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Agent Desktop Agent's Guide

Navigating Agent Desktop

5/18/2022

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Having trouble finding your way around Agent Desktop? If you need help identifying a button or field, hold your mouse pointer over it to reveal a tooltip.

Do you use a screen reader? Do you navigate Agent Desktop using a keyboard? You can find out all about it here!

Related documentation:

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Important

Due to continual changes to Agent Desktop, screen shots in this manual might show interface elements that are not yet available for this product or might not accurately reflect what you encounter in the product when you use it.

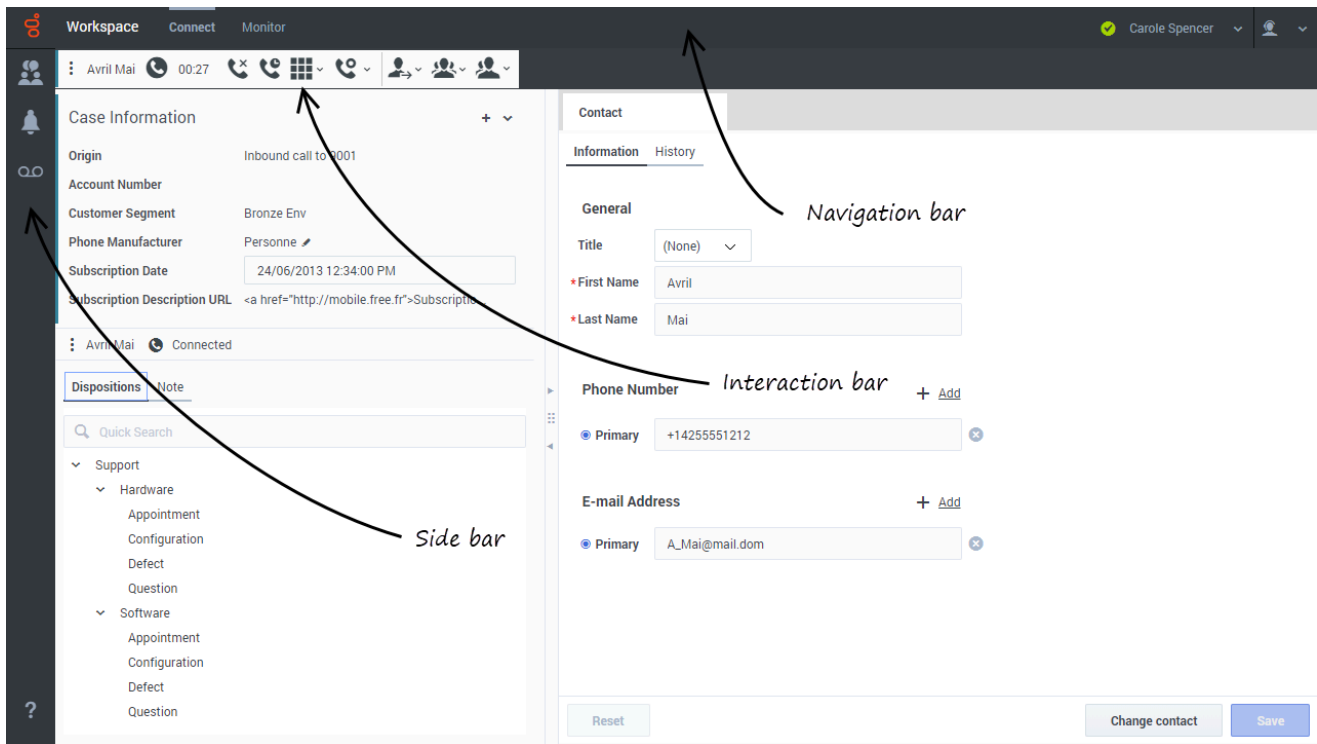
Main view

[Link to video](#)

The main view lets you access the most common features that you use every day, such as handling calls, changing your status, calling internally, and retrieving your voicemail managing your channels, campaigns, KPIs, and messages.

Watch the video for a quick tour of the Agent Desktop main view.

Navigation Bar and Side Bar



The **Navigation Bar** lets you switch between different desktop views. It also contains the **Status** menu and the **Main** menu. The **Navigation Bar** might contain buttons to let you view panels that are specific to your company, including web applications that you use to complete your work. By default, the **Navigation Bar** contains the **Connect** group tab and the **Monitor** group tab.

The **Connect** group tab typically contains the following tabs:

- **My Channels:** Set your status on individual channels, such as voice and turn call forwarding on or off.
- **My History:** Search through the history of interactions that you have handled.
- **Interactions Search:** Search through all interactions in your company database that you are allowed to view.
- **Contact Directory:** Search for contacts and view their information and history.

