

Agent Desktop Agent's Guide

Migrating to Workspace Agent Desktop 9

10/15/2021

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A guide to some of the changes in the user interface if you are a user who is transitioning from the previous version.

Related documentation:

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Important

Some Workspace Agent Desktop features are available only for Genesys Engage cloud users.

Introducing Workspace Web Edition 9, Genesys' next generation Agent Desktop. Built on top of highly scalable cloud architecture, Workspace Agent Desktop 9 user interface has been updated with a new modern look and feel incorporating numerous usability improvements while maintaining the same features from the previous version.

[Link to video](#)

Known Limitations

When you migrate from Agent Desktop 8.5.2 to Agent Desktop 9.0.0, the following data is not carried over:

- Personal favorites
- Recent contacts
- Missed calls

If you use Genesys Screen Recording with Workspace Agent Desktop 9, you must have GSRS 8.5.360.03 or higher installed on the agent workstation.

Agent Desktop requires Genesys Softphone version 8.5.401.03 or higher.

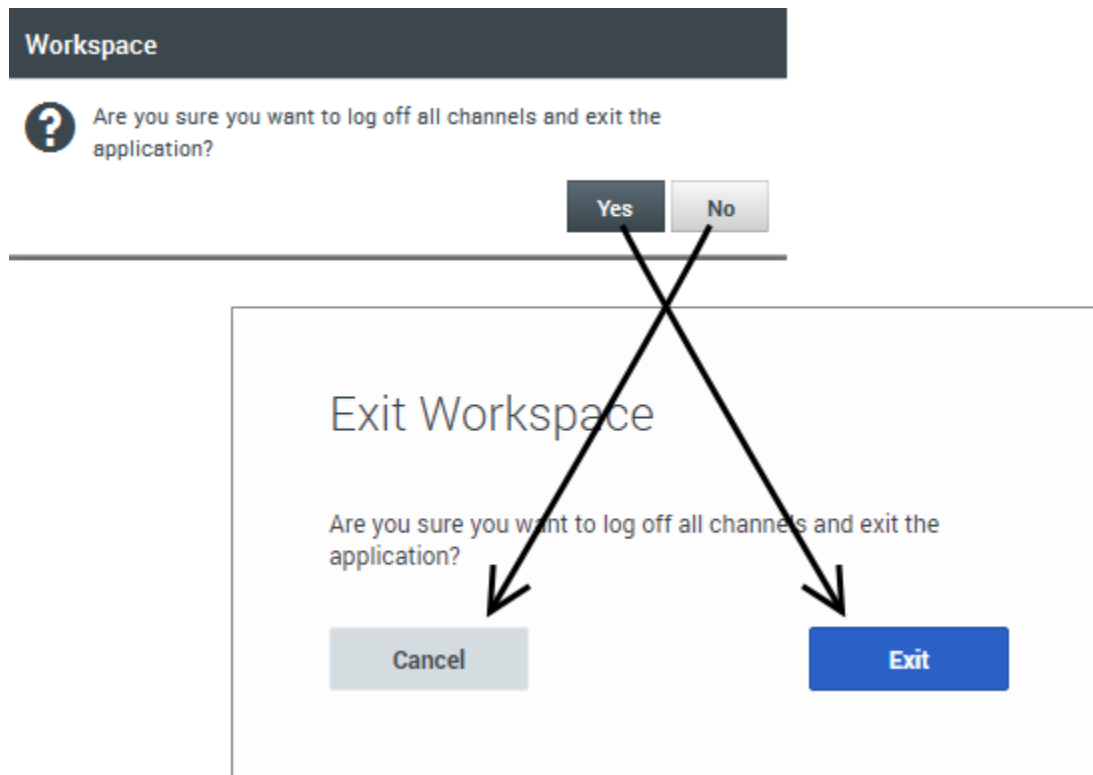
Logging in



Logging in to Workspace Agent Desktop is now a two-step process. After you open Agent Desktop, you must enter your username in the **Login** window. Do not enter your password in the **Tenant** field! If your contact center uses tenants, you will be told by your administrator what to enter here. If it does not, leave this field blank.

To enter your password, click **Next** to progress to the **Password** window. Enter your password and click **Sign in**.

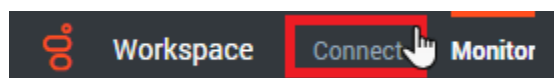
Logging out (exiting)



Logging out of Workspace Agent Desktop has not changed. You still select **Exit** from the **Agent** menu. However, there is a *GOTCHA* in the new Workspace Exit window... the button names have changed and they are in a different order!

Click **Exit** (the button on the right) instead of **Yes** to exit. Click **Cancel** (the button on the left) instead of **No** to stop existing and return to Workspace Agent Desktop.

The Navigation Bar



Workspace Agent Desktop 9.0.0 introduces the Navigation Bar so that you can have access to all the features that you use every day just by clicking a tab. You no longer have to click the hamburger menu to open different work views such as **My Channels** and **My Workbins**.

