# GENESYS™

# Workspace Desktop Edition Help

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4/2/2025

# Contents

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> **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

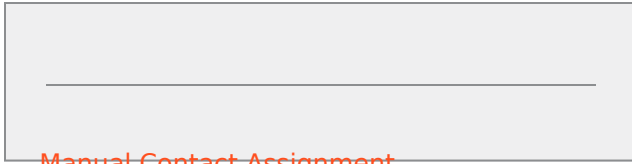Forward Your Phone (see **My Channels**

### 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

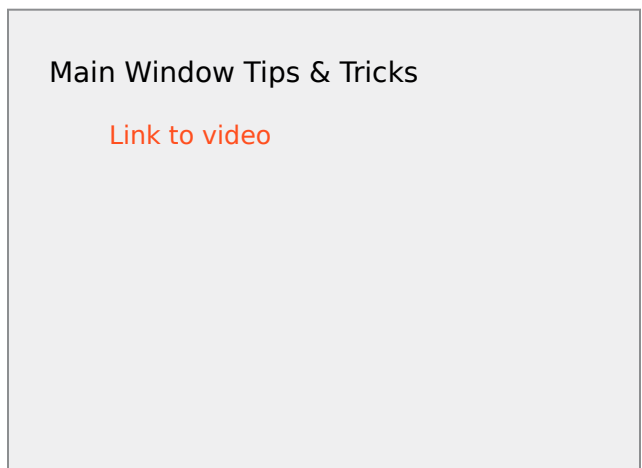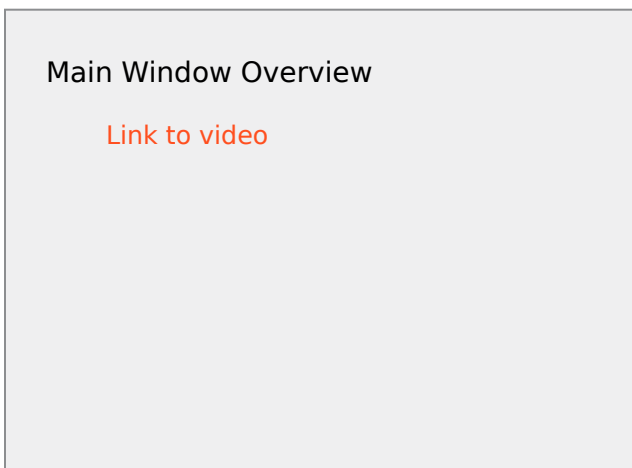The *Getting Started* lessons are a good place to begin your journey.

- 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