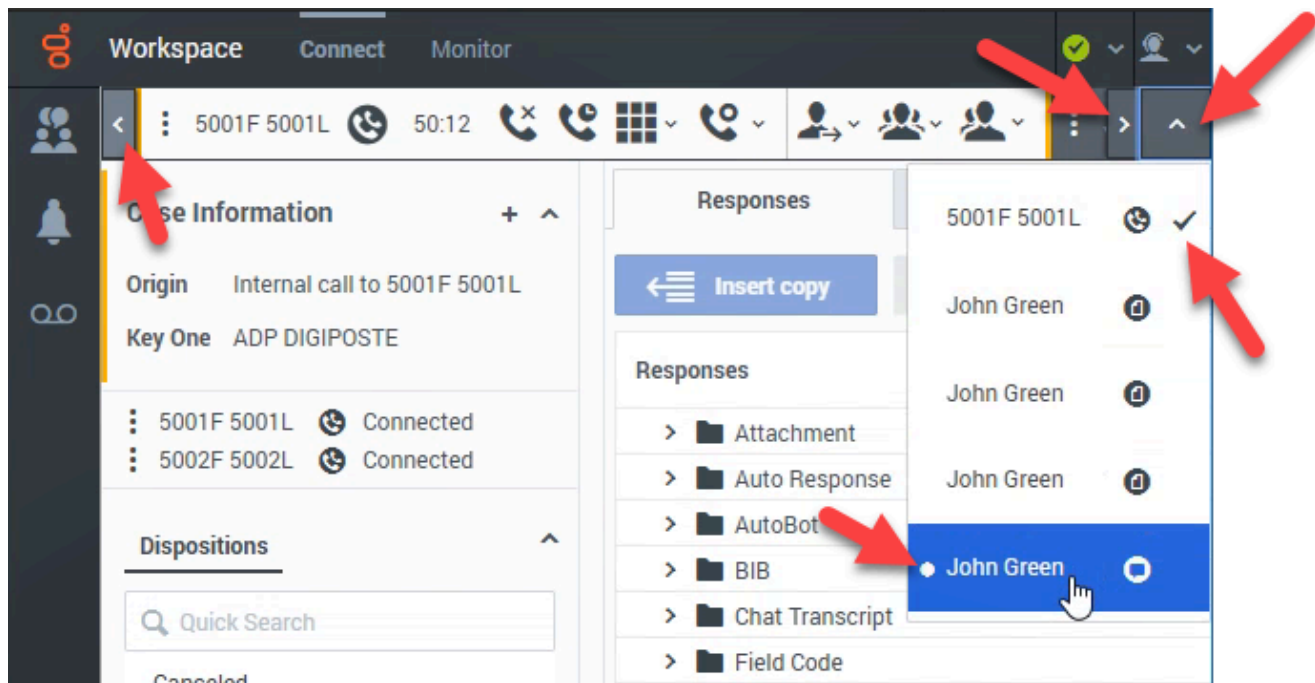
The **Monitor** group tab typically contains the following tab and might also contain other tabs depending on your account settings:

- **Contact Center Statistics:** View the latest statistics and alerts for your contact center.

The **Side Bar** contains the buttons that let you start calls, retrieve your notifications (system messages), and view your voicemail, and monitor your performance. The side bar might contain custom buttons related to tasks and features that are specific to your company.

- **Performance Tracker:** View your latest statistics (KPIs) and alerts.

Interaction Bar



The **Interaction Bar** is displayed in the main view whenever you have one or more active interactions. If you have multiple active interactions, only the tools for the current active interaction are displayed. The **Interaction Toolbar** for other active interactions collapse until you click one of them to make it the current interaction. This video demonstrates how multiple interactions are managed in some environments.

[Link to video](#)

Each interaction is represented by an **Interaction Bar**. When you click an Interaction to make it active, you can use the **Interaction Toolbar** to perform basic actions that are specific to the interaction type, such as ending a call, replying to an email, and so on.

- Click the **Interaction Toolbar** to give it the focus. All other open interactions are collapsed to the **Interaction Bar**.
- Click the three vertical dots on the interaction control to open the **Interaction Action** menu. Select **Floating mode** or **Pinned mode** to switch between these two viewing modes.
 - This video demonstrates how to switch to Pinned mode:
[Link to video](#)
 - This video demonstrates how to switch to Floating mode:
[Link to video](#)

In floating mode, other open views appear dimmed behind the interaction view.

Interactions requiring your attention

Interactions in the **Interaction Bar** flash (or blink) when specific events occur that might require your immediate attention.

Contact Center Statistics and KPIs

There are three places where you can access and track your performance and the performance of your contact center:

- The Dashboard region in the Monitor view
- The Performance Tracker view in the Sidebar
- The Statistics Gadget tool in the Navigation Bar.

Note: Some or all of these features might not be available in your environment.

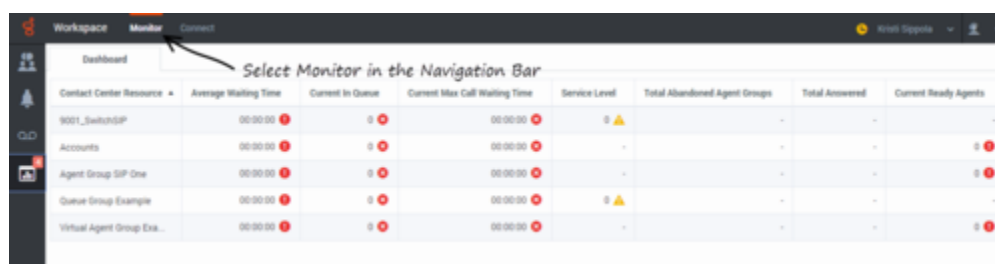
Here are the icons that you might encounter in the Dashboard (Contact Center Statistics) region and Performance Tracker view:

- A worst icon (❌) is displayed if the evaluation of the performance is below the expected worst level for the agent statistic (KPI) or contact center statistic.
- An error icon (!) is displayed if the evaluation of the performance is below the expected error level for the agent statistic (KPI) or contact center statistic.
- A warning icon (⚠️) is displayed if the evaluation of your performance for the agent statistic (KPI) or contact center statistic goes beyond the expected warning level for the statistic.

