Workspace Desktop Edition Help

Workitems

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Contents

Workitems

[**Modified:** 8.5.111.21, 8.5.117.18]

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.

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 access while you are handling interactions of another type, such as email.

The Workitem Interaction window enables you to handle tasks that are related to workitems, including the following:

- Transfer (forward) the workitem
- Mark the current interaction as Done
- Start a Voice Consultation with an internal target or with a contact
- Start an IM Consultation with an internal target
- Store it in a workbin for further processing or review
- Open an in-progress workitem from a workbin or Queue in the History view.
- Set a disposition code
- Use the Note to attach a note to the interaction history
- Review Case Information (attached data) for the current interaction
- Call the sender if there is a phone number in the contact database
- Send the recipient an Instant Message (IM) if the recipient is an internal target
- E-mail the sender if there is an email address in the contact database
- Schedule a Callback interaction by clicking **Schedule Callback** () to open the **New Callback** dialog box. Refer to Genesys Callback. [**Added:** 8.5.111.21]
- Review and manage contact history
- Review and manage contact information. 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 [**Modified:** 8.5.117.18].
- Hide or display the controls and information about the current interaction by clicking the collapse/expand Interaction View button:

Collapse	

Expand	

- Access the standard response library if you decide to call the sender to discuss the workitem contents

If there are in-progress or recent interactions for the current contact, the number of interactions is displayed beside the connection status of the interaction.

Transferring a Workitem

To transfer a workitem that you have accepted, click the **Workitem Transfer** () button. The Team Communicator is displayed. Choose a transfer target. The target must be configured to receive interactions of the type of the workitem. Select **<workitem type> Transfer**.

If the target accepts the interaction, the interaction window on your desktop closes.

If the target rejects the interaction, the interaction window reopens on your desktop and displays an error that informs you that the target has rejected the 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:

- Handle A Workitem Interaction
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Functionality Overview
- Components, Features, and Controls
- Workspace Desktop Edition Help

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