



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

# Workspace Desktop Edition Help

[Interaction Search](#)

# Interaction Search

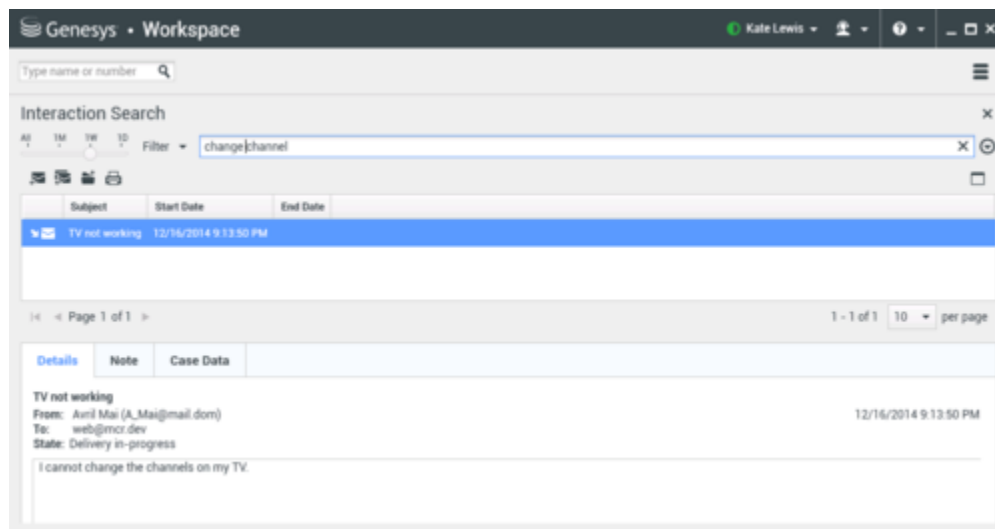
[**Modified:** 8.5.116.10, 8.5.113.11, 8.5.112.08, 8.5.110.13]

[**Added:** 8.5.104.15]

## Tip

Are you looking for **tutorials** to help you learn how to use this feature? Check out the [Related Resources](#) section at the bottom of this article.


The **Interaction Search** view enables you to find interactions based on multiple criteria.



Workspace provides you with multiple ways to find interactions in your contact center interaction database.

- If you know which contact you are searching for, use the [Contact Directory](#) to find the interactions exchanged with that contact.
- If you were the agent who handled the interaction you can use the [My History](#) view to find the interactions that you have handled.

However, sometimes you want to find an interaction, but you no longer remember who the contact was, or whether it was handled by yourself or another agent. The Workspace Global Interaction Search feature enables you to use the **Interaction Search** view to search for interactions based on one or more criteria, including words in the body or transcript of the interaction.

To display the **Interaction Search** view, click the **Access and use Workspace supporting views** button () to display the **Supporting Views** menu, then select **Interaction Search**. Use this

feature to search for interactions. View details about the search results in the [Details tab](#).

Global Interaction Search enables you to find interactions using one of two modes:

- [Quick Search](#)
- [Advanced Search](#)

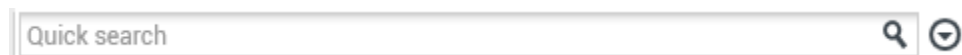
Perform the following [actions](#) on selected interactions:

- [Mark Done](#) voice and email **[Added: 8.5.110.13]** interactions that have the **In-Progress** status.
- [Delete](#) an outbound email interaction that has the **In-Progress** status. **[Added: 8.5.110.13]**
- [Reply](#) or Reply All to email interactions.
- [Resend a previously sent email](#).
- [Open in-progress](#) inbound and outbound email interactions (that are in the process of being routed out of and into workbins and queues).
- [Forward](#) inbound and outbound email interactions **[Added: 8.5.113.11]**
- [Print the interaction](#) (if you have the correct permissions)

## Quick Search

Quick search enables you to perform a simple search of the interaction database.

To search the interaction database, type some text that you want to search for in the [Quick Search](#) field. Click the magnifying glass to search for the criteria that you have entered.



Quick Search field.

Click the **X** to clear the Quick Search field.

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

## Filtering

The **Interaction Search** view filtering controls enable you to refine your search. The chronology slider enables you to search the interaction history by time interval.

