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Agent Workspace Agent's Guide

Workitems

5/8/2024

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Workitems, called Open Media by Genesys Digital channels, are documents that might be directed to you for handling. They include many media types, such as faxes or PDFs, that you might have to access while you are handling interactions of another type, such as email.

The Workitem interaction window enables you to access all of the information necessary to handle a workitem.

Related documentation:

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How do I handle a workitem?

[Link to video](#)

A workitem interaction is the Agent Workspace interface that lets you handle a workitem document.

To start receiving workitem interactions, set your status on the Workitem channel to **Ready**.

Important

In your environment, the Workitem channel might have a custom name that reflects the kinds of documents you handle, such as Fax or PDF.

Tip

In some environments, agent status is set to **Ready** when the agent logs in. This means that workitem interactions are directed to these agents upon login.

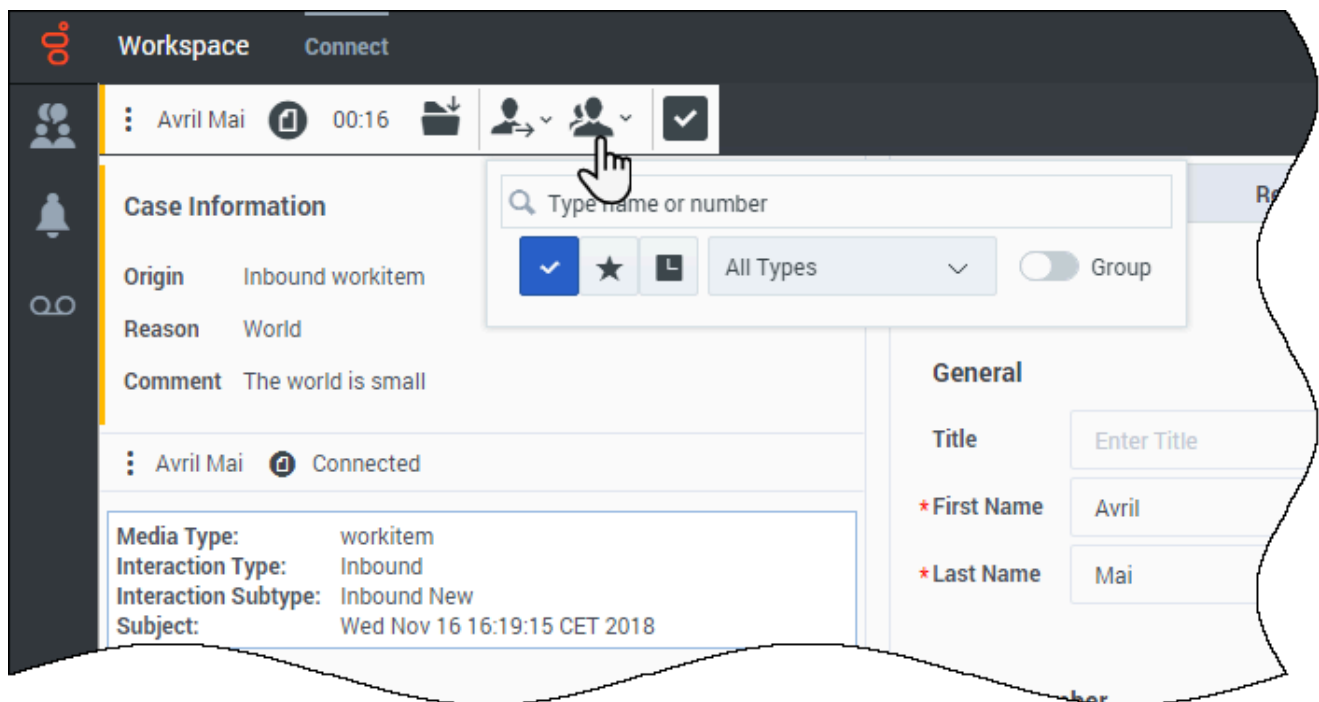
When you receive a workitem it is either answered automatically, or a pop-up notification is displayed on your desktop to enable you to accept the workitem. When you accept a workitem, the Workitem interaction view opens on your Agent Workspace. It includes all the controls, information about the email (Case Information), and **Disposition** and **Note** tabs where you can add information about the document. There might also be tabs on the right side of the view that contain contact information, history, and other features.

The typical actions you can take with a workitem are:

- Click **Transfer** (👤➡️) to transfer the workitem to another agent.
- Review the associated case data.
- Add a Note.
- Add a Disposition code.
- Mark it as done.
- Move it to your in-progress workbin to work on later.

Watch the video to see what happens when a workitem arrives at a workstation.

How can I get help with a workitem?




To get more information or get help with a workitem, try one of the following actions:

- Check the associated case data for information that might help you.
- Call the contact, if your organization has this feature and the contact's number is available in your contacts list.
- Click **Consult** (👤➡️) to start a consultation with a team member. If you want to perform a warm transfer or a two-step transfer, click **Consult** to talk to the consultation target and then click **Transfer** to transfer the call.

Tip

If you are transferring the workitem to someone else, you can add your own notes or instructions for that person to review.

Transferring a Workitem

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

What next?

- Contacts
- Team Communicator
- Internal interactions
- See your workitem in My History
- Open a workitem from a workbin

Top 5 topics

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