Most of the features you are looking for are in the **Connect** group. Click on it to access your work views.

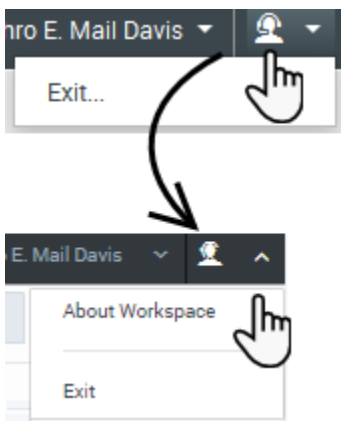
The **Monitor** group contains **Contact Center Statistics**.

The Side Bar



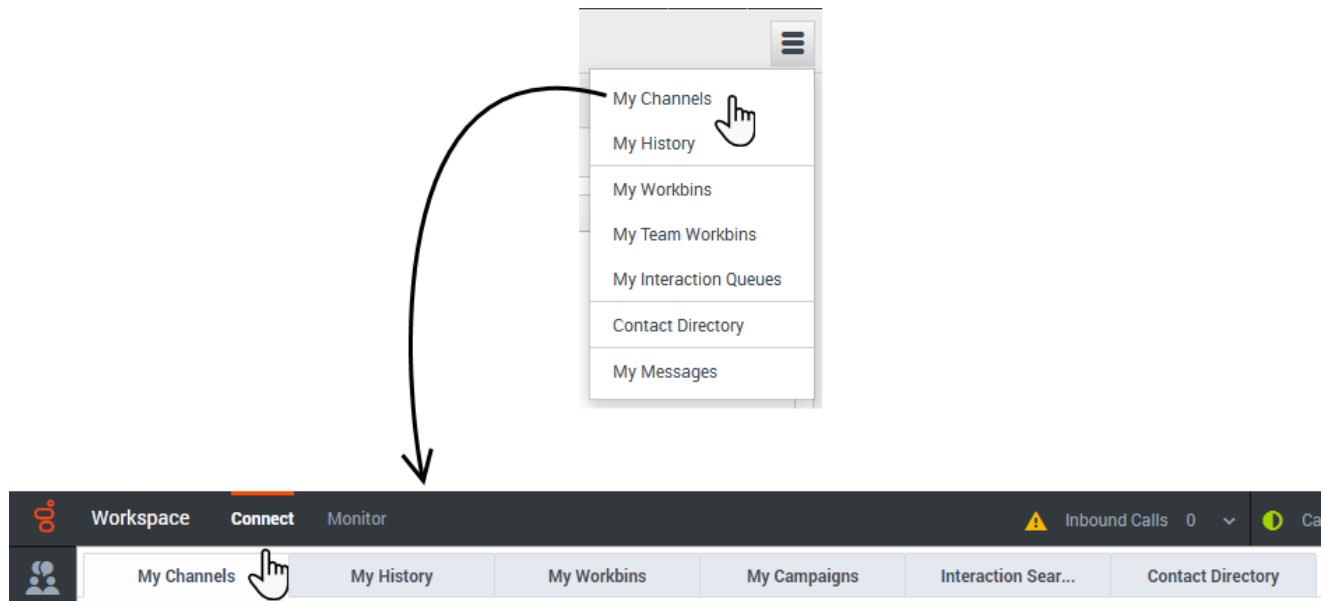
The Side Bar did not exist in Agent Desktop 8.5.2. It is a new feature for Agent Desktop 9.0.0. The Side Bar is where you will find Team Communicator, Notifications, Performance Tracker (formerly **My Statistics**), and product Help. If your account is enabled for Voicemail, it's here too.

The Agent menu



You still use the **Agent** menu to exit Workspace Agent Desktop. Click it and select **Exit**. You can now access the **About** window from this menu instead of the **Help** menu to get information about the version of Agent Desktop that you are using.

Your working views



In Agent Desktop 8.5.2 you had to open the **Main Menu** (the hamburger menu) to access the different work views. In Agent Desktop 9.0.0 all these view are now displayed as tabs in the Main view. Just select **Connect** in the Navigation Bar to access the following tabs:

- My Channels
- My Campaigns
- My History
- My Workbins (including My Team Workbins and My Interaction Queues)
- Interaction Search
- Contact Directory

Tip

Some of these views might not be available to you. It depends on how your administrator has set up your account.

My Messages is now accessed by using the Side Bar.

Contact Center Statistics

My Workspace

My Channels	My History	Contact Center Statistics	Dashboard
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Contact Center Resource	Total Answered	Total Abandoned	Internal Calls	Outbound Calls	Outbound
Agent Group Blended	-	-	-	-	-
Agent Group Everybody	-	-	-	-	-
Routing Blended	-	-	-	-	-

Workspace Connect Monitor

Total Answered ...

