call when you request a voice consultation, your video will be stopped and the start/stop video button will be unavailable during the consultation.

During a voice consultation, the mute button is not displayed in the voice consultation window. However, you can use the Mute button from the main interaction to mute the conversation.

You can speak with the other agent before going back to the conversation with your customer.

Escalating to Video

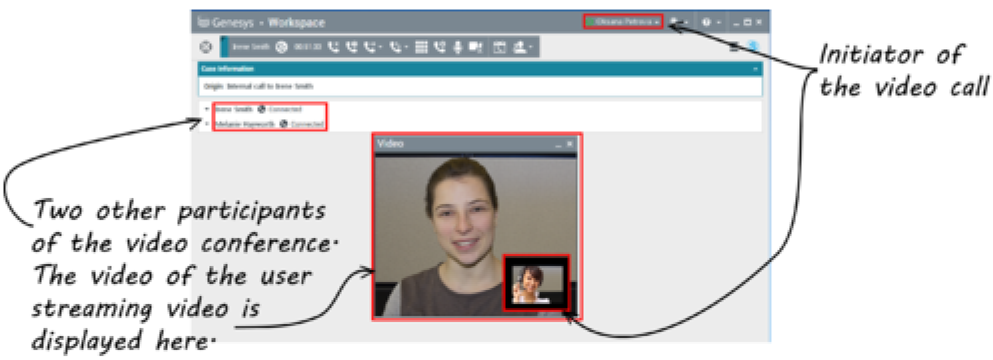
Your customer might need to escalate the conversation from voice to video or to de-escalate the conversation from video to voice. The customer uses their Skype client to initiate a voice call to you. You accept the call. Once you have accepted the call, the customer can escalate the voice call to video. You can add your own video to an existing video call if the customer has made a video call to the agent or has already added video to an existing call.

Video Interactions

When you are in a video call and require additional information, you have the following options

- Video Conferencing: You can add another agent to an existing video call.
- Video Transferring: You can transfer a video call to another agent.
- Video Consultation: You can pause a video call while you consult with another agent and, if necessary, later on do Transfer or Conference from this voice consultation.

Video Conferencing



You can add another agent to an existing video call. Select **Instant Call Conference**, and type the agent's name or contact URI into the text box. When you find the agent's name in the list, select **Instant Call Conference**, or click the icon next to the agent's name.

The other agent receives a toast notification and can either accept or reject the invitation to a call. Now you can speak with all parties in the conference with video, if the invitation was accepted. All participants in the conference can view the video of the customer. Only one agent can display video to the customer. Other agents will not be able to display their video unless the first agent stops his video. When you are finished with the video conference, you can remove either yourself or the other agent from the video conference.

Video Transferring

You can transfer an existing video interaction to another destination (agent, queue, route point, etc). Select **Instant Call Transfer**, and type the agent's name or contact URI into the text box. You can also find the agent's name from the list of all agents. Select the Action menu or the icon next to the agent's name. The other agent receives a toast notification and can either accept or reject the invitation.

Video Consultation

While you are on a video call, you can request a consultation with another agent.

Select **Start a Consultation**, type the agent's name or contact URI into the text box, and select **Start Voice Consultation** from the **Action** menu. A toast notification is displayed on the selected user site. Note that the consultation is voice only; video consultation is not available.

You can speak with the other agent before going back to the video call.

Note that while you are consulting with the other agent, the video is temporarily unavailable, even if the video call is `On Hold` or `Connected`. You can resume streaming after you end the consultation by pressing the **Start video** button.

Facebook Interaction

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Interaction Workspace enables you to handle social media interactions from the Facebook website. This topic is also covered in the Workspace Desktop Edition User's Guide.

Tip

This topic includes the Facebook Session Interaction Window, which you use when replying to a private message.

For the following actions, see:

- Mark multiple interactions as Done in Workbin
- Delete multiple outbound interactions from Workbin
- Have an Instant Message consultation
- Access contact information and history

Important

As Facebook posts and comments are not considered as live interactions, the interactions' status is always shown as **Offline** in the Facebook Interaction window.

Display Facebook User Profile Information

Click the **Show Info** button to open a user profile tab. You can also click the user name to open the Facebook page with user profile information.

The author's gender appears in the user profile. The author's gender also displays as an icon: Male or Female.

View Case Data

The Case Data (attached data) view provides information about an interactio n&medash; for example, an account number or type of service. Your system administrator configures which attached data is displayed.

Display the Number of Facebook "Likes"

The number next to the thumbs up icon 4 indicates the number of likes.

Expand or Collapse the Comments View

You can expand the Comments by clicking **View**. After clicking **View**, the **Hide** button is displayed so you can collapse the comment. You can also select **Expand All** or **Collapse All** in the Comments view to view or hide all comments at once.

View the Total Number of Comments and Show More Comments

Click the **Show Info** button to open the user profile, then click the **Post** tab to view the total comments count.

Total comments is also displayed with the original post. Your administrator configures the number of comments to display per page. If the number of comments exceeds the configured number, the **Show more** link is displayed. Click **Show more** to view additional comments.

Display the Actionability and Sentiment of the Facebook Interaction

When a Facebook interaction arrives, you can access Actionability and Sentiment icons, which either have one of the following values or are undeclared:

- Actionability—Possible values are **Actionable** , **Not Actionable** , or **Undeclared** .
- Sentiment—Possible values are **Positive** , **Negative** , **Neutral** , or undeclared .

Actionability and Sentiment are based on the classification and screening results obtained from Genesys Knowledge Management.

Actionable Facebook posts are colored yellow and non-actionable are colored gray or white. Facebook comments are automatically expanded and colored yellow if they are actionable, and collapsed and colored gray or white if they are non-actionable. Each Facebook comment has its own actionability and sentiment icon, which could be updated by the agent if necessary.

Update the Actionability and Sentiment of the Facebook Interaction

While processing the interaction, you have the option to change the value of the corresponding Actionability and Sentiment key by clicking the related icon and then choosing the correct value.

Hide Post or Unhide Post

Hide a root post on the your organization's Facebook page by clicking **Hide Post** or reveal a hidden post by clicking **Unhide Post**. A hidden post is not visible to viewers of the page

Like or Unlike

Like or unlike a post or comment by clicking **Like** or **Unlike.** The Liked by Agent icon appears on liked posts.

Reply to the Original Routed Facebook Post

The original routed post is on the left pane, under the **Case Information** area. Subsequent comments are indented underneath. To reply to the original post, click **Comment**. Enter your comment, right-click, and select **Spellchecking.** You can also copy and paste selected text. When finished, click **Send.** Workspace associates your comment with the post.

Reply to a Facebook Comment

Subsequent comments are indented underneath the original-routed post. Click the applicable Comment, enter your comment, check the spelling, then click **Send.** You can also copy and paste selected text.

Access Images and Files Attached to Private Messages

If an inbound Private Message has attached images or other files, a list of file attachments and links to any images is appended to the message. You can:

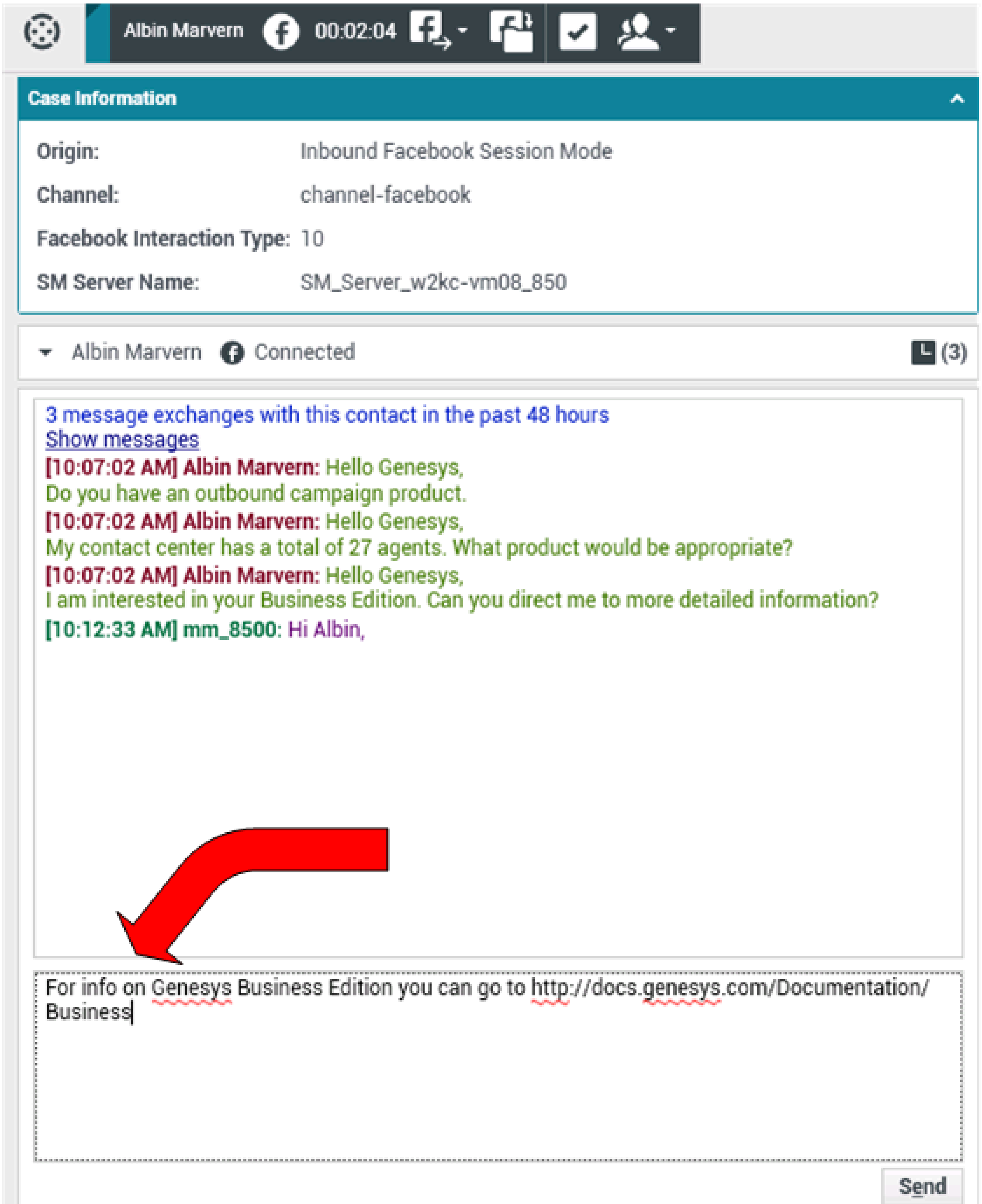
- Click a link in the message to display an image
- Click **FBPM Inbox URL** in the **Case Information** area. This takes you to a page showing all conversations for this Page, where you can display the images and download non-image files.

Replying to Private Messages

You can reply to a private message from a user (you cannot send new private messages). To do so, you must be logged in to either or both of the special channels Facebook (Session Mode) and Facebook Private Message.

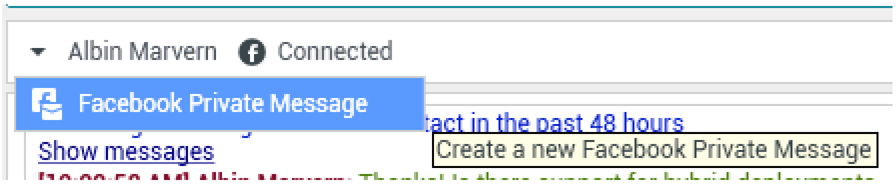
Interaction is Connected

- If the interaction is in the **Connected** status, the reply area is active, enabling you to enter text as in the Figure below. When you are done, you can click **Send** in the lower right corner.



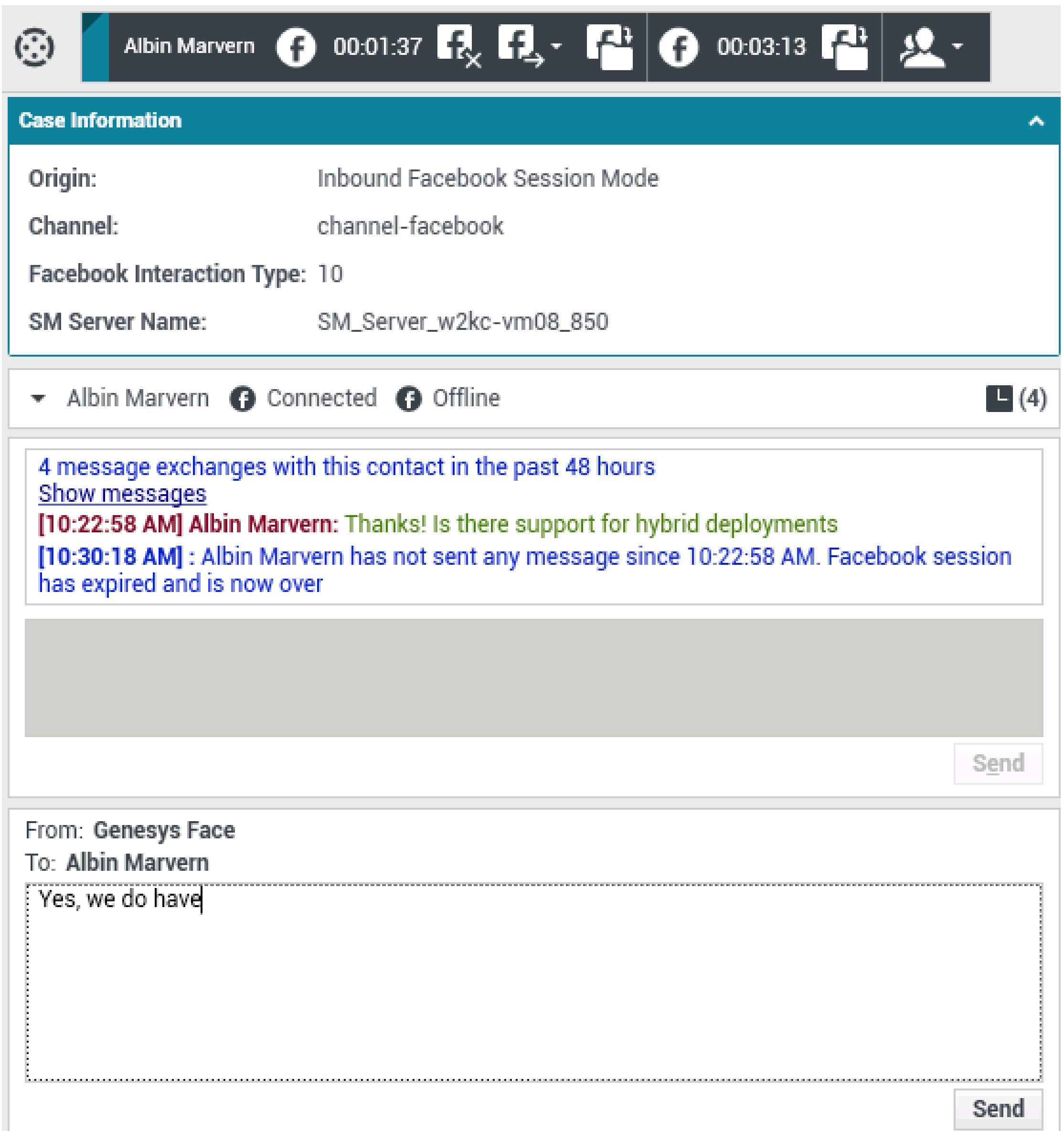
Entering Text in Reply Box

- You can also select **Facebook Private Message** from the drop-down under the contact's name, as in the following Figure:



Private Message in Drop-down.

You then have a new private message area to enter text in.



Entering Text for New Private Message.

- Finally, you can create a reply from the **History** view, as described in the next item.

Interaction is Disconnected

If the interaction is in the **Disconnected** status, you can reply in the following ways:

- By selecting **Facebook Private Message** from the pulldown under the contact's name, as described in the previous section.
- By selecting the interaction on the **History** tab, then clicking the **Reply** button . A **Reply** view opens in which you can enter text.

Channel Dependencies

- If the message has not timed out, you can reply if you are logged in to either Facebook (Session Mode) or Facebook Private Message.
- If the message has timed out, you must be logged in to Facebook Private Message to reply.

Emoji and emoticon support

Workspace supports standard Facebook emojis and emoticons.

Other Actions

- You can send further private messages as replies to an inbound private message. They are threaded with the original inbound private message as their parent.
- You can move a private message that you are working on into a workbin. From there you can perform the standard workbin actions.

Create a New Post

To create a new post, from the Agent Icon dropdown or Gadget dropdown,

1. Select **Post Update,** then **Facebook**. A new message window is displayed.
2. Select an account from the drop-down list.

Attach an Image

You can attach an image to an unsolicited outbound post.

To attach an image, click the **Add Picture** icon , then use the resulting dialog box to navigate to the desired file. This icon appears below the text box.

Use the Standard Response Library

When replying to a post or comment, you can insert a standard response. Click the vertical **Responses** button in the middle of the window to open a Standard Response library. You can search by keywords or open folders and view the responses.

When you click **Comment** or create a new post, an additional icon with the plus sign is displayed. After you click it, the standard response content is added to the message. If the standard response includes an attached image, the attachment is inserted as well. Currently you can attach images only to new unsolicited posts.

Your system might be set up to enable you to automatically insert a response by typing a pre-defined shortcut keyword.

Search Using a Clickable Hashtag

Facebook users can employ the # symbol, called a hashtag, to mark keywords or topics in posts, which can help you find other posts of interest. Clicking a hashtagged word in any message takes you to a Facebook page that lists all other posts in that category.

Delete

Delete an Outbound Interaction

To delete an outbound interaction, click the Delete button on the toolbar at the top of the interaction window.

Delete a Comment or Post

To delete a comment or a post, click **Delete**.

> **Tip**
> The item can be deleted if this action is allowed by the author of the post and you have the permission to delete a post or comment.

Reply to a Facebook Interaction Using Another Media

You can reply using a voice call, email, or SMS. interaction Workspace can present a drop-down list of available channels to access a contact.

If as an agent, you learn other contact information (not Facebook-specific), such as a contact's phone number or email, you can manually enter this on the Information tab. The corresponding choice for other media channels will then appear when you click the arrow to the left of the Contact’s name.

If a channel is not configured or the contact information for this channel is absent, "No possible action" is displayed.

Place Interactions in a Workbin

To place an interaction, inbound or outbound, in a workbin, click the **Move To Workbin** button .

Consult with Another Agent Using Voice

Click the down arrow on the **Start a Consultation** button and select the Type of target. Click the magnifying class to search by name or phone number.

Transfer to an Agent Group, Agent, Interaction Queue or Skill

Click the **Transfer** button to select the Type of target. Click the magnifying class to search by name or phone number.

Select a Disposition Code

You can select the **Dispositions** tab and choose a Disposition code for the original routed Facebook post.

Select Multiple Interactions of the Same Direction in a Workbin

If a workbin contains multiple interactions that are all either inbound or outbound, you can select them all and apply an action; for example, Move to Queue or Mark Done.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle A Facebook Interaction
- Blend Different Media Into A Single Conversation
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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Twitter Interaction

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Interaction Workspace enables you to handle social media interactions from the Twitter website.

For the following actions, see:

- Have an Instant Message consultation
- Mark multiple inbound interactions as Done in Workbin
- Delete multiple outbound interactions in Workbin
- Add a Note
- Access contact information and history
- Mark an interaction as Done

Display Twitter User Profile Information

Click the **Show Info** button to see the user profile information. You can also click the user name to open the Twitter page with user profile information.

Display the Number of Twitter User Tweets

The **Statuses Count** icon 2625 indicates the number of user Tweets.

Display the Actionability and Sentiment of the Twitter Interaction

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

- Actionability—Possible values are **Actionable**, **Not Actionable**, or **undeclared**.
- Sentiment—Possible values are Positive, Negative, Neutral, or undeclared.

Actionable tweets are colored in yellow, and non-actionable in gray or white.

Actionability and Sentiment are based on the classification and screening results obtained from Genesys Knowledge Management.

Update the Actionability and Sentiment of the Twitter Interaction

While processing the interaction, you have the option to change the value of the corresponding Actionability and Sentiment key by clicking the related icon and then choosing the correct value.

Display the Followers Count

The number after the **Follower Count** icon 938 indicates the number of Twitter users following this account.

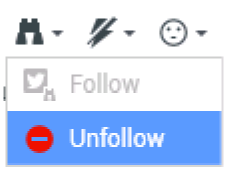
Display Designation that User is a Follower

The **Twitter** icon indicates that the user is a Twitter follower.

Follow/Unfollow a Twitter User

You can become or stop being a follower of an author of the Twitter message.

Click the **Followed** button to unfollow this account. A menu appears where you can select **Unfollow**:



The button changes to **Not Followed** . Or, in case you change your mind, click the **Not Followed** button. The menu re-appears where you can select **Follow**:

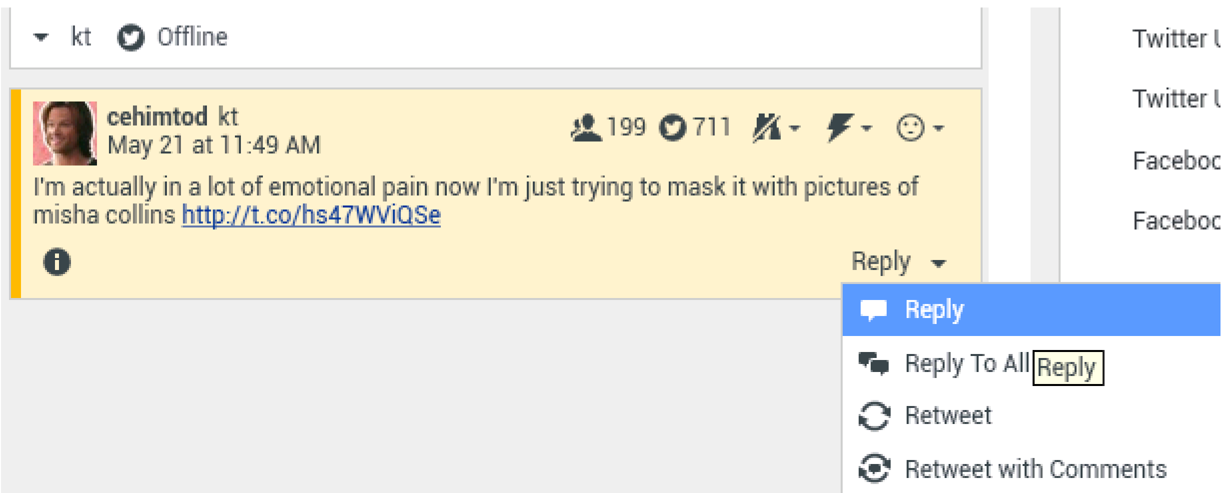
Automatic Insertion of "Mentions"

A mention (@ + <username>) is automatically inserted into replies, Reply All, Retweet w/ Comments, and new tweets with Mention. This @<username> becomes a clickable link to the contact's Twitter profile once the interaction arrives at Twitter.

If you type @<username> into any message, and <username> corresponds to a Contact, this mention also becomes a link to the contact's Twitter profile once the interaction arrives at Twitter.

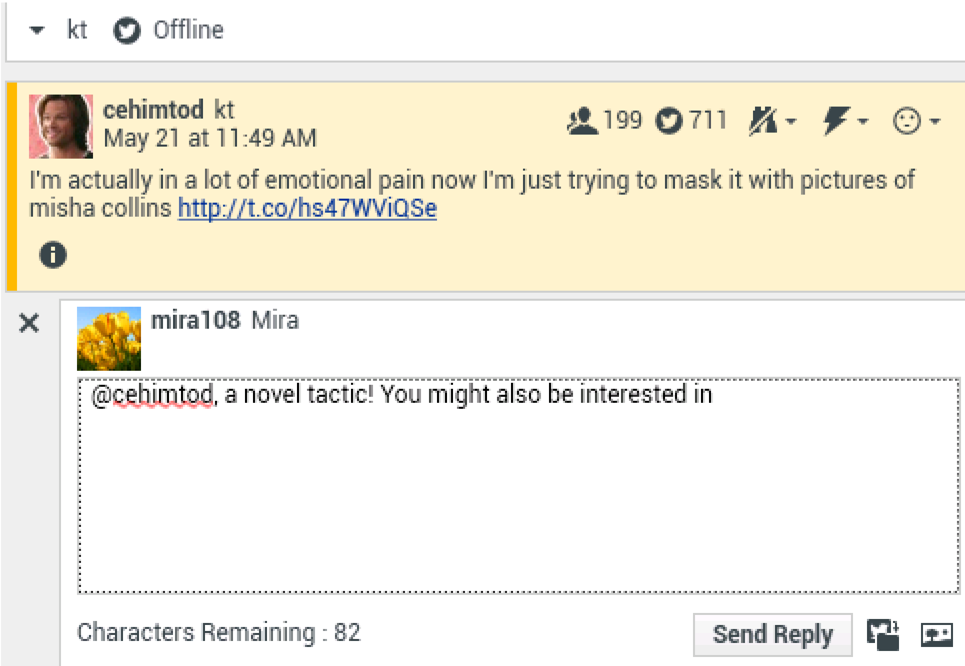
Reply to the Original-Routed Tweet

The original-routed Tweet appears in the left margin under the Case Information area. To reply to the Tweet, click **Reply**, or click the down arrow after **Reply**. A menu drops down. Select a reply type (see figure below).



Replying to a Tweet

A text box opens. Select a Twitter handle from which you want to send your reply to the Twitter user. Enter your text. The text size is limited by the `twitter.max-chars` option value (the default value is `140`). To automatically spell-check your reply, right-click and select **Spellchecking**. You can also copy and paste selected text. When done, click the button to send the reply (see figure below).



Enter Reply Text.

Reply to all Participants in the Current Tweet Thread

Click the down arrow after **Reply**. A menu drops down. Select **Reply to All**.

Reply by Direct Message

When the Twitter message author is a follower, you can send a direct message to the author as a form of reply.

Retweet

Click the down arrow after **Reply**, select **Retweet** from the menu, and then click the **Retweet** button.

Retweet with Comments—Initiate a New Tweet with Reply to Sender

You can make a new Tweet and reply to the sender of the current message, including the text of this message, and add additional comments. You can also copy and paste selected text. A Retweet indicator (RT) is automatically inserted at the start of the message text. Click down arrow after **Reply**, select **Retweet with Comments**, enter the text, and click **Send Retweet with Comments**.

New Unsolicited Tweets and Messages

The Workspace User's Guide describes how to create and send outbound unsolicited messages to a Twitter user.

Emoji and emoticon support

Workspace supports standard emojis and emoticons, both inbound and outbound. You see best results when the **Segoe UI Emoji** font is installed on your system.

Use the Standard Response Library

When replying to a Tweet or creating a new unsolicited Tweet, you can insert a standard response. Click the vertical **Responses** button in the middle of the window to open a Standard Response library. You can search by keywords or open folders and access the responses.

If the standard response includes an attached image the attachment is inserted as well, as long as the message allows attached images.

Your system might be set up to enable you to automatically insert a response by typing a pre-defined shortcut keyword.

Attach an Image

You can attach an image to a new unsolicited Tweet, a reply, a Reply to All, or a Retweet with Comments. (You cannot attach an image to a retweet or any type of direct message).

To attach an image, click the **Add Picture** button , then use the resulting dialog box to navigate to the desired file. This icon appears below the text box in replies and Retweets with Comments; it appears below the text box in unsolicited Tweets.

The following image formats are supported:

- JPEG
- JPG
- PNG
- GIF

Access Case Data

The Case Information (attached data) area provides information about a Twitter interaction. Your system administrator configures which attached data is displayed; examples are Message type, Query name, and User location.

Delete an Outbound Interaction

To delete an outbound interaction, click the **Delete** button on the toolbar at the top of the interaction window.

Reply to a Twitter Interaction Using Another Media

You can reply using a voice call, email, or SMS. The Workspace can present a drop-down list of available channels to access a contact.

If as an agent, you learn other contact information (not Twitter-specific), such as a contact's phone number or email, you can manually enter this on the Information tab. The corresponding choice for the available media channels will then appear when you click the arrow just above the button used to transfer (near the user name).

If a channel is not configured or the contact information for this channel is absent, `No possible action` is displayed.

Place Interactions in a Workbin

To place an interaction, inbound or outbound, in a workbin, click the **Move To Workbin** button .

Consult with Another Agent Using Voice

Click the down arrow on the **Start a Consultation** button and select the Type of target. Click the magnifying glass to search by name or phone number.

Transfer to an Agent Group, Agent, Interaction Queue, or Skill

Click the **Transfer**  button to select the Type of target. Click the magnifying class to search by name or phone number.

Open a Clickable Shortened URL

Twitter messages are limited to 140 characters. If you enter a URL in a Twitter message, a lot of the available characters for your reply are already taken. To overcome this problem, Twitter in its web interface for creating messages converts very long URLs into short URLs. In a short URL, the "long" URL is being replaced by a shorter URL in the form of an automatically generated combination of letters and digits. Interaction Workspace uses such shortened clickable URLs.

Open a Twitter User Profile Page Using Clickable Mentions

The @ sign is used to call out usernames in Tweets, like this: Hello @JoeBelow! Click a username preceded by the @ sign to link to a Twitter user profile.

Perform a Search in Twitter Using a Clickable #hashtag

Twitter uses the # symbol, called a hashtag, to mark keywords or topics in a Tweet. Hashtags help you find Tweets of interest. You can use the hashtag symbol # before relevant keywords in their Tweet to categorize those Tweets to show more easily in Twitter Search. Clicking on a hashtagged word in any message shows you all other Tweets in that category. Hashtags can occur anywhere in the Tweet

Display In-Reply-to Tweet

If the delivered Tweet interaction is a reply to another Tweet, Interaction Workspace allows you to access the original Tweet by clicking the user name located after **In Reply to.** An opened browser window displays the parent Tweet in Twitter.

Select a Disposition Code

You can select the **Dispositions** tab and choose a Disposition code for the original routed Twitter interaction. For more information about how to configure and use selected Dispositions, see Workspace Desktop Edition Help.

Select Multiple Interactions of the Same Direction in Workbin

If a workbin contains multiple interactions that are all either inbound or outbound, you can select them all and apply an action; for example, Move to Queue or Mark Done.

Respond to tweets from My History

You can respond to tweets, retweet, and add tweets to favorites from the My History tab, enabling you to act on interactions marked as done.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle A Twitter Interaction
- Blend Different Media Into A Single Conversation
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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RSS Interaction

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

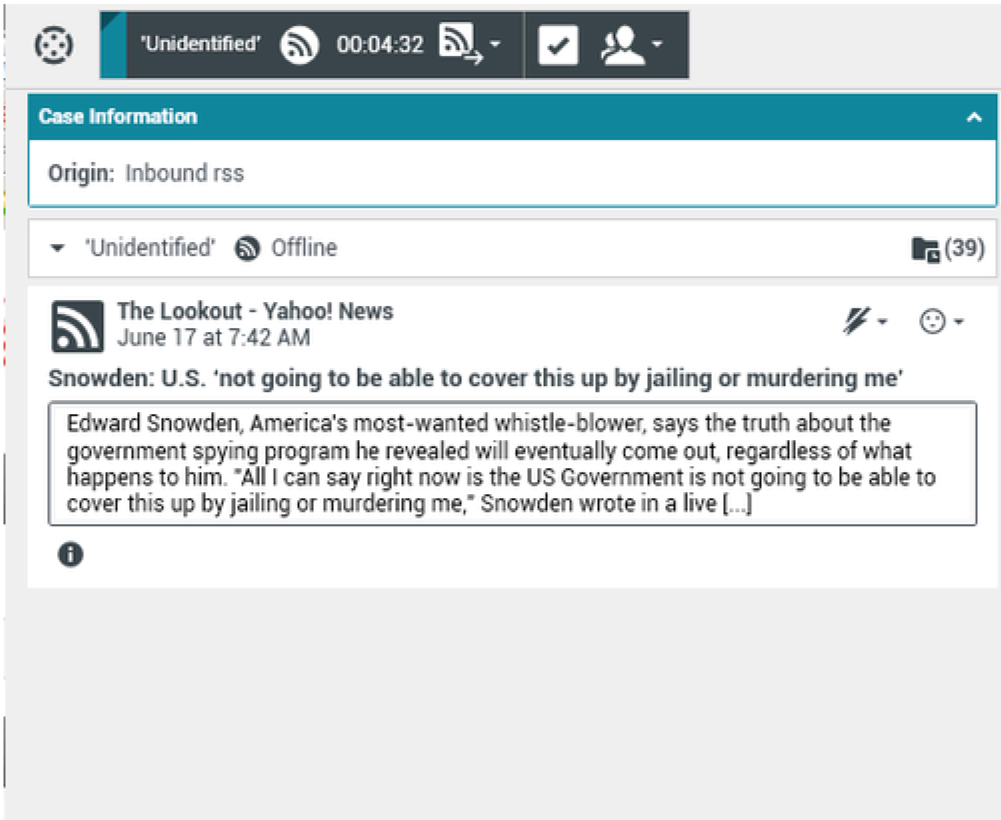
Interaction Workspace enables you to handle RSS social media interactions. You can:

For the following actions, see:

- Add a Note
- Mark an interaction as "Done"

View RSS Web Feed Source, Headline, and Content

The RSS interaction window lets you view the source of the web feed, the headline, and content. Click the headline to go directly to the associated page on the website.



View Channel and Item Category information

Click the **Show Info** button to view the channel copyright, language, published date, and item category.

View the Actionability and Sentiment of the RSS Interaction

When an RSS interaction arrives, you can review the Actionability and Sentiment icons, which could have one of the following values or be unassigned:

- Actionability—Possible values are **Actionable**, **Not Actionable**, or **undeclared**.
- Sentiment—Possible values are **Positive**, **Negative**, **Neutral**, or **undeclared**.

Actionable messages are colored in yellow, and non-actionable in gray.

Actionability and Sentiment are based on the classification and screening results obtained from Genesys Knowledge Management.

Update the Actionability and Sentiment of the RSS Interaction

While processing the interaction, you have the option to change the value of the corresponding Actionability and Sentiment key by clicking the related icon and then choosing the correct value.

Access Case Data

The Case Data (attached data) view provides information about an interaction—for example, an account number or type of service. Your system administrator configures which attached data is displayed.

Consult with Another Agent Using Voice

Click **Start a Consultation** button and select the Type of target. Click the magnifying class to search all, search favorites, or search recent.

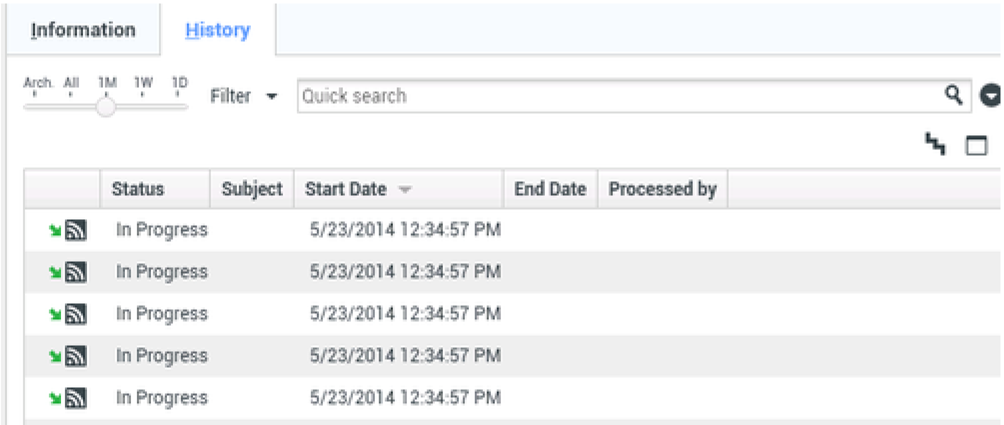
Transfer to an Agent Group, Agent, Interaction Queue or Skill

Click the **Transfer** button, select the Type of target, enter the search criteria, and click the magnifying glass to search all, search favorites, or search recent.