Dashboard

The items displayed on this region are Contact Center statistics for Routing Points, Queues, and other contact center facilities. The Dashboard region displays statistics that summarize the state of various conditions, such as waiting time, calls in queue, average maximum waiting time, service level, and answered and abandoned calls, that are monitored by your contact center.

Click the **Contact Center Resource** column head to change the sort order of the resources.



The screenshot shows a dashboard with a table of Contact Center Resources. The table has columns for Average Waiting Time, Current in Queue, Current Max Call Waiting Time, Service Level, Total Abandoned Agent Groups, Total Answered, and Current Ready Agents. Each row represents a resource and includes status icons (red X, red exclamation mark, or yellow warning triangle) in the Average Waiting Time, Current in Queue, Current Max Call Waiting Time, and Service Level columns. A tooltip points to the 'Monitor' tab in the navigation bar.

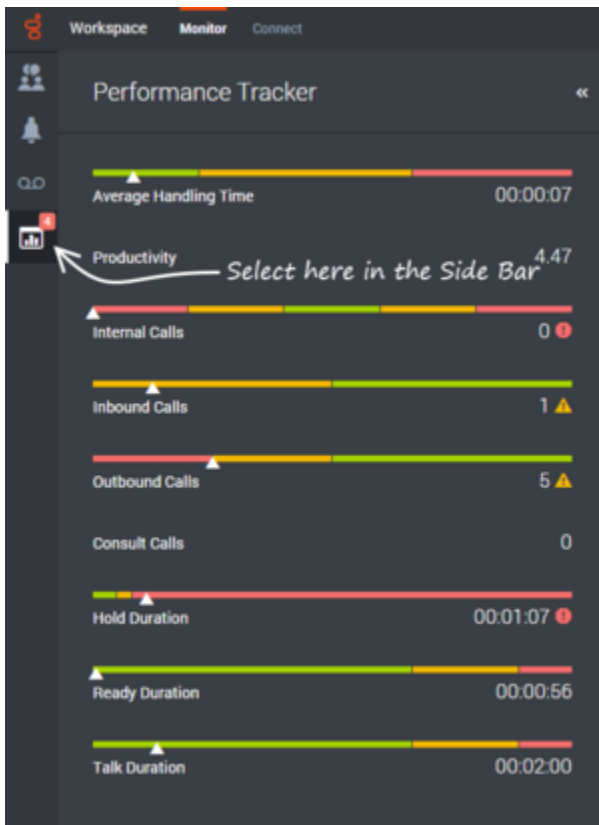
Contact Center Resource	Average Waiting Time	Current in Queue	Current Max Call Waiting Time	Service Level	Total Abandoned Agent Groups	Total Answered	Current Ready Agents
9001_SwitchSP	00:00:00 ❌	0 ❌	00:00:00 ❌	⚠️	-	-	-
Accounts	00:00:00 ❌	0 ❌	00:00:00 ❌	-	-	-	0 ❌
Agent Group SP One	00:00:00 ❌	0 ❌	00:00:00 ❌	-	-	-	0 ❌
Queue Group Example	00:00:00 ❌	0 ❌	00:00:00 ❌	⚠️	-	-	-
Virtual Agent Group Exa...	00:00:00 ❌	0 ❌	00:00:00 ❌	-	-	-	0 ❌

Performance Tracker

This view displays the list of your Key Performance Indicators (KPIs).

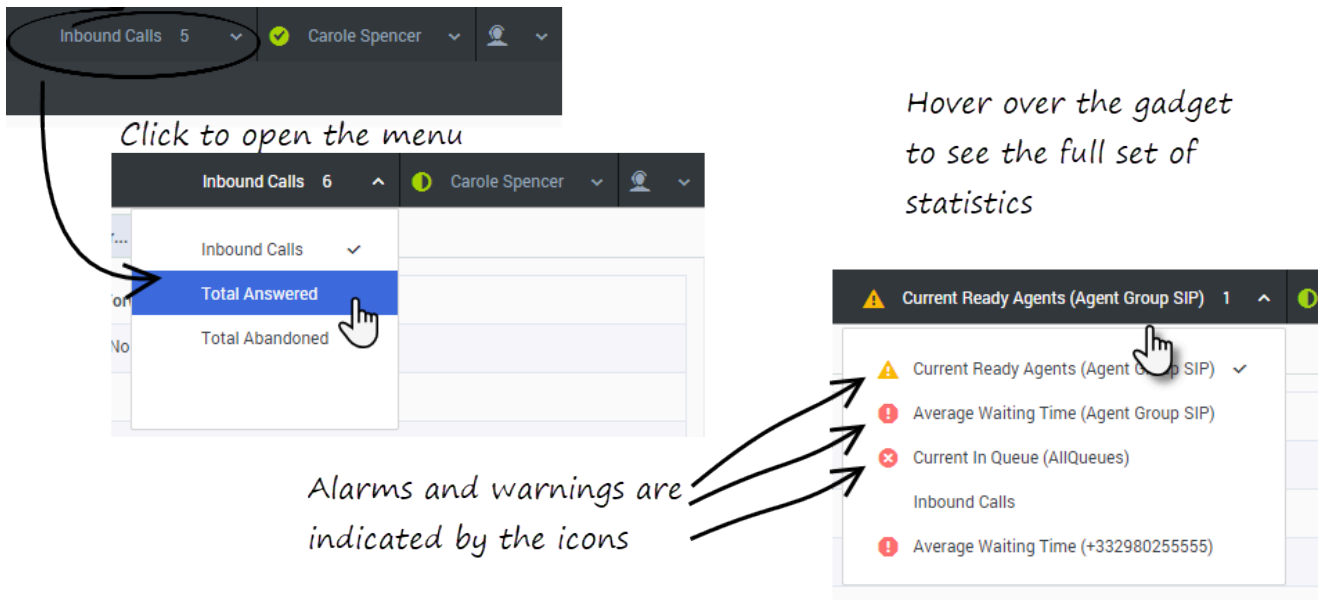
The KPIs that are displayed are set up by your system administrator.