Dashboard

Contact Center Re...	Total Answered	Total Abandoned	Internal Calls
666_Blended	0	0	0
ACD_Queue_Group_B...	-	-	
Agent Group Blended	0	0	0
Agent Group Everybo...	0	0	0
Routing_Blended	0	0	0
RP&2_MISC	0	0	0
VirtualQueue@Blended	-	-	

In Agent Desktop 8.5.2, you accessed Contact Center Statistics in a dedicated tab in the **My Workspace** view. In Agent Desktop 9.0.0, Contact Center Statistics are found in the **Dashboard** tab of the **Monitor** group in the Navigation Bar. The statistics, alerts, warnings and so on are all the same as in Agent Desktop 8.5.2.

No more My Statistics or My Reports dashboard

My Workspace

My Channels | My History | Contact Center Statistics | **Dashboard**

chat | email

My Reports

Chat Activity

0 Total

0 Inbound

0 Transferred

0 Rejected

0 Missed

Talk Time

Workspace | **Monitor** | Connect

Performance Tracker

Average Handling Time 00:00:07

Productivity 4.47 *Select here in the Side Bar*

Internal Calls 0

Inbound Calls 1

Outbound Calls 5

Consult Calls 0

Hold Duration 00:01:07

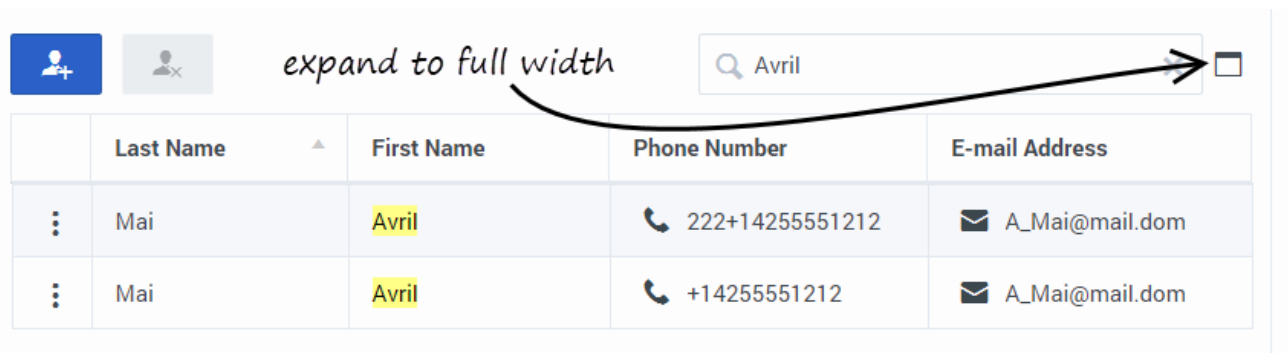
Ready Duration 00:00:56

Talk Duration 00:02:00

The **My Statistics** tab and the **Dashboard** tab that you used to view your KPIs have been replaced by an all new tool in the Side Bar called the Performance Tracker!

The Performance Tracker gives you up to date statistics on how well you are performing against the goals of your contact center.

Contact Directory



The screenshot shows the Contact Directory interface. At the top, there are two buttons: a blue one with a person icon and a grey one with a person icon and an 'x'. To the right is a search bar containing the text 'Avril' and a magnifying glass icon. A handwritten note 'expand to full width' with an arrow points from the search bar to a square icon on the right. Below the search bar is a table with the following columns: Last Name, First Name, Phone Number, and E-mail Address. The table contains two rows of data.

	Last Name	First Name	Phone Number	E-mail Address
⋮	Mai	Avril	📞 222+14255551212	✉️ A_Mai@mail.dom
⋮	Mai	Avril	📞 +14255551212	✉️ A_Mai@mail.dom

The **Contact Directory** view has been simplified. The **List View** is no longer available, only the **Grid View**.

The **Details** panel, containing the **Information** and **History** tabs, can either be displayed to the right of the **Contact Search** area or hidden when the **Contact Search** area is expanded to the full width of the Agent Desktop.

Accessing the application Help

This application Help document is now available to you in two ways, integrated into Workspace Agent Desktop or over the web.

Many contact centers do not want agents browsing help over the web, so now when you click ? at the bottom of the Side Bar, this Help document slides out in a little panel. Click the links to go to any topic you need, or enter keywords in the **Search** field to look for specific content.

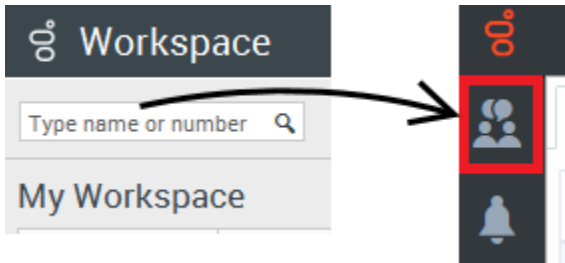
If you are allowed to access this Help document from the web, your administrator can provide you with the URL.