The slider has four positions that represent different time intervals:

- **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

The **Interaction Type** filters enable you to select and deselect the types of interactions that are to be searched. The items that are displayed depend on the interaction types that you are configured to handle. Click the **Filter** menu to select the interaction types that you want to search. You can select multiple items in the **Filter** menu. The following types are available, by default:

- Show all interactions
- Show voice interactions
- Show email interactions
- Show chat interactions
- Show SMS interactions
- Show other media interactions

When a filter is on, a check mark appears next to it in the **Filter** menu and the button remains highlighted if the "All" filter is not applied.


Your administrator might have configured additional customized options for the **Filter** menu, such as business area/department (for example: accounts, sales, and service) or customer level (for example: Silver, Gold, and Platinum). Custom filters enable you to refine your search. For example, if you are searching for email interactions about a service request, you can make two selections in the **Filter** menu to refine your search: **Show email Interactions** and **Show Interactions with Service Department**.

## Search Results

Search results are displayed in a grid. Click a result entry to display **interaction details** in the **Details** tab. You can also use the **Note** tab to view notes associated with the selected interaction and the **Case Data** tabs to view the interaction case information.

## Grid View and Tree View

[Added: 8.5.116.10]

Workspace enables you to view contact interactions either in a flat view or grouped by threads. The **Show Interactions in Grid View/Show Interactions in Tree View** button () enables you to specify how the **Interaction History** panel is displayed. Refer to the **Contact History** page for information about how to use the features of the **Contact History** view, including opening in-progress interactions and resending email interactions that have been marked as **Done**.

Grid View displays interactions in a flat view, and Tree View displays interactions grouped 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 conversation, social-media threads, and so on).

The Details panel contains three tabs:

- **Details**
- **Notes**

- [Case Data](#)

### Page Controls

Page through the list of search results by doing any of the following:

- Click the **Go to the Next Page** button (▶) to view the next page.
- Click the **Go to the Previous Page** button (◀) to view the previous page.
- Click the **Go to First Page** button (◀◀) to return to the start of the list of search results.
- Click the **Go to Last Page** button (▶▶) to return to the end of the list of search results.
- Specify the number of items that are displayed on each page by using the **per page** drop-down list.

### Advanced Search

The Advanced Search feature enables you to enter multiple criteria to refine your search. The **Advanced Search** pane contains drop-down lists of search criteria that enable you to build a complex search based on multiple criteria such as Status, Subject, processing agent, date or date range, and interaction text.

Text field searches are based on a "Matches" search, where the request returns interactions that contain, for each typed word, at least one word starting with the specified word.

### Filtering

The **Interaction Search** view filtering control enables you to refine your search. The **Interaction Type** filters enable you to select and deselect the types of interactions that are to be searched. The items that are displayed depend on the interaction types that you are configured to handle. Click the **Filter** menu to select the interaction types that you want to search. You can select multiple items in the **Filter** menu. The following types are available, by default:

- Show all interactions
- Show voice interactions
- Show email interactions
- Show chat interactions
- Show SMS interactions
- Show other media interactions

When a filter is on, a check mark appears next to it in the **Filter** menu and the button remains highlighted if the "All" filter is not applied.

Your administrator might have configured additional customized options for the **Filter** menu, such as business area/department (for example: accounts, sales, and service) or customer level (for example:

Silver, Gold, and Platinum). Custom filters enable you to refine your search. For example, if you are searching for email interactions about a service request, you can make two selections in the **Filter** menu to refine your search: **Show email Interactions** and **Show Interactions with Service Department**.

### Advanced Search Pane

The Advanced Search feature enables you to use multiple criteria to refine your search. The **Advanced Search** pane contains drop-down lists of search criteria, such as Status, Subject, Start Date, and End Date.

Use the **Add Condition** drop-down menu to add search criteria to the Advanced Search Pane. Remove criteria from consideration by clicking the **X** next to the option.

Use the **Match Conditions** options to specify whether **All** or **Any** of the search conditions that you have specified are applied.

#### Important

The contents of the **Advanced Search** pane are set up by your system administrator. There are many possibilities for how this view will appear to you and what criteria will be available. The following sections describe two use cases that you might experience. The only difference between them is that one contains logical groups of search criteria and the other does not. All other functionality is the same.

#### Use Case 1—No search criteria groups

Your system administrator has specified search criteria that you are allowed to use, but has not put them in logical groups for you. In this scenario, you probably have access to only a few search criteria so it is not necessary to create groups. To add search criteria, select them from the **Add Condition** menu. Remove criteria from consideration by clicking the **X** next to the option.