Access RSS Feed Source History

Click the **History** tab to review RSS interactions from a particular contact (RSS web feed source). Depending on how Workspace Desktop Edition is set up, the list could include interactions from other media channels.

Move the chronology slider to search archived interactions, or to search by month, week, or day. As you move the slider bar, the list of interactions changes to reflect the selected time period. Click the **Filter** button to show all interactions or interactions for a particular media type. Click the magnifying glass to search using your own criteria.



View the Number of Interactions in Progress

The number next to the **Recent Interactions** icon (39) lets you review the number of interactions in progress.

Select a Disposition Code

You can select the Dispositions tab and choose a Disposition code for the RSS interaction. For more information about how to configure and use selected Dispositions.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle An RSS Interaction
- Blend Different Media Into A Single Conversation
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
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- Workspace Desktop Edition Help

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Internal IM

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

This feature enables you to send an Instant Message (IM) to another agent (internal target) or receive an IM from an internal target. If you start the IM from an active Voice Interaction, you can share contact information with the IM target. You can transition from an IM consultation session to a Voice Consultation.

Use the **Zoom** control in the **Main Menu** (refer to Manage your settings and preferences) to change the size of the text in this view. This feature might not be available in your environment.[**Added:** 8.5.109.16]

Important

Your account must be configured to use Internal Instant Messaging.

Sending an IM

Use the Team Communicator on your Main Window view to find the internal target with whom you want to start an IM session.

In the Internal Target **Action** menu, select **Send an Instant Message <*target name*>**.

The IM session is started in the Interaction window. The target is presented with an interactive notification that enables them to accept or reject your invitation to start an Instant Messaging session. You are notified if the target accepts, rejects, or lets your invitation time-out.

The Interaction toolbar indicates the name of the internal target with whom you are in an IM session.

The interaction Status indicator displays the name of the internal target with whom you are in an IM session and the status of the session. The status is either **Connected** or **Ended**.

The large text field contains a transcript of the IM session. Your account name and the name of the Internal target are displayed above the messages in different colors to enable you to determine who is writing. Each entry is marked with a timestamp. The participant names occur before the text that the participant entered.

Enter your message in the message field. Click **Send** or press the **Enter** key on your keyboard to send your message to the internal target.

When your session is complete, click **End Session** () to disconnect the IM session.

Click the **Done** button () to close the IM session window.

Receiving an IM

If another agent wants to start an Instant Message session with you, the other agent selects your name from the Team Communicator and then selects **Send an Instant Message** from the **Action** menu.

An interactive notification is displayed above the system tray and the interaction window is minimized in your task bar.

Click **Accept** to display the new IM interaction in your Interaction window. Click **Reject** to refuse the IM interaction. If you do not click Accept or Reject, the interaction notification is dismissed, but the pending IM interaction remains in your task bar until you display it.

The Interaction toolbar indicates the name of the internal caller with whom you are in an IM session.

The Status indicator displays the name of the internal caller with whom you are in an IM session and the status of the session. The status is either **Connected** or **Ended**.

The large text field contains a transcript of the IM session. Your name and the name of the Internal caller are displayed before the messages in different colors to enable you to determine who is writing. Each entry is marked with a timestamp. The participant names appear above the text that the participant entered.

Enter your message in the text field. Click **Send** or press the **Enter** key on your keyboard to send your message to the internal target.

When your session is complete, click **End Session** () to disconnect the IM session.

Click the **Done** button () to close the IM session window.

Starting an IM Consultation from an Active Interaction

To start an IM consultation from an active interaction, such as voice, email, or chat, perform the following steps:

1. Click **Start Consultation** () to open the Team Communicator on your active Interaction view to find the internal target with whom you want to start an IM session.

2. In the internal target **Action** menu, select **Start Instant Message Consultation**.
   A new Internal IM message window is displayed that has the status **Not Connected**.
3. To initiate an Internal IM session, enter a message and click **Send**. To cancel the IM session, click **Done** ( ).

If you sent a message, the internal target receives an interactive notification of your instant message that includes your initial message.

If the internal target accepts your invitation, you and the target are engaged in an internal IM session. All of the Case Data about the interaction with the contact is displayed in the IM interaction window of your internal target. The Contact Information and Contact History tabs are available to enable your internal target to access information about your contact and to search the contact history database. The Information tab is read-only.

You can perform the following actions in the Consultation IM interaction window:

- Enter messages in the message field.
- Click **Send** to send the message to the internal target.
- Review the message transcript in the message transcript area.
- Click **End** Session ( ) to terminate your IM Consultation.

Transitioning an IM Consultation to a Voice Consultation

If you are engaged in a Consultation IM with an internal target that you initiated from the current voice interaction, you can transition the IM consultation to a Voice Consultation by performing the following steps:

1. Click **Start Consultation** ( ) to open the Team Communicator on your active Interaction view.
2. Under **Active Consultations**, choose the active consultation target as your voice consultation target.
   The internal target with whom you are engaged in an IM consultation is presented as the default selection unless you enter something in the search field or click any of the filter buttons.
3. Select **Start Voice Consultation** in the Team Communicator **Action** menu.

The contact is put on hold. When the internal target accepts the consultation request, you can speak to the internal target.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle Internal Instant Messaging
- Handle A Voice Call
- Main Window Basics
- Workspace Windows and Views

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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Apple Messages for Business Interaction

Tip

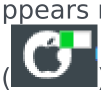
Are you searching for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Interaction Workspace enables you to handle Apple Messages for Business interactions. This topic is also covered in the Workspace Desktop Edition User's Guide.

Pending response indicator

Important

This section applies only to Apple Messages for Business 9.0.002.xx and higher releases.

When you receive an Apple Messages for Business message from a contact, a timer starts and a pending response indicator appears next to the interaction-type icon in the Apple Messages for Business interaction window (). The timer indicates that you have a response to the contact pending.

The color of the pending response indicator begins as green. If you have not responded by a specific time interval, the indicator changes to yellow. If you still have not responded by a second time interval, the indicator changes to red and begins to flash. The indicator disappears after you send a message to the contact.

If you have a pending response but the Apple Messages for Business interaction window is not the active window, the Workspace Windows taskbar icon flashes, regardless of the condition of the pending response indicator. The flashing stops when you navigate to the interaction by clicking the Interaction control bar.

Using workbins

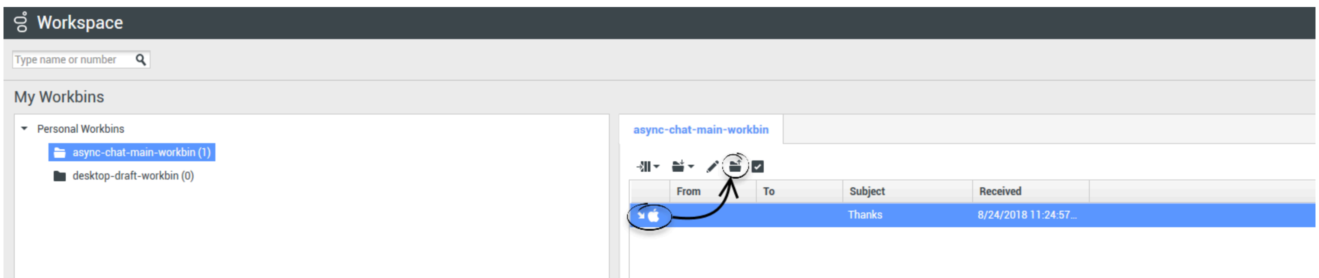
Important

This section applies only to Apple Messages for Business 9.0.001.05 and higher releases.

Your organization might use workbins to manage Apple Messages for Business interactions. A workbin is like a queue in which you can store interactions that are to be handled later. Additionally, when you log out, open Apple Messages for Business interactions are transferred to a workbin for later access. If a contact resumes one of these interactions, it is automatically removed from the workbin and transferred to an available agent.

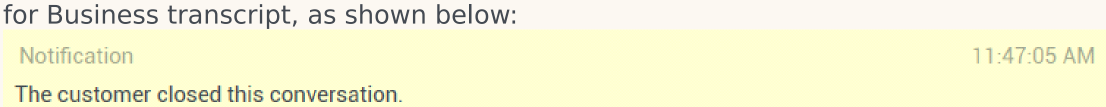
Click  to transfer the interaction to a workbin. The interaction closes in Workspace but the session remains active in the background (server-side) and for the contact.

To retrieve the interaction from the workbin, select the interaction and click **Open**, as shown below:



Important

An agent cannot message a contact after the contact deletes the Apple Messages for Business session from his or her device. This event is reported in the Apple Messages for Business transcript, as shown below:



Standard Response Library

Use the Workspace Standard Response Library to insert prepared replies into your conversation. Text is sent first in a separate message, followed by attachments (if any). Click **X** to remove an attachment file from the response.

You can also use standard responses to insert structured messages that use Apple Messages for Business-specific features, such as:

- Apple Pay
- Custom Extensions

- Date Pickers
- List Pickers
- Rich Links

These features are described in more detail below.

> **Tip**
> Refer toUsing The Standard Response Library in the Workspace Desktop Edition User's Guide for more general information on using standard responses.

Apple Pay

The Apple Pay structured response enables contacts to pay for a purchase using Apple Pay.

You use this feature in the same way you would use a standard response. In the **Responses** tab, select the structured response that uses the Apple Pay feature.

The contact receives the message and provides a response.

Customizing the Apple Pay message

Select the Apple Pay message to access the following tabs and settings:

- **Payment Request** tab
  - **Label**: This column contains one or more line items for which the contact must pay.
  - **Amount**: This column specifies the price for each line item.
  - **Subtotal**: The total amount of the line items for which the contact must pay.
  - **Tax Rate**: The tax rate to use to calculate **Total Amount** price.
  - **Total Label**: The text label for the **Total Amount** value.
  - **Total Amount**: The total price, including tax.
  - **Tax Shipping**: If selected, tax is also applied to the shipping cost (refer to **Shipping Methods**, below).
    Click **Add** or **Remove** to manually add or delete line items before sending tes Apple Pay request to the contact.
- **Shipping Methods** tab
  - **Label**: This column contains one or more shipping methods that the contact may choose.
  - **Detail**: This column provides more information about each shipping method.
  - **Amount**:The cost for each shipping method.
  - **Tax**: If you selected **Tax Shipping** in the **Payment Request** tab, this column shows the tax to be charged for the shipping method.

Click **Add** or **Remove** to manually add or delete shipping methods before sending this Apple Pay request to the contact. The contact can select one of the provided shipping methods before he or she pays. If the contact does not make a selection, the default shipping method (the first item in the **Shipping Methods** list) is automatically applied.

- **Extra Information** tab
  - Information in this tab varies depending on the configuration set up by your organization. Ask your administrator for additional information.
- **Received Message** tab
  - These settings are typically pre-configured in the standard response. Only change these settings if directed to do so by a supervisor or manager.

Custom Extensions

> **Important**
> Custom extensions are unique to each organization. Therefore, the information in this section might not apply to all organizations.

Custom extensions are custom-built iMessage or iOS apps that provide extended functionality. For example, your organization might have an app that helps contacts to access additional information on your server, such as account information.

Use this feature in the same way you use a standard response. In the **Responses** tab, select the standard response that uses the Custom Extension.

The contact receives the message and selects a response.

Configuring the Custom Extension

Select the Custom Extension to access the following tabs and settings:

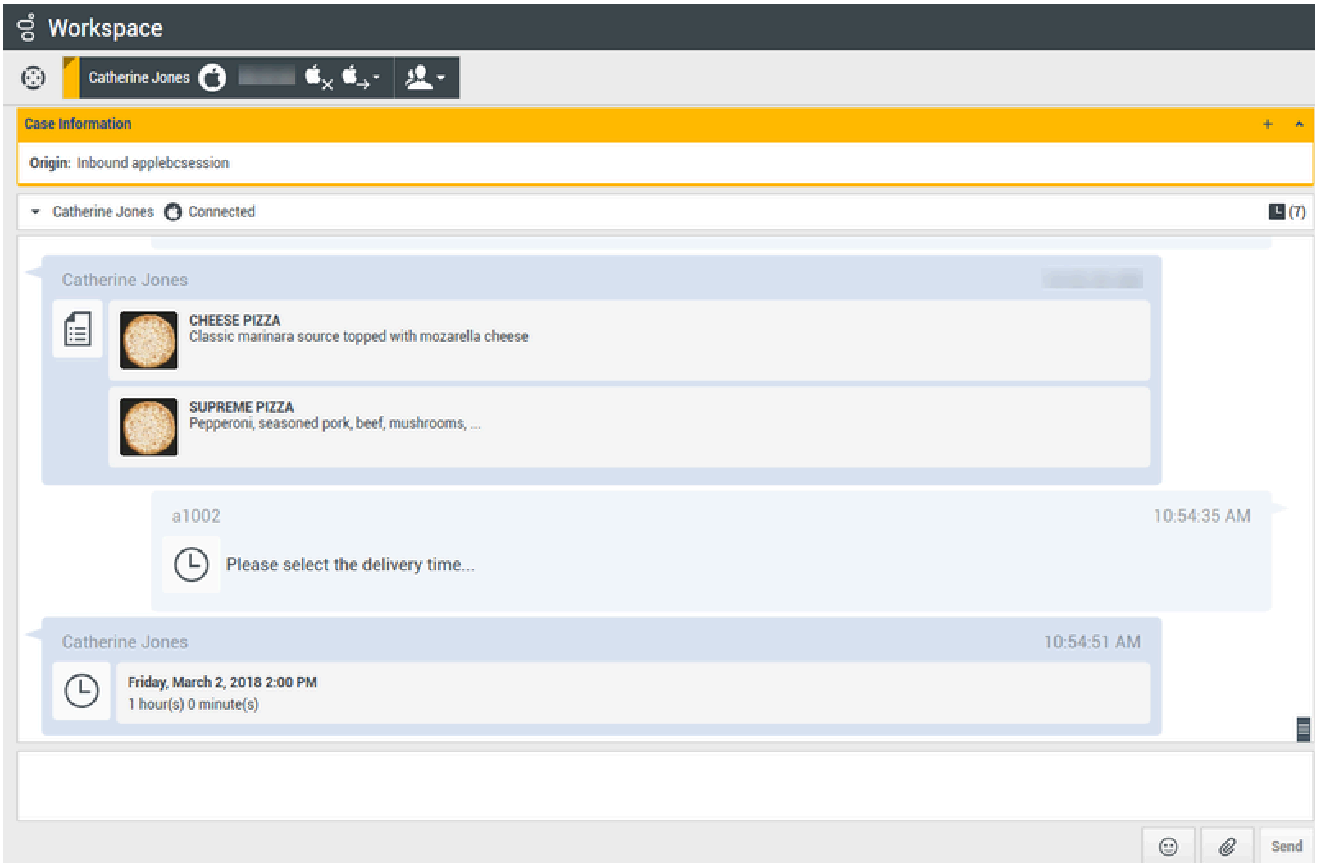
- **Custom Extension** tab: The information on this tab is specific to your custom extension. The information specifies the parameters and values used by the custom extension. Do not modify this information unless directed to do so by a manager or supervisor.
- **Received Message** tab: This tab shows a preview of the message to be sent to the contact.

Date Picker

The Date Picker feature enables you to provide your contact with a list of dates from which to make a selection. For example, you might provide a list that prompts the contact to choose a date for scheduling a service call.

Use this feature in the same way you use a standard response. In the **Responses** tab, select the standard response that uses the Date Picker feature.

The contact receives the message and selects a response.



Customizing the Date Picker

Select the Date Picker to access the following tabs and settings:

- **Event** tab
  - **Title**: Provide a title for the Date Picker message.
  - **Location**: (Optional) Describe a location for the Date Picker event.
  - **Latitude**: (Optional) Provide a latitude for the location.
  - **Longitude**: (Optional) Provide a longitude for the location.
  - **Radius**: (Optional) The location radius, in meters. If the latitude and longitude fields are missing or empty, this field is ignored.
- **Timeslots** tab
  - Click **Add** to add a timeslot. In the **StartTime** field, select a date and time for the timeslot. In the **Duration** section, specify the length of the timeslot.
  - Click **Add** or **Remove** to add or delete a timeslot.
- **Received Message** tab

    - These settings are typically pre-configured in the standard response. Only change these settings if directed to do so by a supervisor or manager.
- **Reply Message** tab
    - These settings are typically pre-configured in the standard response. Only change these settings if directed to do so by a supervisor or manager.

Important

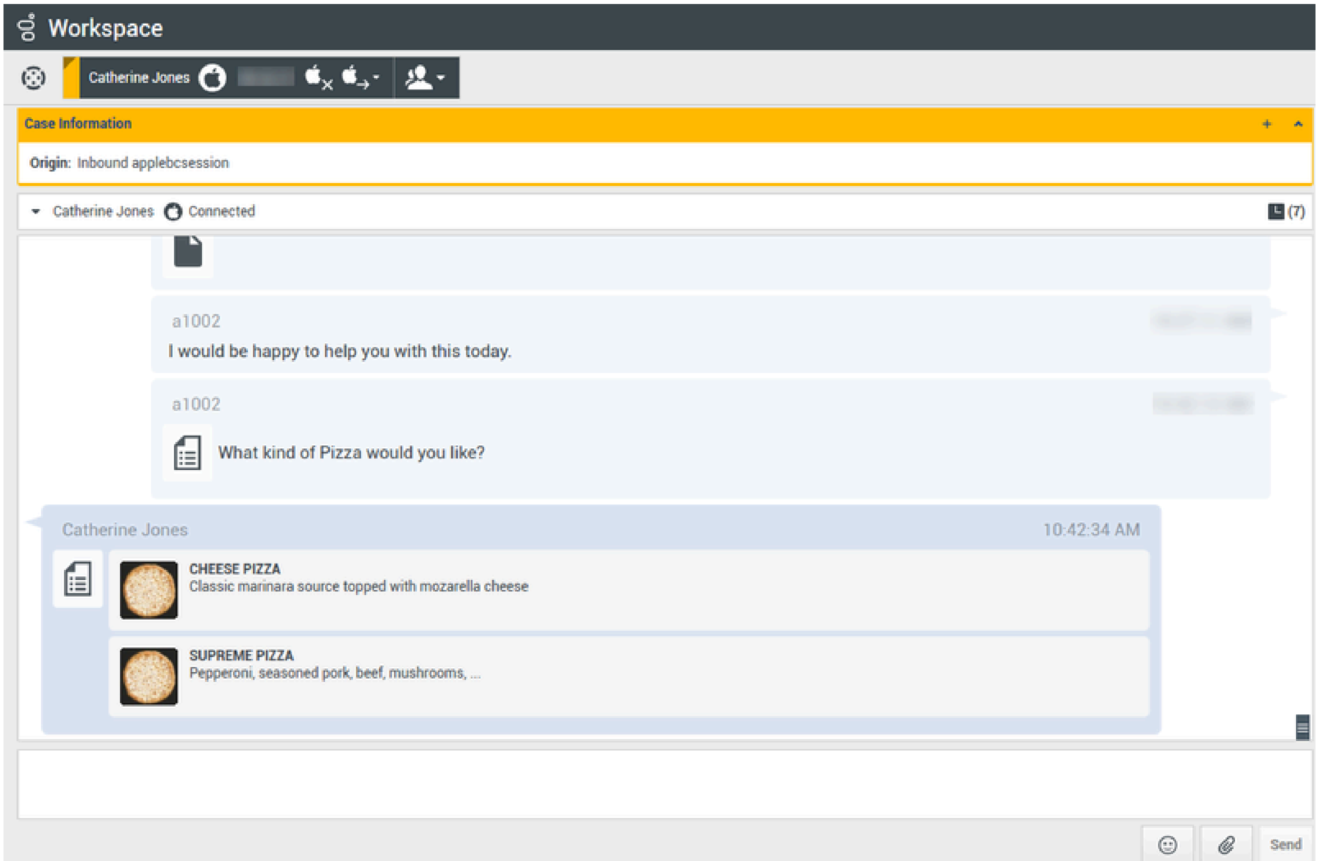
The **Title** and **Duration** fields are only presented to contacts when they add the event to their calendar.

List Picker

The List Picker feature enables you to provide your contact with a list of selectable options. For example, you might provide a list prompting the contact to choose a reward or a particular type of credit card.

Use this feature in the same way you use a standard response. In the **Responses** tab, select the standard response that uses the List Picker feature.

The contact receives the message and selects a response.



Customizing the List Picker

Select the List Picker to access the following tabs and settings:

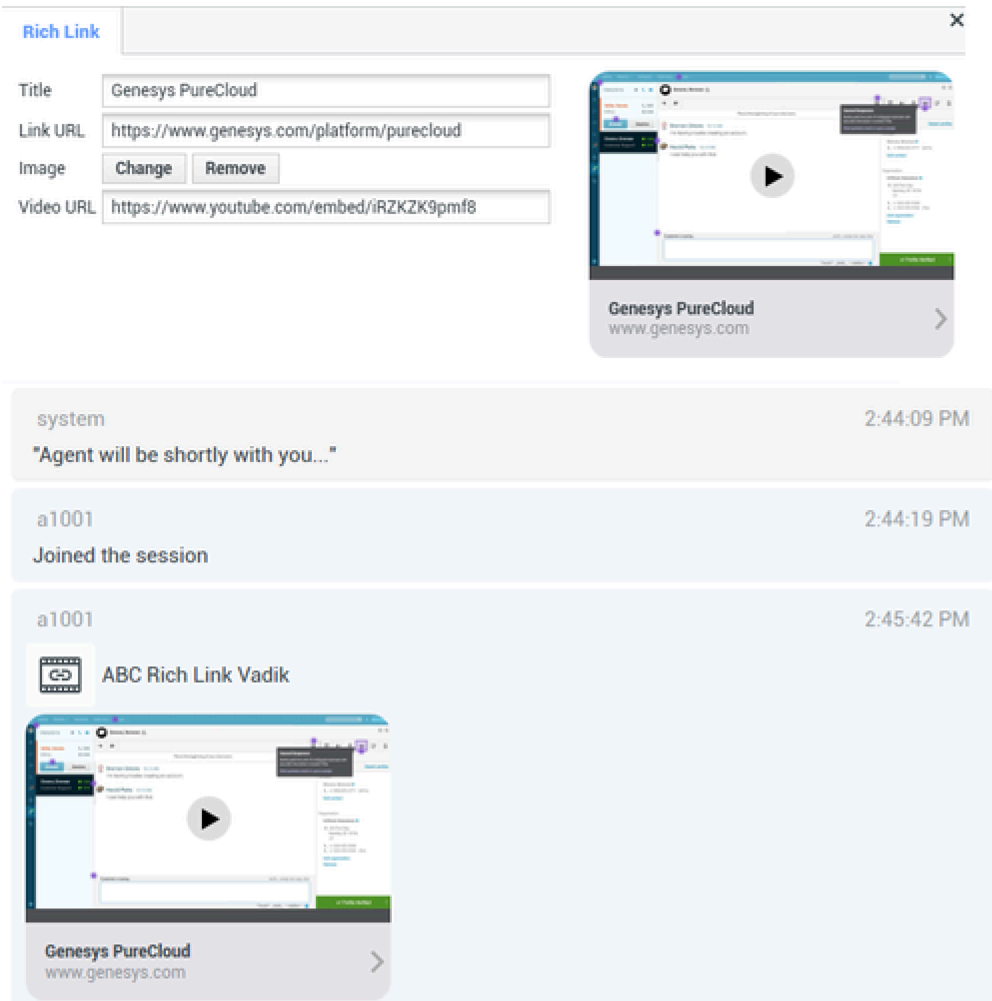
- **List Picker** tab
  - **Multiple Selection**: Select this option to enable the contact to choose more than one item from the list.
  - Right-click an object in the list section to access a contextual menu with the following options:
    - **Add Section**: Add a new section to the list.
    - **Add Item**: Add a new item to the selected section.
    - **Remove Section** or **Remove Item**: Remove the selected section or item.
    - **Move Up**: Move the selected object higher in the list.
    - **Move Down**: Move the selected object lower in the list.
  - **Title**: Provide a title for the List Picker message.
- **Received Message** tab
  - These settings are typically pre-configured in the standard response. Only change these settings if directed to do so by a supervisor or manager.

- **Reply Message** tab
  - These settings are typically pre-configured in the standard response. Only change these settings if directed to do so by a supervisor or manager.

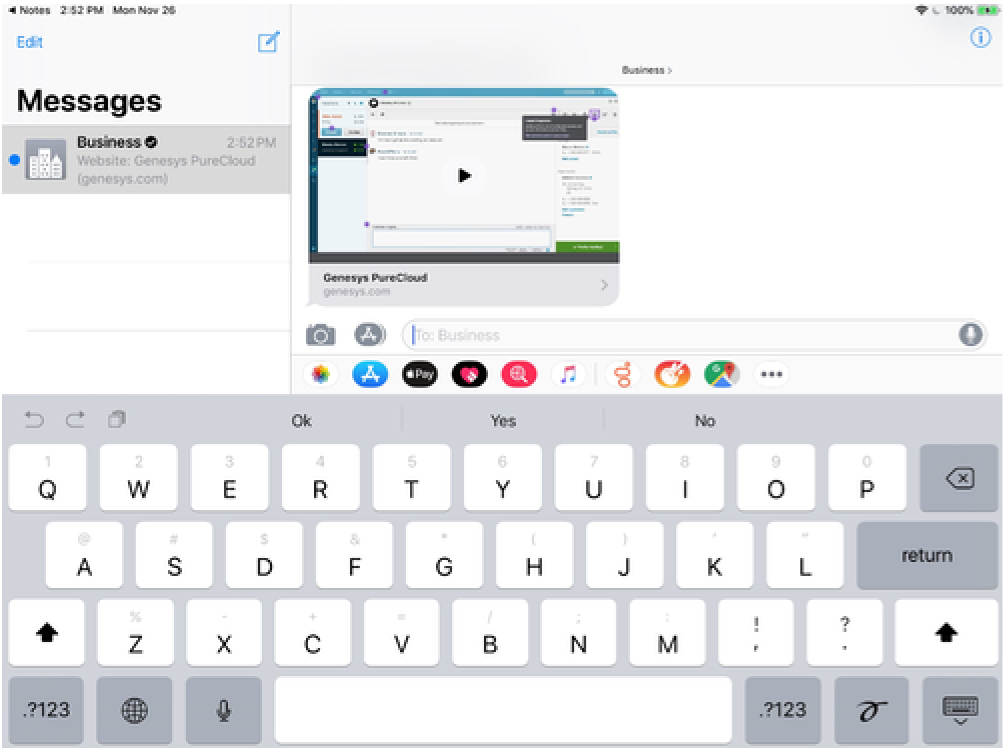
Rich Links

Use Rich Links to show contacts an in-line preview of an image or video within the chat. Unlike regular messages, a contact can access the media immediately without clicking a "Tap to Load Preview" message.

Use this feature in the same way you use a standard response. In the **Responses** tab, select the standard response that uses the Rich Link feature. An example standard response that uses a Rich Link is shown below:



The contact receives the message and can access the media directly in the chat, as shown below:



Supported file types

The following image formats are supported (file size must be less than 25 MB):

- PNG
- JPG/JPEG
- GIF
- BMP

Support for streaming video is dependent on Apple. Video format support is not limited by this plugin.

Attachments

Click **Attach file**  to attach a file. You can also receive attachments.

- Click the corresponding icon in the transcript area to display or play the attachment.
- Right-click the icon and select **Save as...** to save the attachment.

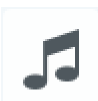
Important

- The file size of an attached file must be smaller than 100 MB.
- The size and type of file that you can attach or receive might be further limited by your configuration.

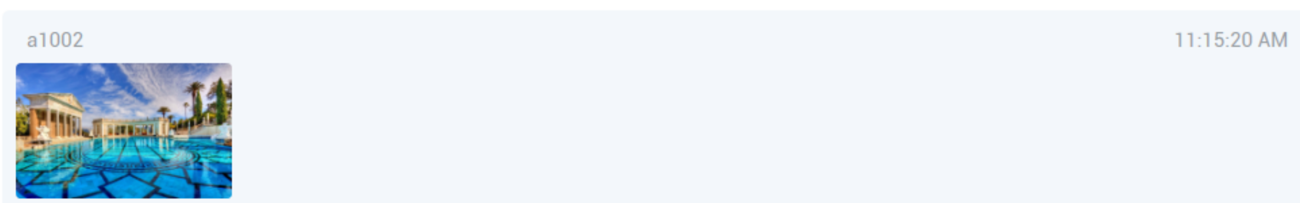
The following attachment types are supported:

- Non-multimedia files: Non-multimedia files are opened by the default application for that file type.

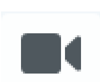
- Audio: An audio attachment icon appears in the message area. Select the icon to open the audio file.



- Images: A preview of the image appears in the message area. Select the image to open the image.



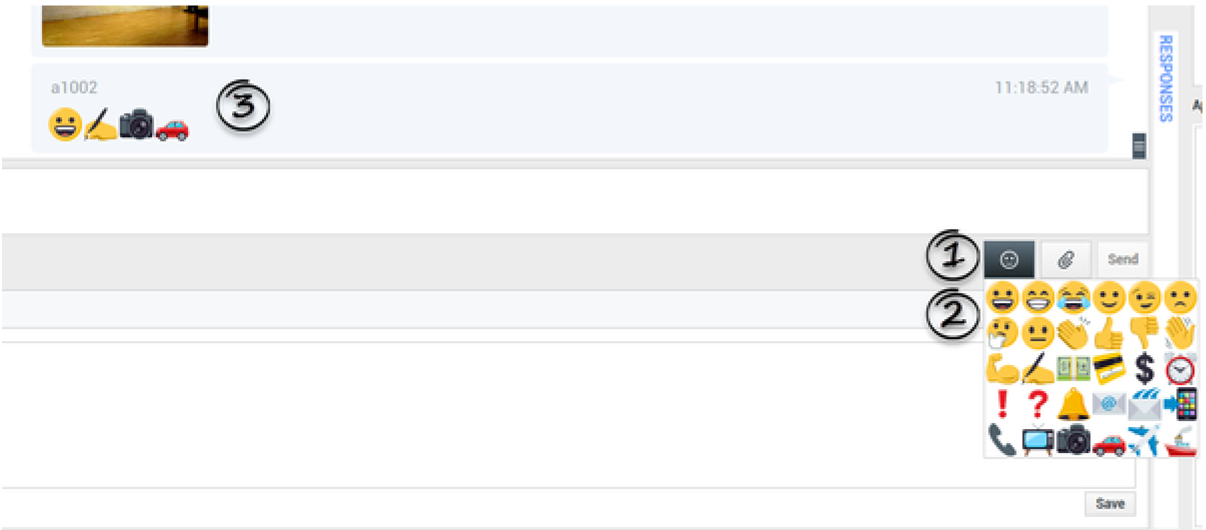
- Videos: A video attachment icon appears in the message area. Select the icon to open the video.



Emojis

Apple Messages for Business provides a set of emojis that you can use in chat interactions.

1. Click **Insert Imoji** (smiley-face) to open the emoji drop-down menu.
2. Select an emoji.
3. When you select an emoji, it appears in the message area.



Web links

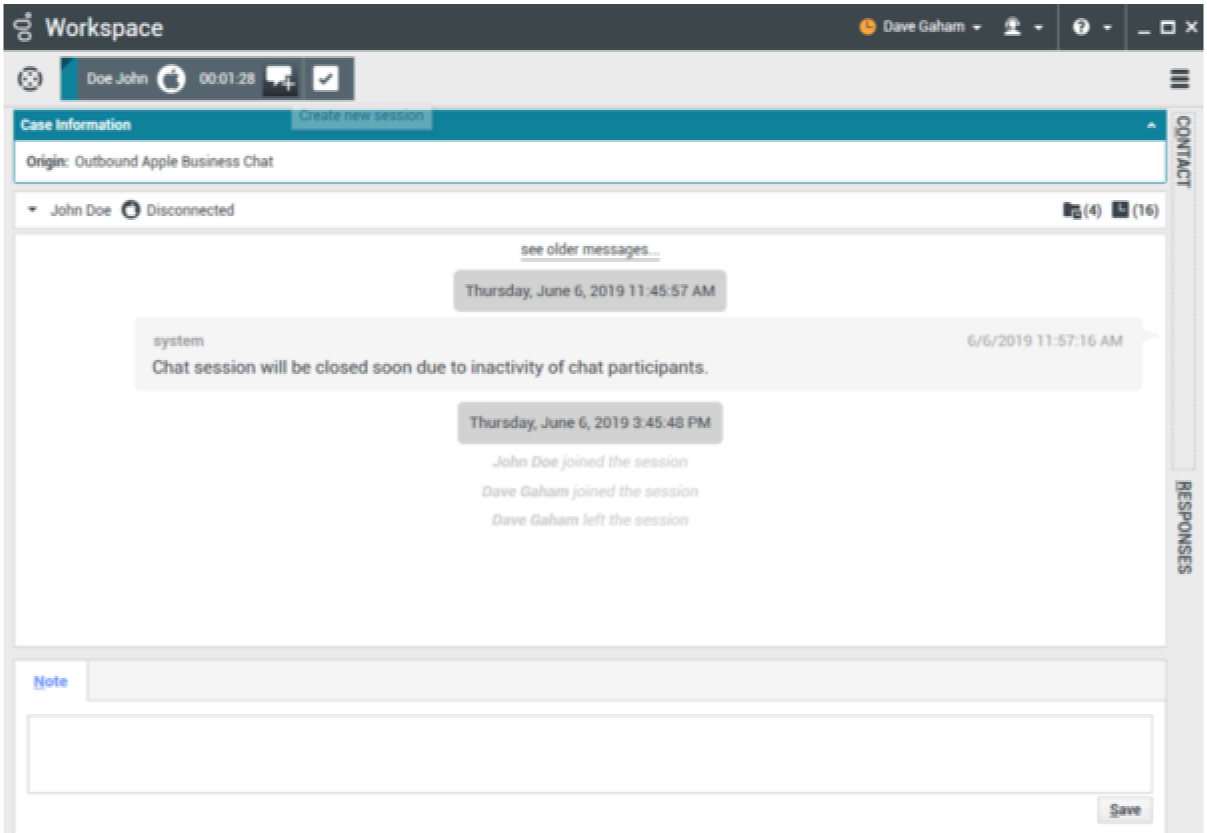
All URL links are shown as hyperlinks in the chat window. Click a link to open it in the system default web browser.

Sending outbound messages

You can initiate a conversation with a past contact using the **My History** view or by accessing the history for a particular contact in the **Contact Directory**. Select a past interaction with the contact and click **Create new chat** (.

The interaction opens and you can use the same functionality as an inbound interaction to converse with the contact.

Alternatively, if you have not yet marked an interaction as Done, you can click **Create new session** ( ) in the interaction control bar to create a new outbound session.



Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle An Apple Messages for Business Interaction
- Blend Different Media Into A Single Conversation
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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WhatsApp Interaction

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Interaction Workspace enables you to handle WhatsApp interactions. Additional information is included in the Workspace Desktop Edition User's Guide.

Pending response indicator

When you receive a message from a contact, a timer is starts and a pending response indicator appears next to the interaction-type icon at the top of the WhatsApp interaction window (). The timer indicates that you have a pending response to the contact.