In Workspace Agent Desktop 8.5.2, when you selected **Help** from the ? menu, you were directed to the Help document in another browser window or tab.

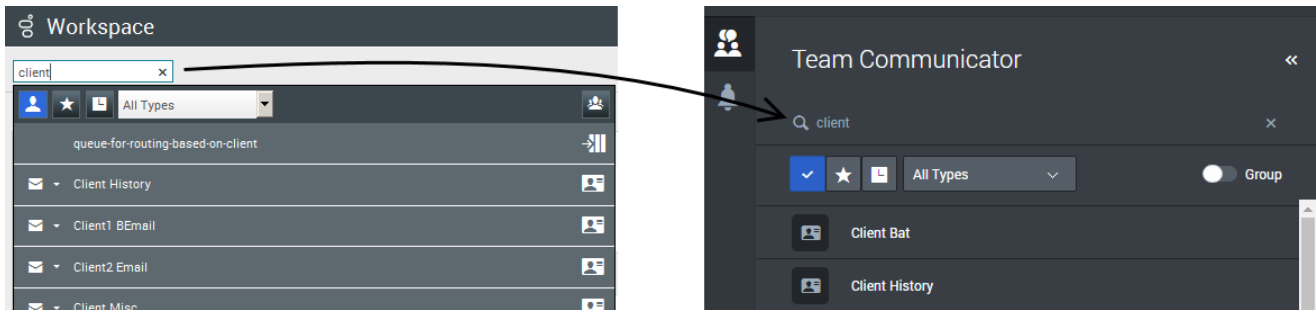
Team Communicator

Workspace Agent Desktop brings lots of little changes to the Team Communicator, but it still works the same as before.

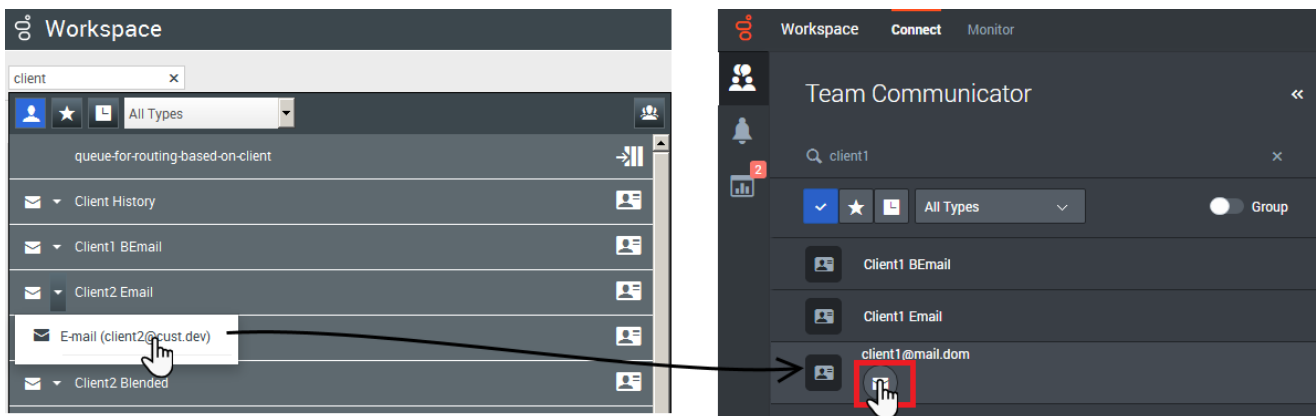
You can find the Team Communicator in the Side Bar; just click the icon to activate it. In Agent Desktop 8.5.2, it was right below the Main Menu bar.