Your KPIs are shown as tri-colored bars with a white triangle indicating your standing. The name of the KPI appears just below the bar. If you are not meeting your KPIs, the white arrow points to yellow and red. When you are meeting your KPIs, the white arrow points to green. Each statistic also displays the statistic value under the colored bar to indicate what your current value is for the statistic. If you have any warnings, they are displayed next to your statistic value.



Statistics Gadget

The Statistics Gadget helps you to stay up to date on certain key statistics. Your administrator decides which statistics are available for you to view.



The Statistics Gadget displays one statistic at a time, giving you the current status of service level, number of calls waiting, number of calls you have handled, and so on.

Hover your mouse pointer over the Statistics Gadget to check the current values for all of the statistics that have been assigned to the gadget by your administrator.

If more than one statistic has been assigned to the gadget, click it to open a list of currently available statistics and select a different one to display. A check mark is displayed next to the current statistic.

Here are the icons that you might encounter in the Statistics Gadget:

- A worst icon (❌) is displayed if the evaluation of the performance is below the expected worst level for the agent statistic (KPI) or contact center statistic.
- An error icon (❗) is displayed if the evaluation of the performance is below the expected error level for the agent statistic (KPI) or contact center statistic.
- A warning icon (⚠️) is displayed if the evaluation of your performance for the agent statistic (KPI) or contact center statistic goes beyond the expected warning level for the statistic.

Tracking Your Time

In most cases, the time you spend handling an interaction is tracked from the moment you click **Accept** to the moment you click **Done**. However, if you are an agent enabled to handle multiple channels of interactions, your administrator can choose to track your time based on the total time spent handling all the interactions that are related to a single Case. You could be talking to a contact on the phone, send them a Chat message, and then compose and send a follow-up email. All these interactions together comprise a single Case.

If you are handling multiple interactions that are not part of the same Case, your administrator might choose to track your time by how many seconds elapsed between you accepting the interaction and you marking it as Done. That means if you have several chat interactions with different contacts all going on at the same time, your time on each interaction might not be accurately tracked. You

administrator might choose to track your time based on how long each interaction was the active interaction. When you are actively working on one interaction, the other interactions are in the background. Active interactions are said to be *in focus*. Only one interaction can be in focus at a time. Your administrator might track your time based on the total time each interaction had focus.

If you are unsure how your time is being tracked, ask your supervisor or administrator.

Using Workspace Agent Desktop in more than one browser window

You can open the same Workspace Agent Desktop session in multiple browser tabs or windows. Workspace keeps track of all the open tabs and windows to ensure that they all display the same content. However, all sounds, such as ringtones, new message bells, and state change tones, are played only from one of the open tabs or windows. A small speaker icon displays on the tab where the sound is played. If you enter numbers on the dial pad, the dialing tones (DTMF) play in the active tab.

To ensure that browser and system notifications display when you are using multiple browser tabs or windows, you must enable notifications for both the browser you are using and your computer's operating system. Some operating systems have a Do Not Disturb mode — ensure that you disable Do Not Disturb.

Browser and system notifications inform you of certain events, such as incoming calls, Smart Failover (system disconnections and recovery), and inactivity timeout. Click the notice when it is displayed to open the active Workspace Agent Desktop browser tab or window to answer a call, connect to a back up environment, or log back in.

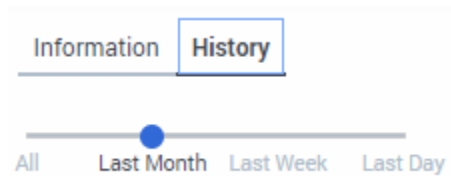
Important

- Old browsers such as Microsoft Internet Explorer 11 and Microsoft Edge HTML (Edge Legacy) do not enable you to work in multiple tabs or windows.
- To avoid performance issues, particularly when Workspace Agent Desktop is embedded in other applications, Genesys recommends opening Agent Desktop in no more than 5 browser tabs.

Multiple tabs in environments using WebRTC

If your organization uses WebRTC to handle calls (ask your supervisor if you are not sure), only one of the open browser tabs/windows is automatically selected to handle calls. If you try to close the tab that is handling WebRTC calls the browser displays a message warning you that closing the tab will cause information to be lost. If you click **Leave** with a currently active call, the call is dropped. Click **Cancel** to keep the tab open and complete the call before closing the tab.