The color of the pending response indicator begins as green. If you have not responded by a specific time interval, the indicator changes to yellow. If you still have not responded by a second time interval, the indicator changes to red and begins to flash. The indicator disappears after you send a message to the contact.

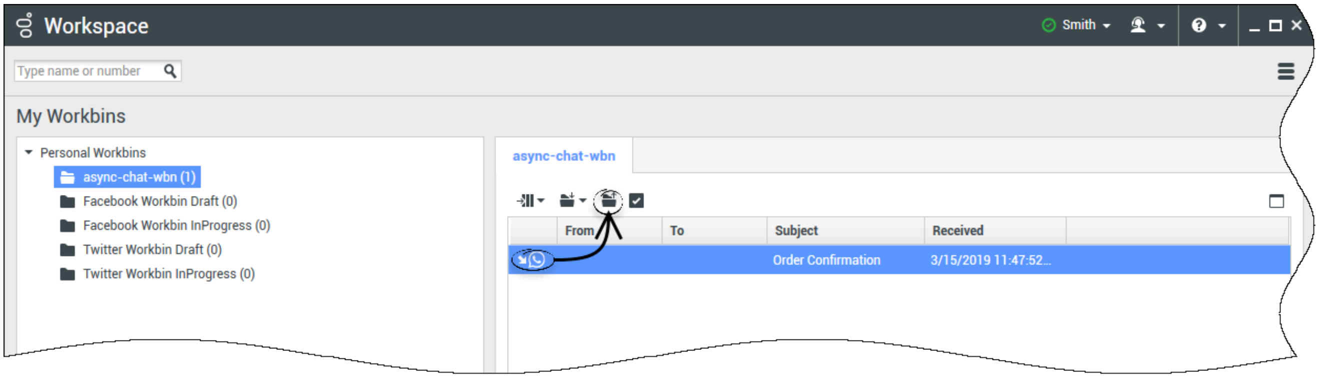
If you have a pending response and the WhatsApp interaction window is not the active window, the Workspace taskbar icon flashes, regardless of the condition of the pending response indicator. The flashing stops when you navigate to the interaction by clicking the Interaction control bar.

Using workbins

Your organization might use workbins to manage WhatsApp interactions. A workbin is like a queue in which you can store interactions that are to be handled later. Additionally, when you log out, active WhatsApp interactions are transferred to a workbin to be accesses later. If a contact resumes one of these interactions, the interaction is automatically removed from the workbin and transferred to an available agent.

Click **Move to Workbin**  to transfer the interaction to a workbin. The interaction closes in Workspace but the session remains active in the background (server-side) and for the end customer.

To retrieve the interaction from the workbin, select the interaction and click **Open**.



Standard Response Library

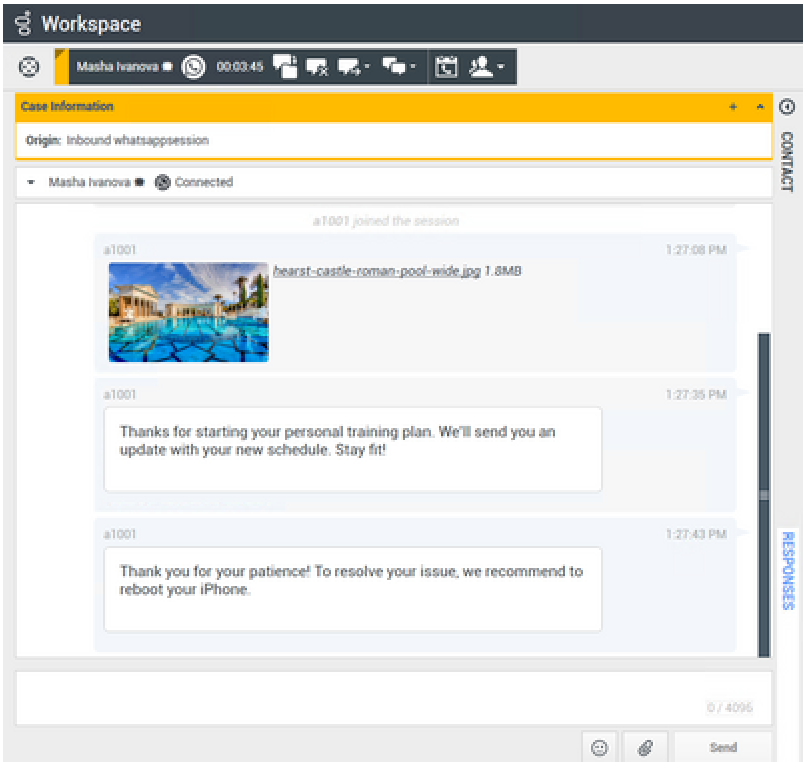
Use the Workspace Standard Response Library to insert prepared replies into a WhatsApp conversation. Text is sent first in a separate message, followed by attachments (if any). You can click **X** to remove an attachment from a response.

Refer to Using The Standard Response Library in the Workspace Desktop Edition documentation for more general information on using standard responses.

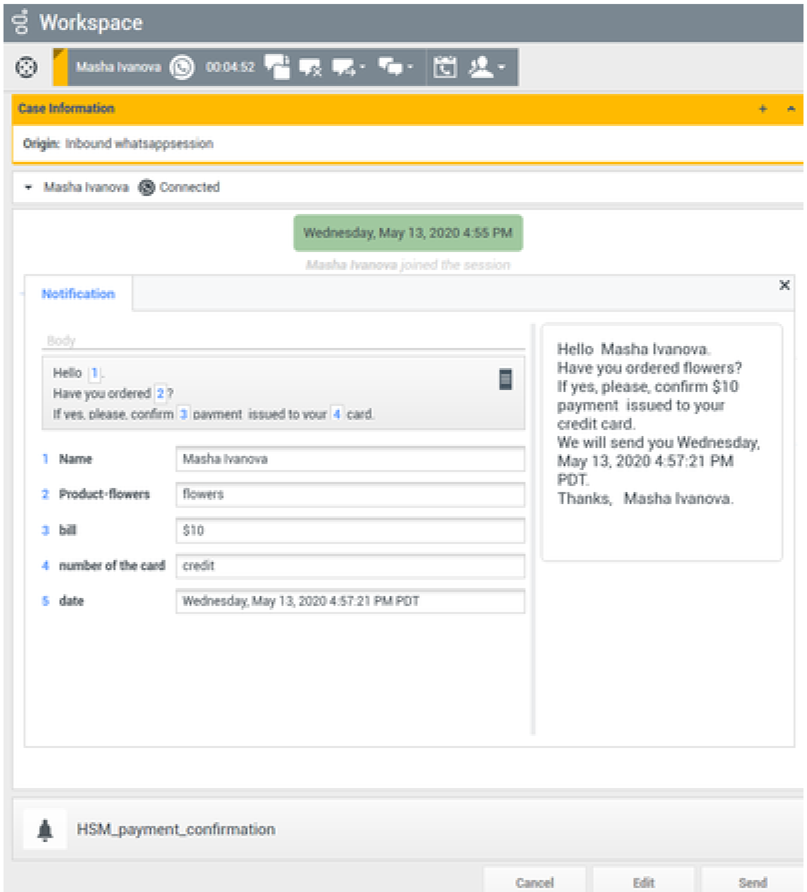
Notifications

Use standard responses to insert structured messages (also known as *Notifications*) into WhatsApp interactions. Structured messages notify customers of useful information such as account balances, service alerts, and so on.

Use this feature in the same way you use standard responses. In the **Responses** tab, select the standard response containing the Notification feature and insert it into the conversation. The following is an example Notification message



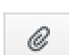
After you insert the Notification, you can click either the Notification type icon or **Edit** to access the **Notification** tab and edit the parameter values that are used in the message. When you are done editing, click **Send** to send the notification, or **Cancel** to cancel the action.



Tip

Refer to Using The Standard Response Library in the Workspace Desktop Edition documentation for more general information on using standard responses.

Attachments

Click **Attach file**  to attach a file. You can also receive attachments.

- Click the corresponding icon in the transcript area to display or play the attachment.
- Right-click the icon and select **Save as...** to save the attachment.

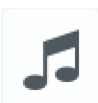
Important

- The file size of an attached file must be smaller than 100 MB.
- The size and type of file that you can attach or receive might be further limited by your configuration.

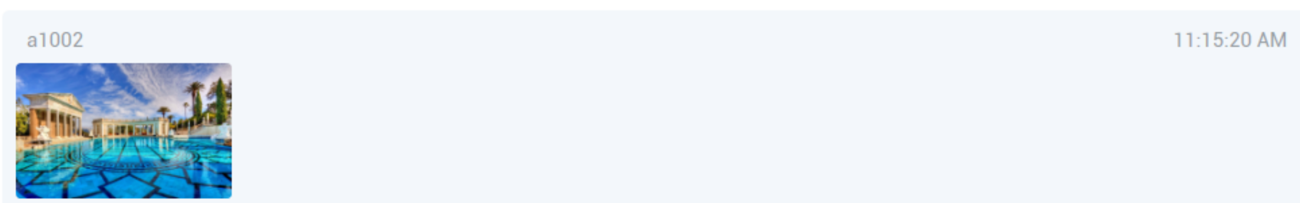
The following attachment types are supported:

- Non-multimedia files: Non-multimedia files are opened by the default application for that file type. Currently, the following document types are supported: PDF, DOC(X), PPT(X), and XLS(X).

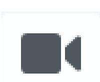
- Audio: An audio attachment icon appears in the message area. Select the icon to open the audio file. Currently, the following file types are supported: AAC, M4A, AMR, MP3, OPUS, OGA, and OGG.



- Images: A preview of the image appears in the message area. Select the image to open the image. Currently, only JPG/JPEG and PNG files are supported.



- Videos: A video attachment icon appears in the message area. Select the icon to open the video. Currently, only MP4 videos are supported.

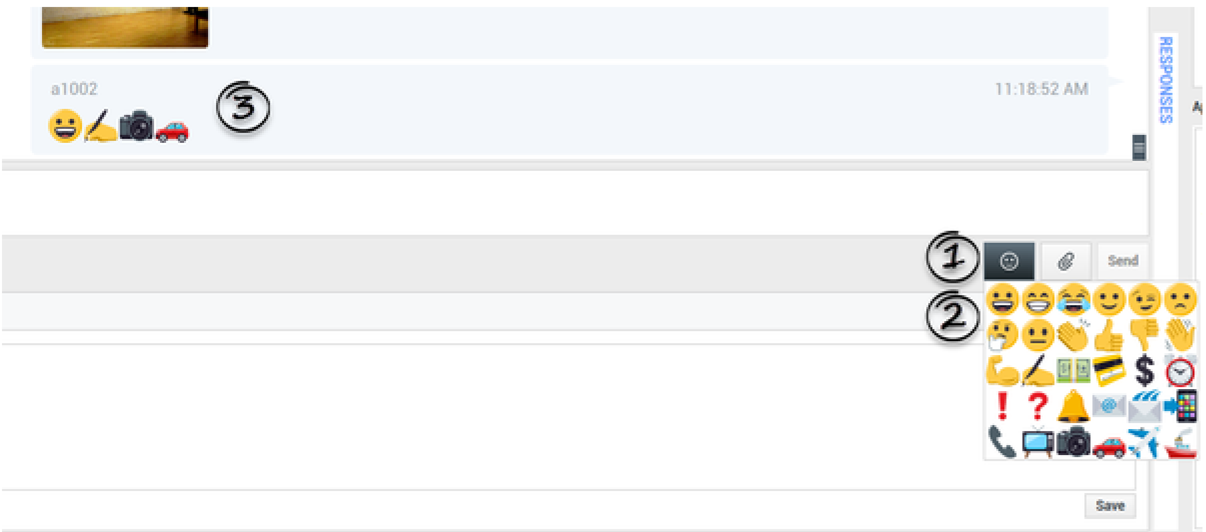


Emojis

WhatsApp provides a set of emojis that you can use in chat interactions.

1. Click **Insert Imoji** (smiley-face) to open the emoji drop-down menu.

2. Select an emoji.
3. When you select an emoji, it appears in the message area.



Web links

All URL links are shown as hyperlinks in the chat window. Click a link to open it in the system default web browser.

Incoming location

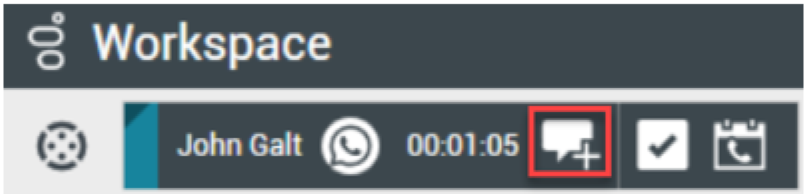
Incoming location is shown as a text message with a link (URL) in the chat window. Click the link to access the location in the system default web browser.

Sending outbound messages

You can initiate a conversation with a past contact using the **My History** view or by accessing the history for a particular contact in the **Contact Directory**. Select a past interaction with the contact and click **Create new chat** (.

The interaction opens and you can use the same functionality as an inbound interaction to converse with the contact.

Alternatively, if you have not yet marked an interaction as Done, you can click **Create new session** ( ) in the interaction control bar to create a new outbound session.



Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle A WhatsApp Interaction
- Blend Different Media Into A Single Conversation
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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Outbound Campaigns Overview

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

As an agent, you might be working on campaigns (for example, collections, telemarketing, or fundraising) in which the contact interactions are outbound voice calls that are based on calling a predetermined list of contacts.

There are two delivery modes of outbound calls. A supervisor determines in which mode you work:

- **Manual**, in which you make outbound calls by requesting an interaction from a preset calling list. Manual delivery has one dialing mode:
    - Preview. The system displays contact-related data to an agent, then the agent makes the call to the contact.
- **Automatic**, in which outbound calls are directed to your desktop. Automatic delivery has three dialing modes:
    - Push Preview. The system displays contact-related data to an agent, then the agent makes the call to the contact.
    - Progressive. The system dials customer numbers automatically and transfers a call to an agent only if the connection was successfully established.
    - Predictive. The system estimates the number of free agents on the basis of current statistics, and may start beforehand, even when no agents are free.

If your supervisor or someone else in your company starts an Outbound campaign to which you are assigned, you receive a warning message to inform you that a specific campaign has begun and that you are assigned to that campaign.

Note: If the campaign began before you logged in, a warning message will be displayed. If you are working on a campaign, the My Campaigns view displays the list of active and running campaigns. Active campaigns are indicated by a Started status message in the My Campaigns view.

After you are connected with your contact, you can perform various tasks, depending on the nature of the interaction. For example, you can update customer records, schedule a callback, select a disposition code or do other call actions.

Negotiated Logout

Sometimes, an abrupt agent logout from a campaign will, by its timing, affect the quality of service of a campaign. For example, you might click Logout at the same moment that a predictive or progressive campaign selected you for a subsequent call currently being established with a customer.

If Workspace logged you out immediately, this particular call may take more time to be delivered to an agent. To avoid this, your logout is delayed a few seconds, if you initiate it by either of the following methods:

- Select Logout from the Main Window title bar or the Main Menu.
- Select Logout from the Voice channel, from the My Channels view of your Workspace.

If you select **Logout** while you are receiving an interaction, a system message will be displayed on your desktop to inform you that you are awaiting logoff authorization. The message contains a countdown clock that informs you of how many minutes and/or seconds remain before you will be authorized to log out.

If you dismiss the message window, you can still monitor the time that remains for logout authorization by accessing your messages in the Main Window or in the My Messages window. You can also place your mouse pointer over the Status icon to access a notification of the time that remains for negotiated logout.

Both the My Messages view and the Status icon ToolTip provide confirmation when your logoff is authorized.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle Outbound-Campaign Voice Interactions
- Handle a Voice Call
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Outbound Preview Calls
- Outbound Push Preview Calls
- Outbound Progressive Calls
- Call Actions for Outbound Calls
- Schedule a Callback
- Voice Interaction
- Voice Consultation
- Voice Recording

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Outbound Preview Calls

[**Modified:** 8.5.109.16, 8.5.115.17]

> **Tip**
>
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Outbound Preview Campaign calls enable you to make campaign calls by requesting an interaction from a preset calling list. You connect the call manually when the interaction window is displayed.

When your administrator loads an Outbound Preview Campaign, you are informed by a pop-up notification. When your administrator starts an Outbound Preview Campaign, you are informed by a second pop-up notification.

The Outbound Campaign notification enables you to retrieve a contact record from the campaign list by clicking **Get Record** or to acknowledge that you are ready to join the campaign by clicking **OK**.

If you click **Get Record**, a new Interaction Preview is displayed.

If you click **OK**, you must retrieve a campaign record manually. In your Workspace view, select the My Campaigns tab. Click the name of the campaign that you want to use. Click **Get Record**. A new Outbound Interaction Preview is displayed. Use the Outbound Interaction Preview to make an outbound call.

Outbound Interaction Preview

The Outbound Interaction Preview is a special version of the Voice Interaction view. More detailed information about voice-interaction controls can be found here.

In preview mode, you can view information about a campaign call *before* you connect to the contact. The Outbound Interaction Preview contains the following features and functionality:

- **Case Information**: Summary information about the campaign. The content of this area is specified by your administrator. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- **Call Preview Actions (toolbar)**: Actions that you can perform, including changing or selecting the phone number, starting the call, and declining the call.
- **Record Information**: Specific information about the record. The content of this area is specified by your administrator. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- **Contact**: The Contact view enables you to manage contact information.

- **Responses**: The Responses view enables you to access a database of prewritten standard responses for your interactions. You can read these responses to the contact during a phone interaction.

> ## Important
>
> Call preview might be set up differently in your contact center:
>
> - Your administrator might have set up your environment to immediately automatically dial an outbound campaign call as soon as you accept the record.
> - Your administrator might have set up your environment to automatically dial an outbound campaign call after displaying the call preview for a specific amount of time—for example 10 seconds. In this case the call preview displays a counter that tells you how many seconds you have before the call is automatically dialed. You can choose to manually connect the call before the timer is finished.
>
> [**Added:** 8.5.109.16]

Call-Preview Actions

Call-preview actions are standard controls for outbound interactions in preview mode. Workspace enables you to perform the following call-preview actions:

- **Select or change the phone number**: Click the down arrow to open the list of possible numbers that are stored in the contact database for the contact, or choose **Other Phone Number** ([**Added:** 8.5.115.17]) if this feature is available in your environment to open the **New Phone Number** dialog box.
- **Call this contact**: Click **Call** () to connect to the contact and display the Outbound Interaction view.
- **Decline**: Click **Decline** () to display the **Decline** menu. Choose **Call this contact later** to return the record to the campaign list that is to be called later. Choose **Do not call this contact for this campaign** to remove the contact from the campaign list.

New Phone Number

[**Added:** 8.5.115.17]

Sometimes there is a problem with the number that the system specifies for an Outbound call. It might be the wrong number type, or it might be incorrectly formatted — for example, it might be missing a digit.

If you need to dial a different phone number from the one provided in the Outbound Preview call tool bar and this feature is available in your environment, click the phone number to open the phone number selection menu, then select **Other Phone Number** to open the **New Phone Number** dialog box.

Enter the new phone number, select a phone number type, and click **Call**.

Outbound Interaction View

If you click **Call** in the Outbound Interaction Preview, the view is updated to display the Call Status and Call Actions for the outbound interaction.

Call Status

The call-status area of the Outbound Interaction view provides the contact's phone number or name, or the internal target's extension or name, and the status of the call. Possible call statuses might include the following:

- **Connected**: You are actively talking to the contact or internal target.
- **Ended**: The call has been ended by either you or the contact.
- **On Hold**: The call is in a state in which the contact is unable to hear you and you are not able to hear the contact when the contact is on hold.

Call Actions

Call actions are standard controls for outbound interactions.

Dispositions

The Dispositions view enables you to assign a call outcome to the outbound interaction by using the

Call Result drop-down list. Select an outcome, or click the **Do Not Call** check box. The content of the Call Result menu is specified by your administrator.

You can also use the Dispositions view to assign a disposition code to an ongoing or terminated interaction, to qualify the outcome of the interaction.

Note

Use the Note to attach a note to the call history.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle Outbound-Campaign Voice Interactions
- Handle a Voice Call
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Call Actions for Outbound Calls
- Voice Interaction
- Voice Consultation
- Voice Recording
- Outbound Push Preview Calls
- Outbound Progressive Calls

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Outbound Push Preview Calls

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Outbound Push-Preview Campaign calls enable you to make campaign calls by first previewing an interaction from a preset calling list and then connecting the call manually when the interaction window is displayed.

When your administrator loads an Outbound Push-Preview Campaign, you are informed by a pop-up notification. When your administrator starts an Outbound Push-Preview Campaign, you are informed by a second pop-up notification.

The Outbound Campaign notification enables you to acknowledge that you are ready to join the campaign by clicking **OK**.

If your status is Ready, a new Interaction Preview is displayed. Click **Accept** to display the Outbound Interaction Preview. Use the Interaction Preview to make an outbound call. Click **Reject** to return the record to the top of the calling list. If you do nothing, the interaction will be returned to the top of the calling list.

Outbound Interaction Preview

The Outbound Interaction Preview is a special version of the Voice Interaction view. More detailed information about voice interaction controls can be found here.

In push-preview mode, you can view information about a campaign call *before* you connect to the contact. The Outbound Interaction Preview contains the following features and functionality:

- **Case Information**: Summary information about the campaign. The content of this area is specified by your administrator. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- **Call Preview Actions (toolbar)**: Actions that you can perform, including changing or selecting the phone number, starting the call, and declining the call.
- **Record Information**: Specific information about the record. The content of this area is specified by your administrator. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- **Contact**: The Contact Directory view enables you to manage contact information.
- **Responses**: The Responses view enables you to access a database of prewritten standard responses for your interactions. You can read these responses to the contact during a phone interaction.

Call-Preview Actions

Call-preview actions are standard controls for outbound interactions in preview mode. Workspace enables you to perform the following call-preview actions:

- **Select or change the phone number**: Click in the field that contains the phone number to edit the number; click the down arrow to open the list of possible numbers that are stored in the contact database for the contact.
- **Call the contact**: Click **Call** ( ) to connect to the contact and display the Outbound Interaction view.
- **Decline**: Click **Decline** ( ) to display the **Decline** menu. Choose **Do not take the record now** to return the record to the campaign list that is to be called later. Choose **Do not contact this record** to remove the contact from the campaign list.

Important

Call preview might be set up differently in your contact center:

- Your administrator might have set up your environment to immediately automatically dial an outbound campaign call as soon as you accept the record.
- Your administrator might have set up your environment to automatically dial an outbound campaign call after displaying the call preview for a specific amount of time—for example 10 seconds. In this case the call preview displays a counter that tells you how many seconds you have before the call is automatically dialed. You can choose to manually connect the call before the timer is finished.

Added: 8.5.109.16

Outbound Interaction View

If you click **Call** in the Outbound Interaction Preview, the view is updated to display the Call Status and Call Actions for the outbound interaction.

Call Status

The call-status area of the Outbound Interaction view provides the contact's phone number or name, or the internal target's extension or name, and the status of the call. Possible call statuses might include the following:

- **Connected**: You are actively talking to the contact or internal target.
- **Ended**: The call has been ended by either you or the contact.
- **On Hold**: The call is in a state in which the contact is unable to hear you and you are not able to hear

the contact when the contact is on hold.

Call Actions

Call actions are standard controls for outbound interactions.

Dispositions

Use the Dispositions view to assign a disposition code to an ongoing or terminated interaction, to qualify the outcome of the interaction.

Note

Use the Note to attach a note to the call history.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle Outbound-Campaign Voice Interactions
- Handle a Voice Call
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Call Actions for Outbound Calls
- Voice Interaction
- Voice Consultation
- Voice Recording
- Outbound Preview Calls
- Outbound Progressive Calls

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Outbound Progressive Calls

[**Modified:** 8.5.145.06]

> **Tip**
>
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Outbound Progressive and Predictive Campaign calls enable you to make campaign calls from a preset calling list. Both Progressive and Predictive outbound calls are directed to your desktop and dialed automatically. The interaction window is displayed as soon as you are connected.

When your administrator loads an Outbound Progressive or Predictive Campaign, you are informed by a pop-up notification. When your administrator starts an Outbound Progressive or Predictive Campaign, you are informed by a second pop-up notification.

The Outbound Campaign notification enables you to acknowledge that you are ready to join the campaign by clicking **OK**.

If your status is Ready, a new Interaction Preview is displayed. Click **Accept** to display the Outbound Interaction view. Your outbound call is connected automatically. Click **Reject** to return the record to the top of the calling list. If you do nothing, the interaction will be returned to the top of the calling list.

Note: Progressive and Predictive calls might behave slightly differently if your account is configured for Active Switching Matrix (ASM). In this scenario, an empty record is delivered to your desktop, and it is not populated with user information unless a connection is made to the user. Non-ASM calls are connected after the call record is displayed on your desktop.

Assured Connection calls

[**Added:** 8.5.145.06]

Some Progressive and Predictive campaigns use Assured Connection mode to reserve an agent before the call is connected to a contact. Reserving an agent ensures that there is no delay for a contact when he or she answers the call. This mode is typically used for VIP or high-value customers in a calling list.

If you are reserved for a call, you are restricted from performing certain tasks, including logging off the Voice channel, starting a new call, and exiting Workspace.

Once you are connected to your contact, you handle the call as a normal Outbound Campaign call.

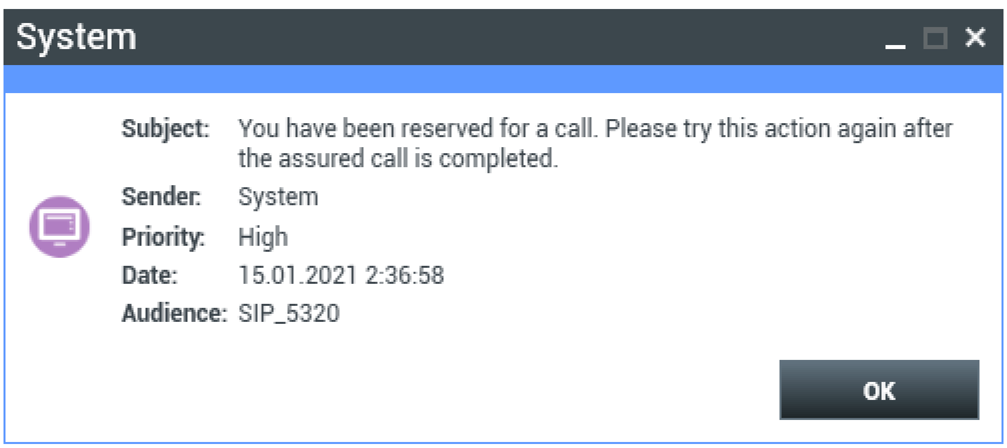
Engaging Phase

In Assured Connection mode, you are called by the campaign before the contact is dialed. This is known as the Engaging Phase. When you accept an Assured Connection call, the interaction is displayed on your desktop with the **Connected** status. During the Engaging Phase you hear call-waiting music to let you know that the call is engaged.

The following actions are not available in the Interaction view during the Engaging Phase:

- Reschedule call
- Set call result (disposition)
- Release the call
- Transfer the call
- Start a consultation call
- Start a conference call
- Recall
- Log off the voice media
- Place the call on hold
- Make a new call
- Exit Workspace

If you attempt to perform certain actions while you are reserved for a call, you might see a message like this one:



Outbound Interaction View

In progressive and predictive modes, you can view information about a campaign call as soon as you are connected to the contact. The Outbound Interaction view also displays the Call Status and Call Actions for the outbound interaction.

The Outbound Interaction View contains the following features and functionality:

- **Case Information**: Summary information about the campaign. The content of this area is specified by your administrator. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- **Record Information**: Specific information about the record. The content of this area is specified by your administrator. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- **Contact**: The Contact Directory view enables you to manage contact information.
- **Responses**: The Responses view enables you to access a database of prewritten standard responses for your interactions. You can read these responses to the contact during a phone interaction.

Call Status

The call-status area of the Outbound Interaction view provides the contact's phone number or name, or the internal target's extension or name, and the status of the call. Possible call statuses might include the following:

- **Connected**: You are actively talking to the contact or internal target.
- **Ended**: The call has been ended by either you or the contact.
- **On Hold**: The call is in a state in which the contact is unable to hear you and you are not able to hear the contact when the contact is on hold.

Call Actions

Call actions are standard controls for outbound interactions.

Dispositions

The Dispositions view enables you to assign a call outcome to the outbound interaction by using the **Call Result** drop-down list. Select an outcome, or click the **Do Not Call** check box. The content of the Call Result menu is specified by your administrator.

You can also use the Dispositions view to assign a disposition code to an ongoing or terminated interaction, to qualify the outcome of the interaction.

Note

Use the Note to attach a note to the call history.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle Outbound-Campaign Voice Interactions

- Handle a Voice Call
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Call Actions for Outbound Calls
- Voice Interaction
- Voice Consultation
- Voice Recording
- Outbound Preview Calls
- Outbound Push Preview Calls

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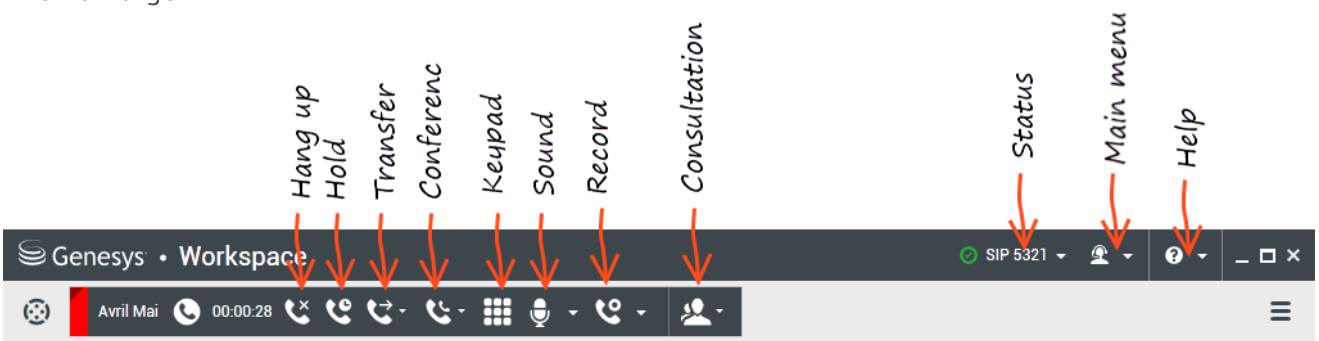
Call Actions for Outbound Calls

[**Modified:** 8.5.117.18]

> ## Tip
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Call actions are standard controls for outbound interactions. The Voice Interaction window enables you to view all of the information that is necessary to handle a voice interaction with a contact or an internal target.



Interaction Workspace enables you to perform the following call actions:

- **End Call**: Click **End Call** () to disconnect the call.
- **Hold Call**: Click **Hold** () to place the active call on hold. If a call is on hold, you cannot hear the contact, and the contact cannot hear you.
- **Resume Call**: Click **Resume Call** () to reconnect to a call that is on hold. You will be able to hear the contact, and the contact will be able to hear you.
- **Instant Call Transfer**: Click **Instant Call Transfer** () to redirect the current outbound interaction to a contact or internal target that you select by using the Team Communicator.

> ## Important
> - When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the target agent, depending on

how your system is set up.

- You might have to set a call result or disposition before you complete a transfer or a conference to another agent, for example to a back office worker. If you forget, an error message is displayed and you are prevented from transferring the call unless you set the call result. After this action, the Call Result and Record Information becomes read-only. [**Added:** 8.5.117.18]

- **Instant Call Conference**: Click **Instant Call Conference** () to start a voice conference instantly with the current outbound interaction and a contact or internal target that you select by using the Team Communicator.

Important

You might have to set a call result or disposition before you complete a transfer or a conference to another agent, for example to a back office worker. If you forget, an error message is displayed and you are prevented from transferring the call unless you set the call result. After this action, the Call Result and Record Information becomes read-only. [**Added:** 8.5.117.18]

- **Send DTMF**: You can attach numerical data to a call by entering dual-tone multifrequency (DTMF) digits into the call case history. Click the keypad button () to open the DTMF keypad. Type numbers into the number field, or click the keypad numbers to enter numbers.
- **Schedule a Callback**: Click **Schedule a Callback** () to reschedule a call (for example, if the contact is too busy to respond now) for a different date and/or time.
- **Start Consultation**: Start a () voice consultation with an internal target or a contact. The target can choose not to accept the request. The target can end the consultation. You can end the consultation, or you can transfer or conference your current interaction to or with the consultation target.
- **Mark Done**: Complete a call, close the Voice Interaction window, and preview the next contact on the campaign call list by clicking **Mark Done** (). You might be configured to specify a disposition code before you can click **Mark Done**.

  (Outbound Preview calls only) Click **Done and Stop** () to stop opening the preview for the next call automatically.
- **Party Action Menu**: In the call-status area, click the down-arrow that is beside the name of the contact to start a different interaction type with the contact, such as an email interaction, if the contact has additional channel information available in the contact database.

Tip

You cannot use the **Party Action** menu to recall an Outbound Contact record. If you use the **Party Action** menu to call the contact, this will be treated as a call that is not part of the Outbound Campaign. Your administrator might have set up a call treatment mechanism that enables you to set a call disposition that will allow you to recall the record.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle Outbound-Campaign Voice Interactions
- Handle a Voice Call
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Outbound Preview Calls
- Outbound Push Preview Calls
- Outbound Progressive Calls
- Voice Interaction
- Voice Consultation
- Voice Recording

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Components, Features, and Controls

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The Workspace components, features, and controls enable you to complete specific tasks that relate to your job as an agent or team lead. For example, the Call History view enables you to access and query information about the contact with whom you are interacting, based on the content of the inbound-voice-interaction window.

Agent Tools

- My Status—Provides a universal status monitor for all of your media channels.
- My Campaigns—A tab that provides a list of the campaigns in which you are currently involved, including active campaigns that are loaded but not yet started, as well as running campaigns that are loaded and started.
- Team Communicator—Enables you to contact other agents or contact center targets, determine the status of other agents or contact center targets, launch outgoing interactions, or start the monitoring or coaching of agents. Use Team Communicator to call/dial both internal and external contacts.
- Team Lead—Enables you to contact other agents or contact center targets, determine the status of other agents or contact center targets, launch outgoing interactions, or start the monitoring or coaching of agents.
- Inactivity Timeout—A security feature that locks the Workspace windows on your workstation, if you do not use your mouse or keyboard for a period of time that is defined by your administrator. You must authenticate to reactivate Workspace.

Statistics, Status, and Other Information

- Contact Center Statistics—The list of statistics about the switches, Routing Points, queues, and other contact center resources.
- My Statistics—The list of your Key Performance Indicators (KPIs).
- My Messages—Provides you with up-to-date information on the status of your contact center, changes that are related to your activities, and business messages that are sent by your leads.
- In Progress and Recent Interactions—If there are in progress or recent interactions for the current contact, the number of interactions is displayed beside the connection status of the interaction.

Functions and Information for Contacts

- Workbins—Enables you to store email messages and other interactions (workitems) that are to be handled later; however, unlike in a queue, interactions that are stored in a workbin can be accessed in any order.

- Contact History—Enables you to access and manage previous interactions with a contact that you have selected from the Contact Directory or from the Information view of the current interaction.
- Interaction History—Provides you with specific information about where the interaction (voice, email, chat, and workitem) came from, who the contact is, and how long the interaction has been active. It is part of the specific interaction view.
- Case Data—Provides you with critical information about the active interaction in the Voice Interaction view.
- Contact Directory—Enables you to manage contact information and use the Change Contact view to assign an interaction to a different contact.
- Manual Contact Assignment—Enables you to create a new contact or to manually reassign an interaction that has been incorrectly assigned to the wrong contact. You can also use the Change Contact view.

