Workspace Desktop Edition User's Guide

Manage Your History

5/4/2025

Manage Your History

[**Modified:** 8.5.113.11, 8.5.110.13, 8.5.136.07]

The Workspace My History view enables you to view and manage previous interactions with a contact.

Managing Your History

The My History view enables you to view and manage previous interactions between you and a contact. You can find and select your previous interactions by using the following views:

- `My History` tab in the Main Window
- `My History` window

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 sort, filter, and perform actions on the interactions that you select. Use the My History view to do the following:

- Find interactions for contacts whom you have handled
- Perform the following actions on selected interactions:
  - Mark In-Progress voice and email [**Added:** 8.5.110.13] interactions as Done
  - Delete an outbound email interaction [**Added:** 8.5.110.13]
  - Reply or Reply All to inbound email interaction
  - Open outbound email interaction
  - Forward inbound and outbound email interactions that are marked as Done [**Added:** 8.5.113.11]
  - Resend outbound email interaction
  - Print an email interaction
- View information about selected interactions

This section contains the following procedure:

- Lesson: Finding and viewing your interactions in the contact database

Lesson: Finding and viewing your interactions in the contact database

Purpose: To find and view or modify your interactions for a contact in the contact database by using the `My History` view.

Prerequisites

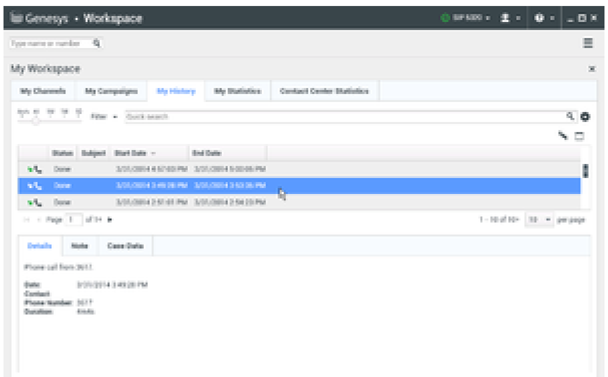
- You are configured to view or manage the contact database.
- You are logged in to Workspace (see Lesson: Logging in to Workspace).

Start

1. Do one of the following:
    - On the Workspace Main Window (see the Main Window, displaying the My History tab in Workspace view figure):

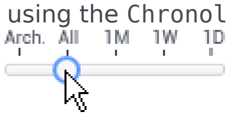
    a. Click `Workspace` to display your workspace.

    b. Click the `My History` tab to display all of your interactions.



Main Window, displaying the My History tab in Workspace view

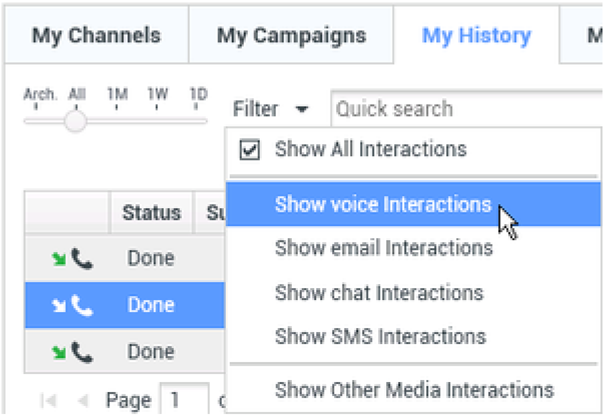
2. To filter your history by date, specify the time interval that is to be used to filter your search results by using the `Chronology` slider.



The `Chronology` slider has five positions that represent different time intervals:

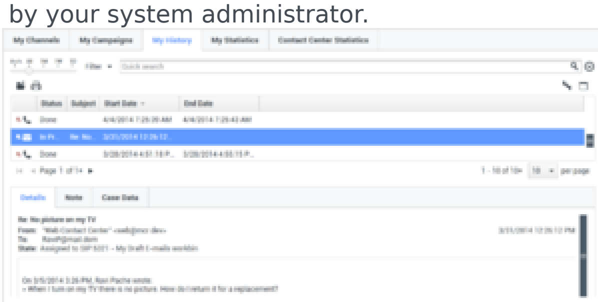
- **Arch.**—Search the database for messages that have been archived (available only in older environments).
- **All**—Search the entire database from the most recent interaction back to the earliest interaction.
- **1M**—Search the database from the most recent interaction back to one month ago.
- **1W**—Search 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.