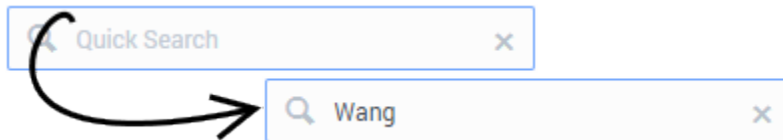
Chronology slider



The chronology slider lets you search the contact history for interactions that took place within a certain time period. The slider has four positions:

- **All**—Search the entire database from the most recent interaction back to the earliest interaction
- **Last Month**—Search the database from the most recent interaction back to one month ago
- **Last Week**—Search the database from the most recent interaction back to one week ago
- **Last Day**—Search the database from the most recent interaction back to one day ago

Quick Search







In the Quick Search field, you can enter the name or other information, such as a phone number or email address, of a contact, then click the magnifying-glass icon to begin the search of the contact database.

Page controls



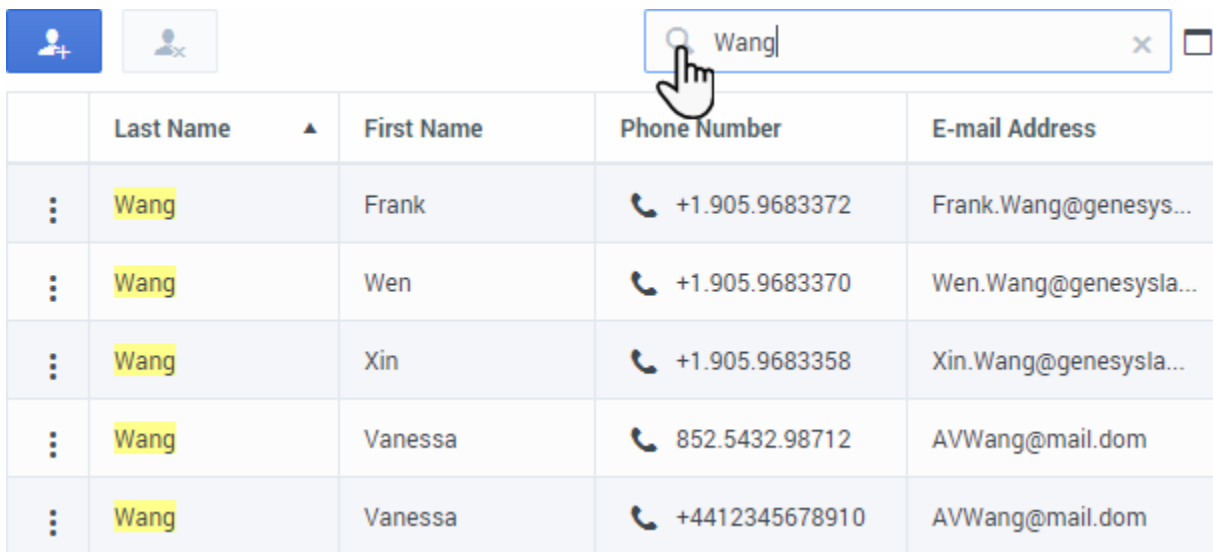
Page through the list of search results by clicking the following buttons:

-  = Go to the Next Page
-  = Go to the Previous Page
-  = Go to First Page

 = Go to Last Page

Specify the number of items that are displayed on each page by using the **per page** drop-down list.

Grid views




	Last Name ▲	First Name	Phone Number	E-mail Address
⋮	Wang	Frank	+1.905.9683372	Frank.Wang@genesys...
⋮	Wang	Wen	+1.905.9683370	Wen.Wang@genesysla...
⋮	Wang	Xin	+1.905.9683358	Xin.Wang@genesysla...
⋮	Wang	Vanessa	852.5432.98712	AVWang@mail.dom
⋮	Wang	Vanessa	+4412345678910	AVWang@mail.dom



In the Grid view, search results are returned in tabular form and sorted according to the default search field, such as Last Name. The Grid view can be used to help to refine your search by sorting the results.

Click a column head in the Grid view to sort the list based on that criterion. Click a column head a second time to switch between ascending and descending sort order.

Show/Hide panel details

The **Show Details Panel/Hide Details Panel** combined button () enables you to specify how the **Details** panel is displayed. The details panel can be shown or hidden, and, when shown, can be displayed to the right of the window.

Click the **Show Details Panel/Hide Details Panel** button to choose one of the following views:

- Display the **Details** panel to the right of the workspace area: 
- Hide the Details panel: 





Team Communicator


[Link to video](#)

Team Communicator lets you find someone in your company's internal directory (such as a team member, a routing point, or an agent group), and sometimes someone outside your company, such as an external resource person or even a customer contact. It's useful for getting help or consulting with someone while working with an interaction.

To start a call, click the Team Communicator button in the **Side Bar**, then click in the Team Communicator search field and start typing a name or number. Team Communicator displays search results that match what you enter.

You can filter the search results by using these buttons:

- Click **Search all** () to search all contacts.
- Click **Show and search my favorites** () to search your favorites.
- Click **Show and search recent** () to search recent contacts.
- Click **Show types** () to group (or ungroup) your results by category or type.

