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# Workspace Desktop Edition Deployment Guide

Setting up agents to use workbins

5/8/2025

# Setting up agents to use workbins

[**Modified:** 8.5.110.13, 8.5.122.08, 8.5.126.07]

## Procedure

Enabling an agent to use and search agent, place, agent group, or place group workbins

### Purpose:

To enable an agent to use agent, place, agent group, or place group workbins to receive and/or store contact interactions for future processing.

### Prerequisites

- Genesys Administrator 8.0.2 or higher, configured to show Advanced View, or Genesys Administrator Extension.
- A working knowledge of Genesys Administrator Extension.
- A Workspace Application object exists in the Configuration Database.
- Workspace has a connection to [Universal Contact Server](#) and Interaction Server.
- The Procedure: [Enabling agents to manage contacts](#).

### Start

1. Use Genesys Interaction Routing Designer (IRD) or Genesys Composer to create a workbin.
2. In Genesys Administrator Extension, create a reference to the workbin in the Workspace Application object, following the generic rule: `workbin.<media-type>.<workbin-nick-name>=<workbin-script-name>`  
Refer to the [Section: interaction-workspace](#) and [workbin](#) configuration option reference for a list of Workbin options and a description of how to configure them.
3. Allow the workbin privileges (see [Workbin Access Privileges](#)) for the role to which the agent is assigned (refer to the Procedure: [Creating a Role and allowing a Workspace privilege and assigning a Role to an agent or agent group](#)).
  - Workbin - Can Use Workbins
4. To enable agents to use Interaction Search in workbins, allow the following privilege on the agent, role, agent group, or other User object: [**Added:** 8.5.110.13]
  - Workbin - Can search in Workbins



Interaction Queue Search Privilege.

5. To specify how the workbin content is displayed and updated, use the following configuration options: **[Added: 8.5.110.13]**
  - `workbin.<media-type>.<workbin-nickname>.auto-update`: Specifies whether the list of interactions in a workbin is updated automatically or manually by the agent. When set to `true`, Workspace registers for workbin notifications from Interaction Server so that the workbin content is always up to date. When set to `false`, the content of the workbin is refreshed only when the user explicitly requests it by selecting the workbin in the selection pane or by clicking the **Refresh** button. When set to `false`, the maximum size of the displayed workbin content is defined by the value of the `workbin.<media-type>.<workbin-nickname>.max-results` option, if Interaction Server 8.5.104.00 or higher is used, or by the value of the Interaction Server `max-workbin-interactions` option with lower releases.
  - `workbin.<media-type>.<workbin-nickname>.max-results`: Specifies the maximum number of interactions to display in a workbin. This option requires Interaction Server 8.5.104.00 or higher.
6. To specify how the workbin search feature works, use the following configuration options: **[Added: 8.5.110.13]**
  - `workbin.<media-type>.<workbin-nickname>.quick-search-attributes`: Specifies the list of interaction attributes that are used when applying a quick search in this workbin. The query is built to match any attributes that start with the criteria specified by the agent. This option requires Interaction Server 8.5.104.00 or higher. The maximum size of the result set is defined by the `workbin.<media-type>.<workbin-nickname>.max-results` option. Once a search result set is displayed, the auto-update no longer applies until the search criteria are cleared. Refer to [Specifying Filter Conditions](#). If this option is not configured, or if the value is left blank, then the Search field is not displayed.
7. To enable agent notification of changes to interaction properties in a workbin, set the value of the `workbin.<media-type>.<nick-name>.notify-property-changed` to `true`. **[Added: 8.5.122.08]**
8. You can choose to sort custom columns numerically or chronologically instead of alpha-numerically. By default, custom columns that are included in a workbin that has been provisioned for auto-update are sorted in alpha-numeric order. To specify that the custom column sorting should be in numerical or date order, you must configure the Business Attribute Value representing this custom column in the 'Interaction Custom Properties' Business Attribute as follows:
  - a. Create a section named `interaction-workspace`.
  - b. In this section, create the `display-type` key and set the value to `int` (for numerical order) or `date` (for chronological order).

### Tip

When a workbin is not provisioned as 'auto-update', sorting is handled by the Interaction Server database, and so relies on the type assigned in the database table schema.

[Added: 8.5.126.07]

**End**