

Genesys Cloud - Admin - Create a group workspace

Workspaces (Groups) in Genesys Cloud

Workspaces in Genesys Cloud are created using **Groups**.

A workspace provides a **shared collaboration environment** where members can communicate, share files, and coordinate work inside the platform.

Purpose of Workspaces

| Purpose | Description | Example |
|--------------------------|--|-----------------------|
| Team Collaboration | Provides a shared communication space for a team | Support Team |
| Operational Coordination | Allows teams to coordinate incidents or daily operations | NOC Operations |
| Project Communication | Dedicated space for project teams | Migration Project |
| Knowledge Sharing | Members share files, links, and information | Engineering Workspace |

Workspace Components

| Component | Description |
|-------------|---------------------------------------|
| Name | Identifies the workspace |
| Description | Explains the purpose of the workspace |

| Component | Description |
|------------|--|
| Members | Users who belong to the workspace |
| Owners | Users who manage the workspace |
| Visibility | Determines if the workspace is public or private |
| Tags | Labels used to organize and search workspaces |

Example Workspace Configuration

| Field | Example |
|----------------|---|
| Workspace Name | Platform-NOC |
| Description | Network Operations coordination workspace |
| Visibility | Private |
| Owners | NOC Manager |
| Members | Network Engineers |
| Tags | noc, infrastructure |

How to Create a Workspace

1. Go to **Admin**
2. Navigate to **Directory** → **Groups**
3. Click **Create Group**
4. Enter **Name** and **Description**
5. Set **Visibility**
6. Assign **Owners**
7. Add **Members**
8. Click **Save**

Example Workspace Structure

| Workspace | Purpose |
|---------------|-------------------------------|
| Support-Tier1 | Customer support coordination |

| Workspace | Purpose |
|-------------------|-------------------------------------|
| Dialer-Operations | Outbound dialing operations |
| Network-NOC | Infrastructure monitoring |
| Engineering-Voice | Telephony engineering collaboration |

Best Practices

| Practice | Reason |
|------------------------------|----------------------------------|
| Use clear workspace names | Helps users identify the purpose |
| Limit workspace owners | Prevents configuration conflicts |
| Assign relevant members only | Keeps communication focused |
| Use tags for organization | Improves search and filtering |

Key Notes

| Statement | Explanation |
|--------------------------------------|--|
| Workspaces are implemented as Groups | Genesys Cloud uses groups as collaboration spaces |
| Membership controls access | Users must be members to participate in private workspaces |
| Owners manage the workspace | Owners can modify configuration and membership |
| Workspaces support collaboration | Enables messaging and shared information across teams |

How to Implement

| Step | Procedure |
|------|---|
| 1 | Log in to Genesys Cloud with administrator privileges |
| 2 | Navigate to Admin |
| 3 | Select Directory |
| 4 | Click Groups |

| Step | Procedure |
|------|----------------------------------|
| 5 | Select Create Group |
| 6 | Enter group name and description |
| 7 | Configure visibility settings |
| 8 | Assign owners |
| 9 | Add members |
| 10 | Click Save |

Step by Step

Navigate to Workspaces

The screenshot displays the Genesys Cloud Admin dashboard. The top navigation bar includes links for Activity, Directory, Documents, Performance, Reports, Apps, and Admin. The main content area is titled "Genesys Cloud Admin" and features a search bar. The interface is organized into several sections:

- Account Settings:** Subscription, Genesys Add Ons, Organization Settings
- People & Permissions:** People, Roles / Permissions, Authorized Organizations, Divisions
- Directory:** Groups, Work Teams, Locations, Profile Fields, External Contacts
- Integrations:** Integrations, Actions, Single Sign-on, OAuth, Authorized Applications
- Documents:** Workspaces (highlighted with a callout box)
- Telephony:** Trunks, Sites, Edge Groups, Edges, Phone Management, Certificate Authorities, DID Numbers, Extensions
- Genesys Cloud Voice:** Number Management
- Contact Center:** Assistants, ACD Skills & Languages, Utilization, Queues, Wrap-Up Codes, Email, Canned Responses, Response Assets, Co-browse, Widgets

A callout box points to the "Workspaces" link under the "Documents" section, with the text: "Under Documents, click Workspaces."

Create workspace

The screenshot shows a web application interface for managing workspaces. At the top, there is a navigation bar with menu items: Activity, Directory, Documents, Performance, Reports, Apps, and Admin. A search bar and a bell icon are also present, along with a toggle for 'Off Queue'. Below the navigation bar, the breadcrumb 'Documents / Workspaces' is displayed. The main heading is 'Manage Workspaces'. A callout bubble points to a blue 'Create Workspace' button with the text 'Click Create Workspace.'. Below this is a search input field labeled 'Search for workspace'. A table with two columns, 'Name' and 'Description', contains one entry: 'Workspace Example'.