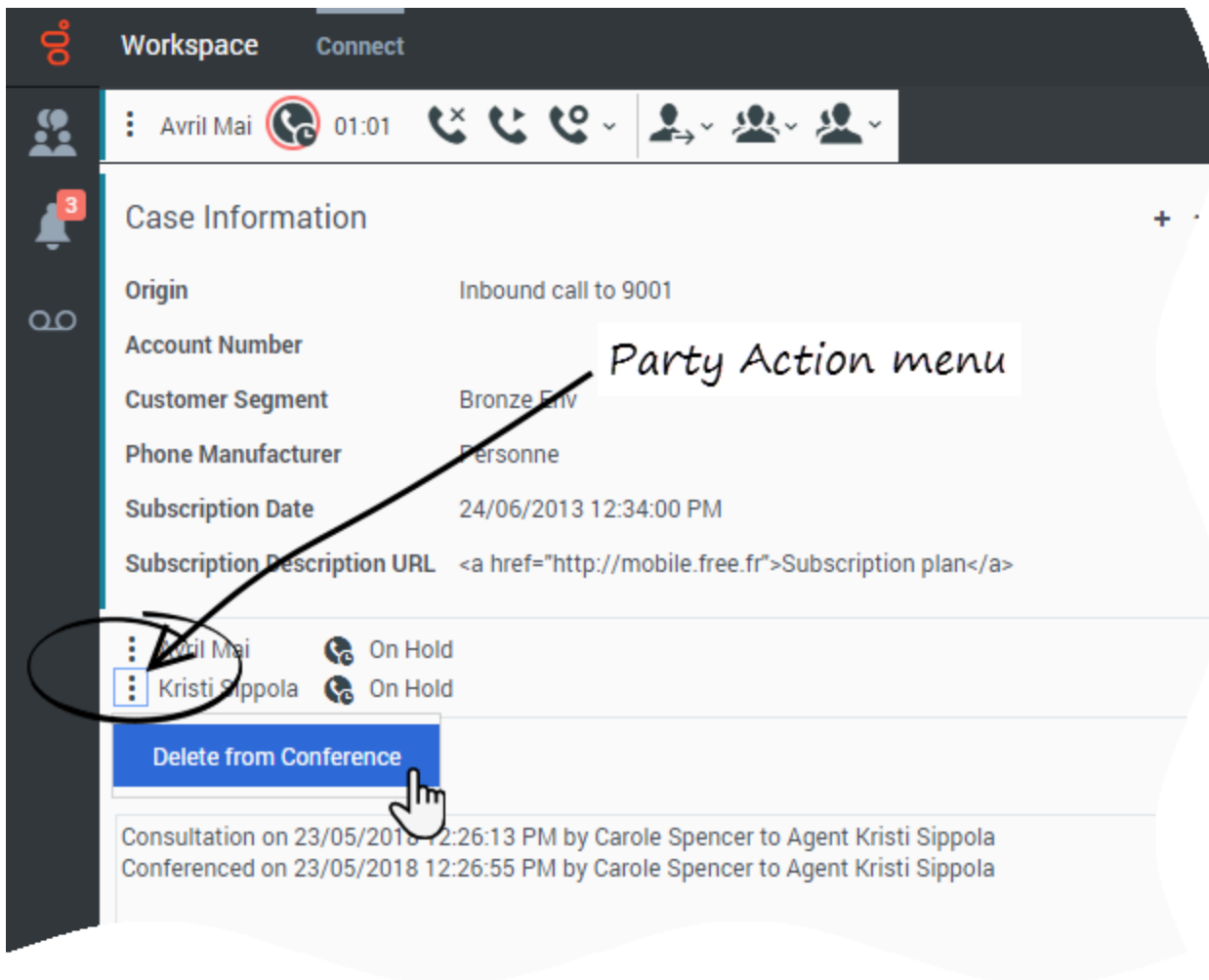
If you miss a call, a red indicator is added to the clock button, like this: , to tell you how many calls you missed. Click it to display the following information about any missed calls: date, time, and known contact details.

Tip: When you close the Team Communicator, or if you switch the filter to All contacts or Favorite contacts, the red indicator on the **Recent** button disappears if you have viewed your recent and missed calls, or if you have called back all of your missed calls.

When you are on a call and your call becomes disconnected, use the Team Communicator to call back your contact by filtering on **Recent** contacts.

Watch the video for a short demonstration of how to use Team Communicator.