3. To filter your history by type of interaction, use the Type filters to search only for interactions of a specific type (see the My History view Filter menu figure). The interaction types are: Voice, E-mail, and Chat/Instant Message. Select the types to display from the `Filter` drop-down menu. The `Filter` menu options turn the filters on and off. When a filter is on, a check mark is displayed next to its name in the menu. Your administrator might include filter types that are related to your specific role in the company, such as the type of customer that your deal with or the business area for which you are responsible.



My History view Filter menu.

4. If your history contains more than one interaction, you can sort the contents of the search-results table by an attribute (see the Search results displaying the My History tab figure). The attributes are defined by your system administrator.

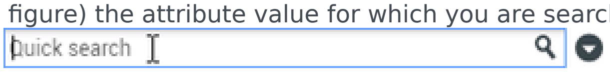

Search results displaying the My History tab

To sort the interactions by one of the attributes, click the column headings that match the attribute that you want to use to sort the results (see the Search results displaying the My History tab figure). Your available search criteria might include one of the following:

- **Status**—Done or `In Progress`
- **Subject**—For email interactions only
- **Start Date**—The date and timestamp when the interaction was first received
- **End Date**—The date and timestamp when the interaction was marked Done

5. The Quick Search enables you to search for any interaction by an attribute value.

    a. To search your history, type in the `Quick Search` field (see the My History view Quick Search tool figure) the attribute value for which you are searching.

    My History view Quick Search tool

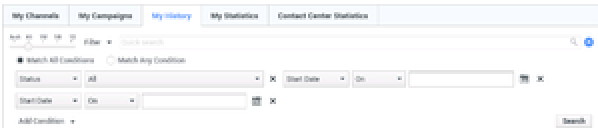
    ## Important

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

    b. Click the magnifying-glass icon, or press `Enter`, to search for the criteria that you have entered. Your search results are displayed in the Search Results table (see Lesson: Finding and viewing an interaction in the contact database).

c. Click the X to clear the `Quick Search` field.

6. The Advanced Search enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as `Status`, `Start Date`, and `Subject` (see the Advanced Search view displaying the My History tab figure). It also contains drop-down lists with modifiers that determine how the criteria will affect the search. See Lesson: Using the History tab Advanced Search to find an interaction.



Advanced Search view displaying the My History tab

7. Workspace enables you to view contact interactions either by attributes or as threads. Click the `Show Interactions in Grid View`/`Show Interactions in Tree View` button (/) to specify how the Contact History panel is displayed. Grid View displays interactions by attribute 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 conversations, social-media threads, and so on). The Grid view in newer environments displays a sortable list of all of the contacts in the contact database that match the search criteria.

8. Click an interaction to select it. The `Details` panel displays information about interactions on the `Details` tab, the `Note` tab, and the `Case Data` tab (see the Main Window, displaying the My History tab in Workspace view figure).

   - If you are configured to see the detailed status of the in-progress interaction, the status of the interaction is displayed in the `Details` tab. 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).

     a. Click `Open` to open the email interaction in the current active interaction window, or in a new E-mail Interaction window if you are opening the email from the Main Window Contact History view.

     b. After you open the in-progress email interaction, you can read or handle it as an inbound email interaction or an outbound email interaction (refer to Lesson: Replying to a inbound email interaction and Lesson: Creating and sending a new email interaction to a contact).
     You can also click `Put back in original location` () to return the email interaction back to the In-Progress workbin or into a queue.

   - If an interaction is still in progress, you can click **Mark Done** (). The status of the interaction will be changed to `Done`.

   - If you have the correct permissions you can print an email interaction. Click **Print** () to open the Print Preview window. [**Added:** 8.5.101.14]

   - If you have the correct permissions and you select an In-Progress outbound email interaction, you can delete it (). [**Added:** 8.5.110.13]

   - If you have the correct permissions, for email interactions that have been marked as `Done`, you can click the **Forward** button () to create a new outbound email interaction that includes the selected interaction in the Forward Email interaction window. [**Added:** 8.5.113.11]

   - If you have the correct permissions to enable you to manage contact data, you can use the **Change Contact** button to assign a different contact for the selected interaction.

9. When you have finished working on the selected interaction in the `My History` tab, clear the search

field by clicking the X button beside the search field.

End

Related Information

- My History
- Interaction Search
- Contact History
- Contact Directory
- Contact Search