Functions and Information for Interactions

- Spelling Check—Enables you to verify the spelling of the content of your message before you send it by using an interactive Spelling Checker.
- Disposition Code—Enables you to assign one or more codes to an ongoing or terminated interaction that qualifies the outcome of the interaction.
- My History—Enables you to access and manage your previous interactions.
- Note—Enables you to enter comments about the current interaction or about a selected interaction in the history database.
- Responses—Enables you to access a database of prewritten standard responses for your interactions. You can search for a response (all interactions), choose from a list of your favorite responses (all interactions), or choose from a list of suggested responses that are sorted by their relevance to the incoming interaction.
- Schedule a Callback—Enables you to set a new date and time to call an Outbound campaign contact.
- Print—Enables you to set up the appearance of printed email interactions before you print them.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handling Interactions
- Contact and Interaction Management
- Getting Started

Related topics

- Functionality Overview

- Interaction Search
- Contact Directory

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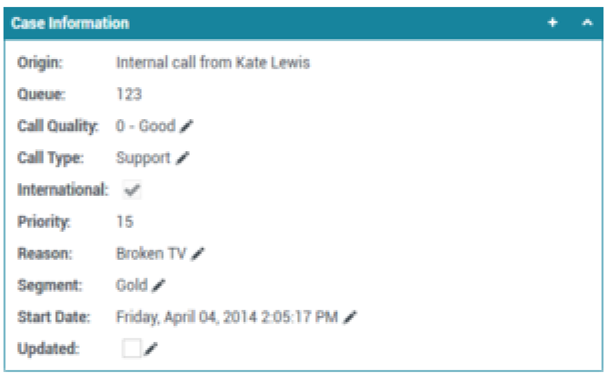
Case Information

[**Modified:** 8.5.117.18, 8.5.118.10., 8.5.121.03]

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The **Case Information** (also known as case data or attached data) view provides information about an interaction—for example, an account number or type of service. Your system administrator configures which attached data is displayed.



The following are examples of the type of critical information that the **Case Information** view provides about the active interaction:

- Contact name
- Contact type
- Call type
- Account information
- Subject

The **Case Information** view is part of the Interaction view and the **History** tab of the Contact Directory view.

Hyperlinks

Some case data might be a URL (website address). If your account is set up to preview the URL target, you can place your mouse pointer over the URL to display a preview of the target. Your account might also be set up to enable you to click active URLs in the **Case Information** view to open the target in the interaction window. A URL might be displayed as the title of the web page, as an anchor, or as a URL. If the URL is active, it is displayed as blue text.

URLs and Security

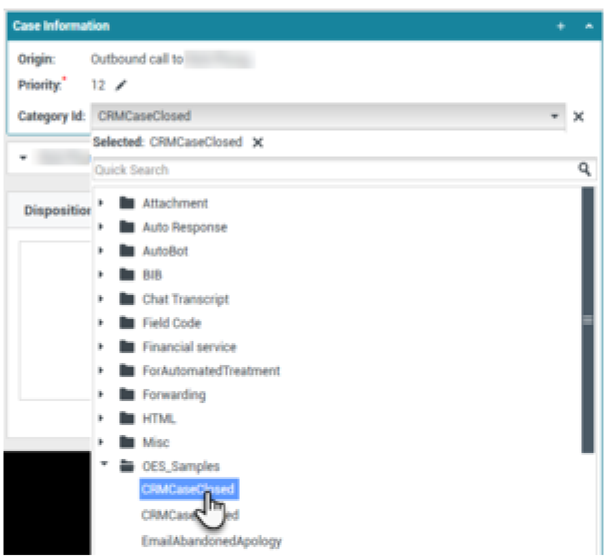
[**Added:** 8.5.121.03] Sometimes URLs (links to websites) are included in case data. URLs in the **Case Information** view might be plain text or they might be hyperlinked text. Preview the URL before clicking it by hovering your mouse pointer over the URL to display a tooltip that lets you review the address.

> **Warning**
> To avoid opening malicious web links, review hyperlinks using the tooltip before you click them.

Editing Case Data or Adding Missing Fields

[**Modified:** 8.5.117.18, 8.5.118.10]

Your account might be set up to enable you to edit one or more entries in the **Case Information** view. Any field that can be edited displays a **Pencil** icon when you place your mouse pointer over it. Click the field to edit the content. Press the **Enter** key or click away from the field to commit your change. Editable fields might have text fields that you can enter text or numbers, check boxes, calendars, or drop-down lists. Some drop-down lists might contain a set of folders and entries (selectable valid value for the field), like in the picture below, that you select (use the **Quick Search** field to find a specific entry).



Example of selecting a value from a drop-down list in the Case Information view.

Important

Mandatory fields: Your administrator might have made some editable fields mandatory to be edited before you can mark done, send, or close an interaction. Mandatory fields are indicated by a red asterisk. If you attempt to mark done, send, or close an interaction without editing a mandatory field an error message is displayed, and you are prevented from marking done, sending, or closing the interaction [**Added:** 8.5.117.18]

Missing Case Data Fields

Sometimes, not all of the case data is available. There might be fields missing. If you are allowed to add missing fields, the **Add Field** ( ) button is displayed in the Case Data toolbar.

1. Click **Add Field** to display a drop-down list of fields.
2. Select a missing field to display the field in the **Case Information** view. You can edit the added field.
3. Enter the missing case data. For certain types of data, what you enter might be restricted to a certain number of characters or certain types and combinations of characters. For example, if you have to enter a credit card number, then the field might only allow certain numbers for a particular type of credit card.

   If one of the characters that you type is invalid or the maximum number of characters that is allowed is reached, then nothing will be entered in the text field.

   If what you have typed does not match what Workspace is expecting you to enter, an error icon appears to warn you that you must check what you have entered and correct it.

   ## Important

   Incorrect format: If you do not correct incorrectly formatted entries before you attempt to mark done, transfer, move the interaction to a workbin, or any other action that transfers ownership of the interaction, a warning message is displayed asking you to either discard your changes or proceed with the action. If you cancel your action, you can correct the entry. If the entry is mandatory, you must set the correct value before you can close the interaction.

   If what you have entered is correct, then do one of the following actions:

   - Press **Enter** to add the case data to the case information for the interaction.
   - Click **X** to remove the field.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Edit Case Information And Record Information

Related topics

- Interaction Preview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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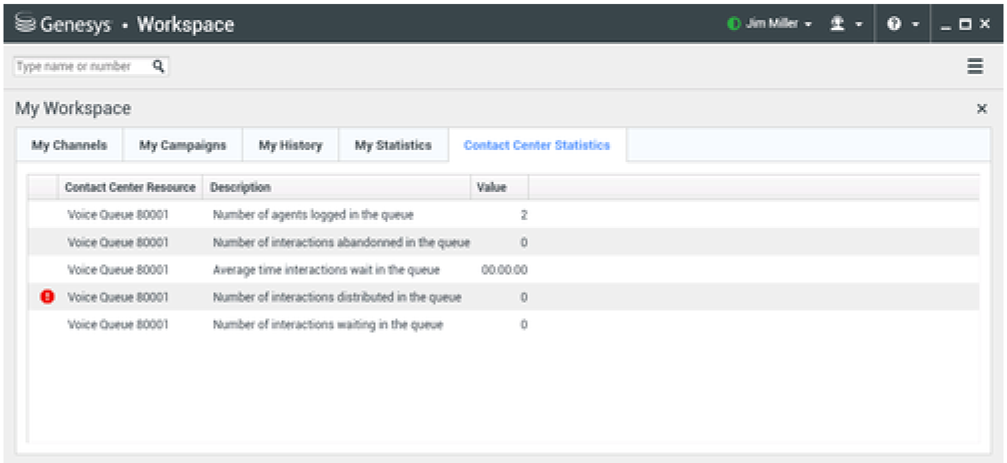
Contact Center Statistics

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The list of statistics about the Routing Points, Queues, and other contact center objects is displayed in the **Contact Center Statistics** tab of the Main Window. You can also view the contact center statistics in the Statistics Gadget.



The **Contact Center Statistics** tab displays statistics that summarize the state of various conditions that are monitored by your contact center, such as the percentage of abandoned calls, the average call-waiting time, and the number of interactions that are in queue.

The following columns of information are available for each monitored object:

- **Contact Center Resource**: The name or location of the object
- **Description**: A description of the contact center statistic
- **Value**: The value of the contact center statistic

Click column heads to change the sort order of the objects.

Right-click in the **Contact Center Statistics** view to display the **Statistics** menu.

Use the **Statistics** menu to do the following:

- Show or hide statistics
- Show only alerting statistics or show all statistics

> **Tip**
> Your Key Performance Indicators (KPIs) are displayed in the My Statistics tab.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- View KPIs And Statistics

Related topics

- My Workspace
- Statistics Gadget
- Components, Features, and Controls

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Contact Directory

[**Modified:** 8.5.112.08]

> ### Tip
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

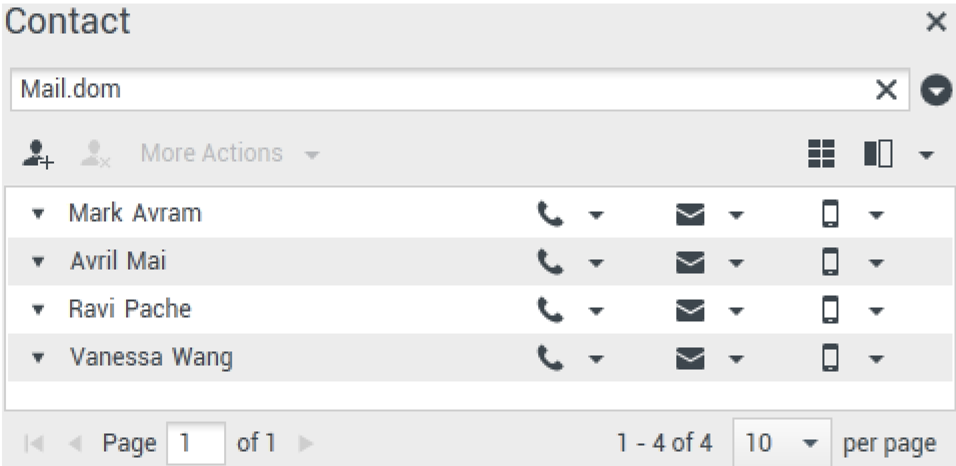
The **Contact Directory** view enables you to do the following:

- Manage contact information
- Find contacts
- Manage or call contacts by using contact actions
- Assign interactions with unknown contacts to a known contact

The following are examples of the type of the fields that are available in the **Contact Directory** view:

- Title
- First name
- Last name
- Address
- E-mail address
- Phone number
- Other criteria

To view the contact directory, in the Main Window click the **Access and use Workspace supporting views** button () to display the **Supporting Views** menu, then select **Contact Directory**. The **Contact Directory** view is contained in a tab that opens below the Main Window.



Contact Actions

Select a contact from the search results, list view, or grid view to perform any of the following actions:

- Delete the contact
- Call the contact if there is a phone number in the contact database
- Create an outbound email if there is an email address in the contact database
- Merge or unmerge the contact
- View contact information
- Edit contact information (you might not have this capability enabled)
- View contact history

To open the contact **Information** and **History** views, double-click a contact in the search results, list view, or grid view.

Finding Contacts

The search behavior is dependent on the search result-type that you select:

- 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.
- 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.

For each search type, you can search the contact database in one of two ways:

- Quick Search
- Advanced Search

Your administrator might configure your system to enable you to search only the contacts that are related to your work.

To find interactions, use the Interaction Search view.

Quick Search

To search the contact directory, type the name, phone number, email address, or any contact attribute allowed by your Administrator for quick search, of a contact in the **Quick Search** field. The quick search function uses the *starts with* and *match any condition* criteria of the **Advanced Search** view applied to all the attributes allowed by your administrator in the scope of quick search. Please refer to the Grid and List results for information about each result type and the expected search behavior.

Click the magnifying glass to search for the value that you have entered.

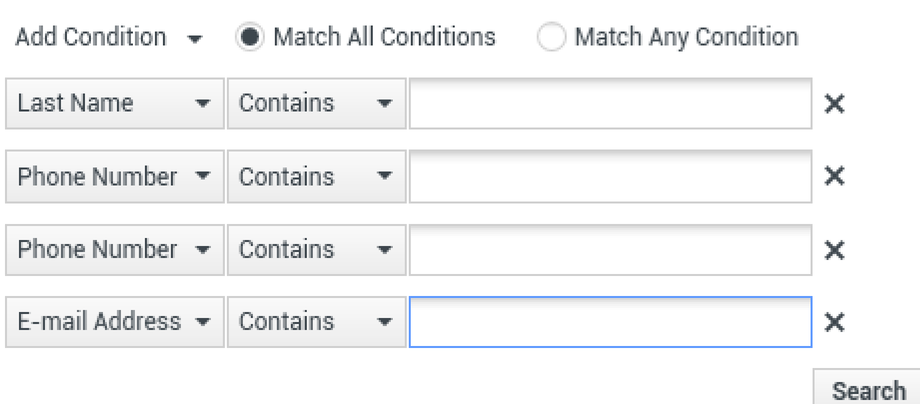
The contact database is searched based on your criteria and the search results are displayed in the **Contact Directory**.

Click the **X** to clear the **Quick Search** field.

Tip

Genesys does not support *wildcard* characters in contact database searches.

Advanced Search



Click the **Add Condition** link to add more search criteria. Remove criteria from consideration by clicking the **X** next to the option.

Select *Match All Conditions* if all the specified criteria must be matched or *Match Any Conditions* if only one matching criteria is enough.

Click the magnifying glass to search for the value(s) that you have entered.

The contact database is searched based on your criteria and the search results are displayed in the **Contact Directory**.

Please refer to the descriptions of each result-type to get information about the expected search behavior.

Click the **X** to clear all search field.

Tip

Your administrator configures the default search criteria for this view; however, you can add or remove search criteria as needed. Workspace remembers the last search criteria that you used and displays these when you use the **Advanced Search** feature again. [**Added:** 8.5.112.08]

Tip

Genesys does not support *wildcard* characters in contact database searches

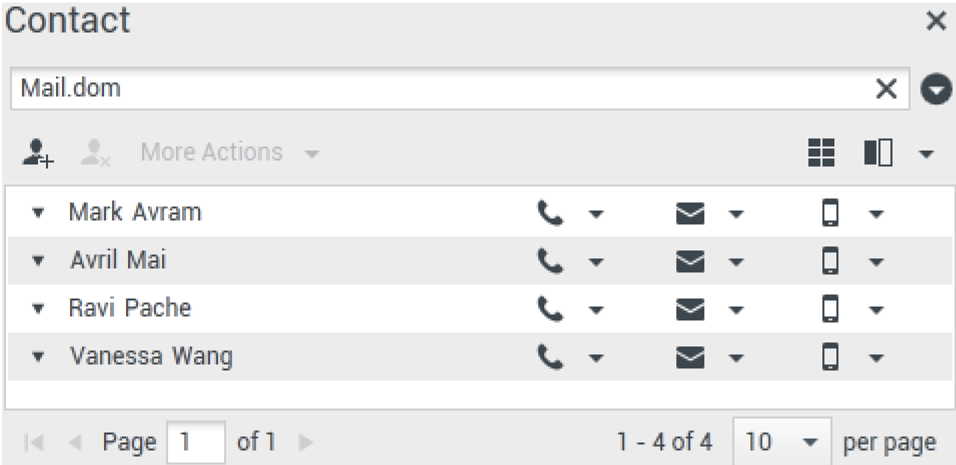
Search Results

Search results are displayed in a list or in a tabular grid.

The search behavior is determined by the search result-type that you select (see descriptions of the List View and Grid View results below).

Tip

In some contact centers, only one of the two views might be available. In this case, the **List** () and **Grid** () buttons are not displayed. (**Modified:** 8.5.105.12)



Use the **Show Contacts** View () button to toggle back and forth between the Grid and List views.

Page Controls

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.

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.

Examples:

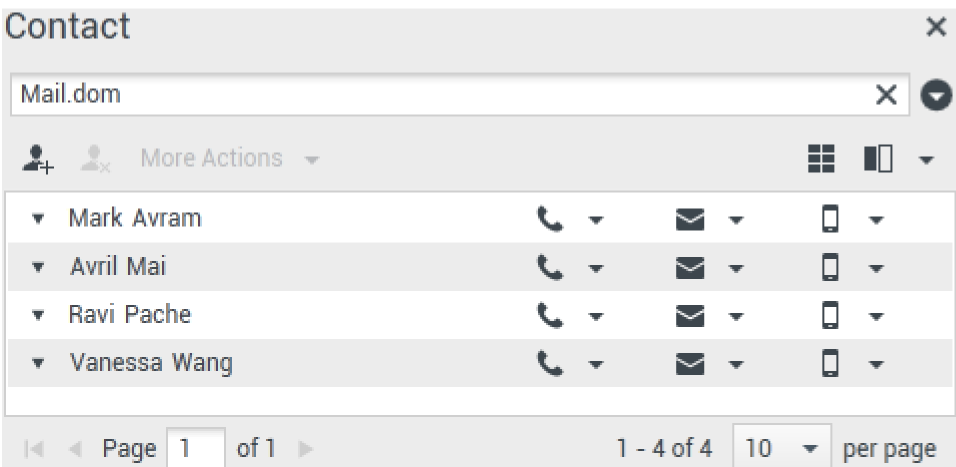
- Quick search using the keywords *John Daly* as the criteria in a quick search defined to apply to only the **First Name** and **Last Name** fields will match a contact where **First Name**=*John* and **Last Name**=*Daly*
- Quick search using the keywords *John Junipero* as the criteria in quick search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

- Advanced search set to **Match all criteria** ***using the*** *First Name*' `equals` *Johnny* and **Address** `contains` *pero* will also match the 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.

Use the page controls to navigate the list. Click a contact to select it for an action. Use the Grid view to sort the search results based on contact attributes.



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.

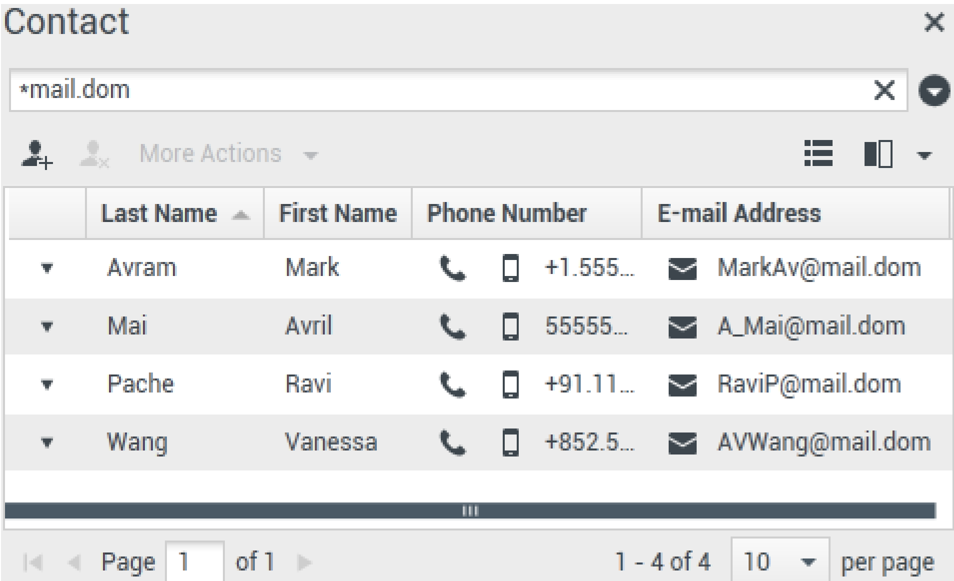
Examples:

- 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*

- Advanced search set to **Match all criteria** using **First Name** `equals` *Johnny* and **Address** `starts with` *2001, Junip* as the criteria will match a contact where **First Name** = *Johnny* and **Address** = *2001, Junipero Serra Blvd*.

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.

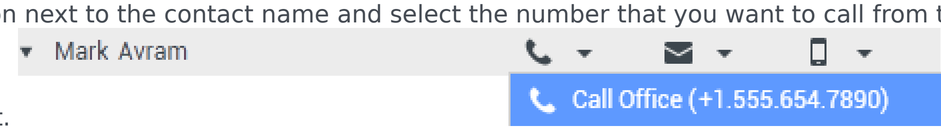


Click a column head in the Grid view to sort the list based on that criterion. Click a column head a second time to switch between ascending and descending sort order. Use the page controls to navigate the list. Click a contact to select it for an action.

Call or E-Mail Contacts

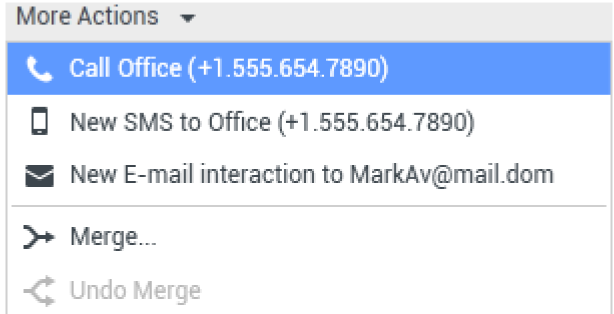
To call or email the contact that you have selected in the search results, do one of the following:

- Click the **Contact** icon next to the contact name and select the number that you want to call from the Action drop-down list.



- Click the **Call** icon () to call the contact using the primary phone number associated with that contact. Click the **Call** icon drop-down list to select the number that you will use to call the contact. If you are sending an email, click the **E-Mail** icon.
- In the **More Actions** drop-down menu, select the number or email address that you will use to call or

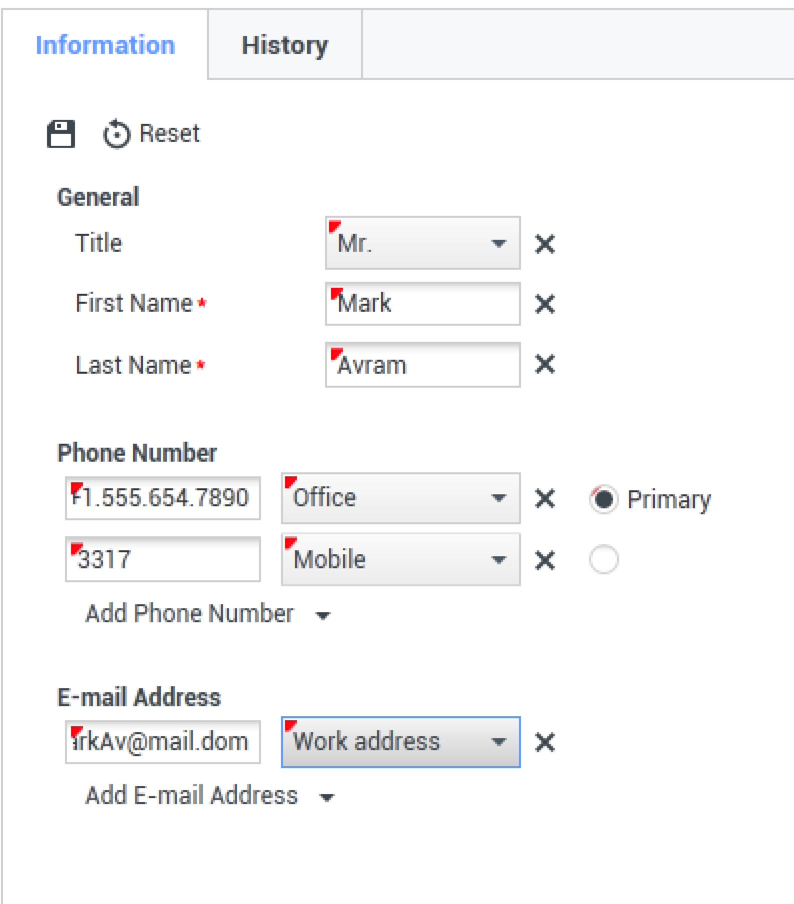
send an email message to the contact.



Any of these actions launches the outgoing Voice Interaction view. Use this view to handle the voice interaction.

Add Contacts

If your account is configured to do so, you can add new contacts to the contact database by clicking the **Add Contact** button () to launch the **Add Contact** view in the Contact Information tab.



Enter the contact information in the fields. A small red triangle appears in the top left hand corner of the text field to indicate that the information is not saved. Do one of the following:

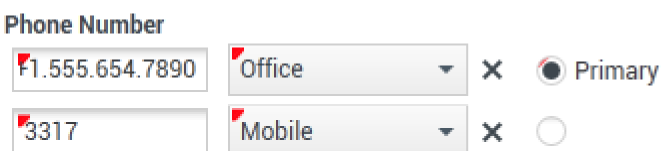
- Click the **Save** button () to save the information in the contact database.

> ## Important
> (**Added:** 8.5.101.14) Once you create a contact, you might not have permissions to make further changes after clicking **Save**. In this scenario, a message box is displayed asking you to confirm that you want to save the information. Review the content carefully before clicking **Save**.

- Click the **Reset** button () to clear any *unsaved* changes from the **Add Contact** view.

If you want to add additional phone numbers and email addresses for the new contact, click the **Add Phone Number** or **Add E-mail Address** button. A new set of fields is added into which you can enter this information.

To specify a phone number or email address as the *primary* contact number or address, click the **Primary** button next to the phone number or email address that you want to specify as the primary for the contact.



Delete Contacts

To delete a contact, you must first find the contact in the contact database and then select it in the Contact Directory.

Select one or more contacts that you want to delete, then click the **Delete** button ().

A confirmation dialog box is displayed. Click **OK** to remove the contact from the contact database permanently. Click **Cancel** to cancel the delete contact function; this leaves the contact in the contact database.

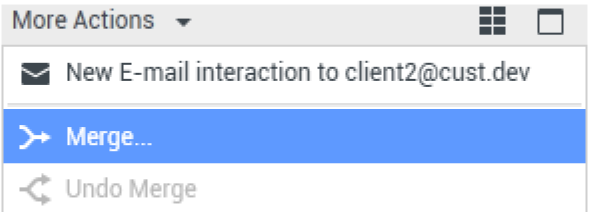
Merge Contacts

To Merge a contact, you must first find the contact in the contact database and select it in the **Contact Directory**.

If there are two contact entries in the contact database for the same contact, you can merge the two entries into a single entry.

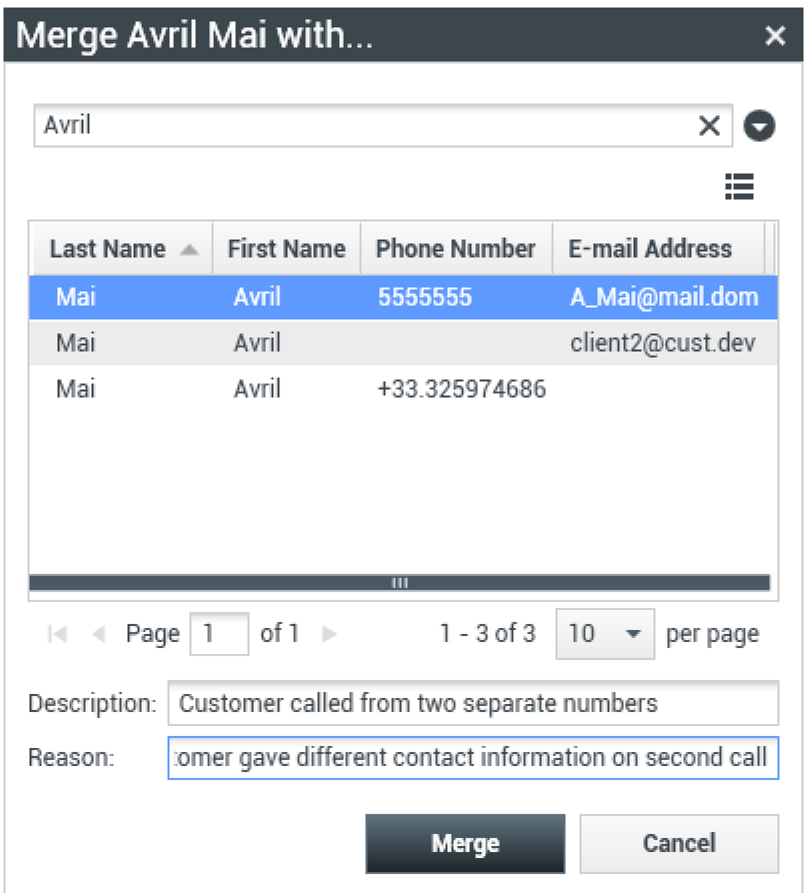
First, find the contact in the contact database, then select it in the Contact Directory.

Click the **More Actions** menu and select **Merge**.



The **Merge Contact** dialog box is displayed. Use the search tools to find the duplicate contact, and then do one of the following:

- Click **Merge** to complete the merge of the two contact entries.
- Click **Cancel** to cancel the merge and return to the Main Window.



You might be required to enter a **Description** and/or **Reasons** for the merge. Use the fields after selecting the duplicate contact.

Unmerge Contacts

To Unmerge a contact, you must first find the contact in the contact database and select it in the **Contact Directory**.

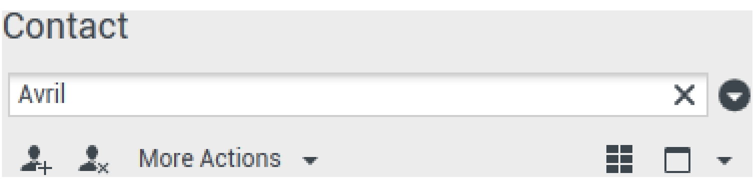
If there are two contact entries in the contact database that have previously been merged, you can unmerge them into their original contact entries.

First, find the contact in the contact database, then select it in the **Contact Directory**.

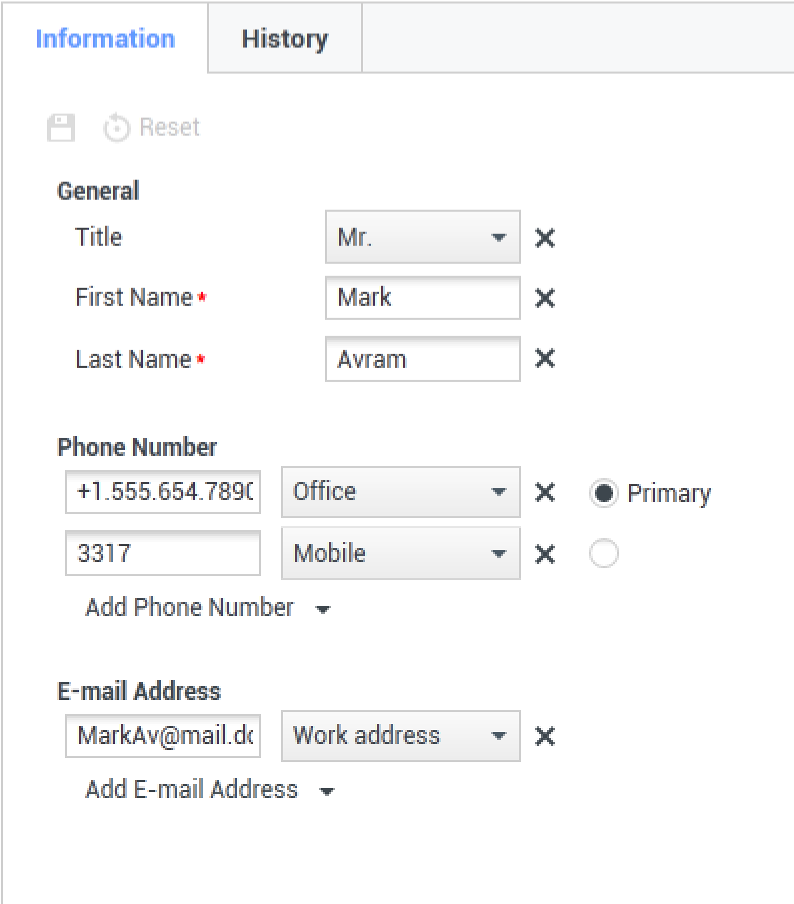
Click **Undo Merge**. A confirmation dialog box is displayed. Click **Yes** to unmerge and **No** to keep the contact merged.

Contact Information and Contact History

Click the **Show Details Panel on Bottom/Hide Details Panel** button to show or hide contact information and contact history for the currently selected contact.

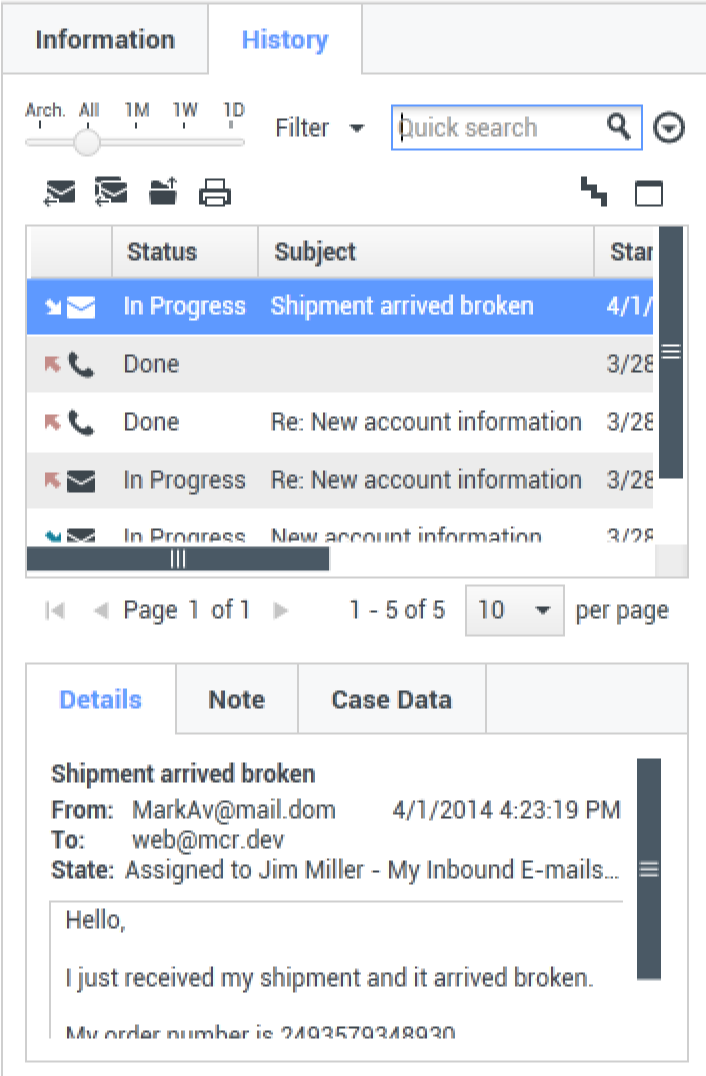


The **Contact Information** view enables you to view and, if you are configured to do so, edit information for the currently selected contact. You might also be configured to assign an unknown interaction to a contact in the contact database by using the Manual Contact Assignment feature.



The **Show Details Panel on Bottom/Hide Details Panel** () button in the **Contact Information** view specifies where the **Contact Information** view is placed in the **Contact Directory** view: next to the directory or below the directory.

The Contact History view tab enables you to view and, if you are configured to do so, edit current and archived interactions that are associated with the currently selected contact.



Change Contact

The **Change Contact** view enables you to assign a different contact for the selected interaction.

If an interaction has been incorrectly assigned to a specific contact, or if a new contact was created for an interaction when the contact already existed in the contact database, you can assign an open interaction to a specific contact by using the **Change this interaction to contact** view.