Documents / Workspaces

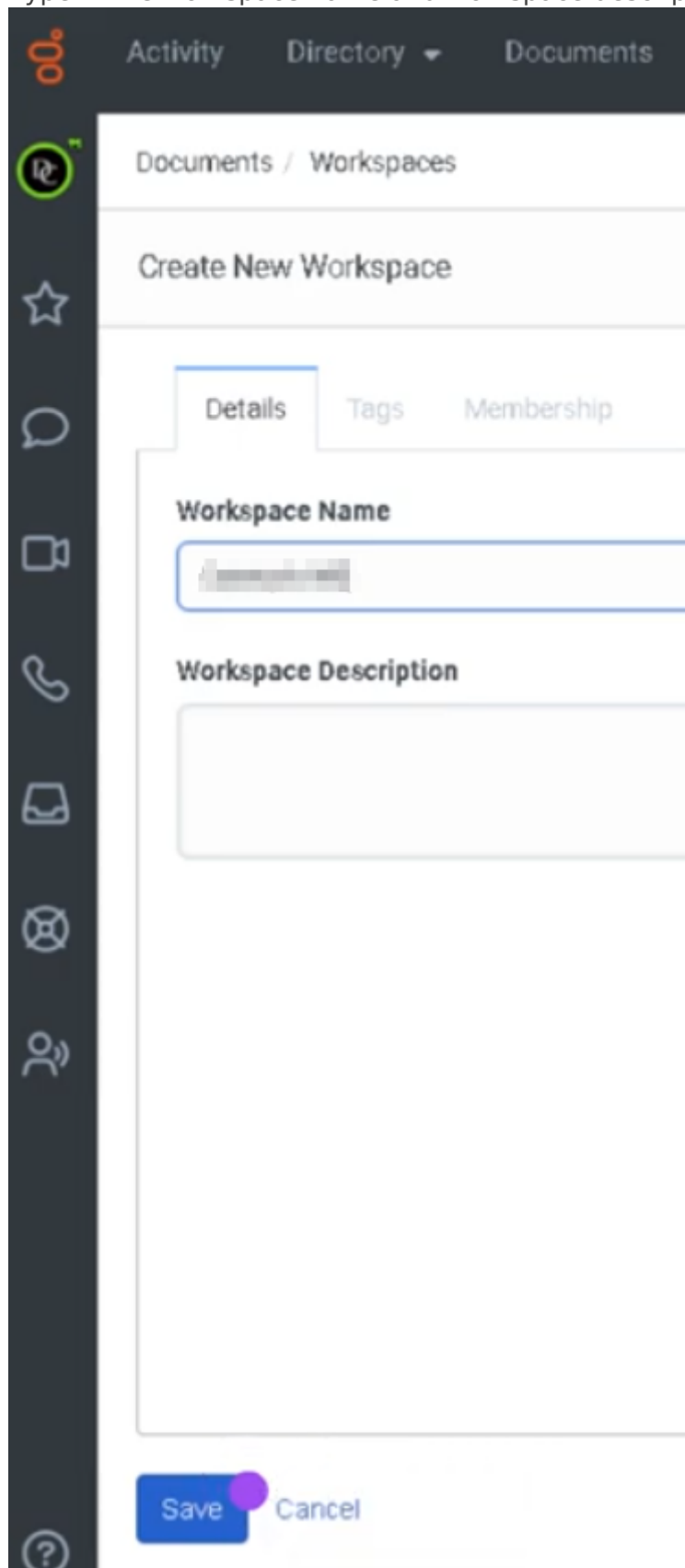
Manage Workspaces

Click Create Workspace. Create Workspace

Search for workspace

| Name | Description |
|-------------------|-------------|
| Workspace Example | |

Type in the workspace name and workspace description and save



The image shows a software interface for creating a new workspace. At the top, there is a navigation bar with 'Activity', 'Directory', and 'Documents'. Below this, the breadcrumb 'Documents / Workspaces' is visible. The main heading is 'Create New Workspace'. There are three tabs: 'Details' (selected), 'Tags', and 'Membership'. The 'Details' tab contains two input fields: 'Workspace Name' and 'Workspace Description'. The 'Workspace Name' field has a blue border and contains some blurred text. The 'Workspace Description' field is a larger, empty text area. At the bottom, there are two buttons: 'Save' (highlighted with a purple dot) and 'Cancel'. A vertical sidebar on the left contains various icons, including a question mark at the bottom.