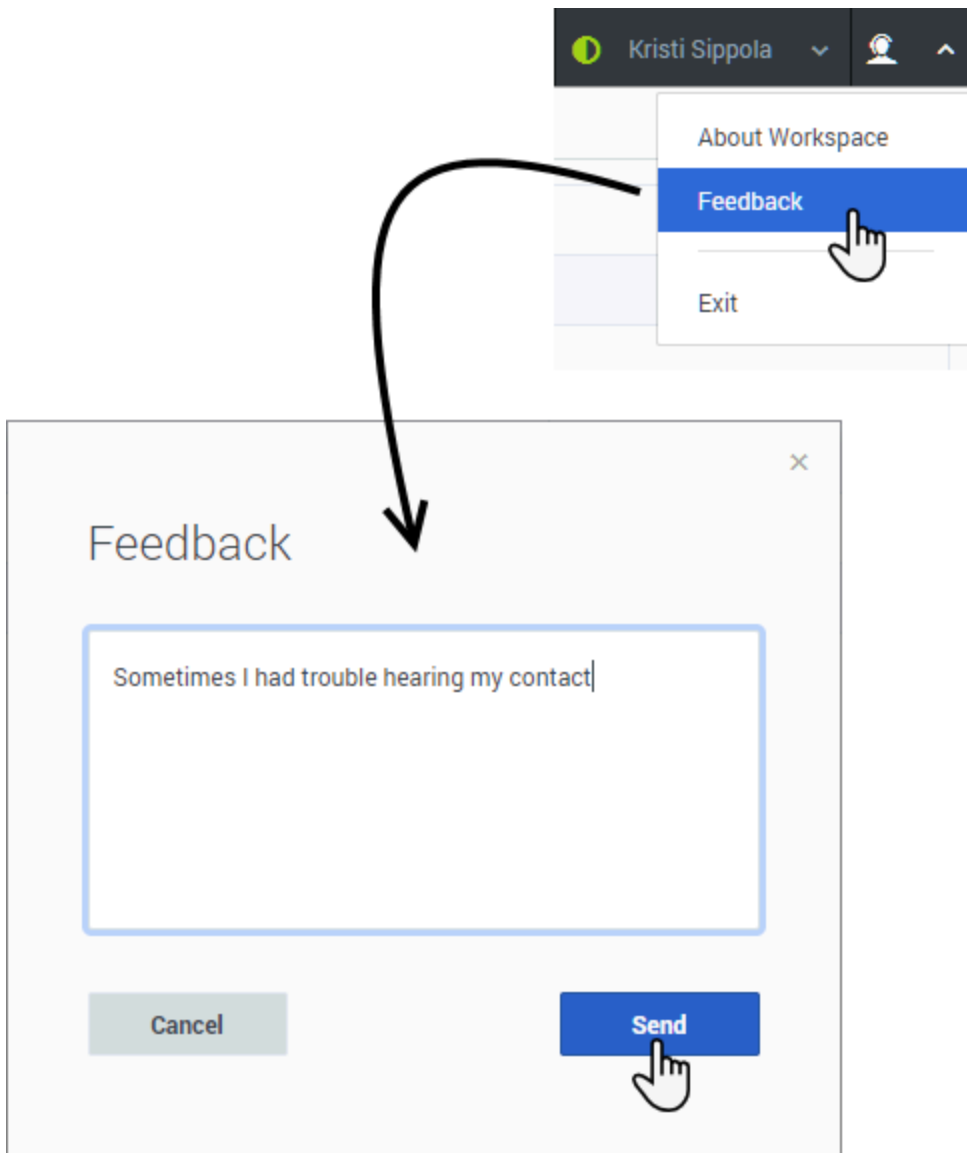
Party Actions menu



The **Party Actions** menu is a part of every interaction. You can use it during an interaction to launch a secondary interaction or carry out other actions.

For example, the **Party Actions** menu can be used to launch an email interaction while you are talking to a contact. You can also use the **Party Actions** menu to call back the contact if you become disconnected.

How to provide feedback when something goes wrong



Sometimes web-based applications don't work as expected. There might be network connection issues, or the system that sends you phone calls, emails, and chats might be slow or behaving in odd ways. Sometimes the sound quality of a phone call is bad. Sometimes an error message is displayed on your desktop.

These and other issues are problems that you should report to your supervisor. Open the **Main** menu and select **Feedback** to open the **Feedback** window. Describe the problem or suggestion by typing in the text box, then click **Send** to submit your feedback. Your administrator might limit the number of characters that you can send as feedback; if you exceed this limit a warning message is displayed to you. Edit your comment before sending it to ensure that it does not exceed the character limit. This information, along with logs about what you were doing in your most recent Workspace Agent Desktop session, are sent to Genesys and are available to Customer Care for later reference.

If for some reason Workspace Agent Desktop becomes disconnected from your network you can reconnect by one of the following methods:

-
- Refresh your browser. If the **Unable to connect** dialog box is displayed, click **Login**.
 - Close your browser, launch a new one, and log in again.

Workspace automatically opens the **Connection Lost** window when you reconnect. Click **Continue** to open the **Feedback** window so you can write a report about the disconnection problem immediately.

After you complete a feedback report, please tell your supervisor about it. He or she might want to call Genesys Customer Care about the problem and will be able to refer to the feedback you just submitted.

Accessibility

Agent Desktop lets you navigate the interface entirely by keyboard. This means that you don't have to use a mouse to activate different features or select buttons.

It also means that you can use a screen-reader application to perform all the functions you need.

Whenever an event happens in Agent Desktop, like you get a new interaction or an error message is displayed, Agent Desktop makes a sound to alert you.

Agent Desktop lets you use keyboard shortcut combinations for some common actions. Ask your administrator for a list of the shortcuts that are set up for Agent Desktop.

All the different ways that you can use the keyboard and a screen-reader to move around are described in the following sections:

- Shortcut key combinations
- Keyboard navigation
- Basic navigation using the TAB key
- Navigation shortcuts
- Tables

Shortcut key combinations

A shortcut is a combination of keys that you press to make something happen in an Agent Desktop window.

OS shortcuts

The computer operating system also has shortcut keys to let you copy, cut, paste, undo, delete, find, maximize window, minimize window, open menu and select command, switch application, cancel, change focus, and so on. Consult your operating-system documentation for a list of supported keyboard shortcuts.