In the **Information** tab of the **Contact** view of an interaction, select **Change Contact** ( ). The **Change this interaction to contact view** is displayed.

Use the Quick Search or the Advanced Search to find the Contact to whom you want to assign the interaction that you selected in the My History view or the Contact History view.

Select the contact from the result list and then click **Assign** to assign the interaction to the **Contact History** for the selected contact. Click **Cancel** to return to the My History view or the Contact History view without assigning the interaction to a contact.

You can verify that the update to the interaction record was completed correctly by selecting the interaction in the My History view or the Contact History view and checking the **Details** tab. You can also search for the interaction in the contact database.

You can also use the **Assign Another Contact to This Interaction** button to manually reassign an interaction that has been incorrectly assigned to the wrong contact.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Manage Contacts and Contact Information
- Manage Your History
- Manage Contact History

Related topics

- Contact History
- Manual and Automatic Contact Assignment

Top 10 pages

1. Workspace Desktop Edition Help
2. Main Window
3. My Status
4. Contact Directory
5. Workbins
6. Functionality Overview

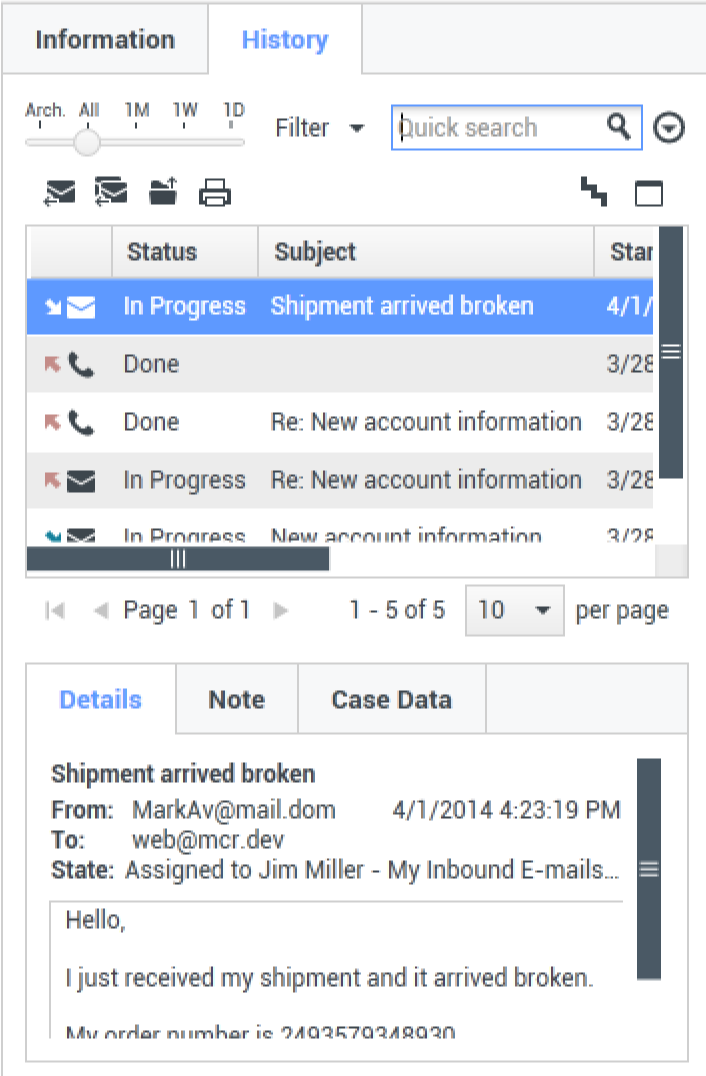
7. My Messages
8. Login
9. Voice Consultation
10. Components, Features, and Controls

Contact History

[**Modified:** 8.5.110.13, 8.5.112.08, 8.5.113.11, 8.5.115.17, 8.5.117.18]

> **Tip**
>
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The **Contact History** view enables you to access and manage previous interactions with a contact that you have selected from the Contact Directory or from the Information view of the current voice, chat, email, or workitem interaction.



If you are reviewing the **Contact History** tab in the current interaction view, the current interaction is highlighted in the **History** view if your administrator has enabled this feature. [**Added:** 8.5.117.18]

Use the **Contact History** view to do the following:

- Find interactions for the current contact or the currently selected contact.
- Perform the following actions on selected interactions:
  - Mark Done voice and email [**Added:** 8.5.110.13] interactions if the status is **In-Progress**.
  - Change Contact for the selected interaction if the status is **In-Progress** (not supported for all media types).
  - Reply or Reply All to email interactions.
  - Resend a previously sent email.
  - Open in-progress inbound and outbound email interactions (that are in the process of being routed

out of and into workbins and queues) and workitems.
- Forward inbound and outbound email interactions (that are marked as Done). [**Added:** 8.5.113.11]
- Delete an outbound email interaction if the status is **In-Progress**. [**Added:** 8.5.110.13].
- Print the interaction (if your account has the correct permissions).

- View information about the selected interaction.

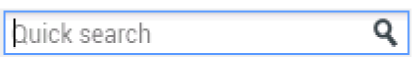
Finding Interactions

Interactions are stored with various attributes. You can use these attributes to find specific interactions. Search results are shown in the Interactions table. You can review, filter, and perform actions on the interactions that you select. Your administrator might configure your system to restrict your search results.

Quick Search

The Quick Search enables you to search for any attribute that begins with the criteria you enter. For example, you could search for a disposition code of "Transferred" or find all interactions that are related to the subject of "billing".

To search the contact history, enter into the **Quick Search** field the attribute value for which you are searching. Quick Search is a *contains* keyword search.



Click the magnifying glass to search for the value that you have entered. Click the **X** to clear the **Quick Search** field.

Advanced Search

Click the **Show/Hide Advanced Search** () toggle button to show or hide the advanced search feature.

The Advanced Search feature enables you to use multiple criteria to refine your search. The **Advanced Search** pane contains drop-down lists of search criteria, such as Status, Subject, Start Date, and End Date.

From the column of search modifiers to the right of the attribute column, choose how the search string should be considered.

Menus for pre-defined fields, such as Status, contain the pre-defined field names from the database — for example, **All**, **Done**, and **In-Progress**.

Menus for date fields contain the following choices:

- **On**: The exact date.
- **On or after**: The specified date or any date after.

- **Before**: Before the specified date.

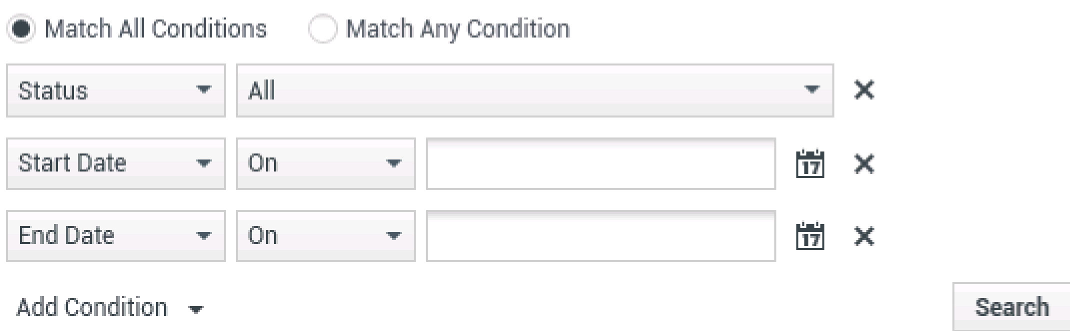
Menus for text fields contain the following choices:

- **Contains**: The specified text string occurs anywhere in the selected criterion.
- **Begins With**: The specified text string occurs at the beginning of the selected criterion.
- **Is**: The specified text string exactly matches the criterion.

Enter the search value in the text field on the right side. If your criterion is a start date or end date, use the calendar pop-up window to specify the date.

Use the **Match Conditions** options to specify whether **All** or **Any** of the search conditions that you have specified are applied.

To search based on the Start Date, use the **Calendar** button () to select a date, or enter the date in the format that conforms to your local day and time display preferences.



> **Tip**
>
> Your administrator configures the default search criteria for this view; however, you can add or remove search criteria as needed. Workspace remembers the last search criteria that you used and displays these when you use the Advanced Search feature again. [**Added:** 8.5.112.08]

Filtering

The **Contact History** view filtering controls enable you to refine your search. The chronology slider enables you to search the contact history by time interval.

The slider has five positions that represent different time intervals:

- **Arch.**: Search the database for messages that have been archived
- **All**: Search the entire database from the most recent interaction back to the earliest interaction

- **1M**: Search the database from the most recent interaction back to one month ago
- **1W**: Search the database from the most recent interaction back to one week ago
- **1D**: Search the database from the most recent interaction back to one day ago

The Interaction Type filters enable you to select and deselect the types of interactions that are to be searched. The items that are displayed depend on the interaction types that you are configured to handle. Click the **Filter** menu to select the interaction types that you want to search. You can select multiple items in the **Filter** menu. The following types are available, by default:

- Show all Interactions
- Show voice Interactions
- Show email Interactions
- Show chat Interactions
- Show SMS Interactions
- Show Other Media Interactions

When a filter is on, a check mark appears next to it in the **Filter** menu.

Your administrator might have configured additional customized options for the **Filter** menu, such as business area/department (for example: accounts, sales, and service) or customer level (for example: Silver, Gold, and Platinum). Custom filters enable you to refine your search. For example, if you are seeking email interactions about a service request, you can make two selections in the **Filter** menu to refine your search: **Show email Interactions** and **Show Interactions with Service Department**.

Grid View and Tree View

Workspace enables you to review contact interactions either chronologically or as threads. The **Show Interactions in Grid View**/**Show Interactions in Tree View** buttons (/) enables you to specify how the **Contact History** view is displayed.

Grid View displays interactions chronologically, and Tree View displays the interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (email replies, multichannel conversation, social-media threads, and so on).

Both the Grid and Tree views have columns that contain information about each interaction. Depending on how your system is configured, columns might include **From**, **Subject**, **Status**, **Start Date**, **End Date**, or custom attributes that are assigned by your administrator. Depending on your system configuration, interaction status might include the following states:

- Done
- In-progress
- Assigned to <agent> in <name> workbin
- Assigned to <name> Place in <name> workbin
- In shared workbin <name>

- Assigned to <agent> Actively Handling
- Delivery in-progress
- In a queue

Page Controls

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

- Click the **Go to the Next Page** button (▶) to access the next page.
- Click the **Go to the Previous Page** button (◀) to return to 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.

Reviewing 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.

Actions

Workspace enables you to perform actions on interactions that you have selected in the interactions table. You must be configured to perform contact management by your system administrator.

Actions that you might be configured for include the following:

- Marking Done (voice and email [**Added:** 8.5.110.13] interactions)
- Change Contact
- Replying/Replying All (email interactions)
- Resending a previously sent email
- Opening in-progress email interactions
- Review attachments [**Added:** 8.5.115.17]
- Forward inbound and outbound email interactions [**Added:** 8.5.113.11]
- Delete an outbound email interaction [**Added:** 8.5.110.13]
- Print the interaction

Completing Interactions

To complete a voice or email [**Added:** 8.5.110.13] interaction with the status of In-Progress, select it in the Interactions table and click **Done** (☑). The status of the interaction changes to **Done**.

Changing Contact

To assign a voice interaction with the status of In-Progress to a different contact, select it in the Interactions table, and click Change Contact. In the Change Contact window, select a new contact and click **Merge**.

Reply or Reply All

Reply () or Reply All () to an email interaction.

Resending a Previously Sent Email

If you select an outbound email interaction in the **Contact History** view that is in the **Done** state, the **Resend** button () is displayed if you are configured to resend outbound emails that have already been sent.

Click **Resend** to open the previous outbound email interaction in a new outbound Email Interaction window. The contents of the previous email interaction are copied into the body of your new email interaction, and the recipients are copied into the recipient list of the outbound Email Interaction window.

Opening In-Progress Email Interactions

If the status of an email interaction in the **Contact History** view is in one of the in-progress states, when you select the interaction, the **Open** button () is displayed (if the email is in a queue, a workbin, or in routing (including outbound in-progress emails). Click **Open** to open the email interaction in the current active interaction window or in a new Email Interaction window if you are opening the email from the Main Window or Gadget **Contact History** view.

After you pull the in-progress email interaction, you can read or handle it as an inbound email interaction or an outbound email interaction.

You can also click **Put back in original location** () to return the email interaction back to the In-Progress workbin or into a queue.

Reviewing Attachments

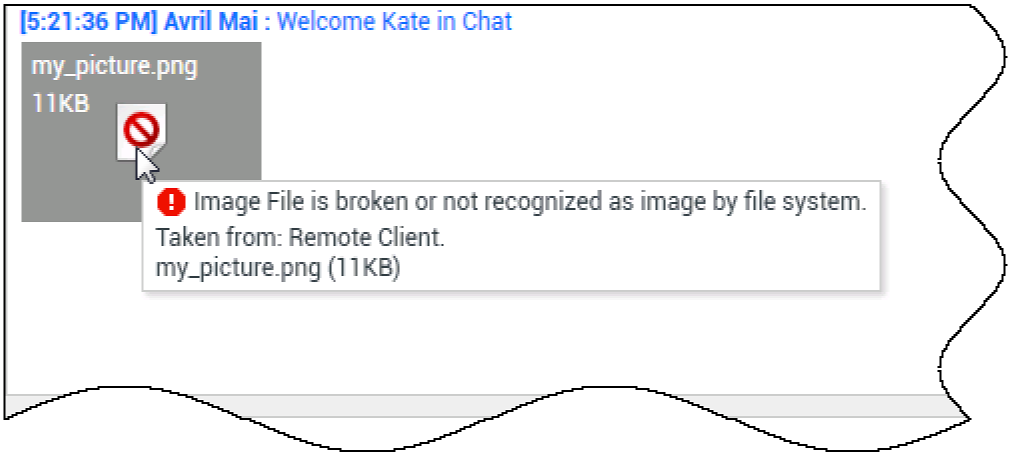
[**Added:** 8.5.115.17]

Both email and chat interactions might have file attachments. You might be allowed to open, save, or print files that are attached to interactions.

If you double-click it you can open it. If you click the save button you might be able to save the file to your workstation or network.

If you right-click the thumbnail/icon, a menu is displayed that might allow you to open, save, or print the file. If more than one file has been transferred, you have the opportunity to save the one that you clicked on, or save all (including the files that you have transferred).

If there is a problem with the transferred file, the following icon and tooltip are displayed. You might have to request that the sender check that they sent the correct file and then ask him or her to resend it. If you transferred the file, you should check that you sent the correct file and then resend it to the contact.



Forward

[**Added:** 8.5.113.11]

If the status of an email interaction in the **Contact History** view is **Done**, when you select the interaction, the **Forward** button () is displayed. Click **Forward** to open a new outbound email interaction that includes the selected interaction in the Forward interaction window.

If you are not ready to send the forwarded email interaction, you can click **Save in Workbin** () to store the email to be forwarded in the Draft workbin. Open this draft interaction when you are ready to work on it again or to send it.

Delete

To delete a selected outbound email interaction with the **In-Progress** status, click **Delete** () [**Added:** 8.5.110.13]

> ### Tip
> If you accidentally delete an email, ask your administrator about recovering the email from the database backup.

Printing Email Interactions

[**Added:** 8.5.101.14]

If you have the correct permissions, click **Print** () to open the Print Preview window and print the selected interaction.

About the Selected Interaction

Workspace enables you to review information details about interactions that you have selected in the **Contact History** view. The **Show Details Panel on Bottom**/**Hide Details Panel** button ( ) enables you to specify how the Details panel is displayed. Click the **Show Details Panel on Bottom**/**Hide Details Panel** button to choose one of the following views:

- To display the **Details** panel to the right of the workspace area, click **Show Details on Right** ( ).
- To display the **Details** panel below the workspace area, click **Show Details Panel on Bottom** ( ).
- To hide the **Details** panel, click **Hide Details Panel** ( ).

The Details panel contains the following three tabs:

- Details
- Note
- Case Data

Details

The **Details** tab might display information such as the following:

- Phone number
- To and from email addresses
- Origin of the call — for example, the name of the agent who transferred the call (this information is stored in the Note tab).
- Time: Elapsed time between the interaction **connected event** and the **markdone** event by the agent or the system.
- Timestamp
- Chat transcript
- Name of the contact

Note

The Note is a feature that enables you to enter comments about the current interaction or read comments that have been entered in the past. The comments are stored as a part of the history for the contact. The contents of the Note are available to any agent who accesses the contact's history.

Case Data

Case Data (attached data) provides information — such as an account number, type of service, and disposition — about an interaction. Your system administrator configures which attached data is displayed.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Manage Contact History
- Manage Contacts and Contact Information
- Manage Your History

Related topics

- My History
- Interaction History
- Contact Directory

Top 10 pages

1. Workspace Desktop Edition Help
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9. Voice Consultation
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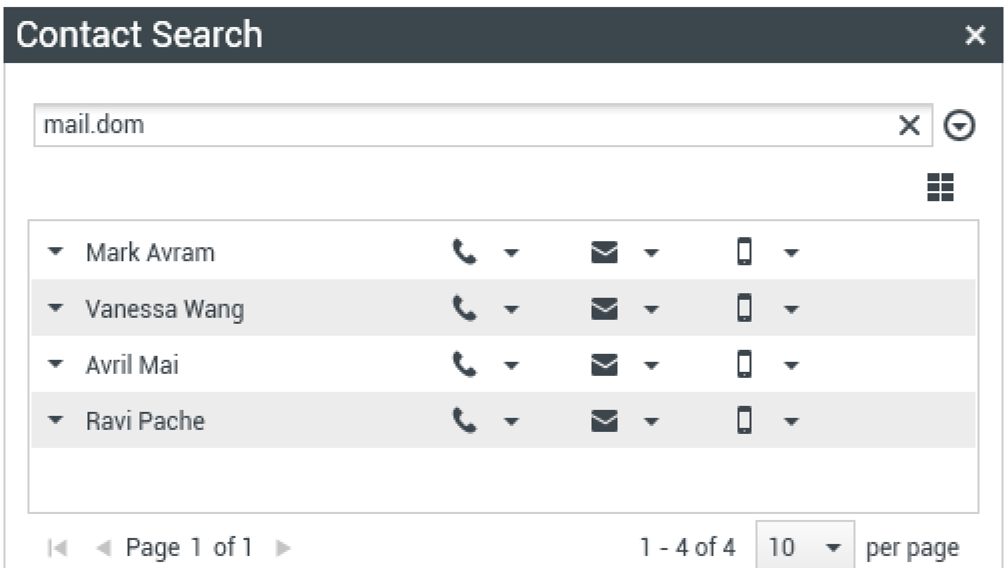
Contact Search

[**Modified:** 8.5.112.08, 8.5.136.07]

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The **Contact Search** view enables you to use the Contact Directory to find the email address of the target to whom you want to forward an inbound email interaction, direct an outbound email interaction, or merge with an existing contact.



You can search the contact database in one of two ways:

- Quick Search
- Advanced Search

> **Tip**
> Your administrator might configure your system to enable you to search only the contacts that are related to your work.

Quick Search

To search the contact directory, type the name, phone number, or email address of a contact in the **Quick Search** field. Quick Search is a *begins with* search.

Contact Quick Search.

> ## Tip
> Genesys does not support *wildcard* characters in contact database searches.

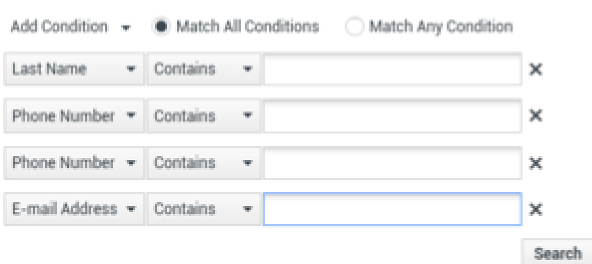
Click the magnifying glass to search for the value that you have entered.

The contact database is search based on your criteria and the search results are displayed in the **Contact Directory** view.

Click the **X** to clear the **Quick Search** field.

Advanced Search

Click **Advanced Search** () to open the **Advanced Search** view.



Contact Advanced Search

Click the **Add Condition** link to add more search criteria. Remove criteria from consideration by clicking the **X** next to the option.

> ## Tip
> Genesys does not support *wildcard* characters in Contact Database searches.

Click the magnifying glass to search for the value(s) that you have entered.

The contact database is search based on your criteria and the search results are displayed in the

Contact Directory view.

Click the **X** to clear all search field.

> Tip
>
> Your administrator configures the default search criteria for this view; however, you can add or remove search criteria as needed. Workspace remembers the last search criteria that you used and displays these when you use the Advanced Search feature again. [**Added:** 8.5.112.08]

Search Results

Search results are displayed in one of three possible view types that each give different results (some environments might have only one type).

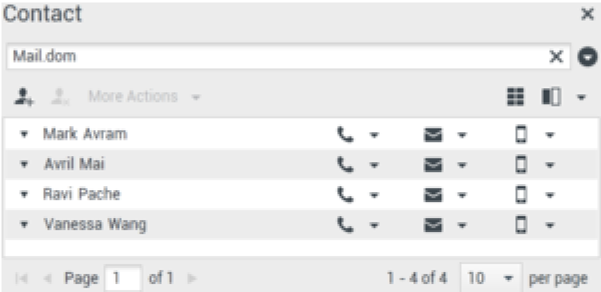
In newer environments (UCS 9.1), there is one search results type:

- Grid View: Searches each field of the contact database for the keyword(s) or phrase(s) that you specify and displays an unsorted list of all of the contacts in the contact database that match the search criteria. You might be enabled to sort the search results in this view.

In older environments (UCS 8.5), the search behavior is determined by the search result-type that you select (one or both of these options might be available to you, depending on how your administrator has set up your environment):

- 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.

> Tip
>
> In some contact centers only one of the two views might be available. In this case, the **List** () and **Grid** () buttons are not displayed. (**Modified:** 8.5.105.12)



Contact Directory

Use the **Show Contacts** View () button to toggle back and forth between the Grid and List views.

Page Controls

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

- Click the **Go to the Next Page** button () to access the next page.
- Click the **Go to the Previous Page** button () to access 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.

Grid View in newer environments

[**Modified:** 8.5.136.07]

The Grid view in newer environments (UCS 9.1) displays a sortable list of all of the contacts in the contact database that match the search criteria.

The search is a 'keyword' or 'phrase' 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' in quick search, and 'starts with', 'is', or 'contains' in advanced search to search for the keyword(s) that you provide.

Examples:

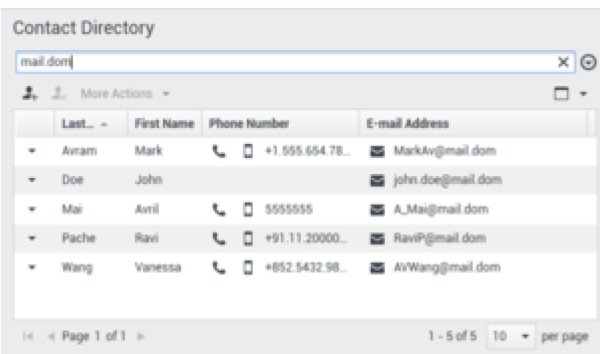
- Quick search using the keywords *John Daly* as the criteria in a quick search defined to apply to only the **First Name** and **Last Name** fields will match a contact where **First Name**=*John* and **Last Name**= *Daly*
- Quick search using the keywords *John Junipero* as the criteria in quick search 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*.
- Advanced search set to **Match all criteria *using the*** *First Name*' `equals` *Johnny* and **Address**

`contains` *pero* will also match the contact where **First Name** = *Johnny* and **Address** = *2001, Junipero Serra Blvd*.

Results are returned in a list that is sortable. If the result set is too large, you can refine the search results by adding more keywords to your search criteria.

> ## 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.

Use the page controls to navigate the list. Click a contact to select it for an action. Click the column heads to sort the search results based on contact attributes.



List View in older environments

In older environments (UCS 8.5), 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' in quick search, and 'starts with', 'is', or 'contains', if enabled by your Administrator, in advanced search) 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

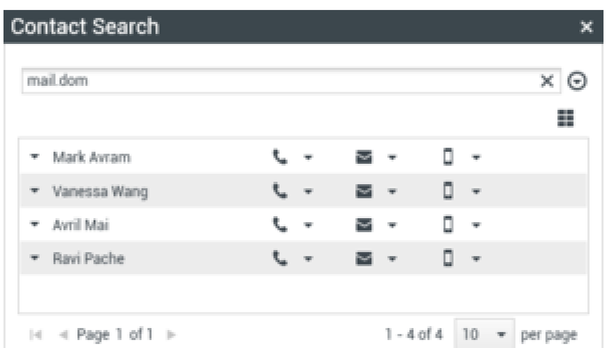
First Name and **Last Name** fields will match a contact where **First Name**=*John* and **Last Name**= *Daly*

- 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*.
- Advanced search set to **Match all criteria *using the*** *First Name*' `equals` *Johnny* and **Address** `contains` *pero* will also match the 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.

Use the page controls to navigate the list. Click a contact to select it for an action. Use the Grid view to sort the search results based on contact attributes.



Contact Directory in List View.

Grid View in older environments

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

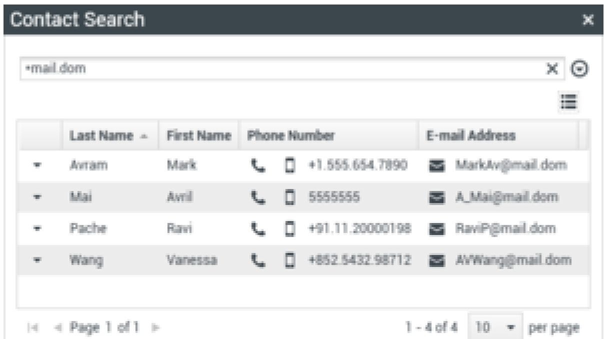
Grid mode performs a search that considers each field of the contact database (name, phone number, email address, or other criteria) as a *phrase* (as opposed to the list view mode that considers each field as a *tokenized* list of words) and uses the search criteria that you provide as a *phrase*, not 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*
- Advanced search set to **Match all criteria** using **First Name** `equals` *Johnny* and **Address** `starts with` *2001, Junip* as the criteria will match a contact where **First Name** = *Johnny* and **Address** = *2001, Junipero Serra Blvd*.

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.



Contact Directory in Grid View.

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. Use the page controls to navigate the list. Click a contact to select it for an action.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Manage Contact History
- Manage Contacts and Contact Information
- Manage Your History

Related topics

- Contact Directory
- Contact History
- Manual and Automatic Contact Assignment

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Disposition Code

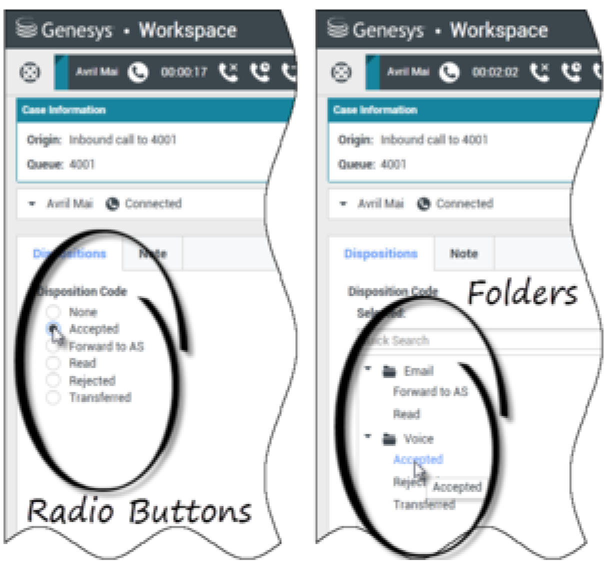
[**Modified:** 8.5.108.11, 8.5.146.06]

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The **Disposition Code** view enables you to assign an interaction disposition (outcome) code to an ongoing or terminated interaction that tell your administrator and/or your contact center system what the outcome of the interaction was.

Your administrator sets up the different codes that you can use. Your supervisor should instruct you in the use of disposition codes. If more than one disposition is required, your administrator might have added editable fields or drop-down menus to the Case Data area where you can choose additional outcomes.

If your system is set up to use disposition codes, then the Dispositions tab is part of the Interaction window. It contains a radio button checklist of options or a hierarchy of folders and sub-folders with dispositions that you can click to specify the outcome of the interaction.

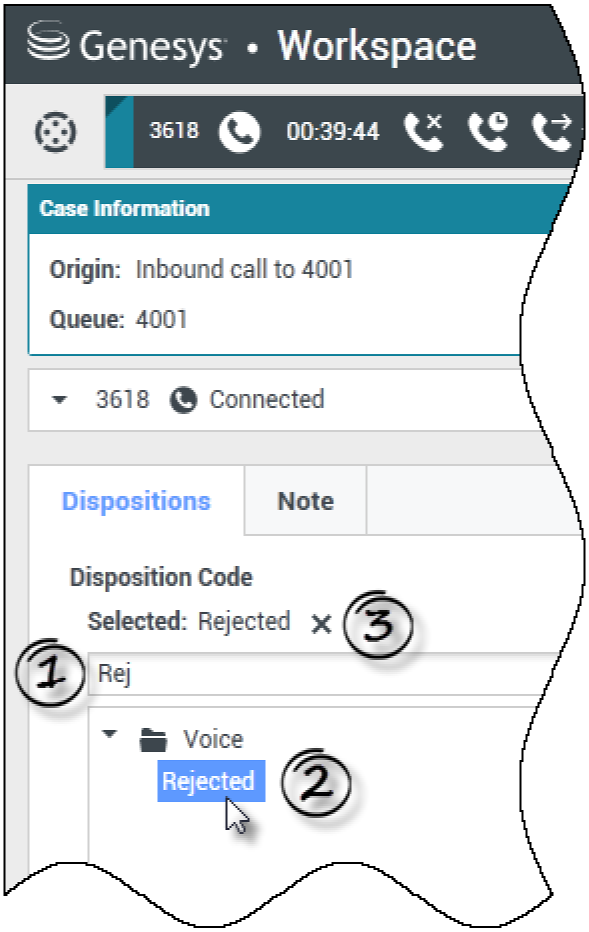


Interaction views that show the two different types of disposition code tabs, Radio Buttons and Folders

Click a disposition radio button or name to select a disposition code for the interaction.

If you have disposition codes in a file folder hierarchy, you can use the Disposition Code **Quick Search** field to find a specific code. Enter the name of the code in the **Quick Search** field. Quick search works as a "start typing" search. Results are returned as you type. All folders that match your search are opened and the view is filtered to show only codes that match what you entered.

In the folder hierarchy view, when you select a disposition, its name is displayed next to the **Selected** label. You can deselect the disposition by clicking the **X** next to it.



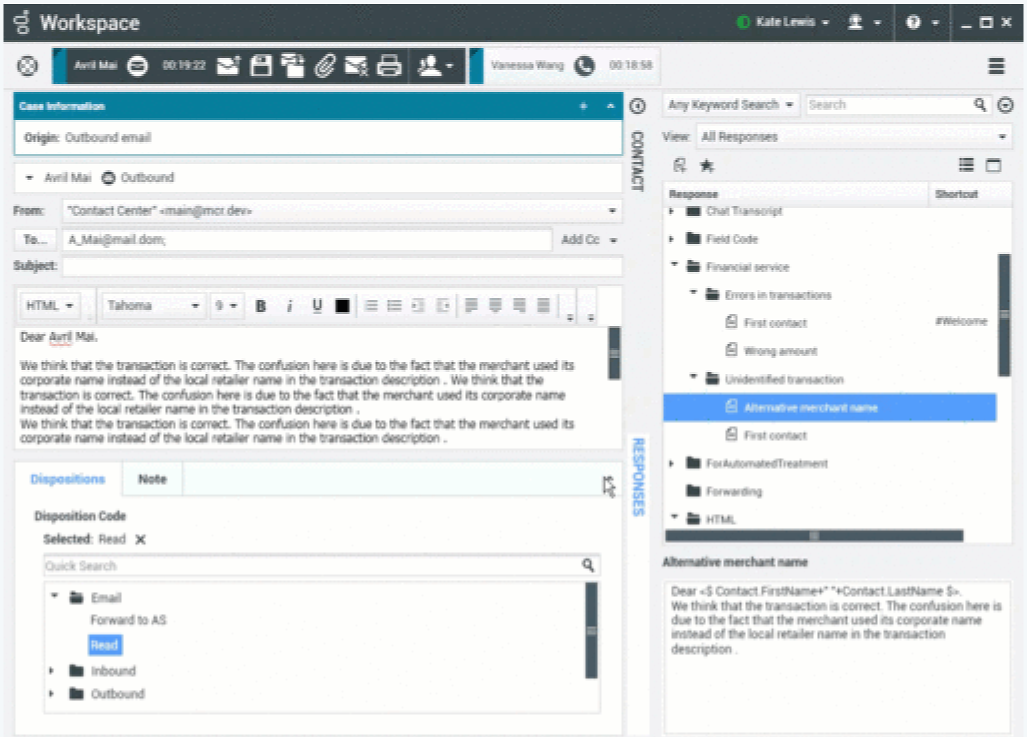
Use the Quick Search to find a disposition. Click it to select it.

Depending on your system configuration:

- You might have to set a disposition code before you click **Done** — in some environments, you might have to set a disposition code before you transfer or forward an email interaction [**Added:** 8.5.103.10]
- You might be able to click **Done** without a disposition code
- The **Disposition Code** view might not be displayed

Tip

Minimizing and Restoring the Disposition Code view. If you need more space in the Interaction view you can minimize or restore the Disposition tab and Note tab area by clicking the chevron. [**Added:** 8.5.146.06]



Click the image if animation does not start.

Important

The **Dispositions** tab and the **Note** tab do not become available until the call is established.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Apply Disposition Codes

Related topics

- Voice Tasks Overview
- Chat Tasks Overview

- Email Tasks Overview
- Outbound Campaigns Overview

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Inactivity Timeout

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

For your security and the security of your company, Workspace might be configured by your administrator to become locked after a specific period of time during which neither your mouse nor keyboard is used. This feature protects you from unwanted system access, if you walk away from your workstation without locking it.

When the time period of inactivity specified by your administrator is reached, all of the open Workspace windows on your desktop are minimized, and the **Reauthenticate** view is displayed.

To unlock Workspace, you must enter in the **Reauthenticate** view the password that was used to log in the locked application, then click **Authenticate**. Click **Cancel** to log off all channels and exit the application.

Your status might be set to Not Ready. To change your status, use the My Status view.

All Workspace windows are minimized when the application is locked, except for the following windows, which are locked but remain visible:

- Interaction notifications (with Case Information hidden during lock-out)
- System-tray icon

System notices are not locked. When Workspace times out, a system-message notification is displayed to alert you that Workspace has timed out.

Click **Show** to access the message. Click **Dismiss** to dismiss the notification.

If you clicked **Show**, click **OK** to dismiss the message.

Single Sign-On Environments

In Single Sign-On Environments, if Workspace times-out due to inactivity, click **Reauthenticate**. If reauthentication fails, the following message is displayed in the **Reauthenticate** view: `Cannot resume application session due to authentication error. Please lock this computer, then unlock it using your most recent password and try again.`.

