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Genesys Engage cloud Workspace Web Edition Agent Desktop Help

Getting started

Getting started

Workspace Web Edition is your gateway for handling calls (both inbound and outbound) and other interactions, such as chat or emails.

Important

What you see in Workspace depends on your contact center and your role within it, so you might not be able to do or see all the things covered in this help. If you think you should be able to do or see something you can't, check with your supervisor or system administrator.

Now that you know what Workspace Web Edition is, you're probably wondering how to use it. This Getting Started page will get you logged on and ready to take a call. Let's get started.

Tip

- The pictures and videos in this Help document show native Genesys Workspace. Your company might have customized many features including corporate logos and the name of the product. This document uses the name Workspace to mean the Agent Desktop application that you use to handle calls and other interactions and to manage your work and your contacts.
- The screen shots and videos show the Dashboard tab. This is available only in the cloud version of Workspace Web Edition.

Workspace Video Tutorials

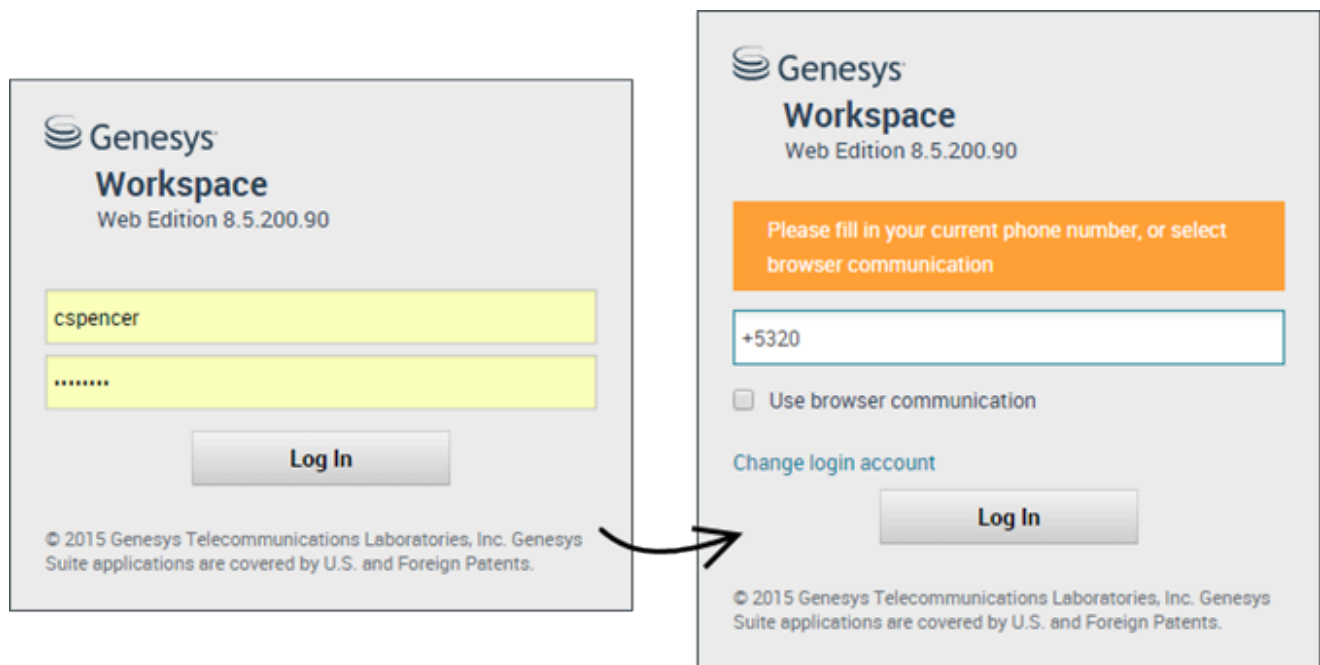
Want quick video tutorials? See our "How To" **Videos** collection!



Check out this video about how to handle a phone call!

[Link to video](#)

Log in to Workspace



Open a supported browser (if you are using browser communication, use Chrome) and go to the link for Workspace that your supervisor gave you.

Log in with your username and password. You might also have to enter some additional information:

- If prompted, enter your phone number, place, or preferred language.
- If your system uses browser communication, select **Use browser communication**.
- If this is your first time logging on, a dialog box might be displayed asking you to change your password.

If you are not sure about any of the prompts, ask your supervisor for help.

Please read the following tips and important notes:

Tip

- Clicking **Change login account** takes you back to the main log in screen.
- Workspace has a security feature that might be set up for your account that logs you out if you stop using Workspace for a while. Workspace first displays a message to warn you that you are going to be logged out. If Workspace logs you out, just log back in again when you are ready to start using Workspace.