#### Use Case 2—Multiple search criteria groups

Your system administrator might have created one or more search option groups and specified default criteria to enable you to make logical search criteria choices.

For example, your administrator might create the following groups and specified the following search criteria for each group:

- Agent: OwnerId
- Contact: BccAddresses, CcAddresses, ContactId, FromAddress, FromPersonal, PhoneNumber, ReplyToAddress, SentDate, ToAddress
- Dates: EstablishedDate, ReleasedDate, SentDate, StartDate, EndDate
- Interaction: Subject, ContactId, Id, OwnerId, SubtypeId, TypeId
- Other: A group that is created automatically when your administrator creates one or more criteria groups. It contains all available search criteria that are not specified as members of other groups.


Next to the name of the group in the Advanced Search Pane is a **+**. Click the **+** to add more criteria from this group.

To add other search criteria or to display additional available groups, select them from the **Add Condition** menu. Remove criteria from consideration by clicking the **X** next to the option.

### Tip

Your administrator configures the default search criteria for this view; however, you can add or remove search criteria as needed. Workspace remembers the last search criteria that you used and displays these when you use the Advanced Search feature again. **[Added: 8.5.112.08]**

The following information applies to both use cases:

Date specific criteria use a calendar picker to enable you to specify a date. You can also type in a date manually. For example, to search based on the Start Date, use the calendar icon () to select a date, or enter the date in the format that conforms to your local day and time display preferences.

Menus for date fields might contain the following choices:

- **On**—The exact date
- **On or after**—The specified date or any date after
- **Before**—Before the specified date
- **Between**—Between the specified dates

Menus for pre-defined fields, such as Status, contain the pre-defined field names from the database—for example: **All**, **Done**, and **In Progress**.

Text field searches are based on a **Matches** search where the request returns interactions that contain the at least one word starting with the specified typed text.

Business Attribute searches use a drop-down menu that enables you to select the exact value to match.


Build up your search by adding criteria, then click **Search** to start your search based on the criteria that you have specified.

## Search Results

Search results are displayed in a grid. Click a result entry to display **interaction details** in the **Details** tab. You can also use the **Note** tab to view notes associated with the selected interaction and the **Case Data** tabs to view the interaction case information.

## Grid View and Tree View

**[Added: 8.5.116.10]**

Workspace enables you to view contact interactions either in a flat view or grouped by threads. The **Show Interactions in Grid View/Show Interactions in Tree View** button () enables you to specify how the Interaction History panel is displayed. Refer to the [Contact History](#) page for information about how to use the features of the Contact History view, including opening in-progress interactions and resending email interactions that have been marked as **Done**.

The **Grid** view in newer environments displays a sortable list of all of the contacts in the contact database that match the search criteria.





Grid View displays interactions in a flat view, and Tree View displays interactions grouped 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 conversation, social-media threads, and so on).

The Details panel contains three tabs:

- [Details](#)
- [Notes](#)
- [Case Data](#)


## Page Controls

Page through the list of search results by doing any of the following:

- Click the **Go to the Next Page** button () to view the next page.
- Click the **Go to the Previous Page** button () to view the previous page.
- Click the **Go to First Page** button () to return to the start of the list of search results.
- Click the **Go to Last Page** button () to return to the start of the list of search results.
- Specify the number of items that are displayed on each page by using the **per page** drop-down list.

## Interaction Details

The **Details** panel enables you to view the results of your interaction search. The **Details** panel includes the **Details**, **Note**, and **Case Data** tabs.

You can view [interaction details](#) in the **Details** tab for the *currently selected interaction* in the **Details** panel by clicking the **Show Details Panel on Bottom/Hide Details Panel** toggle button: 

The **Details** tab displays interaction specific information. For example, if you have selected an email interaction, the Subject, From, To, State, and body of the email interactions are displayed.

The **Note** tab enables you to view notes that are associated with the selected interaction.

The **Case Data** tab enables you to view the case information for the selected interaction.



## Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- [Find Interactions](#)
- [Manage Contact History](#)
- [Manage Your History](#)

### Related topics

- [Contact History](#)
- [My History](#)

### Top 10 pages

1. [Workspace Desktop Edition Help](#)
2. [Main Window](#)
3. [My Status](#)
4. [Contact Directory](#)
5. [Workbins](#)
6. [Functionality Overview](#)
7. [My Messages](#)
8. [Login](#)
9. [Voice Consultation](#)
10. [Components, Features, and Controls](#)