After you reauthenticate in your environment, Workspace is available to use.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Log In
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Launching Workspace
- Login
- Main Window

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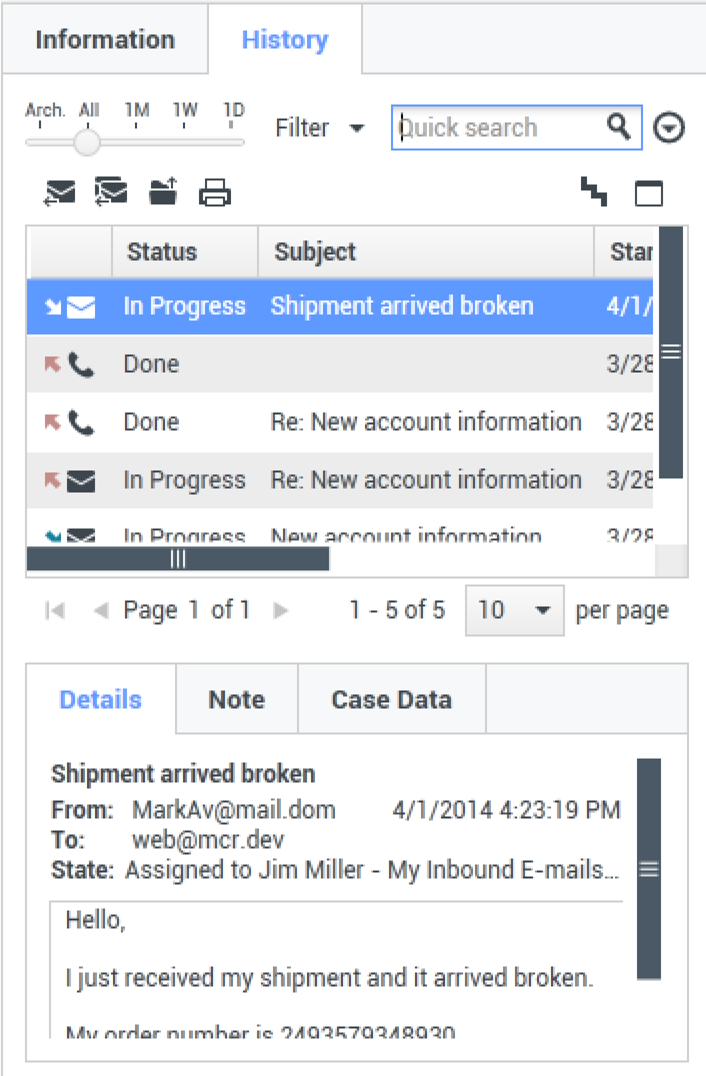
Interaction History

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The **Interaction History** view provides you with specific information about where the interaction (voice, email, chat, and workitem) came from, who the contact is, and how long the interaction has been active.

- **Contact**: If the contact is in the contact database, the name of the contact is displayed. The display might also show the contact's number or email address, or "Unknown".
- **Duration**: The time in hours, minutes, and seconds that you have been handling the interaction.

The **Interaction History** view is part of the Interaction window and the **History** tab of the Contact Directory view.



Use the **Zoom** control in the **Main Menu** (refer to Manage your settings and preferences) to change the size of the text in this view. This feature might not be available in your environment. [**Added:** 8.5.109.16]

If you are looking for information about your KPIs, Contact Center Statistics, or other stats, refer to these topics:

- My Statistics
- Statistics Gadget
- View KPIs And Statistics

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Manage Contacts and Contact Information

Related topics

- My History
- Interaction History
- Contact Directory
- Voice Tasks Overview
- Chat Tasks Overview
- Email Tasks Overview
- Outbound Campaigns Overview

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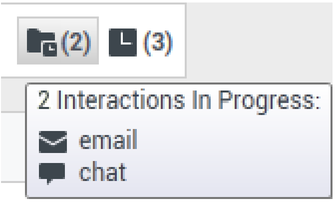
In-Progress and Recent Interactions

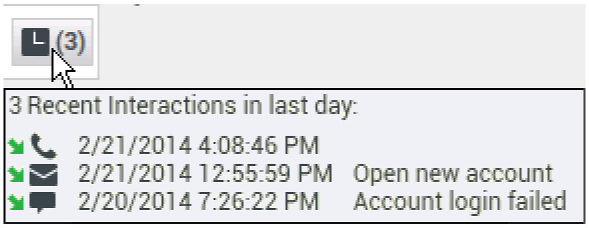
Tip
Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction. Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact. If you click the icon, the **Contact** view is opened and the **Contact History** tab is displayed.



Dynamic contact history.

If there are recent interactions for the current contact; the number of interactions is displayed beside the connection status of the interaction. Place your mouse pointer over the icon to display the number and type of recent interaction(s) for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions in the last-specified number of days.



Display of recent interactions.

The **Interaction History** view is part of the Interaction window and the **History** tab of the Contact Directory view.

Use the **Zoom** control in the **Main Menu** (refer to Manage your settings and preferences) to change the size of the text in this view. This feature might not be available in your environment. [**Added:** 8.5.109.16]

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Manage Contact History

Related topics

- Voice Tasks Overview
- Chat Tasks Overview
- Email Tasks Overview
- Outbound Campaigns Overview
- My History
- Interaction History
- Contact Directory

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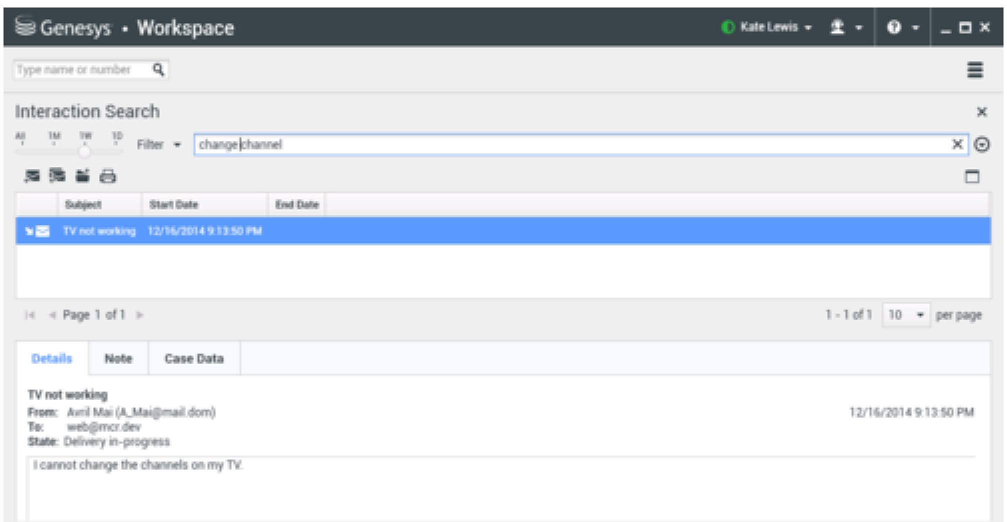
Interaction Search

[**Modified:** 8.5.116.10, 8.5.113.11, 8.5.112.08, 8.5.110.13]

[**Added:** 8.5.104.15]

> ## Tip
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The **Interaction Search** view enables you to find interactions based on multiple criteria.



Workspace provides you with multiple ways to find interactions in your contact center interaction database.

- If you know which contact you are searching for, use the Contact Directory to find the interactions exchanged with that contact.
- If you were the agent who handled the interaction you can use the My History view to find the interactions that you have handled.

However, sometimes you want to find an interaction, but you no longer remember who the contact was, or whether it was handled by yourself or another agent. The Workspace Global Interaction Search feature enables you to use the **Interaction Search** view to search for interactions based on one or more criteria, including words in the body or transcript of the interaction.

To display the **Interaction Search** view, click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select **Interaction Search**. Use this feature to search for interactions. View details about the search results in the Details tab.

Global Interaction Search enables you to find interactions using one of two modes:

- Quick Search
- Advanced Search

Perform the following actions on selected interactions:

- Mark Done voice and email [**Added:** 8.5.110.13] interactions that have the **In-Progress** status.
- Delete an outbound email interaction that has the **In-Progress** status. [**Added:** 8.5.110.13]
- Reply or Reply All to email interactions.
- Resend a previously sent email.
- Open in-progress inbound and outbound email interactions (that are in the process of being routed out of and into workbins and queues).
- Forward inbound and outbound email interactions [**Added:** 8.5.113.11]
- Print the interaction (if you have the correct permissions)

Quick Search

Quick search enables you to perform a simple search of the interaction database.

To search the interaction database, type some text that you want to search for in the Quick Search field. Click the magnifying glass to search for the criteria that you have entered.

Quick Search field.

Click the **X** to clear the Quick Search field.

Quick search combines a subset of search criteria selected by your administrator. It typically applies a "starts with" for each word of the criteria in any of the attributes selected by your administrator.

Filtering

The **Interaction Search** view filtering controls enable you to refine your search. The chronology slider enables you to search the interaction history by time interval.

The slider has four positions that represent different time intervals:

- **All**: Search the entire database from the most recent interaction back to the earliest interaction
- **1M**: Search the database from the most recent interaction back to one month ago
- **1W**: Search the database from the most recent interaction back to one week ago

- **1D**: Search the database from the most recent interaction back to one day ago

The **Interaction Type** filters enable you to select and deselect the types of interactions that are to be searched. The items that are displayed depend on the interaction types that you are configured to handle. Click the **Filter** menu to select the interaction types that you want to search. You can select multiple items in the **Filter** menu. The following types are available, by default:

- Show all interactions
- Show voice interactions
- Show email interactions
- Show chat interactions
- Show SMS interactions
- Show other media interactions

When a filter is on, a check mark appears next to it in the **Filter** menu and the button remains highlighted if the "All" filter is not applied.

Your administrator might have configured additional customized options for the **Filter** menu, such as business area/department (for example: accounts, sales, and service) or customer level (for example: Silver, Gold, and Platinum). Custom filters enable you to refine your search. For example, if you are searching for email interactions about a service request, you can make two selections in the **Filter** menu to refine your search: **Show email Interactions** and **Show Interactions with Service Department**.

Search Results

Search results are displayed in a grid. Click a result entry to display interaction details in the **Details** tab. You can also use the **Note** tab to view notes associated with the selected interaction and the **Case Data** tabs to view the interaction case information.

Grid View and Tree View

[**Added:** 8.5.116.10]

Workspace enables you to view contact interactions either in a flat view or grouped by threads. The **Show Interactions in Grid View/Show Interactions in Tree View** button (/) enables you to specify how the **Interaction History** panel is displayed. Refer to the Contact History page for information about how to use the features of the **Contact History** view, including opening in-progress interactions and resending email interactions that have been marked as **Done**.

Grid View displays interactions in a flat view, and Tree View displays interactions grouped by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (email replies, multichannel conversation, social-media threads, and so on).

The Details panel contains three tabs:

- Details
- Notes

- Case Data

Page Controls

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.

Advanced Search

The Advanced Search feature enables you to enter multiple criteria to refine your search. The **Advanced Search** pane contains drop-down lists of search criteria that enable you to build a complex search based on multiple criteria such as Status, Subject, processing agent, date or date range, and interaction text.

Text field searches are based on a "Matches" search, where the request returns interactions that contain, for each typed word, at least one word starting with the specified word.

Filtering

The **Interaction Search** view filtering control enables you to refine your search. The **Interaction Type** filters enable you to select and deselect the types of interactions that are to be searched. The items that are displayed depend on the interaction types that you are configured to handle. Click the **Filter** menu to select the interaction types that you want to search. You can select multiple items in the **Filter** menu. The following types are available, by default:

- Show all interactions
- Show voice interactions
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- Show chat interactions
- Show SMS interactions
- Show other media interactions

When a filter is on, a check mark appears next to it in the **Filter** menu and the button remains highlighted if the "All" filter is not applied.

Your administrator might have configured additional customized options for the **Filter** menu, such as business area/department (for example: accounts, sales, and service) or customer level (for example:

Silver, Gold, and Platinum). Custom filters enable you to refine your search. For example, if you are searching for email interactions about a service request, you can make two selections in the **Filter** menu to refine your search: **Show email Interactions** and **Show Interactions with Service Department**.

Advanced Search Pane

The Advanced Search feature enables you to use multiple criteria to refine your search. The **Advanced Search** pane contains drop-down lists of search criteria, such as Status, Subject, Start Date, and End Date.

Use the **Add Condition** drop-down menu to add search criteria to the Advanced Search Pane. Remove criteria from consideration by clicking the **X** next to the option.

Use the **Match Conditions** options to specify whether **All** or **Any** of the search conditions that you have specified are applied.

> ### Important
> The contents of the **Advanced Search** pane are set up by your system administrator. There are many possibilities for how this view will appear to you and what criteria will be available. The following sections describe two use cases that you might experience. The only difference between them is that one contains logical groups of search criteria and the other does not. All other functionality is the same.

Use Case 1—No search criteria groups

Your system administrator has specified search criteria that you are allowed to use, but has not put them in logical groups for you. In this scenario, you probably have access to only a few search criteria so it is not necessary to create groups. To add search criteria, select them from the **Add Condition** menu. Remove criteria from consideration by clicking the **X** next to the option.

Use Case 2—Multiple search criteria groups

Your system administrator might have created one or more search option groups and specified default criteria to enable you to make logical search criteria choices.

For example, your administrator might create the following groups and specified the following search criteria for each group:

- Agent: `OwnerId`
- Contact: `BccAddresses`, `CcAddresses`, `ContactId`, `FromAddress`, `FromPersonal`, `PhoneNumber`, `ReplyToAddress`, `SentDate`, `ToAddress`
- Dates: `EstablishedDate`, `ReleasedDate`, `SentDate`, `StartDate`, `EndDate`
- Interaction: `Subject`, `ContactId`, `Id`, `OwnerId`, `SubtypeId`, `TypeId`
- Other: A group that is created automatically when your administrator creates one or more criteria groups. It contains all available search criteria that are not specified as members of other groups.

Next to the name of the group in the Advanced Search Pane is a **+**. Click the **+** to add more criteria from this group.

To add other search criteria or to display additional available groups, select them from the **Add Condition** menu. Remove criteria from consideration by clicking the **X** next to the option.

Tip

Your administrator configures the default search criteria for this view; however, you can add or remove search criteria as needed. Workspace remembers the last search criteria that you used and displays these when you use the Advanced Search feature again. [**Added:** 8.5.112.08]

The following information applies to both use cases:

Date specific criteria use a calendar picker to enable you to specify a date. You can also type in a date manually. For example, to search based on the Start Date, use the calendar icon () to select a date, or enter the date in the format that conforms to your local day and time display preferences.

Menus for date fields might contain the following choices:

- **On**—The exact date
- **On or after**—The specified date or any date after
- **Before**—Before the specified date
- **Between**—Between the specified dates

Menus for pre-defined fields, such as Status, contain the pre-defined field names from the database—for example: **All**, **Done**, and **In Progress**.

Text field searches are based on a **Matches** search where the request returns interactions that contain the at least one word starting with the specified typed text.

Business Attribute searches use a drop-down menu that enables you to select the exact value to match.

Build up your search by adding criteria, then click **Search** to start your search based on the criteria that you have specified.

Search Results

Search results are displayed in a grid. Click a result entry to display interaction details in the **Details** tab. You can also use the **Note** tab to view notes associated with the selected interaction and the **Case Data** tabs to view the interaction case information.

Grid View and Tree View

[**Added:** 8.5.116.10]

Workspace enables you to view contact interactions either in a flat view or grouped by threads. The **Show Interactions in Grid View/Show Interactions in Tree View** button (/) enables you to specify how the Interaction History panel is displayed. Refer to the Contact History page for information about how to use the features of the Contact History view, including opening in-progress interactions and resending email interactions that have been marked as **Done**.

The **Grid** view in newer environments displays a sortable list of all of the contacts in the contact database that match the search criteria.

Grid View displays interactions in a flat view, and Tree View displays interactions grouped by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (email replies, multichannel conversation, social-media threads, and so on).

The Details panel contains three tabs:

- Details
- Notes
- Case Data

Page Controls

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.

Interaction Details

The **Details** panel enables you to view the results of your interaction search. The **Details** panel includes the **Details**, **Note**, and **Case Data** tabs.

You can view interaction details in the **Details** tab for the *currently selected interaction* in the **Details** panel by clicking the **Show Details Panel on Bottom**/**Hide Details Panel** toggle button:

The **Details** tab 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.

The **Note** tab enables you to view notes that are associated with the selected interaction.

The **Case Data** tab enables you to view the case information for the selected interaction.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Find Interactions
- Manage Contact History
- Manage Your History

Related topics

- Contact History
- My History

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Knowledge tab

> **Important**
> Screenshots will be available soon.

[**Added:** 8.5.146.07]

How to access your corporate knowledge base to provide the best possible answer when interacting with a contact.

You can access your organization’s Knowledge documents through the **Knowledge** tab in Workspace. If the **Knowledge** tab is available in your environment, you might be able to access it from **My Workspace** in the Main Window or from the right side of the interaction view.

The Knowledge documents enable you to enter a question from a contact about your products, services, or other aspects of your organization. Use the **Knowledge** tab to search your organization's knowledge databases for matching FAQs (Frequently Asked Questions) and answers. You can use these answers to develop responses to your contact's query.

You can filter each FAQ by category.

For the question that you enter, each FAQ is assigned a confidence score to indicate how relevant the answer is likely to be. You can help improve future query results by clicking thumbs-up and thumbs-down to provide feedback about the applicability of the FAQs.

The **Knowledge** tab has two different views, the Search view and the Browse view to enable you to find answers to your contact's FAQs.

The Knowledge tab in the interaction view

1

Your account might be set up to enable you to use the **Knowledge** tab while you are handling interactions. The tab is part of the supporting information of the interaction view, along with other tabs such as the **Contact** tab. To make the **Knowledge** tab active, select it, then use the Search view and Browse view to find answers to frequently asked questions (FAQs) from your contacts.

> **Tip**
> If you use Floating Mode in the interaction view, the **Knowledge** tab is not displayed

> or accessible. You must be in Pinned Mode to view the **Knowledge** tab in the interaction view.

To insert the content of the FAQ into your interaction, perform the following steps:

1. Enter a question in the Search field.
2. Review the results to find the answer you are looking for.
3. Click **Insert Content** to copy the FAQ answer from the **Knowledge** tab into your Chat composition field or your email editor.

> ### Tip
> - You can use the cursor to select some or all of the FAQ answer, then copy and paste the content into an interaction.
> - If you are on a voice call, you can read or paraphrase the answer.

Your supervisor or administrator will tell you how they want you to use the FAQ answers. You might be required to use the information verbatim, or you might be allowed to use it to help you craft your own answer.

The Knowledge tab in the Main Window

1

Your account might be set up to enable you to use the **Knowledge** tab in the Main Window.

In the Main Window, select the **Knowledge** tab to make it active then use the Search view and Browse view to find answers to frequently asked questions (FAQs) from your contacts.

Search view

1

To use Search view, click the **Search View** button  then choose a Knowledge Base from the

Knowledge Base drop down list on the right side of the view. You can also select **All** from this list to search in all the knowledge bases to which you have access.

Under the **Home** link, enter a question, phrase, or keyword of at least five characters in length in the Search field. To start the search, press **Return**. To clear the search field, click **X**.

The 10 top search results from all categories in the selected Knowledge Base are displayed in order of Confidence.

===Using the Search view===

The Search view is a list of FAQs with a preview of each answer. The search results are displayed and are sorted by Confidence.

Preview view

To expand the answer preview, click the **+** next to a FAQ. If the answer is too long to display, **Read more** appears in bold text at the end of the last line. Click **Read more** to open the answer in a new page. To return to the preview view, click **Home**.

To collapse the FAQ, click the **-** next to the expanded FAQ.

Category link

Beneath the answer preview is a link to the FAQ category where the answer was found in the selected Knowledge Base. Click the category link to view all FAQs in that category.

To return to the preview view, click the left-pointing arrow or **Home**.

Category Filter

You can filter the search results so that you see only the results from a specific category. Click **Category Filter +** to open a drop-down list of available categories. Click **+** again to add more categories to the filtered view. Click **Clear All** to remove filtering of the search view.

Browse Category view

1

To use Browse Category view, click the **Browse Category View** button  then choose a Knowledge Base from the **Knowledge Base** drop down list on the right side of the view.

This view enables you to browse the knowledge base with or without a query.

To start the search, enter a question, phrase, or keyword of at least five characters in length in the Search field. To display the search results, press **Return**. The search results are grouped by category and sorted by Confidence.

If you do not enter a question in the Search field, the view instead displays all categories in the selected knowledge base, including documents not assigned to a category.

===Using the Browse Category view===

The Browse Category view is a folder and document tree view of the search results organized by categories. You can expand and collapse categories by clicking the chevron next to the category name.

Under each category folder is a list of FAQ documents sorted by Confidence.

To view an answer to an FAQ, click an FAQ. The answer is displayed in the **Details** view at the bottom of the **Browse Category** view.

What is Confidence?

1

Knowledge Center uses Artificial Intelligence (AI) to evaluate the questions that you enter into the Search field. The search field is available in both the Search view and the Browse Category view. Knowledge Center matches your questions, phrases, and character strings to FAQs in your organization's Knowledge Base and selects the FAQs and answers that best match the question.

Knowledge Center uses AI to assign a confidence level as a percentage to each FAQ and then presents you with the FAQs that have the highest confidence ratings.

You can help the Knowledge Center AI to improve its confidence level for each FAQ by up-voting or down-voting one or more FAQ search results.

On the right side of each FAQ is the following question: **Was this helpful?** Next to it is a thumbs-up and a thumbs-down icon. To up-vote the FAQ, click the thumbs-up icon. To down-vote the FAQ, click the thumbs-down icon. To make improvements to matching FAQs to questions entered by agents, Knowledge Center gathers all the up-votes and down-votes from all the agents in your organization.

Confidence number

Search results are always sorted by the confidence number assigned by the Knowledge Center AI. Next to the thumbs-up and thumbs-down icons is the confidence number assigned by Knowledge Center. That does not necessarily mean that the FAQ with the highest confidence number is the answer you are looking for. As an agent, you must evaluate the search results and choose the best response for your contact.

Select the best answer from your organization's Knowledge Base based on your experience and knowledge.

By providing feedback about the Knowledge Center's FAQ matches, you can

improve the search results in the future for yourself and your colleagues.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- xx

Related topics

- xx

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Manual and Automatic Contact Assignment

[**Modified:** 8.5.117.18]

> **Tip**
>
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Assigning a contact to an interaction

Link to video

When interactions arrive on your desktop, Workspace tries to assign a contact to the interaction based on the list of existing contacts in your company's database.

Sometimes a known contact might connect anonymously to your contact center by using a phone, email account, or other media that is not part of the information that is stored about that contact in the contact database.

Sometimes more than one contact matches the information, and so Workspace might not be able to correctly assign a contact. By default, the first match is assigned; however, this might not be the correct match. Sometimes two people share the same name. Sometimes two people live at the same address and share the same phone number.

Your administrator might have set up Workspace to let you decide which person is contacting you so that you make the contact assignment manually. If your account is set up for this feature, there are four possible scenarios that you might have to handle:

1. There is no conflict, so Workspace assigns the contact automatically.

   When a call arrives and there is only one matching contact in the database, that contact is assigned automatically. If you discover that the person calling is not the contact assigned, you can press Ctrl-A to assign the call to another contact, and then click **Create New Contact** () to create a new contact for the call.

2. There are multiple contacts that match the caller.

   When an interaction arrives and there is more than one match in the database, Workspace presents you with a list of suggested contacts.

   Click each one to access their information and click **Assign** when you find the right one.

3. The contact does not match any of the suggested contacts and is not in the contact database.

   If the contact that is not in the contact database is using the same phone number, address, or email address as an existing contact, Workspace will suggest still suggest existing contacts.

   If you determine that the contact is not one of the suggested contacts, you can choose to click **Create New Contact** and manually create a new contact.

   In this case, the new contact is the spouse of an existing contact, living at the same address and using the same phone number.

4. The contact does not match any of the suggested contacts but is in the contact database.

   A contact might call from a phone number or send an email from an address that is not in the contact database.

   If you identify the contact as being one of your known contacts, you can add the interaction to the history of the contact by clicking **Assign Another Contact to this Interaction** () or by pressing Ctrl-A. The **Contact Search** view is displayed.

   a. In the **Quick Search** field, enter the name, or other identifying information of the contact, and click the magnifying-glass icon to begin the search of the contact database.
   b. In the **Search Results** list or grid, select the correct contact.
   c. Click **Assign** to assign this interaction to the selected contact. The interaction is added to the Contact History. Click **Cancel** to return to the blank **Contact Information** view.

You can also use the **Assign Another Contact to This Interaction** button to create a new contact or to manually reassign an interaction that has been incorrectly assigned to the wrong contact. You can also use the Change Contact view.

[**Added:** 8.5.117.18]

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Manage Contact History
- Manage Contacts and Contact Information

Related topics

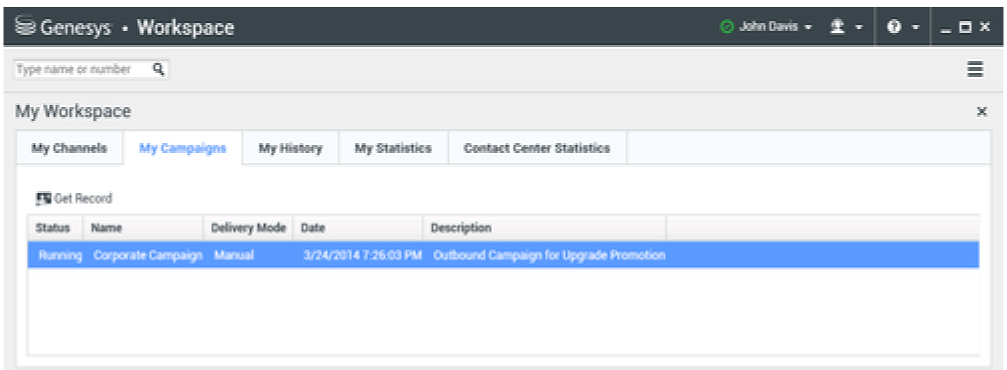
- Contact Directory
- Contact History
- Voice Tasks Overview
- Chat Tasks Overview
- Email Tasks Overview
- Outbound Campaigns Overview

Top 10 pages

My Campaigns

> **Tip**
>
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The **My Campaigns** view is part of the Workspace in the Main Window. It provides a list of the active (loaded, but not yet started) and running (loaded and started) campaigns in which you are currently involved.



The **My Campaigns** view displays the name, delivery mode (automatic or manual), and description of each campaign.

If you are part of an Outbound Preview campaign, you can use the My Campaign view to request a new record by selecting the name of the campaign and then clicking **Get Record**.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle Outbound-Campaign Voice Interactions
- Handle a Voice Call
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Outbound Preview Calls
- Outbound Push Preview Calls
- Outbound Progressive Calls
- Call Actions for Outbound Calls
- Voice Interaction
- Voice Consultation
- Voice Recording

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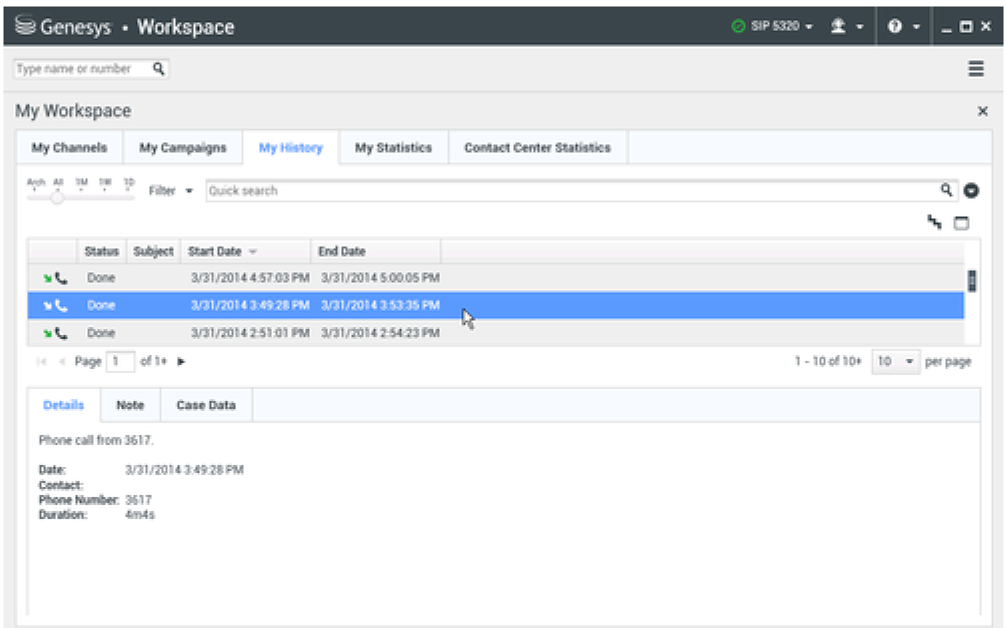
My History

[**Modified:** 8.5.115.17, 8.5.113.11, 8.5.110.13]

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

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



To display the My History view, in the Main Window, click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select **My History**.

Use the **My History** view to do the following:

- Find interactions. The Quick Search and Advanced search return only your interactions.
  - Searching on a phone number, status, start date, or end date returns a list of your interactions that match the criterion or criteria.
  - The search and filter tools work the same in this view as they do in the Contact History view, except that they return only your interactions, not all interactions that match the criteria.
- Perform the following actions on selected interactions:
  - Mark done voice and email [**Added:** 8.5.110.13] interactions that have the **In-Progress** status.

    - Reply/Reply All to email interaction.
    - Resend a previously sent email.
    - Open in-progress inbound and outbound email interactions (that are in the process of being routed out of and into workbins and queues).
    - View attachments [**Added:** 8.5.115.17]
    - Forward inbound and outbound email interactions [**Added:** 8.5.113.11]
    - Delete an outbound email interaction that has the **In-Progress** status. [**Added:** 8.5.110.13]
    - Assign contact for the selected voice interaction assigns the interaction to an existing contact.
    - Print the interaction (if you have the correct permissions)
- View information about the selected interaction.

Workspace enables you to access information details about interactions that you have selected in the **My History** view. The **Show Details Panel on Bottom/Hide Details Panel** button () enables you to specify how the Details panel is displayed. Click the **Show Details Panel on Bottom/Hide Details Panel** button to choose one of the following views:

- Details Panel Right
- Details Panel Bottom
- Hide Details Panel

Grid View and Tree View

Workspace enables you to access contact interactions either chronologically or as threads. The **Show Interactions in Grid View/Show Interactions in Tree View** button (/) enables you to specify how the **My History** view is displayed. Refer to the Contact History page for information about how to use the features of the **Contact History** view, including opening in-progress interactions and resending email interactions that have been marked as **Done**.

Grid View displays interactions chronologically, and Tree View displays interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (email replies, multichannel conversation, social-media threads, and so on).

The **Details** view contains three tabs:

- Details
- Notes
- Case Data

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Manage Your History
- Manage Contact History
- Manage Contacts and Contact Information

Related topics

- My History
- Interaction History
- Contact Directory

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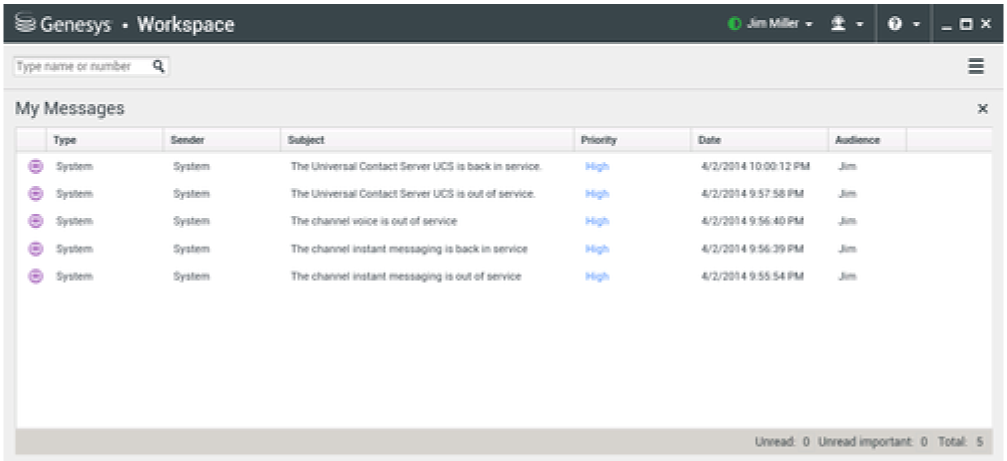
My Messages

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Your lead or your administrator can send messages directly to you or your group by using the Workspace Broadcast Message function. You might receive business-type messages or system-type messages.



Examples of business messages include:

- Performance reminders
- Instructions for you or your workgroup
- Information about upcoming events or requirements

Examples of system messages include:

- Switch is out of service
- Channel voice is out of/back in service
- The Universal Contact Server is out of service

Message Preview

If you receive a message, a Message Preview interactive notification is displayed on your desktop.

Message priority might be indicated by one or more of the following methods:

- Audio cue
- Color border around the message preview
- Message type indicator graphic
- Priority text (for example: High)

If a Message Preview interactive notification is displayed on your desktop, you can do one of the following:

- Click **Show**: Displays the message window. The message is also displayed in the My Messages area of the Main Window. The message is marked as Read.
- Click **Dismiss**: Closes the Message Preview. The message is displayed in the My Messages area of the Main Window. The message is marked as Unread.
- Do nothing: The Message Preview is dismissed automatically after a time interval that is defined by your system administrator; the message is displayed in the My Messages area of the Main Window. The message is marked as Unread.

Message Window

You can display the Message Window by clicking **Show** in the Message Preview or by double-clicking the message in the My Messages area of the Main Window.

The Message Window contains the full content of a message that has been directed to you or your group. As well as displaying the content of the message, the Message Window also might contain the following information:

- Message Type—This information might be conveyed by text, the title bar, and/or an icon.
- Subject
- Sender
- Priority—This information might be conveyed by text and/or by the color of the border that surrounds the information about the message.
- Date
- Topic (target audience)
- Other data that is defined by your administrator

My Messages

The **My Messages** view of the Main Window provides you with up-to-date information about the status of your contact center, changes related to your activities, and business messages sent by your leads.

In the Main Window, click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select **My Messages**.

In the **My Messages** view, the messages are displayed in a scrolling list with the most recent message on the top.

Depending on the configuration if your system, you might be able to mark messages as read/unread or delete messages. To do this, right click the message in the message view and select **Mark as Read**, **Mark as Unread**, or **Delete** from the context menu.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Receive Business And System Messages
- Main Window Basics
- Workspace Windows and Views

Related topics

- Main Window

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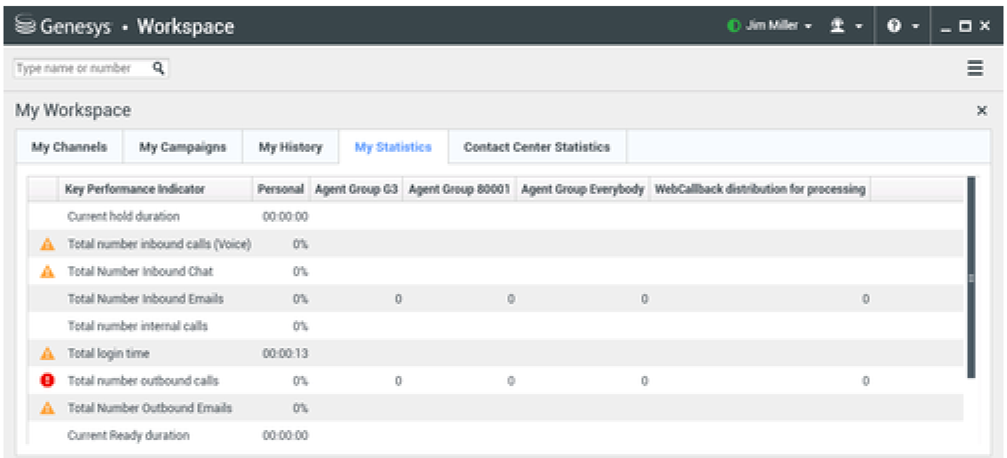
My Statistics

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The **My Statistics** tab of the Main Window displays the list of your Key Performance Indicators (KPIs). You can also access your KPIs in the Statistics Gadget.



