Workspace Desktop Edition User's Guide

Basic Use-Case Summary

5/10/2025

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Basic Use-Case Summary

The purpose of this user's guide is to enable you to learn the *basic* functionality of Workspace. See the *Workspace 8.5 Help* for more details about each user-interface component. To access the context-sensitive Help from any window in the Workspace interface, open the Help menu, or press the F1 key on your keyboard.

This section summarizes the *high-level* steps that you might follow to handle a voice interaction.

> **Warning**
>
> During your use of Workspace, you might be locked out of Workspace and have your status set to Not Ready if you do not use your keyboard or mouse for an inactivity period that is defined by your administrator. If you are locked out of Workspace, you must reauthenticate and reset your status to Ready to receive new interactions. For more information, see the Inactivity Timeout topic in the *Workspace 8.5 Help*.

Prerequisites

To begin these role privileges your system must meet the following requirements:

- The Workspace ClickOnce application is installed on your local web server.
- The Workspace ClickOnce application is installed on your workstation.
- You are configured as an agent.
- Your workstation operating system is Windows Vista, Windows 7 or Windows 8.

Starting the Application and Handling an Inbound Interaction

Use a Microsoft Internet Explorer 8 or higher web browser to launch the Workspace bootstrap application. This bootstrap application enables you to login to your system and download the Workspace application.

1. Before you launch Workspace, if you are using a softphone (a headset connected to your workstation), make sure that your headset is plugged in.

    > **Important**
    >
    > When you log in to Workspace, the application is enabled for any headsets that are plugged into your workstation. If you want to use a different headset, exit Workspace, plug in the new headset, then relaunch Workspace.

2. Double-click the Workspace icon on your desktop to start the Workspace application.

3. Log in to the system (see Lesson: Logging in to Workspace).
4. Enter your additional authentication information.
5. Enter a media channel, or select one from the list.
6. In the Main Window set your status to Ready (see Lesson: Going Ready in the Workspace Main window).
7. Accept inbound interactions that are routed to you. See:
    - Lesson: Handling an inbound voice interaction
    - Lesson: Handling a web callback interaction
    - Lesson: Receiving an Instant Messaging session
    - Lesson: Handling an inbound email interaction
    - Lesson: Handling an inbound chat interaction
    - Lesson: Handling an inbound SMS interaction
    - Lesson: Handling an inbound workitem interaction
    - Lesson: Handling a predictive or progressive Outbound-Campaign voice interaction

    Or, retrieve an interaction from a workbin. See:
    - Lesson: Accessing and handling interactions that are stored in a workbin
8. Handle each inbound interaction. This step can include any or all of the following functions:
    - Start a voice, IM or chat consultation (see Lesson: Starting a voice conference or Lesson: Starting a chat consultation).
    - Transfer the call (see Lesson: Starting a voice transfer).
    - Conference the call (see Lesson: Starting a voice conference).
    - Update the Contact History (see Managing Contact History).
    - Update the Note (see Managing Contact History).
    - Send or receive an internal Instant Message (IM) (see Instant Messaging Overview).
    - Employ a Standard Response (see Inserting a Standard Response into an E-Mail Interaction).
9. Complete the interaction.
10. If required, enter a disposition code (see Assigning Disposition Codes).
11. Click `Mark Done`.
12. Complete any required aftercall work.
13. Click the close box to close the corresponding Interaction window.
14. Set your status to Ready (see Lesson: Going Ready in the Workspace Main window).

15. View your Key Performance Indicators (KPIs) or the KPI status of your group (see Lesson: View KPIs And Statistics).
16. After you have completed all of your tasks for the day, select `Log Out` from the Main Menu.

Related Information

- Workspace Functionality Overview help
- Launching Workspace help
- Workspace Components, Features, and Controls help