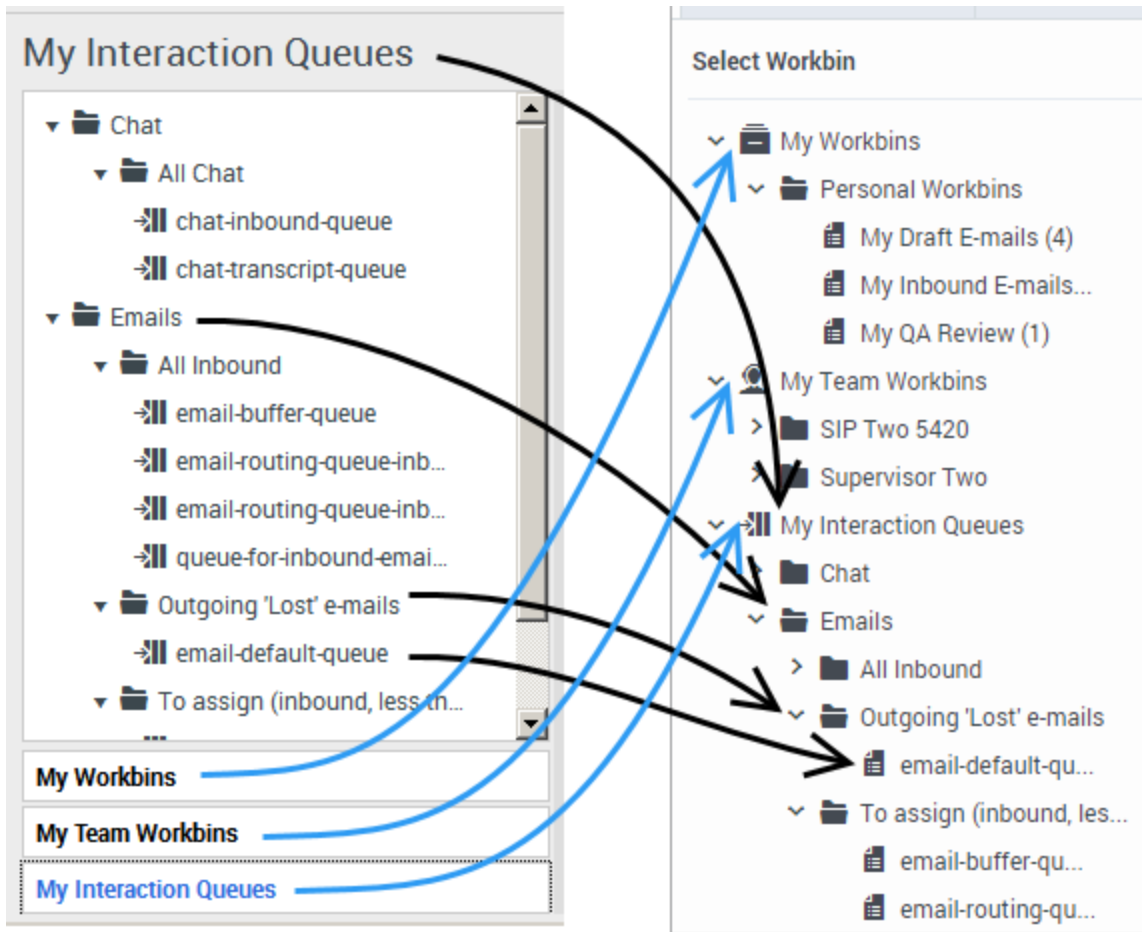
In Workspace Agent Desktop 9.0.0, you enter names, addresses, phone numbers, and so on in the search field, use the same filtering buttons (contact, favorite, recent, type, and group) to narrow your search. The search results are displayed below the search field.



In Workspace Agent Desktop 9.0.0, the **Action** menu is replaced by action buttons. Instead of selecting email or call from the **Action** menu, click the appropriate action button. To make the **Action** buttons appear, just hover your mouse pointer over the contact or internal target that you want to call, email, or select as a favorite.