Tip

The Statistics/KPIs that are displayed in this view are configured by your system administrator.

The statistics defined as KPIs could also be evaluated for the agent groups of which you are a member. Your performance is displayed in the **Personal** column, and the statistic value for each Agent Group is displayed in a column with the name of the agent group as the column header.

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

The **My Statistics** tab displays your current KPIs and a summary of the KPIs of your work group(s). The **My Statistics** tab enables you to compare your performance with the overall performance of the group(s) to which you belong.

A warning icon is displayed in the left-most column of the row. The warning icon is displayed if the evaluation of your performance for the KPI goes beyond the expected warning level for the KPI ().

An error icon might be displayed next to a KPI if the evaluation of the performance is below the expected error level for the KPI (❗).

> **Tip**
> Statistics about the Routing Points, Queues, and so on, are displayed in the Contact Center Statistics tab.

If a statistic has been configured incorrectly, the background of the statistic becomes red and the error icon is displayed. You should report errors immediately. The reason for the problem is displayed in a tooltip if you place your mouse pointer over the problematic statistic row.

My Statistics menu

Right-click in the **My Statistics** tab to access the shortcut menu that enables you to show/hide columns and KPIs, and to turn on or off KPI filtering to show only those that have alerts.

- The **My Statistics** menu enables you to specify which KPIs are displayed. Select a KPI to show or hide it. KPIs that are displayed have a check mark next to them.
- The **Agent Groups** menu enables you to show or hide the column that contains the KPI values for the agent group. Select a group to show or hide it. Agent Groups that are displayed have a check mark next to them.
- Select **Show All statistics** to display all of the KPIs. Select **Show Only Alerting Statistics** to display only KPIs that have warnings or errors. This menu does not affect the columns that are displayed.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- View KPIs And Statistics

Related topics

- My Workspace
- Statistics Gadget
- Components, Features, and Controls

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My Status

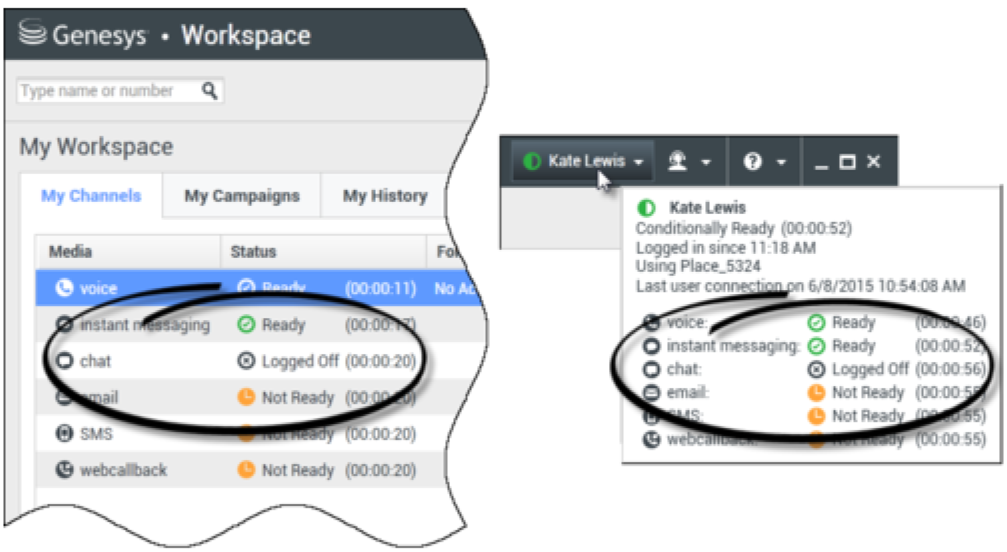
[**Modified:** 8.5.108.11, 8.5.139.06]

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Link to video

The **My Status** view provides a universal status monitor in the Main Window for all of your media channels.



You can review your status universally and by media type. Place the mouse pointer over the Global Status icon to review your status summary for each media to which you are logged in. For the voice channel, you can also forward your calls to a different extension.

Use the toolbar to apply actions to selected media types. You can apply the following actions:

- Log On/Log Off
- DND on
- Not ready (reason)/Ready
- After call work

The following statuses are available for each of the media types to which you are logged in:

- Out of service
- Logged Off
- DND is on
- Not ready (reason)/Ready

Security

[**Modified:** 8.5.139.06] The following security features can be configured by your administrator to protect you and your workstation:

- You might be locked out of Workspace and have your status set to Not Ready, with or without a Not Ready Reason, if you do not use your keyboard or mouse for an inactivity period that is defined by your administrator. If you are locked out of Workspace, you must reauthenticate and reset your status to Ready to receive new interactions.
- In the ToolTip for the **Global Status** icon, you can verify the date and time of your last login. Place your mouse pointer over the Global Status icon to open its ToolTip.
- If you lock your workstation with or without first setting your status to Not Ready, your administrator might have set up your account to automatically change to Not Ready, with or without a Not Ready Reason. When you unlock your workstation, your status will remain in the Not Ready state until you set it to Ready.

Capacity Rules

The view of your state that is displayed to other agents might be configured to be based on a capacity rule. Your state on any channel might not be Busy until you are *at capacity* for that channel.

My Channels Tab

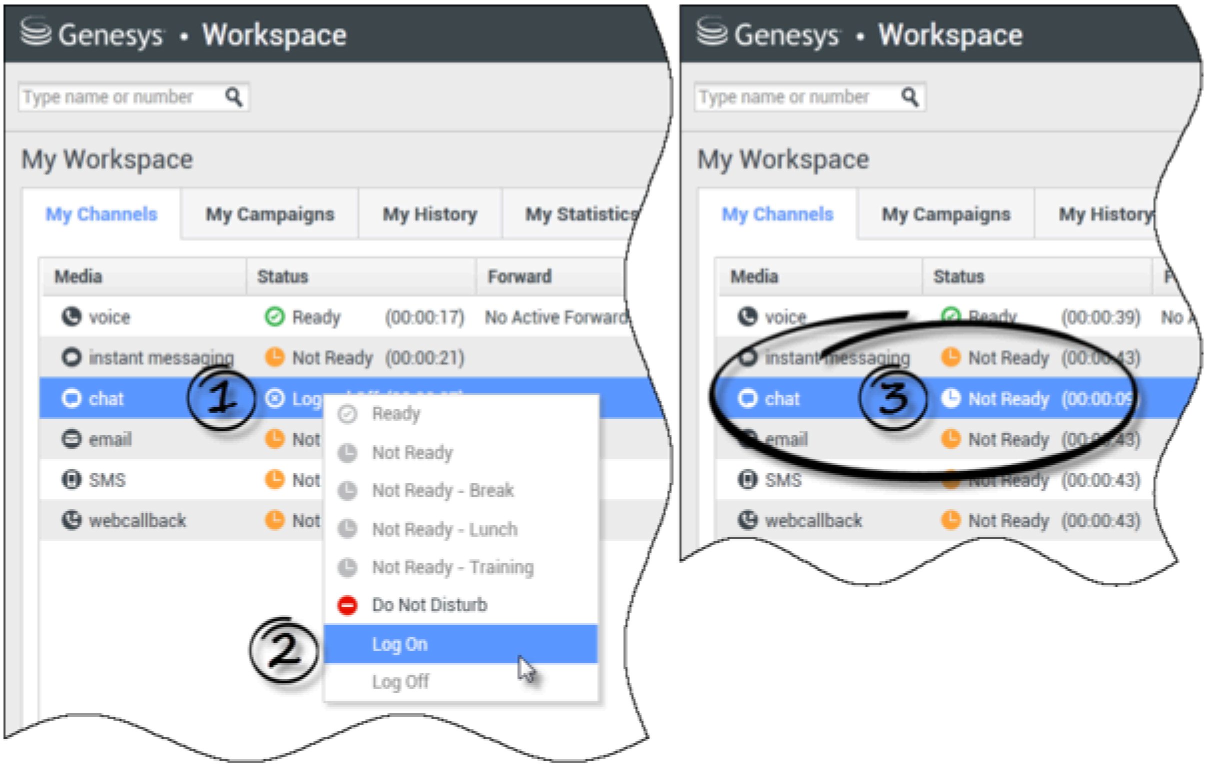
[**Modified:** 8.5.108.11]

Use the **My Channels** tab to view and modify which interaction channels you are using.

Right-click a channel in either the **Status** column or the **Forward** column, to open the **Action** menu for that channel and column. Use the **Action** menu to perform the following actions:

- Change your Ready status on a channel
- Log on to or log off from a channel
- Turn on/off your Do Not Disturb status

- Forward calls that are directed to your extension to another extension on the voice switch/channel



Forwarding Calls

To forward calls to a different extension, on the selected media channel, right-click in the Forward column and click **Forward**.

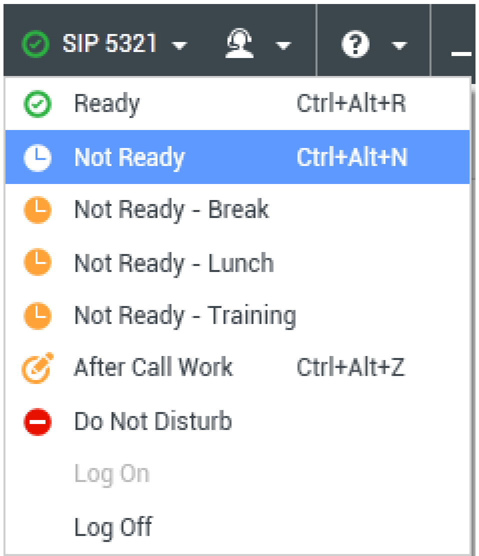
This action opens the Forward dialog box. Enter the extension to which you want to forward your calls and click **Apply**. Click **Cancel** to return to the My Channels tab without forwarding your calls.

If you have an active forward set and you want to disable it, on the selected media channel, right-click in the Forward column, and select **Cancel Forward**.

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

Global Status Icon

Click the **Global Status** icon to open your status menu.



Select your status from the menu. The contents of this menu are defined by your administrator. Status choices might include Ready, Not Ready, Do Not Disturb, After Call Work, Not Ready with a Not Ready Reason, and Log On/Log Off.

Selections that you make from this menu are applied to *all of the media to which you are logged in.*

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Manage Your Status
- Log In

Related topics

- Main Window
- Login

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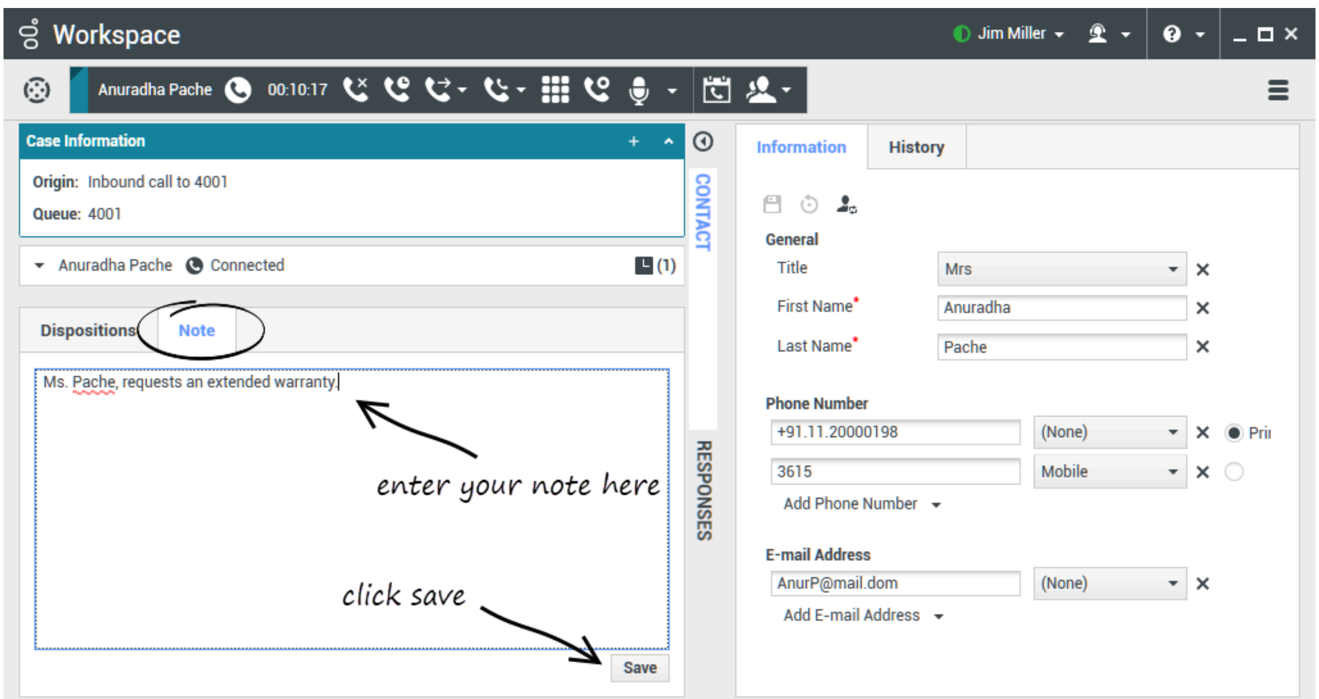
Note

[**Modified:** 8.5.146.06]

> ## Tip
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The **Note** view is a feature that enables you to enter comments about the current interaction or about a selected interaction in the History database. The comments are stored as a part of the history for the contact. The contents of the note can be viewed by any agent who views the contact's history.

Where can I find the notepad?



The Note is available as a tab in the following views:

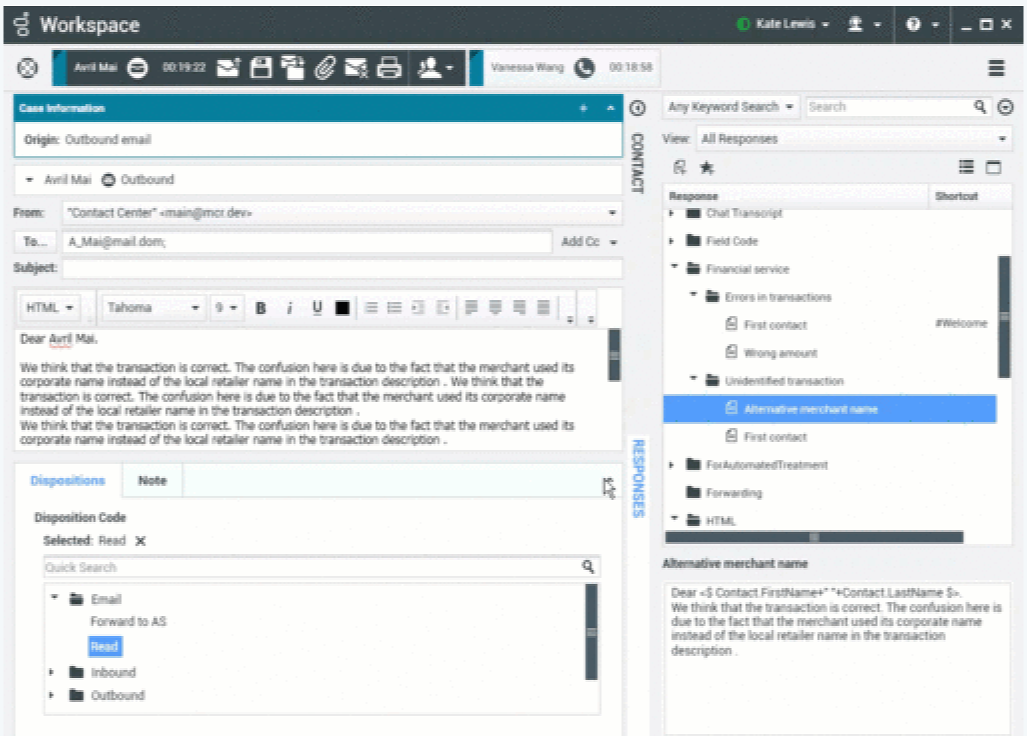
- Voice Interaction
- E-Mail Interaction

- Chat Interaction
- Workitem Interaction
- History

Type notes in the Note text field. Click **Save** to save the notes as part of the interaction.

Tip

Minimizing and Restoring the **Note** view. If you need more space in the Interaction view you can minimize or restore the Disposition tab and Note tab area by clicking the chevron. [**Added:** 8.5.146.06]



Click the image if animation does not start.

Important

The **Dispositions** tab and the **Note** do not become available until the call is established.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls

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Printing

> **Tip**
>
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The **Print Preview** window enables you to specify the format of email interactions before you print them.

To display the **Print Preview** window, open an email interaction then click **Print** ().

The **Print Preview** window enables you to do the following:

- Print the email interaction by applying the layout that you specify in the Print Preview window. Click **Print** to print the specified layout. Click **Cancel** to close the Print Preview window.
- Select a destination printer from the **Destination** drop-down list of printers that are available on your network.
- Specify which pages to print: all pages, a range of pages and/or specific pages. Click **All** to print the entire document. Into the text field, enter a range — for example **2-6** — or individual page numbers, separated by commas.
- Specify the number of copies to print in the **Copies** field.
- Specify a **Portrait** or **Landscape** layout.
- Specify the page margins. Select **Uniform Margins** to make all of the margins match the value that you specify for the top margin, or un-select **Uniform Margins** and specify the margins for the top, left, right, and bottom margins. Margin units are determined by your local settings.
- Add page numbers to the printout.
- Print by using the **System Print** dialog box.

In the **Print Layout** view, you can preview your printout. The **Print Layout** view contains the following controls:

- Zoom in/out
- View at 100%
- Fit the page into the view by page width
- Fit the whole page into the view
- View pages as front and back pairs side-by-side

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle An Email Interaction
- Workspace Windows and Views

Related topics

- Inbound Email
- Outbound Email
- QA Review of Email

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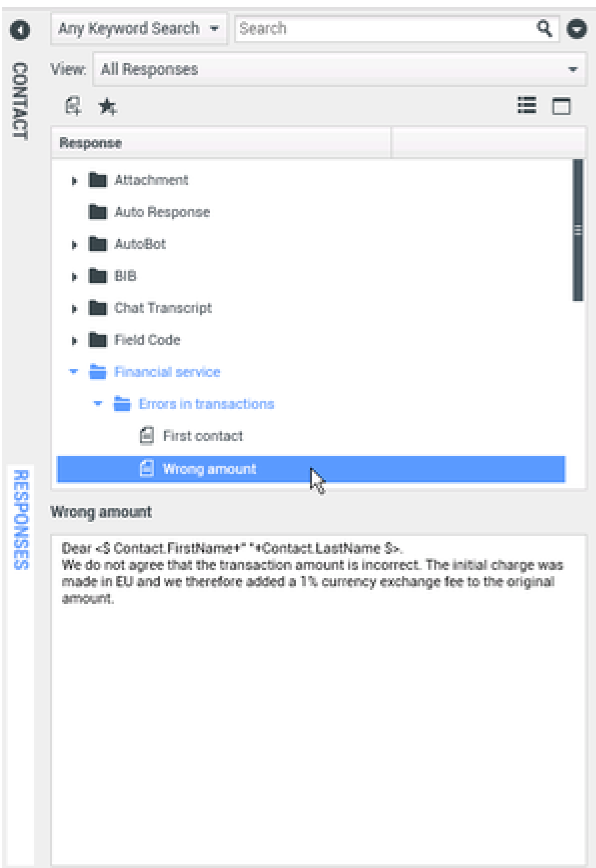
Responses

[**Modified:** 8.5.109.16, 8.5.118.10]

> ## Tip
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The **Responses** view enables you to access a database of prewritten standard responses for your interactions. You can insert these responses as replies 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.

Use the **Zoom** control in the **Main Menu** (refer to Manage your settings and preferences) to change the size of the text in this view. This feature might not be available in your environment.[**Added:** 8.5.109.16]

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

The **Responses** view comprises two main areas, the **Search** and **Filter** area and the **Responses Explorer**.

Search and Filter

The **Search and Filter** area enables you to specify keywords for which to search in your organization'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.
- **Basic/Advanced Search**: Specify where to search for the specified keywords; enables you to limit or expand the search.
    - **Responses Names**: Search for the keywords in the names of the responses.
    - **Responses Body Text**: Search for the keywords in the body of the responses.
- **View**: A drop-down list that enables you to view:
    - **All Responses**: All of the prewritten responses that are available for you to use.
    - **Favorite Responses**: Those prewritten responses that you have designated as favorites.
    - **Responses with predefined Shortcut**: Those prewritten responses that have an associated shortcut keywords.
    - **Suggested Responses**: Responses are selected automatically, based on categories, and sorted according to their relevance to the content of the incoming interaction. You can select an auto-suggest response and insert it into your reply. Then, you can modify the text of the auto-suggest response as necessary. Responses are ranked according to their relevance to the incoming interaction. You can choose to sort by Response name, Relevance, or Parent category by clicking the respective column head in the **Responses List** view.

> ### 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.

Responses Explorer

The **Responses Explorer** contains a tree view of folders (standard-response categories) and pages (standard-response documents). You can change the view to a sortable table view of response documents and Parent Category folders.

The **Responses Explorer** enables you to:

- View the responses that meet the criteria that you have specified in the **Search and Filter** area.
- Navigate the responses folders and documents by clicking folders to open or close them and clicking documents to select them.
- Insert the response into your interaction at the insertion point by one of the following methods:
  - Press **Enter** on your keyboard.
  - Click **Insert Standard Response Text** ().
  - Right-click the response and select **Insert Standard Response Text** from the context menu.
  - Double-click a response to automatically insert the content at the insertion point in the text field. [**Added:** 8.5.105.12]
- Add the currently selected response document to your list of favorites by clicking **Add Standard Response** into Favorites Responses ().
- Remove the currently selected response document from your list of favorites by clicking **Remove Standard Response from Favorites Responses** ().
- Show results in List view or in Tree view by clicking the **View Mode** button ().
- Show and hide the responses details area by clicking the **Show Detail**/**Hide Detail** () button.
- 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.

Responses Shortcuts

[**Added:** 8.5.118.10]

Your system might be set up to enable you to type shortcut keywords into the text composition field of email, chat, and other interactions that automatically add common responses to your interactions.

Ask your administrator or supervisor what the shortcut keywords are for your organization.

If a response has a shortcut keyword associated with it, when you select the response in the **Responses** view, the shortcut keyword is displayed above the preview and in the **Shortcut** column of the responses tree.

To use a shortcut, type the prefix specified by your company (for example, "#") followed by the keyword for the response you want to insert, followed by Ctrl+Space. If your prefix is "#" and the keyword is "sale", then you type: `#sale+Ctrl+Space`

Watch the video: *Using standard response shortcut keywords*

Link to video

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Using The Standard Response Library

Related topics

- Voice Tasks Overview
- Chat Tasks Overview
- Email Tasks Overview
- Outbound Campaigns Overview

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Schedule a Callback

[**Modified:** 8.5.115.17, 8.5.111.21]

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

There are three types of callbacks that you can reschedule:

- Outbound campaign interaction callback [**Modified:** 8.5.115.17]
- Genesys Callback [**Added:** 8.5.111.21]
- Web Callback

Rescheduling an Outbound interaction as a callback

[**Modified:** 8.5.115.17] You can reschedule an **Outbound campaign** call (for example, if the contact is too busy to respond now) to a different date and/or time by using the Reschedule Callback function.

In the Outbound campaign–call interaction window, in the call-action tool bar, click **Reschedule Callback** (). The **Reschedule Callback** view is displayed.

Click the **Reschedule Callback** check box to reschedule the call. After you have specified a new date and/or time and, if necessary, a new number, click **End Call** (]) to disconnect the call. Click **Done** () to reschedule the callback. The **Reschedule Callback** button changes to after the call has been rescheduled.

To set a new date, either enter a new date in the date field or use the calendar view to click a new day. Use the left and right arrow buttons to change the month and year.

To set a new time, either enter a new time in the time field or use the up and down arrow buttons to change the hours and minutes.

Click **Personal Callback** to reschedule the callback from you personally. Leave the **Personal Callback** check box clear to send the interaction back to the calling queue. [**Modified:** 8.5.115.17]

- In some environments, all rescheduled calls are personal callbacks. In this case, you will not be able to change the selection.

- In some environments, all rescheduled calls are campaign callbacks (any active agent in the campaign can make the callback). In this case, the **Personal Callback** check box is not displayed.

To select a new number for the contact, click the **Phone** drop-down list, and choose a different number.

To add a new number that is to be used for the callback, click **New Phone Number**. The **Add New Number** view is displayed. The following options are available for you to use:

- **Phone**: Enter a new phone number that is to be used for the scheduled callback.
- **Type**: Select a voice or other media type, such as a mobile phone.
- **From**: Select a start time for which the device can be contacted.
- **Until**: Select an end time for which the device can be contacted.

Genesys Callback

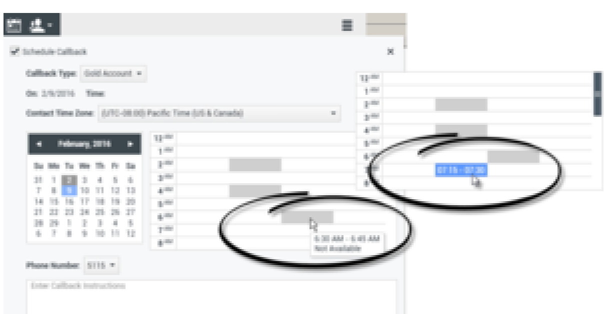
[**Added:** 8.5.111.21]

If Genesys Callback is enabled in your environment, you can either reschedule a current callback interaction or schedule (create) a new callback interaction for your contact.

Reschedule a Callback

To reschedule your current callback interaction, in the Callback interaction window, click  to open the **Reschedule Callback** view.

Check **Reschedule Callback**, choose a callback type, a time zone, a date in the calendar, and a time slot in the schedule grid. Time slots that are not available are grey. Available time slots are blue and display the time range. Click outside the view to commit the callback.



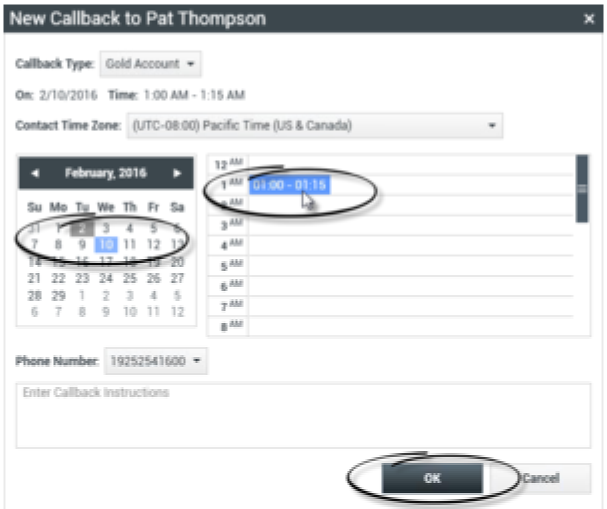
Use the Reschedule Callback view to reschedule the current callback interaction.

Schedule a new Callback from an interaction

In the toolbar of an existing interactions, such as a voice, chat, email, SMS, and so on, click **New**

Callback  to open the **New Callback** dialog box.

Choose a callback type, a time zone, a date in the calendar, and a time slot in the schedule grid. Time slots that are not available are grey. Available time slots are blue and display the time range. Click **OK** to commit the callback.

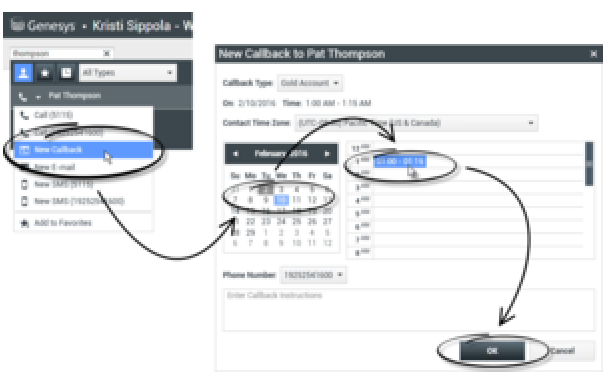


Use the New Callback dialog box to schedule a new callback interaction.

Schedule a new Callback from Team Communicator

In Team Communicator, find a contact, then select **New Callback** from the **Action** menu to open the **New Callback** dialog box.

Choose a callback type, a time zone, a date in the calendar, and a time slot in the schedule grid. Time slots that are not available are grey. Available time slots are blue and display the time range. Click **OK** to commit the callback.



Use the New Callback dialog box to schedule a new callback interaction.

Rescheduling a Web Callback

You can reschedule a Web Callback call (for example, if the contact does not answer at the time that he or she requested the Web Callback) to a different date and/or time by using the Reschedule Callback function.

In the **Web Callback Preview** window, in the call-action tool bar, click **Reschedule Callback** (). The **Reschedule Callback** view is displayed.

Click the **Reschedule Callback** check box to reschedule the call. Use the **On** field to enter a new date, or use the Calendar picker to click a new date. Specify a new time and call duration by using the **From** and **Till** fields. The clock-face display will update to show the new "from" time.

If necessary, you can specify a new number by selecting a number for the contact from the **To** drop-down list.

After you have specified a new date and/or time and, if necessary, a new number, click the **X** to close the **Reschedule Callback** view. The **Reschedule Callback** button changes to the **Rescheduled Callback** button after the callback has been rescheduled.

Click **Done** () to reschedule the callback to the date and time that you specified. At the specified date and time, the Web Callback interaction notification is displayed on your desktop.

Outbound Campaigns Overview

As an agent, you might be working on campaigns (for example, collections, telemarketing, or fundraising) in which the contact interactions are outbound voice calls that are based on calling a predetermined list of contacts.

There are two delivery modes of outbound calls. A supervisor determines in which mode you will work:

- **Manual**, in which you make outbound calls by requesting an interaction from a preset calling list. Manual delivery has one dialing mode:
    - Preview. The system displays contact-related data to an agent, then the agent makes the call to the contact.
- **Automatic**, in which outbound calls are directed to your desktop. Automatic delivery has three dialing modes:
    - Push Preview. The system displays contact-related data to an agent, then the agent makes the call to the contact.
    - Progressive. The system dials customer numbers automatically and transfers a call to an agent only if the connection was successfully established.
    - Predictive. The system estimates the number of free agents on the basis of current statistics, and may start beforehand, even when no agents are free.

If your supervisor or someone else in your organization starts an Outbound campaign to which you are assigned, you will receive a warning message to inform you that a specific campaign has begun and that you are assigned to that campaign.

Note: If the campaign began before you logged in, a warning message will be displayed. If you are working on a campaign, the My Campaigns view displays the list of active and running campaigns. Active campaigns are indicated by a Started status message in the My Campaigns view.

After you are connected with your contact, you can perform various tasks, depending on the nature of the interaction. For example, you can update customer records, schedule a callback, select a disposition code or do other call actions.

Negotiated Logout

Sometimes, an abrupt agent logout from a campaign will, by its timing, affect the quality of service of a campaign. For example, you might click Logout at the same moment that a predictive or progressive campaign selected you for a subsequent call currently being established with a customer. If Workspace logged you out immediately, this particular call may take more time to be delivered to an agent. To avoid this, your logout is delayed a few seconds, if you initiate it by either of the following methods:

- Select Logout from the Main Window title bar or the Main Menu.
- Select Logout from the Voice channel, from the My Channels view of your Workspace.

If you select **Logout** while you are receiving an interaction, a system message will be displayed on your desktop to inform you that you are awaiting logoff authorization. The message contains a countdown clock that informs you of how many minutes and/or seconds remain before you will be authorized to log out.

If you dismiss the message window, you can still monitor the time that remains for logout authorization by reviewing your messages in the Main Window or in the My Messages window. You can also place your mouse pointer over the **Status** icon to display a notification of the time that remains for negotiated logout.

Both the **My Messages** view and the **Status** icon ToolTip provide confirmation when your logoff is authorized.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Lesson: Rescheduling a call as a callback
- Handle Outbound-Campaign Voice Interactions

Related topics

- Outbound Preview Calls
- Outbound Push Preview Calls
- Outbound Progressive Calls
- Call Actions for Outbound Calls
- Voice Interaction

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Spelling Check

> **Tip**
>
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The spelling-check feature enables you to verify the spelling of the content of your message before you send it by using an interactive Spelling Checker. You have access to three dictionaries: a corporate dictionary that is defined by your administrator, a language-specific dictionary that you can choose from a drop-down menu, and a personal dictionary that is called My Dictionary.

Workspace creates a single dictionary for each agent. Any additions or changes that you make affect only your personal dictionary. If you are working at a different workstation, you can still access your personal dictionary, provided that you are logged in under your unique user name and password.

As you type your message, a red wavy line appears below each word that is not in the spelling-check dictionary that you have specified. Right-click the misspelled word to correct it or to add the word to your personal dictionary. You can also choose to ignore once (**Ignore**) or always ignore (**Ignore All**) the spelling.

If you try to send a message that contains misspelled world, your system might be configured to display a warning dialog box that asks you to confirm that you want to send the message without correcting the potential misspelled words. Click **Yes** to send the message anyway, or click **No** to return to the message and correct the misspelled words. [**Added:** 8.5.105.12]

The spelling-check context menu contains the following options:

- **Suggestions**—A list of words from the currently selected dictionary that might be the correct spelling of the underlined word.
- **Ignore**—Do not mark this instance of this spelling as incorrect.
- **Ignore All**—Do not mark any instance of this spelling as incorrect.
- **Add to Dictionary**—Add this spelling to the currently selected dictionary.
- **Spell Checking**—Turn spelling check on and off. You can also turn spelling check on and off by clicking the **Check Spelling** button next to the language drop-down menu.
- **Languages**—Select the language that you want to use for spelling check.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle An Email Interaction
- Handle A Chat Interaction

Related topics

- Outbound Email
- Chat Interaction

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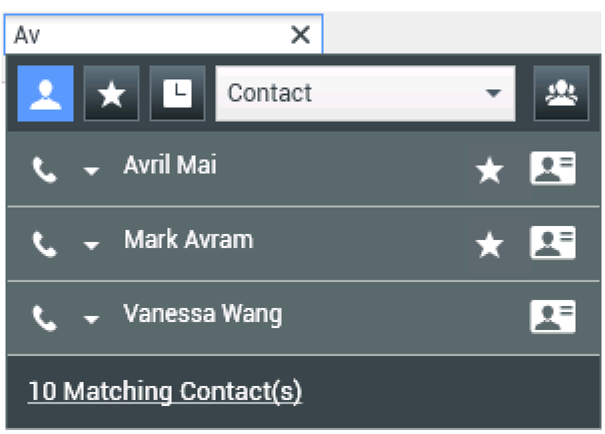
Team Communicator

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

The **Team Communicator** is a common service that is available in the following views:

- Main Window
- Interaction windows (for transfer, consultation, or the initiation of a voice interaction from a non-voice interaction):
  - Voice
  - Chat
  - E-mail
  - SMS
  - Internal IM
  - Workitem
  - Social Media Channels (through eServices plug-ins)

The **Team Communicator** is a service that enables you to find an internal target or a contact and initiate an interaction. Your administrator might configure your system to restrict your search results.

