Workspace Desktop Edition User's Guide

Handle A Workitem Interaction

3/18/2025

Handle A Workitem Interaction

In this lesson, you will learn how to handle inbound workitem interactions. 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 view while you are handling interactions of another type, such as email. This lesson contains the following sections:

- Receiving and Handling an Inbound Workitem Interaction
- Transferring a Workitem Interaction

Receiving and Handling an Inbound Workitem Interaction

If you are the selected internal target for an inbound workitem interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the Workitem Interaction window is displayed. The Workitem Interaction window contains information about the interaction and the controls that you need to complete the interaction. This section contains the following procedure:

- Lesson: Handling an inbound workitem interaction

Lesson: Handling an inbound workitem interaction

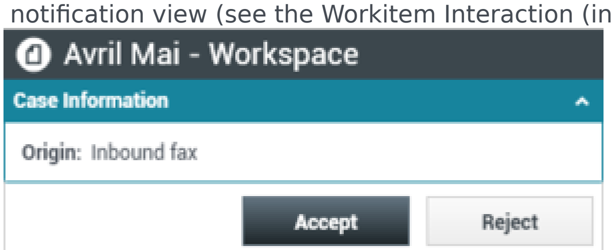
- To handle an inbound workitem interaction properly.

Prerequisites

- You are logged in to Workspace (see Getting Started).
- Your status is Ready for the workitem-media channel (see Lesson: Going Ready in the Workspace Main window).
- You are the internal target for the inbound interaction.

Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Workitem Interaction (in this case, a fax) interactive notification figure).



Workitem Interaction (in this case, a fax) interactive notification

The Interaction Notification contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Notification might also contain Case Information, which is part of the case data about the interaction.

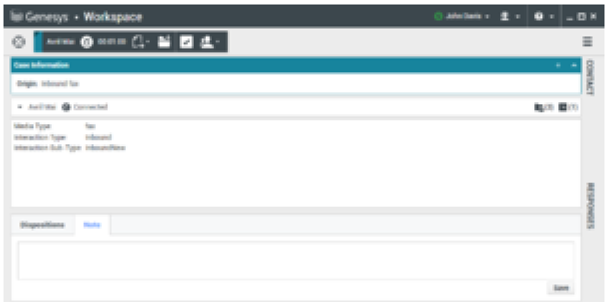
> ## Tip
> If you are using a screen reader, your system might be configured to give the focus to the Interaction Preview window. In this scenario, your screen reader will automatically read the window title to you. Navigate to the content area to have your screen reader read the Interaction Preview content. However, if your system is not configured to give the focus to the Interaction Preview window, to have your screen reader read the contents of the Interaction Preview window, you must use screen navigation to give the focus to the Interaction Preview. (**Added:** 8.5.101.14)

If your account is configured for auto-answer, the Interaction Preview is not displayed and the workitem is opened automatically unless 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. 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.[**Added:** 8.5.105.12]

Error creating thumbnail: Unable to save thumbnail to destination

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the following steps:
   - Click `Accept` to display the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time-out and be redirected.
3. If you accept the interaction, the inbound Workitem Interaction window is displayed (see the Inbound Workitem Interaction window figure). The Inbound Workitem Interaction window provides the following functionality:
   - Transfer (forward) the workitem to another internal target. See Transferring a Workitem Interaction.
   - Save the workitem in a workbin and close the Workitem Interaction window. See Using Workbins to Access Stored Interactions.
   - Select `Mark Done` for the current interaction to save the workitem in the contact history and close the Workitem Interaction window. See Managing Contact History.
   - Stat a voice or IM consultation with an internal target or with a contact. See Starting a Voice Conference or Lesson: Initiating an Instant Messaging session.
   - Set a disposition code. See Assigning Disposition Codes.
   - View and edit Case Information for the current interaction
   - Initiate a voice consultation. See Starting a Voice Conference.
   - Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
   - Call (or email) the sender by clicking the `Action` menu that is displayed next to the contact name. See Making a Voice Call.
   - View and manage contact history. See Managing Contact History.

- View and manage contact information. See Lesson: Finding and viewing an interaction in the contact database.
- 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.
- View the Standard Response Library if you decide to call the sender. See Inserting a Standard Response into an Email Interaction.



Inbound Workitem Interaction window

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix, displaying the number and type of interactions in progress figure). 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.

Error creating thumbnail: Unable to save thumbnail to destination

Dynamic Contact History Matrix, displaying the number and type of interactions in progress for the current contact

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions 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 during the last-specified number of days.

Error creating thumbnail: Unable to save thumbnail to destination

Recent interactions matrix displaying the list of interactions with the current contact within the last day

End

Transferring a Workitem Interaction

The Workspace Workitem Interaction window enables you to transfer your current workitem interaction to another party. In this section, you will learn how to use the Team Communicator feature to transfer a workitem interaction to an internal target or to a contact. The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call a contact or an internal target, initiate a conference, or transfer a call. This section contains the following procedure:

- Lesson: Initiating a workitem transfer

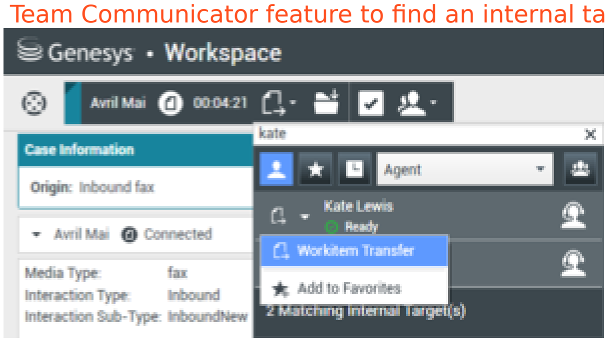
Lesson: Initiating a workitem transfer

- To find an internal target (such as an agent, Routing Point, or queue), and then transfer the workitem to the internal target.

Prerequisites

- You are logged in to Workspace (see Lesson: Logging in to Workspace).
- You have an active interaction with a contact (see Receiving and Handling an Inbound Workitem Interaction).

Start

1. In the active Workitem Interaction window, click `Transfer` to open the Team Communicator (see the Finding an internal target for workitem transfer in the active Workitem Interaction window figure) to find the internal target to whom you want to transfer the current interaction (see the Lesson: Using the Team Communicator feature to find an internal target).


Finding an internal target for workitem transfer in the active Workitem Interaction window
2. Click the `Action Menu` drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction and select `Workitem Transfer`. An invitation is sent to the target to accept the workitem transfer. If the target accepts the interaction transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target. If the target does not accept the interaction transfer request, the Workitem Interaction window remains displayed on your desktop and an error is displayed both at the top of the window and in the Workspace My Messages interactive notification.

End

Related Information

- Workitems