- Workspace does not let you change your password. Contact your administrator to have your password changed.
- To ensure that your account and password remain secure, ensure that auto-fill, "remember me", and password manager are disabled in your browser. Your administrator might already have done this for you. If your browser asks you if you want it to remember passwords, select **No** or **Never**. If you have questions about password security, contact your supervisor, administrator, or IT personnel.

Important

- You may log in only to a single Workspace session at a time. You must log out of one session before logging into a new session.
- To log out of Workspace, you must use the **Exit** option from the menu in the upper right-hand corner. You won't be able to log out if you have any active calls or interactions.

Single Sign-On environments

You might work in an environment that uses Single Sign-On (SSO) identity authentication. If you do, your log in experience will be a little different. After entering your username in the application login screen, you will be taken to your company's authentication provider where you will enter your username and password. After that, you will no have to log in again until your authentication expires which is typically every eight hours. Using SSO means that once you log in to one application, you will not have to log in to any other applications that are also set up for SSO.

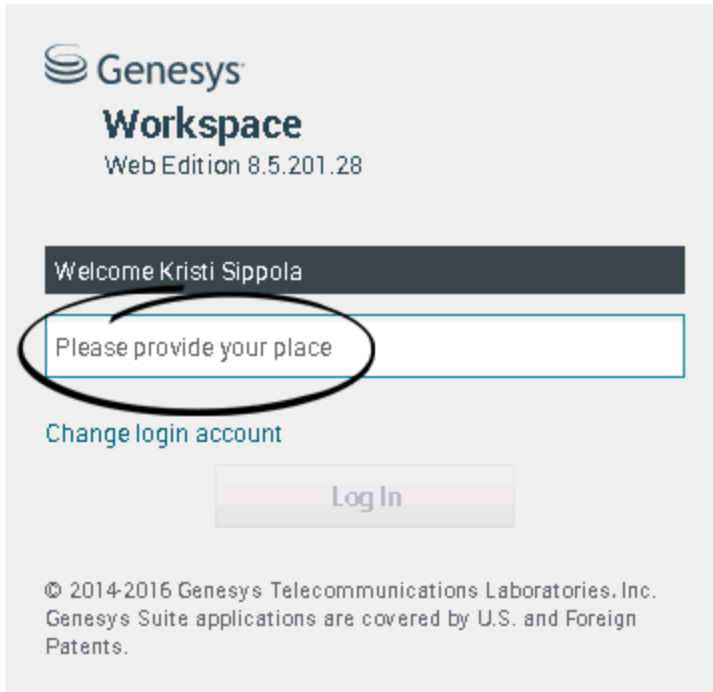
Remote and virtual desktop environments

You might work in an environment that uses Virtual Desktop Infrastructure (VDI, sometimes called VMware) 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.

In VDI environments, your administrator installed the Genesys Softphone 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 Genesys Softphone automatically launches and the Genesys Softphone icon is displayed in your system tray. Until you log in to Workspace, this icon looks like this: . After you launch Workspace and the Genesys Softphone is connected, the Genesys Softphone icon looks like this: .

Place



During login, you might see a window that asks you to input your Place.

Your Place is the name or number of the workstation or phone you are using. If you do not know what to enter, ask your supervisor.

If you do not see this window, your account is set up to always log you in on the same Place.

Tip

By default, the last Place that you logged in is already in the Place field.

If you move around from Place to Place, you might have to enter a different Place each time that you log in.

Change your status to Ready

[Link to video](#)