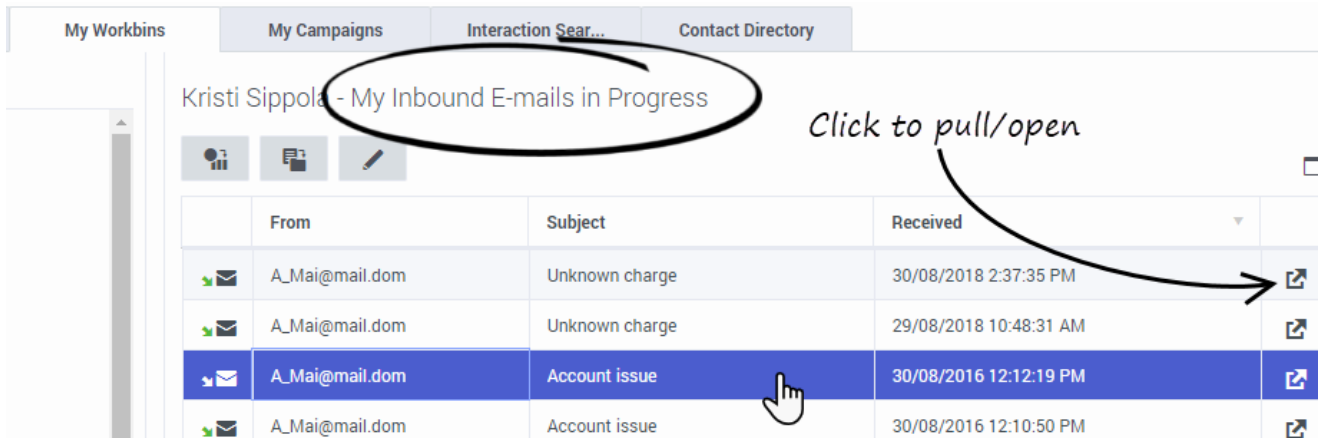
Workbins



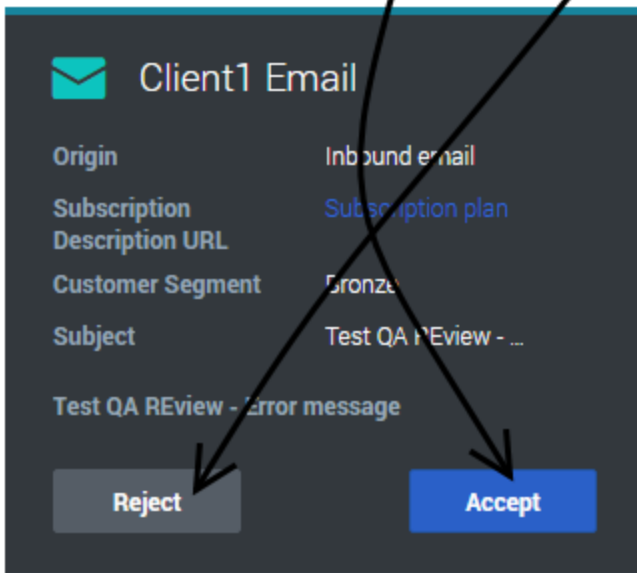
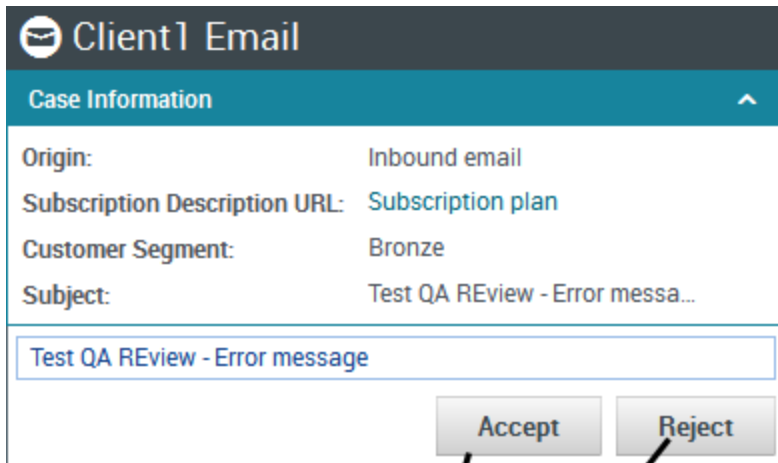
Workbins in Workspace Agent Desktop 9.0.0 work the same way that they did in 8.5.2. You can find your workbins in the **Connect** group in the Navigation Bar. You no longer use the hamburger menu to open the **My Workbins**, **My Team Workbin**, or **My Interaction Queue** lists. The **My Workbins** tab contains all Workbin and Interaction Queue views, depending on how your account is set up.

The appearance of the icons in the 9.0.0 workbins are almost the same. The only real difference is that now interaction queue icons look like folders and documents instead of like folders and queues.

To open an item from a workbin, click the **Open** icon () which is displayed on the right side of the interactions in a workbin.



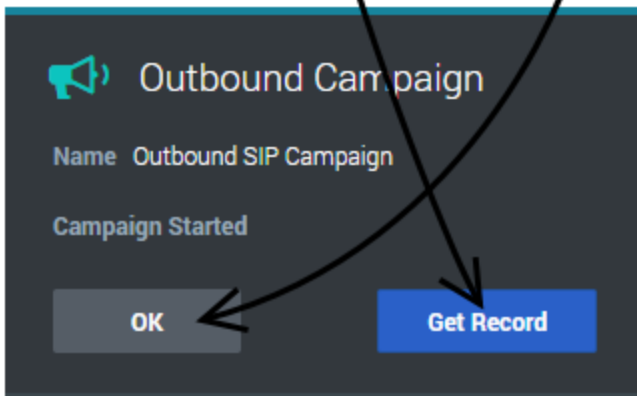
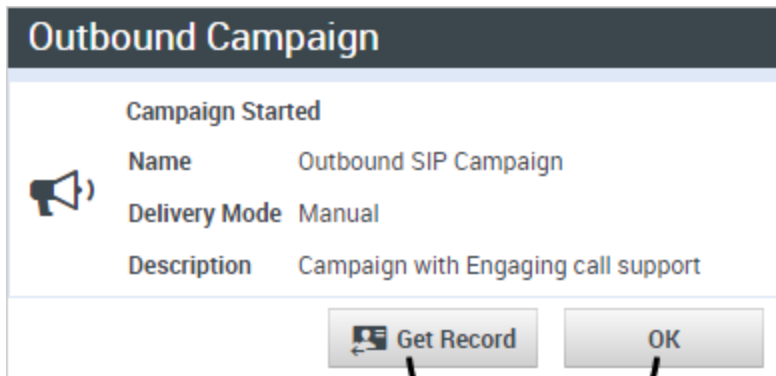
Interaction Notification (pop-up toast)



The Interaction Notification that pop-up when an interaction is directed to you looks much more bold and easier to see! It contains all the same information as before. The Interaction Notification is colored for different business purposes. Ask your supervisor what the different colors mean.