Agent Desktop shortcut keys

Agent Desktop supports three shortcut key combinations that you can use to make you more productive. These are the default shortcuts (your administrator might have set up different shortcuts for you):

- **Alt+N** — Jump to the next interaction if you have multiple interactions open
- **Alt+B** — Jump to the previous interaction if you have multiple interactions open
- **Alt+L** — Jump to the last error message that you received

Keyboard navigation

Agent Desktop supports keyboard navigation for all features, functions, options, and menus.

If you do not use a mouse or if you are using a device for accessibility that needs keyboard navigation, you can still use all the Agent Desktop features. Many *expert users* prefer to use keyboard navigation to maximize productivity.

Colors and appearance change as you select different items on the Agent Desktop. For example, buttons change color and menus open with the current selection highlighted by color.

Team Communicator navigation

The Team Communicator is a complex widget in Agent Desktop that can be tricky to navigate. Its purpose is to enable you to find a contact or an internal target, such as a skill, a routing point, or a specific agent. It comprises three parts:

1. The **Search** field where you input a name or number.
2. A set of buttons that enables you to specify the search type, to filter search results, or to group search results.
3. The **Suggestion list** that displays the final search results. When you navigate inside the **Suggestion list**, additional navigation is necessary to navigate between the items in the search results list.

You can navigate between these parts by using TAB key navigation.

Team Communicator Suggestion list navigation

Once you use the TAB key to put the focus there, here is how to navigate the **Suggestion list**:

- To navigate between suggested items, use the **Up/Down** arrow keys.
- To navigate between grouped items when the Group option is selected, use the **Up/Down** arrow keys. Use the the **Up/Down** arrow keys to navigate between groups. Expand or collapse groups by navigating to the group name, then use **Return**.
- When the focus is on a suggestion list item, you can do the following:
 - use the TAB key to focus on interactive elements such as **Call**, **Email**, or **Add to favorites**. Press **Return** to select an interactive element. If you do not select an interactive element, press TAB

again to move outside the **Suggestion list**. To return the focus to the last focused element inside the **Suggestion list**, use Shift + TAB.

- use the **Up/Down** arrow keys to move between items in the **Suggestion list**.

Warning

When the focus is on a suggestion list item, if you type an alpha-numeric key, the focus is automatically moved to the **Search** field to enable you to modify the current search criterion. You cannot use alpha-numeric keys to navigate inside the suggestion list.

If you are using a screen reader while navigating the **Suggestion list**, the item type and name, and sometimes additional information, are announced.

Basic navigation using the TAB key

The simplest way to navigate by keyboard is to use the **TAB** and **SHIFT+TAB** keys.

- **Tab**—Moves your focus to the next menu, field, button, view, and so on.
- **Shift + Tab**—Moves your focus to the previous menu, field, button, view, and so on.

Movement occurs from left to right and from top to bottom, unless the ordering of components dictates otherwise. Navigation moves from component to component within a view, and from view to view within the application.

Navigation Shortcuts

This table shows you the keyboard shortcuts that let you control Agent Desktop without using a mouse.

Agent Desktop keyboard shortcuts

Shortcut	Description
Left Arrow	<ul style="list-style-type: none">• Move left in a menu bar or out of a submenu.• Move to the next tab on the left.• Move left in the history slider.
Right Arrow	<ul style="list-style-type: none">• Move right in a menu bar or out of a submenu.• Move to the next tab on the right.

Shortcut	Description
	<ul style="list-style-type: none"> Move right in the history slider.
Up Arrow	Move up in lists and menus.
Down Arrow	Move down in lists and menus.
Alt+Down Arrow	Open a selected drop-down list.
Home and End keys	For lists and other interfaces with rows, Home moves the focus to the start of the list and End moves the focus to the last item in the list.
Enter	<p>For a modifiable list, apply the edit mode, or validate the modification.</p> <p>For a button, execute the associated action.</p> <p>For a menu item, execute the associated action.</p>
Space	For some controls, select or clear the check box that has the focus.
Escape	For a modifiable list, cancel the edit mode.

Navigating tables

For Screen Reader users who are navigating tables in various views, such as **My History**, using keyboard control, Workspace Agent Desktop alerts you when a table contains elements that you can select. There are several table types that you might use. For example:

- Tables that enable you to select a row and access details about the selected row.
- Tables that enable you to select a row and perform an action on the selection.
- Tables with checkboxes, such as **My Workbins**, enable you to select multiple rows and perform the same action on each selected item.

Tables that enable you to select a row or rows are announced by screen readers as "Selectable table".

Tables enabling a single row to be selected

For tables that support the selection of a single row, navigate to the row using the tab and arrow keys, then press Enter or the Spacebar key to select the row. Each cell of the row is announced by screen readers as "selected".

If the table enables you to access details about the selected row and the **Show details** button is active, access the details by using the Tab key. Use Shift+tab to return to the selected row.

If the table enables you to perform an action on the selected row, such as opening, printing, or completing (marking Done) an interaction, use Shift+tab to navigate to the action buttons then press Enter or the Spacebar key to perform the action.

Tables enabling one or more row to be selected

For tables that support the selection of one or more rows, navigate to each row using the tab and arrow keys.

To access details or perform functions on a single row, refer to the subsection above.

To activate the checkboxes, navigate to the check box using the Tab and Shift-tab keys, then press Enter or the Spacebar key to check or uncheck the row. Use the Tab and Shift-tab keys to navigate to the action buttons then press Enter or the Spacebar key to perform the action.

What next?

- Calls
- Watch "How to" videos
- Internal interactions
- Contact and interaction history

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history