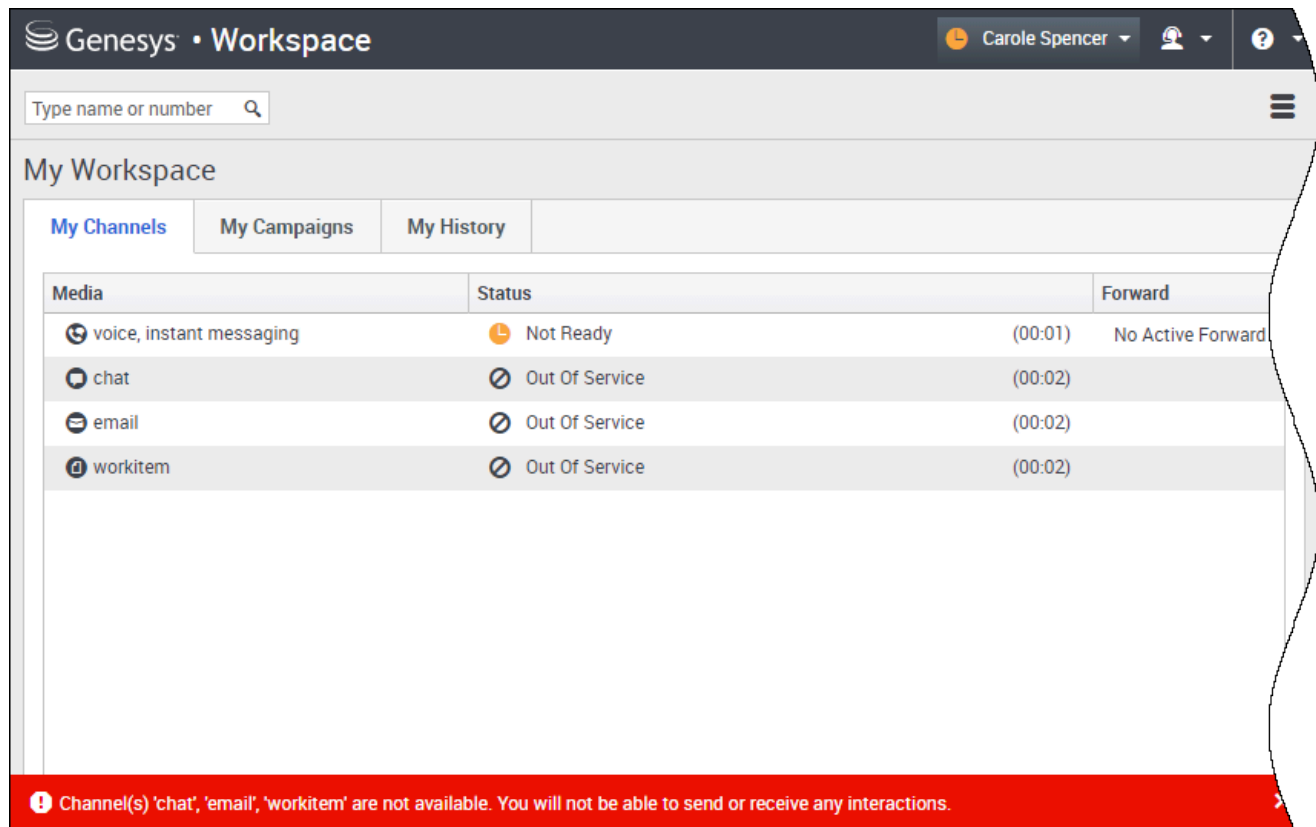
To receive calls, you must be in a **Ready** status (indicated by a green checkmark beside your name).

If you need to change your status, go to **My Channels** and toggle the voice channel to **Ready**.

Tip: You can also change your status for all channels in one easy step. Click your name at the top right-hand corner of the screen and select **Ready**.

Watch the video for a short demonstration of changing your status.

What happens if not all channels are available when I log in?



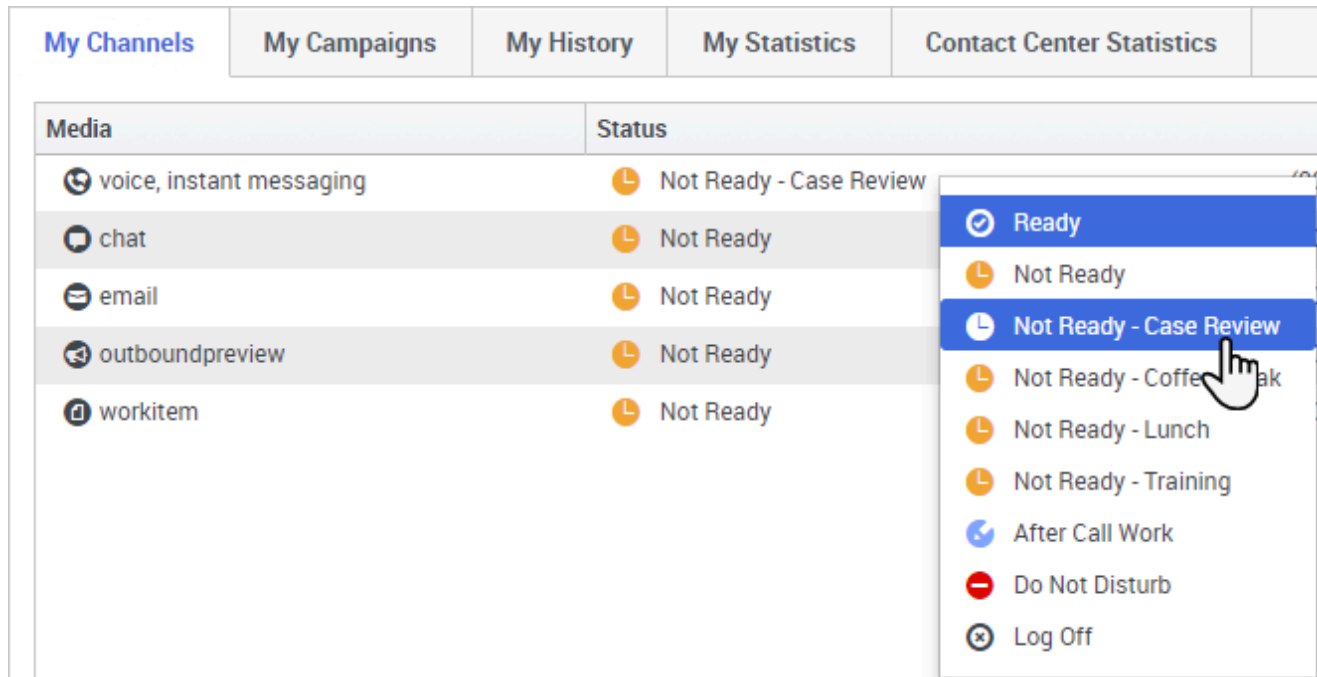
Sometimes when you log in, one or more of the channels that you are assigned might not be available.