If your account is set up to enable you to accept or reject an interaction, the order of the **Accept** and **Reject** buttons is reversed! Be careful that you click the correct button!

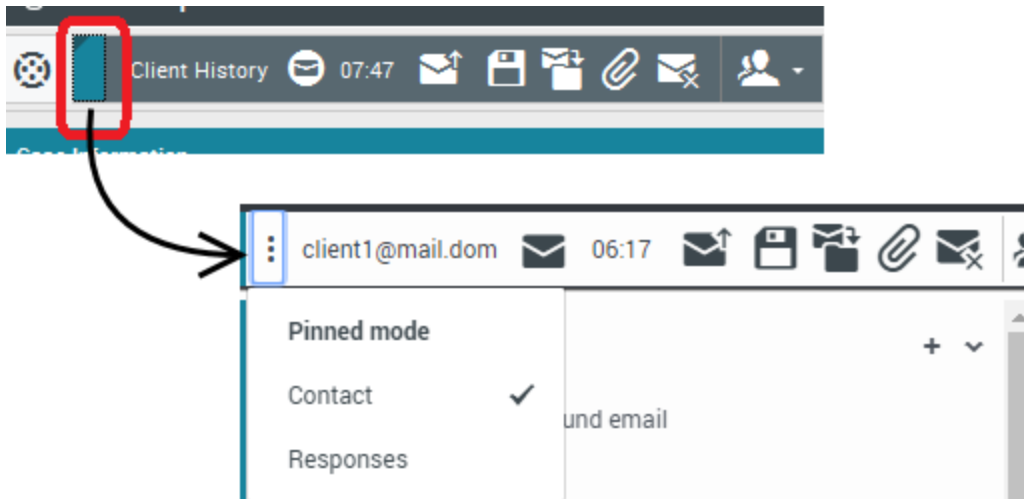
Outbound Campaigns



Outbound campaigns work the same as in Agent Desktop 8.5.2, but there are a couple of small changes. In the **Outbound Campaign** notification (pop-up), the **Get Record** and **OK** buttons are reversed! Be careful that you click the correct button!

In the **Outbound Campaign** tab, the **Get Record** button has changed appearance and location. Use this button to get a new record: [🔗](#)

Pinned mode and Floating mode



Workspace Agent Desktop 9.0.0 supports Pinned mode and Floating mode for interactions, just like 8.5.2.

To switch between the two modes in 9.0.0, click the three dots to the far left of the Interaction toolbar. In 8.5.2, you would have clicked the colored rectangle to the far left of the Interaction bar.

In Workspace Agent Desktop 9.0.0, the Pinned/Floating menu not only lets you toggle between these two modes, but when you are in Floating mode, you have some additional choices from this button:

- Pinned mode (to switch to Pinned mode)
- Contact (to switch to the **Contact** tab in Pinned mode)
- Responses (to switch to the **Responses** tab in Pinned mode)

Interaction views

CONTACT

Information | History

General ▾

Title (None) ▾

First Name* Enter First Name

Last Name* Enter Last Name

Phone Number ▾

Enter Phone Number (None) ▾

Add Phone Number ▾

E-mail Address ▾

client1@mail.dom (None) ▾ ×

Add E-mail Address ▾

RESPONSES

Contact | **Responses**

Information | History

General

Title (None) ▾

* First Name Enter First Name

* Last Name Enter Last Name

Phone Number + Add

Primary Enter Phone Number ×

Email Address

Primary client1@mail

The Interaction view has not changed very much between Agent Desktop 8.5.2 and Agent Desktop 9.0.0. Some of the buttons on the call Interaction bar are in different places, but their functionality is the same.