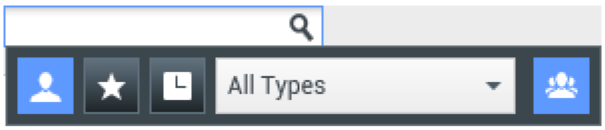


The **Team Communicator** enables you to initiate different types of communication with internal or external resources to help resolve a particular customer case or for other purposes, such as a follow-up call or a meeting.

If your account is configured as a Supervisor or Team Lead, you can use the **Team Communicator** and **Call Actions** toolbar to manage agent monitoring and coaching, which includes starting and stopping.

Main Window Team Communicator

The Main Window contains the **Team Communicator Quick Search** field. The **Quick Search** field is a universal-lookup tool; it 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.



Team Communicator Quick Search field.

When you click in the field, the **Team Communicator** toolbar is displayed. Enter a name, telephone number, or other keyword in the field to begin your search. The toolbar buttons enable the following capabilities:

- To search every target in the contact database and internal targets, click **Search All** ().
- To search only targets marked as favorites or corporate favorites, click **Search Favorites** ().
- To search only your recent contacts and internal targets, click **Search Recents**() contacts and internal targets.
- To filter by contact or internal-target type, and to group or ungroup your search results by category or type, click **Group/Ungroup** ().

The **Team Communicator** view might be configured by your administrator to store and display recent calls, including missed calls. If this feature is enabled, recent voice interactions are displayed in the **Team Communicator** view with a specific visual indicator (in/out/missed). Also, the tooltip for each record displays additional information about the corresponding incoming call event (for example: call type, call timestamp, and missed status, if applicable).

> **Tip**
>
> Genesys does not support *wildcard* characters in Contact Database searches

Launching a New Interaction

To launch a new interaction (internal Instant Messaging or external/internal voice interaction or outbound email), enter the name of an internal target (agent, skill, group, queue, or Routing Point) or a contact name, telephone number, or email address in the universal-lookup field.

> **Tip**
> If you directly dial a number that is not in the Contact Database, if the contact profile is not displayed, the call is not tracked in your **My History** view. To add the call to your history, use the **Create New Contact** button, if you are enabled for this feature, in the interaction **Contact** view to create a contact in the Contact Database.

Entering Information in the universal-lookup field

As you type, Workspace searches the internal target and contact databases and lists potential contacts and internal targets. The system opens a view that lists potential contacts and internal targets. The status of each internal target is displayed.

You can use the pop-up view to do the following:

- Filter and sort the list of search results.
- Perform actions on a selected contact such as calling, sending an instant message, creating a new outbound email, or saving as a favorite.

Filtering and Sorting the List of Search Results

Search results are displayed in a list. The search is a “keyword” search that searches each field of the contact database for the word or words (name, telephone number, email address, or other criteria) that you provide in the search field. Each field of the database is searched by using a 'starts with' search for the keywords that you provide.

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) 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.

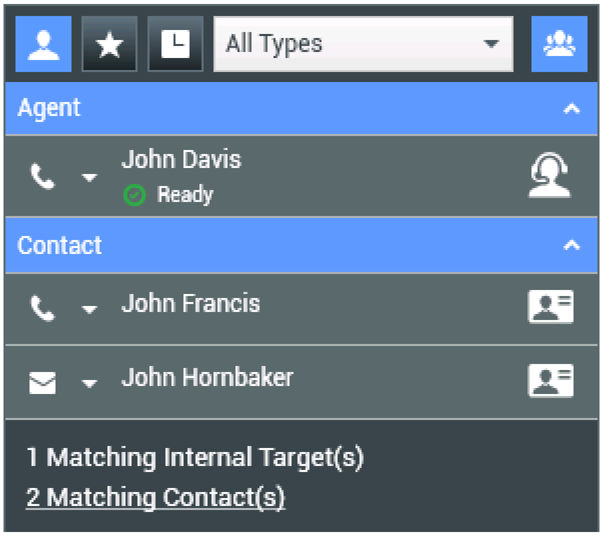
In most cases, you can refine the search results by using the filtering features of the list view. You can filter search results by result-type by using the result-type drop-down list. For example, you can filter your search results so that only contacts or favorites are displayed.

Contacts drop-down list showing Agent.

Result types might include the following:

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

Click the **Sort Results by Type/Categories** button () to arrange the search results by type/categories. You can collapse categories by clicking the arrow that is displayed beside the name of the category.

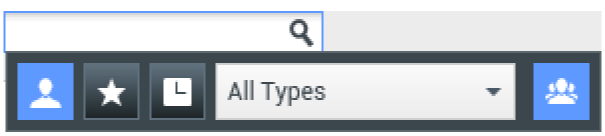


Sorting results by group.

To view only contacts, click the **Matching Contacts** link. The Contact Directory view is displayed.

Matching external contacts.

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



Quick Search field.

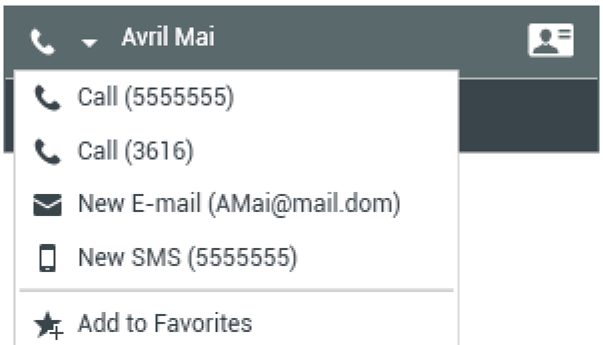
From left to right, the buttons are the following:

- To to select from all matching internal targets and contacts, click **Search All** (). Does not affect the sort order.
- To show only contacts/internal targets that you have flagged as favorites, click **Show and Search my Favorites** (). Sort is by category or type.
- To to select from the last 1 to 10 contacts/internal targets that you have directly dialed, instant messaged, emailed, or monitored. Sort is by date, click **Show and Search my Recent Interactions** (). Workspace might be configured to display recently missed calls of one or more of the following types: internal, external, or consultation. If you hover your mouse pointer over the name or number of the caller, information about the time of the missed call is displayed as a tool tip.
- To specify the type to search, including Agent, Contact, Routing Point, Skill, Queue, Interaction Queue, and Agent Group, select **Filter by Type**.

- To to show or hide types or categories, click **Show/Hide Types** ().

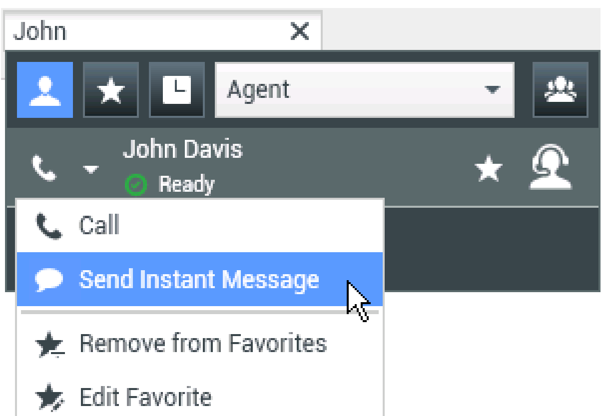
Actions

Click the **Action Menu** pop-up list next to the internal target or contact that you want to find. This example shows the **Action Menu** for a contact:



Team Communicator party Action menu.

This example shows the **Action Menu** for an internal target:



Team Communicator Action menu for an internal target.

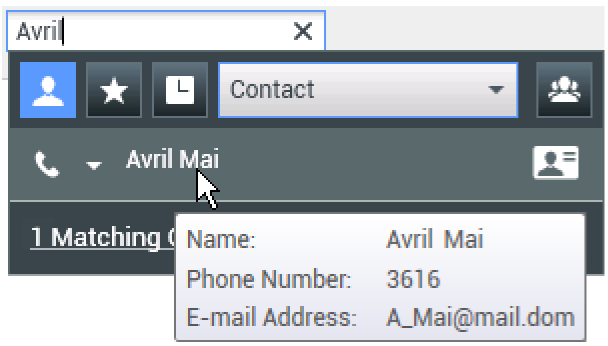
From the list, you can:

- Select the kind of interaction that you want to launch (external voice, internal voice, outbound email, or internal instant message).
- Select **Add to Favorites** to add the contact to your list of favorite contacts.

Viewing Contact Information

Place your mouse pointer over the contact icon to access additional contact information. The **Contact Summary** pop-up view is displayed briefly to enable you to access critical information, such as the following:

- Contact name
- Contact information
- Other Business Attributes



Contact summary tooltip.

Click the telephone icon to launch a voice interaction.

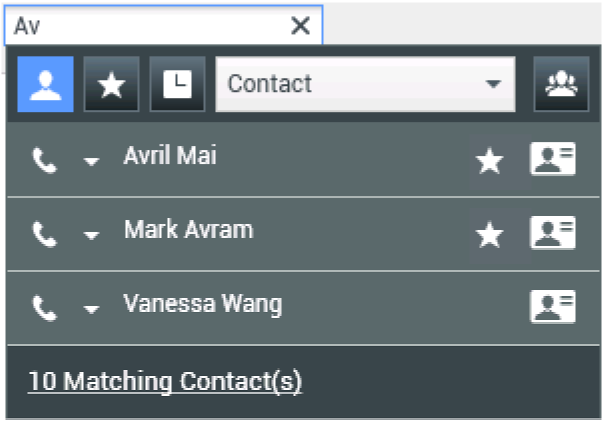
Favorites

A favorite is an internal target or a contact that you call frequently, or who you want to be able to find quickly. You can designate internal targets and contacts as "favorites" by using the **Action Menu** in the **Team Communicator**. When you designate an internal target or a contact as a favorite, you might be configured to assign him, her, or it to a favorite category. Favorite categories might be pre-defined by your administrator, or you might be configured to create your own categories. Corporate Favorites are read-only.

To designate an internal target or a contact as a favorite, perform the following steps:

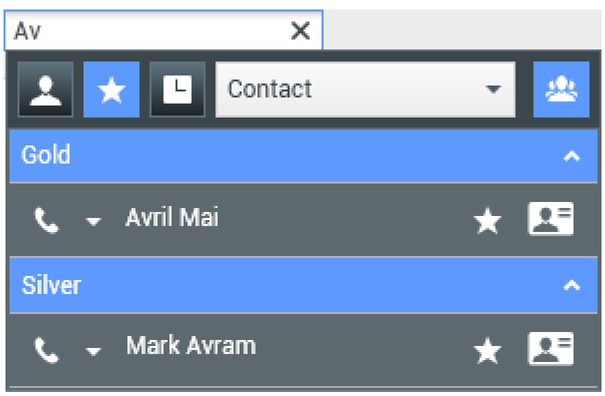
1. Find the internal target or contact in the **Team Communicator**.
2. Click to open the **Action Menu** that is displayed beside the name of the internal target or contact that you want to add to your favorites, and select **Add to Favorites**.
3. The **New Favorite** dialog box is displayed.
    - The **Category** drop-down list enables you to define a new category or select from a list of existing categories.
    - Click **OK** to add the internal target or contact to a category as a favorite. If you do not choose a category, the favorite will be listed in the Other Favorites category when the **Team Communicator** is displayed in the **Category** view.

In the **Team Communicator**, designated favorites are marked by a white star (), and corporate favorites are marked by a locked white star (). Your administrator might designate corporate favorites for you that might be context-sensitive, determined by your role, or with which contact you are currently interacting.



Finding a contact.alt=Team Communicator search results showing contacts marked as favorites.

If you filter your **Team Communicator** search results by favorites and by type (category), the **Team Communicator** sorts favorites into the designated categories. In the figure below, favorite contacts are displayed in two categories, Gold and Silver. The first contact is a personal favorite and the second is a corporate favorite.



Finding a favorite.

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**.

Notes:

- 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.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Voice Interaction
- Chat Interaction
- Email Interaction
- SMS Interaction
- Internal IM Interaction
- Workitems

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Team Lead

[**Modified:** 8.5.126.07]

Important

This article describes the most common monitoring configuration. Your administrator might have set up monitoring differently in your environment. If you are unsure about whether you can monitor the currently active interaction or the next interaction of an agent you are monitoring, ask your administrator.

Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

If your account is configured as a supervisor (Team Lead or Team Supervisor)) for an agent group, you can monitor or coach agents. If you accept the interaction, an interaction window is displayed on your desktop, and you are connected to the call or chat interaction.

Some supervisors might be set up to control the status of agents, including setting an agent to **Ready**, **Not Ready**, and **Logoff**.

Notes about monitoring, coaching, and barging-in

Keep the following points in mind when you are monitoring your voice and chat agents:

- If you are monitoring the agent, neither the agent nor the contact can hear you. The agent might be configured to know when he or she is being monitored (an icon is displayed in the interaction window), or he or she might be configured to be monitored without his or her knowledge.
- If you are coaching the agent, the agent can hear you, 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. For example, you can switch from Silent Monitoring to Barge-in.

Tip

Voice Monitoring:

- You can monitor only one voice agent at a time.
- You can monitor only one interaction from the same agent at the same time.
- You can monitor the next interaction of only one agent at the same time.
- Multiple supervisors cannot monitor the next interactions of the same agent.

Tip

Chat Monitoring:

- You can monitor multiple chat agents at the same time.
- You can monitor multiple interactions from the same agent at the same time.
- You can monitor the next interaction of several agents at the same time.
- Multiple supervisors can monitor the next interactions of the same agent.
- Workspace does not limit the number of concurrent chat iterations that a supervisor may monitor. The maximum number should be determined by the policies of your company.

Monitoring

When you monitor a selected agent who is in your group, you receive an Interaction Preview that informs you that the selected agent is handling a voice or chat interaction. You can monitor the current or next 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 Next Interactions** (). If there is a currently active interaction, it is displayed in the **Monitor** menu; to monitor the current interaction, select it from the **Monitor** menu. To monitor continuously the interactions handled by an agent (starting from the current one or the next one depending on how your administrator has set up your environment), select **Next Interactions**.

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.

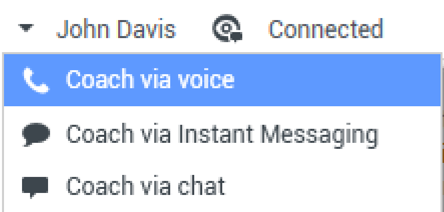
Coaching

When you coach a selected agent who is in your group, you receive an Interaction Preview that informs you that the selected agent is handling a voice or chat interaction. You can coach the current or next interaction of an agent.

You can start coaching an agent in your group by using the **Team Communicator** to find the agent.

In the **Action Menu**, select **Coach Next Interactions** (). If there is a currently active interaction, it is displayed in the **Coach** menu; to coach the current interaction, select it from the **Coach** menu. To coach the next interaction, select **Next Interactions**.

In the current monitored interaction, you can also start coaching an agent in your group by using **Action Menu** that is associated with the party.



Team Lead switch party action menu.

Coaching is available for three channels: voice, chat, and IM.

You can end coaching an agent by using the Team Communicator selecting **Stop Coaching** from the **Action Menu** ().

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

Barge-in

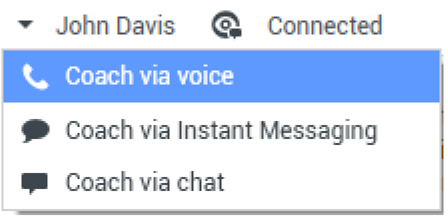
When you barge in to an active interaction, you must already be either monitoring or coaching the interaction.

To barge in to (join) an active interaction that you are either monitoring or coaching, click **Barge-in** () in the Supervision toolbar. **Barge-in** is a simple button if you are supervising a single channel interaction (voice or chat), and it is a drop-down menu button if you are monitoring a multiple channel interaction (both voice and chat interactions at the same time).

Switching Monitoring Modes

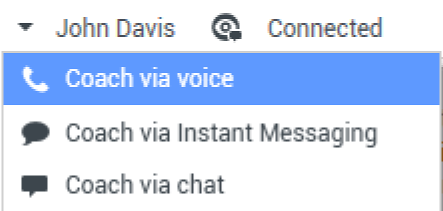
During monitoring or coaching of an active interaction, you can switch from one supervision mode to another:

- To switch from monitoring to coaching, use the **Action** menu that is associated with the party, or use **Unmute (Coach)** () in the Interaction toolbar to return to coaching.



Team Lead switch party action menu.

- To switch from monitoring to barge-in, click **Barge-in** () in the Supervision toolbar.
- To switch from coaching to barge-in, click **Barge-in** () in the Supervision toolbar.
- To switch from coaching to monitoring, click **End Chat** (), **End Call** (), or **End IM** () in the Interaction toolbar of the coaching interaction to return to monitoring, or the **Mute (Monitor)** () in the Interaction toolbar to return to monitoring.
- To barge-in to monitoring, click **End Chat** () or **End Call** () in the Interaction toolbar to return to monitoring.
- To barge-in to coaching, use the **Action** menu that is associated with the party.



Team Lead switch party action menu.

- To end monitoring, click **End Monitoring** () in the Interaction toolbar.

Tip

All switching modes are available for the Chat channel; however, depending on the technical environment of your voice channel, the following voice specific supervisor switch-modes might not be available:

- Switching from coaching to barge-in
- Switching from monitoring to barge-in
- Switching from monitoring to coaching
- Switching from coaching to monitoring
- Switching from barge-in to coaching

If you are an administrator and require technical details about these limitations, refer to Monitoring SIP, Cisco UCM, or Skype for Business voice interactions in the *Workspace Desktop Edition Deployment Guide*.

Log off or change agent state

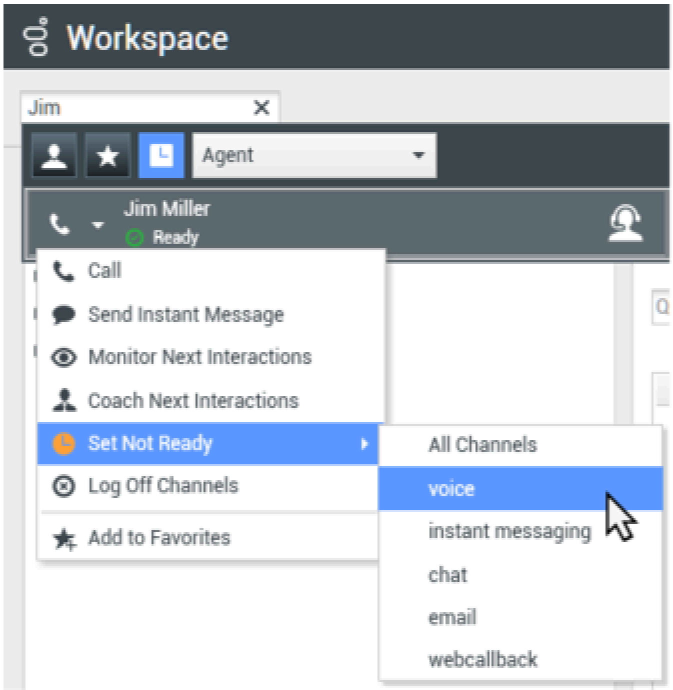
You might be enabled to manually change the state or log off agents by using the Team Communicator.

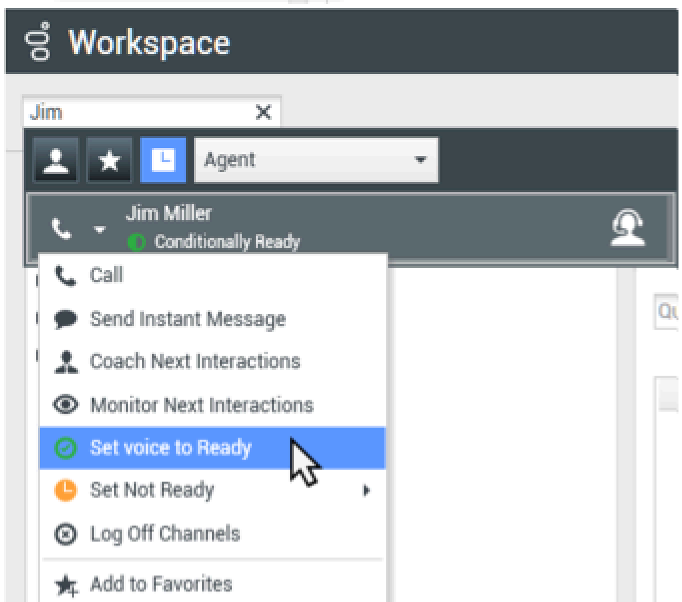
Changing agent state

The Change Agent State feature is useful if you discover that an agent is in the wrong state. Open Team Communicator and find the agent, then use the **Action** menu to set an agent to **Ready** or **Not Ready** on all channels, which means all the channels that are listed in the menu, or on specific channels.

Important

- If an agent has set their status to **After Call Work**, **Not Ready <with the reason>**, or **Do Not Disturb**, these are displayed as **Not Ready** in Team Communicator.
- Since **Team Communicator** does not support these statuses, you cannot set an agent status from **Ready** to **After Call Work**, **Not Ready <with the reason>**, or **Do Not Disturb**, only to **Not Ready**.



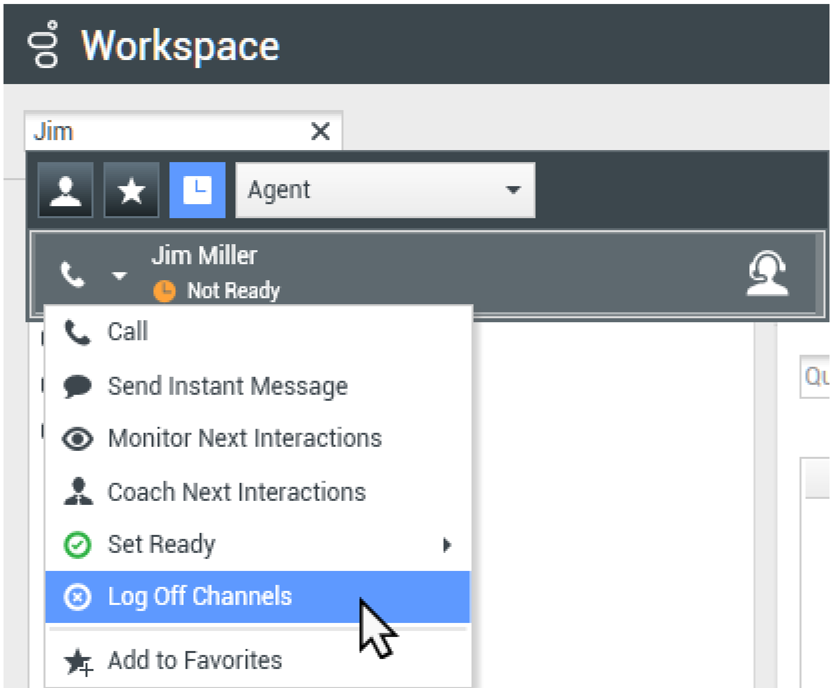


Log off an agent

The Log off Agent feature is useful if you discover that an agent has forgotten to log off after their shift. Open Team Communicator and find the agent, then use the **Action** menu to log off the agent on all channels; this is beneficial because it ensures that your company is not unnecessarily consuming seat/concurrent media licenses, and it also prevents interactions from being routed to an agent who is not present but is configured for auto-answer!

Important

The Log Off feature is not available for agents who are currently handling an interaction.



Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Monitor, Coach, And Barge-in Interactions
- Workbin and Queue Management
- Email Quality Assurance (QA) Review

If you want to monitor the status of your agents you can use Genesys Pulse:

- Dashboards and Wallboards in the *Genesys Pulse Help*

Related topics

- Voice Interaction
- Chat Interaction

- QA Review of Email

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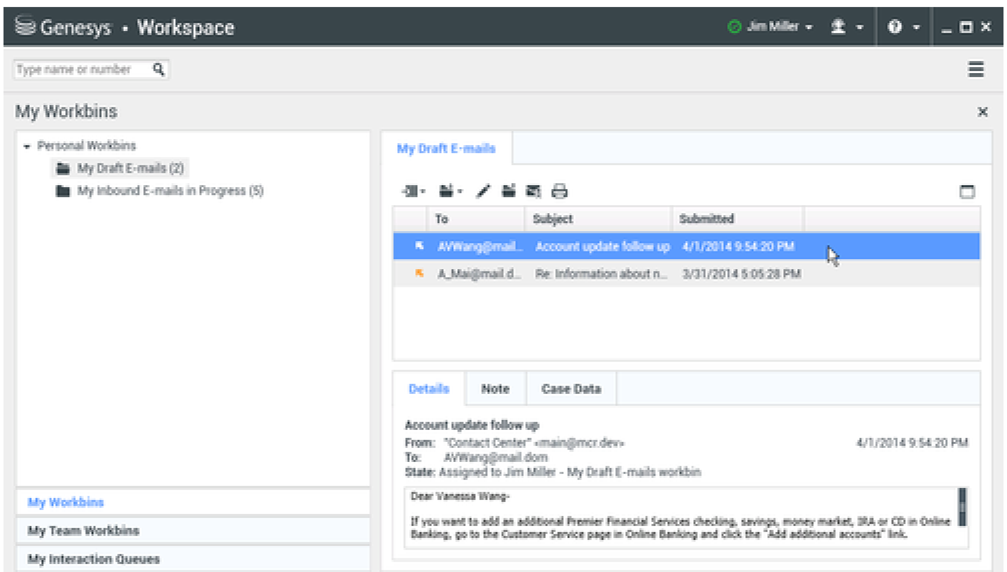
Workbins

[**Modified:** 8.5.110.13]

> **Tip**
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

A workbin is like a personal queue, in which you can store emails and other interactions (workitems) to be handled later; however, unlike with a queue, interactions that are stored in a workbin can be accessed in any order; interactions 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.



Interactions are placed in workbins in different ways: by routing strategies, by saving in-progress interactions (interactions that are not marked as done), or by a Team Lead (supervisor) who manually moves interactions.

To open the Workbin view from the Main Window, click the **Access and use Workspace supporting views** button (☰) to display the **Supporting Views** menu, then select one of the following Workbin views:

- My Workbins
- My Team Workbins
- My Interaction Queues

The list of available workbins depends on the configuration of your system.

The **Workbins** view comprises three areas:

- **Workbins Explorer**: Enables you to select workbin folders from your personal workbins and your shared workbins. For agents whose accounts are configured as Team Leads, you can change the explorer view to the following views:
  - **My Workbins**: For all agents, a view of your personal workbins.
  - **My Team Workbins**: For Team Leads, a view of all of the workbins that belong to agents that you supervise.
  - **My Interaction Queues**: For Team Leads, a filtered view of your queues and workbins.
- **Workbin view**: Lists all of the interactions that are stored in the selected workbins; 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

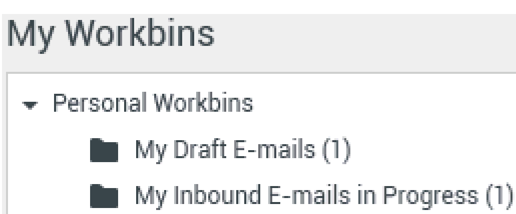
Workbin Explorer

The **Workbin Explorer** enables you to view a list of your personal and shared workbins, and to navigate to a specific workbin to view its contents in the Workbin view.

Choose a workbin view by clicking the one of the **Workbin Explorer** view buttons:

- **My Workbins**: For all agents, a view of your personal workbins.
- **My Team Workbins**: For Team Leads, a view of all of the workbins that belong to agents that you supervise.
- **My Interaction Queues**: For Team Leads, a filtered view of your queues and workbins.

To view a workbin, click it in the **Workbin Explorer**.



The number of stored email messages and/or workitems in each workbin is indicated in parentheses next to the name of the workbin folder.

To navigate directly to a specific workbin from the Main Window, click the **Access and use Workspace supporting views** button () to display the **Supporting Views** menu, then select one of the following Workbin views:

- My Workbins
- My Team Workbins
- My Interaction Queues

The list of available workbins depends on the configuration of your system.

Some of the workbins which might be configured for your **My Workbins** view include:

- **In-Progress**: Contains inbound email messages or other workitems that have not been processed
- **Draft**: Contains outbound (reply) email messages that have been saved as draft
- **Custom**: Your administrator might have configured you to view additional workbins.

My Team Workbins

For Team Leads, this view in the **Workbins Explorer** contains a list of all the agents that you are configured to supervise. To view the workbins for the agents that you supervise, click the name of the agent in the list, then click the workbin to open it.

My Interaction Queues

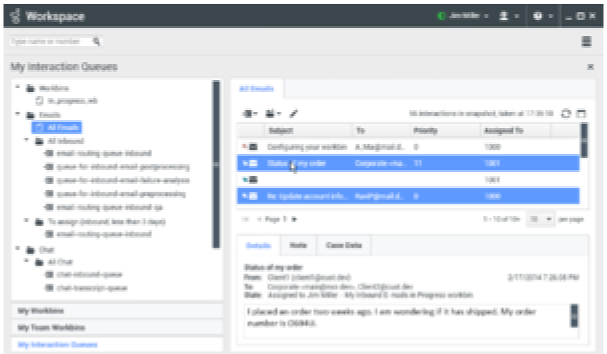
For Team Leads, this view in the **Workbins Explorer** contains a list of filters that are defined by your system administrator. Click a filter or a queue to view its contents in the **Workbin** view.

Interaction filters search the interaction database for interactions that meet certain criteria, such as time in queue, date received, interactions state, and so on. Filter results are "snapshots" of the state of the interactions in the database at the time that the query was executed. Snapshot views are not updated automatically. You must click **Refresh** () to review the latest changes to the database.

Workbin View

[**Modified:** 8.5.110.13]

The **Workbin** view enables you to view, sort, search, and perform actions on selected interactions. To select an interaction, click it.



Selecting multiple interactions.

To select more than one interaction, use **Shift-click** to select a range or **Ctrl-click** to select multiple items.

Information about the selected interaction is displayed in the tabs that appear at the bottom of the **Workbins** view.

To open an interaction, double-click it.

You can perform the following functions on selected interactions in workbins by using the Workbin Actions toolbar:

- To reply to the selected email, click **Reply** (). Opens a reply to the interaction in an outbound E-mail Interaction window.
- To reply to all parties of the selected email, click **Reply All** (). Opens a reply to the interaction in an outbound E-mail Interaction window and addresses the email to the sender and all other recipients of the original email.
- To open the selected email, click **Open** (). Opens the selected email interaction in an inbound or outbound E-mail Interaction window. Opens the selected workitem in a Workitem Interaction window.
- To mark the selected interaction as done, click **Done** (). Completes the email and closes the Interaction window; your account might be configured to specify a disposition code before you can click **Done**; in that case, the interaction is opened to enable you to set the disposition code before allowing you to click **Done**.
- To delete the selected interaction, click **Delete** (). Deletes the email from the contact database, if you have the correct permissions.
- To move the interaction to a queue, click **Move to Queue** () (if you have the correct permissions). Opens the **Team Communicator** to enable you to select a queue to which you want to move the selected interaction(s). Enter the name of the queue into the **Team Communicator** search field, then from the **Queue** item **Action** menu, select **Move to Queue**.
- To move the selected interaction to another workbin, click **Move to Workbin** () (if you have the correct permissions). Opens the **Team Communicator** to enable you to find an agent or agent group to which you want to move the selected interaction(s).
- To edit the case data of the selected interaction, click **Edit Case Information** () (if you have the correct permissions). Opens the **Edit Case Information** window to enable you to edit the content of the Case Data tab for the selected interaction(s).
- To print the selected interaction, click **Print** () (if you have the correct permissions). Opens the Print

Preview window to enable you to print the selected interaction. [**Added:** 8.5.101.14]

- To refresh the **Workbins** view, click **Refresh** () (if the workbin is not configured to be automatically updated). Refreshes the list of interactions in the workbin. [**Added:** 8.5.110.13]

The Workbin view is a table that lists all of the interactions that are stored in the currently selected workbin. The four columns provide basic information about the interactions and their status. You can change the sorting order of the table columns by clicking the column heads. Clicking the active column head a second time reverses the sort order. Unhandled interactions are displayed in bold text.

The Workbin view contains sortable columns for email interactions — for example:

- **Icon**: Displays the interaction type and status.
- **From**: Lists the names of the sender.
- **Subject**: Lists the subject of the interaction.
- **Received**: Lists the date and time at which the interaction was first received.

Your administrator sets up this view and decides what columns you have available.

To show or hide columns, right-click in the list area to open the column context menu and select the column to show or hide.

Other media that can be stored in a workbin, such as workitems, might have different columns configured for them. The columns that are displayed for interaction queues are configured by your administrator. Ask your administrator for information about other columns.

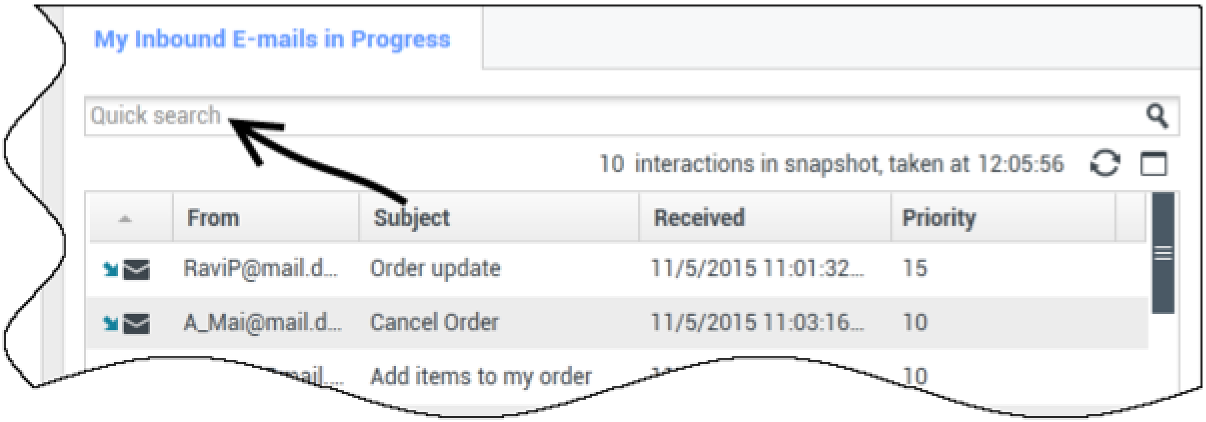
Workbin and Interaction Queue Search

[**Added:** 8.5.110.13]

Your administrator might enable the search/filtering capability for some or all of your Workbins and Interaction Queues. This feature lets you enter a search/filter value in a **Quick Search** field to limit the contents of the list of items in the Workbin or Interaction Queue to only those interactions that contain the value that you entered.

Your administrator decides which columns (or interaction properties) that can be used to limit the display. For example, your administrator might configure an attribute, such as `Priority` for interactions to enable you to search for interactions that have been assigned a specific priority. If the search feature is enabled for you, ask your supervisor what values you are allowed to use.

Enter a search/filter value and press **Enter** or click the magnifying glass to find all the interactions that contain the value.



Workbin Interaction Information

Details, notes, and case data for the selected interaction are displayed in the interaction information tabs. You might have to display the interaction information tabs. To do so, click the **Show/Hide Details Panel** () button.

The interaction information area contains the following tabs:

- **Details**: Information that is specific to the interaction, including To, From, attachments, and the body of the interaction
- **Notes**: The content of the notes that are stored in the Contact History
- **Case Data**: The case data that is stored in the Contact History

Details

The **Details** tab contains a preview of the selected interaction, links to attachments, and the following information about the email interaction:

- Subject
- Date and time at which the interaction was sent
- To (recipient) email address
- From (sender) email address
- Custom fields that are configured by your administrator

For workitem interactions, such as faxes, the Details tab contains the following information:

- Media Type
- Interaction Type
- Interaction Sub-Type

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Using Workbins
- Handle An Email Interaction
- Handle A Workitem Interaction

Related topics

- Email Tasks Overview
- Disposition Code
- Workitems

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