You will know that one or more channels are not available because you will see a warning message at the bottom of the Workspace window.

When this happens, you can still log in, but when you look at your **My Channels** tab, you'll see that one or more channels have the **Out Of Service** status. When a channel is out of service, you cannot log on or off on that channel and you cannot set your status.

When the channel becomes available again, a message will be displayed at the bottom of the Workspace window. You can use the **My Channels** tab to change your status on that channel.

Setting your status to Not Ready with a Reason



Media	Status
voice, instant messaging	Not Ready - Case Review
chat	Not Ready
email	Not Ready
outboundpreview	Not Ready
workitem	Not Ready

- Ready
- Not Ready
- Not Ready - Case Review
- Not Ready - Coffee Break
- Not Ready - Lunch
- Not Ready - Training
- After Call Work
- Do Not Disturb
- Log Off

Sometimes you need to set your status on one or more channels to Not Ready so that you do not receive new interaction on that channel. You can choose to set the status to Not Ready or Not Ready with a reason. Your administrator sets up the Not Ready Reasons that are available to you from the Status drop-down menus.

Tip

If you manually set your status to Not Ready while you are handling a phone call, chat, or email, the system starts recording your time in that state rather than the time spent handling the call. Some contact centers have the Pending state enabled so that the Not Ready state does not take effect until after you end your phone call or chat interaction, or after you send your email or place it in a workbin.

Handle an inbound call

[Link to video](#)

Make sure your softphone or phone device is connected and ready.

Need help with your softphone? See [How do I use my web phone with Workspace?](#)

When a call arrives, you'll get a pop-up in the bottom right-hand corner of your screen. You might also hear a sound to alert you that a call has arrived.

Click **Accept** to connect the call. If you **Reject** the call, or ignore the pop-up, it goes to the next available agent.

Tip

If your account is set up to automatically answer calls, you will not see the pop-up

To get you started, here are some common call handling features:



= Hold



= Resume



= Transfer



= Hang up



= Mark Done

After the call is complete, you might enter an **After Call Work** state, during which you can complete any tasks related to the call. For example, you could add a [Note](#) or select a [Disposition](#) code.

Tip

If dispositions are mandatory in your contact center, you will not be able to close a call without specifying a disposition

Watch the video for a short demonstration of how to handle a voice call.

Log in, log out, log on, log off, and exit, what's the difference?

You **log in** and log out of the Workspace Agent Desktop application. Logging in means launching the application in your browser and identifying yourself to the system so that you become authorized to receive interactions and use the various features that are enabled for you.



Typically, you log in to Workspace Agent Desktop at the beginning of your shift and log out (Exit) at the end of your shift. To log out of Workspace, you must use the **Exit** option from the menu in the upper right-hand corner. You won't be able to log out if you have any active calls or interactions.

You log on to and log off of **channels** in Workspace Agent Desktop. Channels include voice, email, chat, and so on. Channels are the media that you use to interact with contacts. When you log in to Workspace Agent Desktop, you are usually logged on to all the channels assigned to you, and when you log out (exit) of Workspace Agent Desktop, you are logged off from all the assigned channels. In some environments, you might be logged off from one or more channels when you log in because the channel is out of service or your administrator has set up your account to be logged on to specific channels only.

Use the **My Channels** tab to log on or log off one or more channels. Logging off of all your channels does not log you out of Workspace Agent Desktop. You must still exit the application to log out.

You can log on or log off all your assigned channels by using the **Global Status menu**.

What do I do next?

You might want to learn more about:

- **Media channels**
- **Handling calls**
- **Working with contacts**
- **Using standard responses**
- **Managing your workbins** (which store your work in progress)