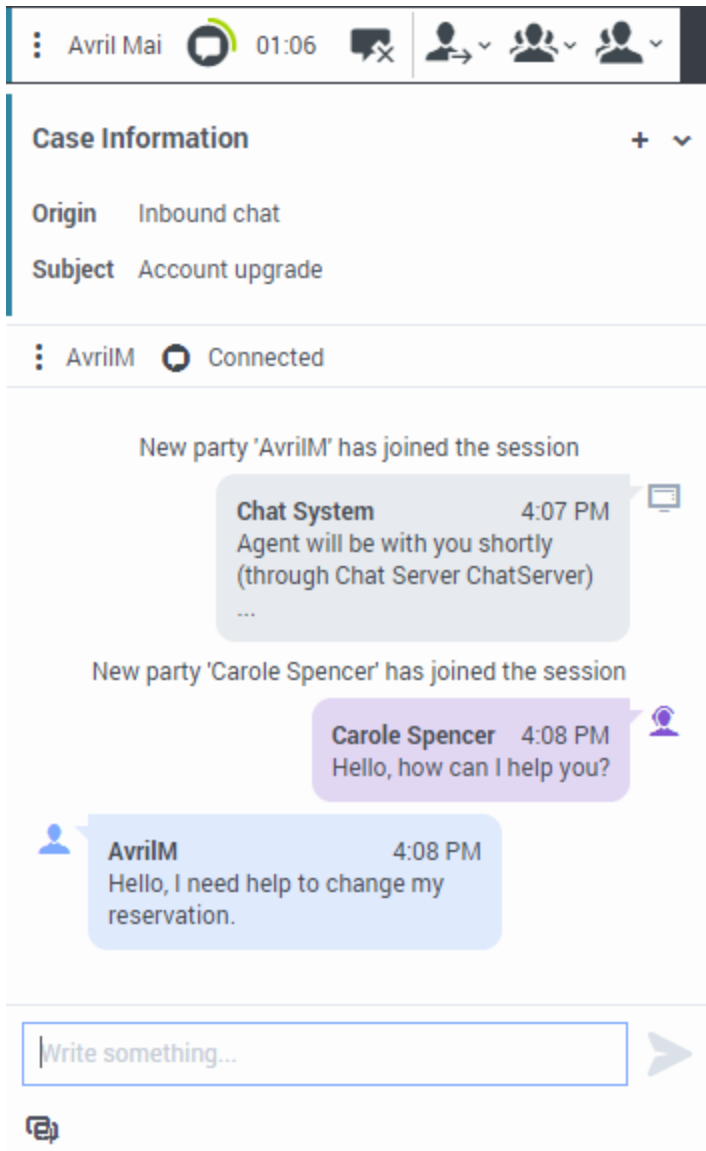
The biggest change to the Interaction view is that the vertical **Contact** and **Responses** buttons are gone. They have been replaced by a **Contact** tab and a **Responses** tab on the right side of the interaction view.

The **Contact** tab contains the **Information** and **History** tabs.

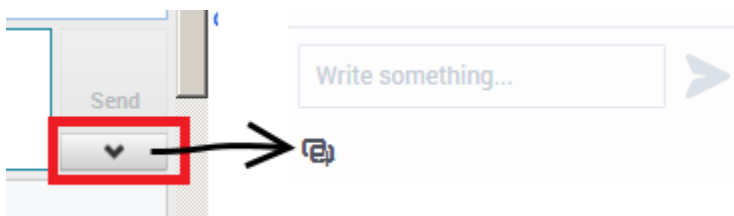
The **Responses** tab contains the standard response folders.

Changes to the Chat interaction view

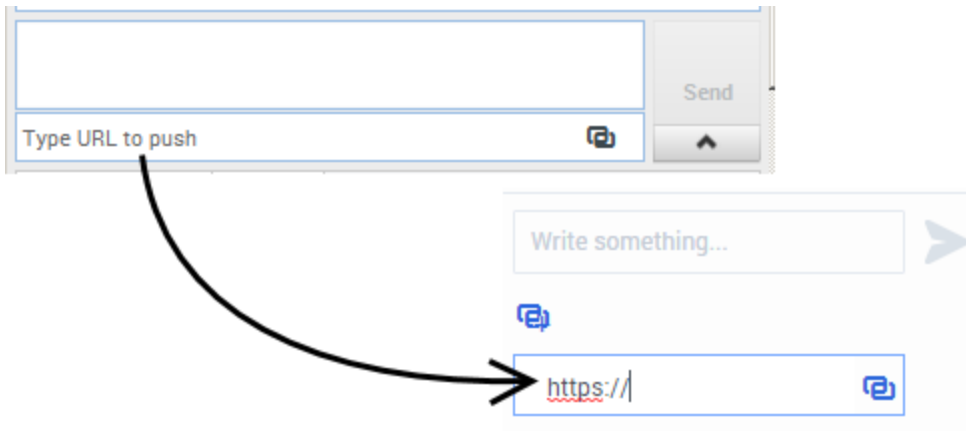
The Chat interaction view works the same in Workspace Agent Desktop 9.0.0. The Chat transcript is designed to make chat interactions easier to read and follow. It is now much clearer which messages belong to whom.



The look and feel of the Push URL functionality has changed.



In Agent Desktop 8.5.2, to open the **Push URL** area you had to click the down arrow beneath the **Send** button. In Agent Desktop 9.0.0, click the **Push URL** icon instead; click it again to close the area.



New buttons for Transfer, Conference, and Consult

In the Interaction toolbar, the **Transfer**, **Conference**, and **Consult** buttons have all been grouped together and the same button is now used for every interaction type. In Agent Desktop 8.5.2, each interaction type had a different **Transfer** button. xx|alt=xx|

Function	Agent Desktop 8.5.2	Agent Desktop 9.0.0
Transfer		
Consult		
Conference		

Improvements to Email QA review



If you are a reviewer of email interactions, you will notice that the interaction type icon has been changed. In Agent Desktop 8.5.2, the icon for an email for review was the same as a regular email icon. This could cause some confusion about what type of interaction you were handling.

In Agent Desktop 9.0.0, this icon had been changed to a supervisor eye with a small email icon underneath it.

Important

The **Delete Email** button is no longer available for email review interactions.