Activity Directory Documents

Documents / Workspaces

Create New Workspace

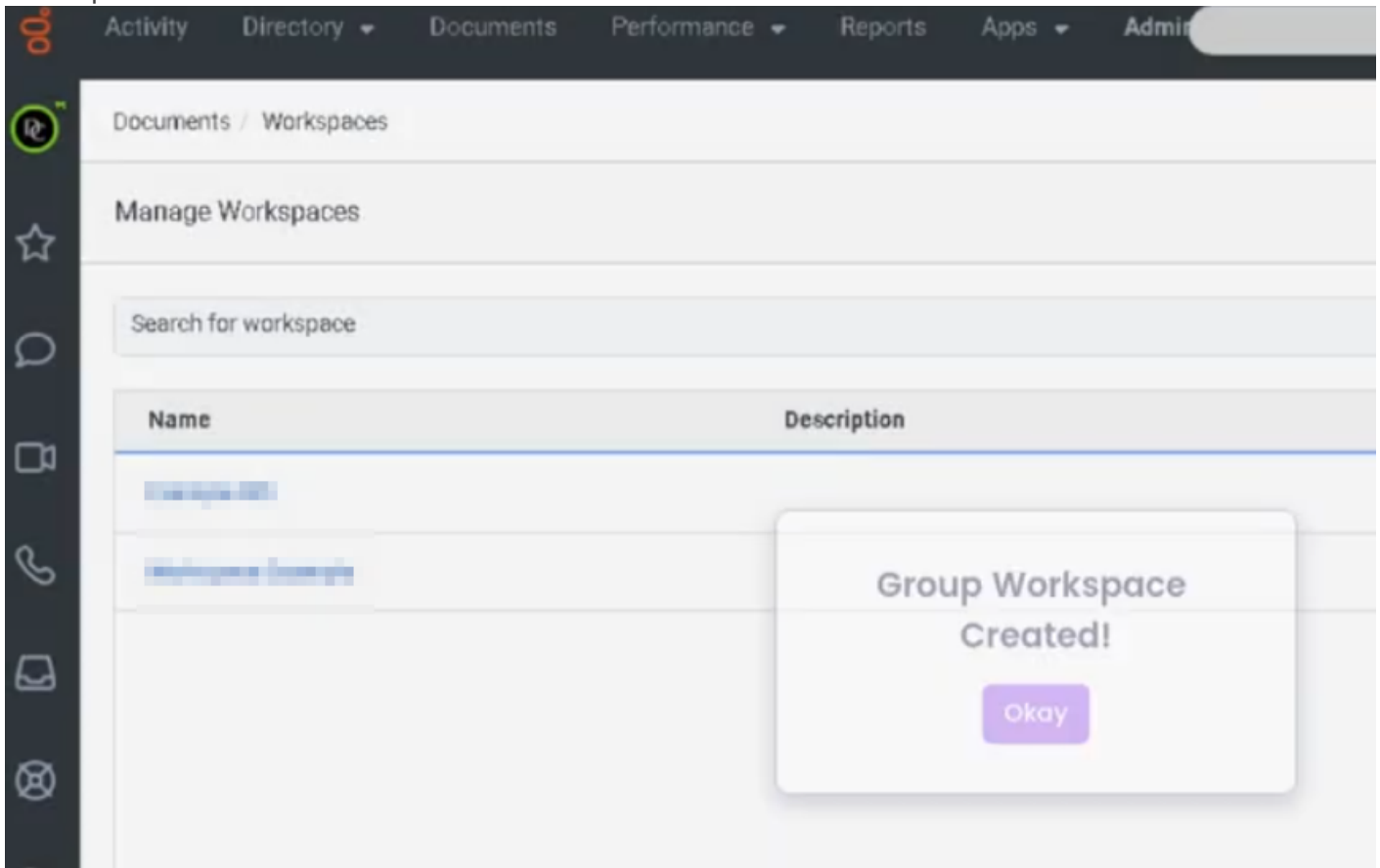
Details Tags Membership

Workspace Name

Workspace Description

Save Cancel

Workspace created



TAGS

In Genesys Cloud, tags are metadata labels applied to groups (workspaces) to make them easier to organize, search, filter, and manage across the platform. They are especially useful in environments with many teams, departments, and operational groups.

Tags do not change permissions or functionality — they primarily improve classification and discoverability.

Why Use Tags

| Purpose | Description | Example |
|--------------|--|----------------------|
| Organization | Categorize groups by function or department | support, engineering |
| Search | Quickly locate groups using filters | incident, dialer |
| Scalability | Helps manage large environments with many groups | project, migration |

| Purpose | Description | Example |
|----------------|----------------------------------|-----------------|
| Classification | Identify region or business unit | na, latam, emea |

Common Tag Categories

| Category | Example Tags | Use Case |
|------------|------------------------------|--------------------------------|
| Department | support, sales, engineering | Organize by team |
| Function | incident, escalation, dialer | Operational classification |
| Region | na, latam, emea | Geographic grouping |
| Project | migration, ai, analytics | Temporary collaboration spaces |

Example Workspace Tag Configuration

| Workspace Name | Tags |
|----------------------|---------------------|
| Support Tier 1 | support, escalation |
| Network Operations | noc, infrastructure |
| Outbound Dialer Team | dialer, outbound |
| Platform Engineering | engineering, voice |

Tag Best Practices

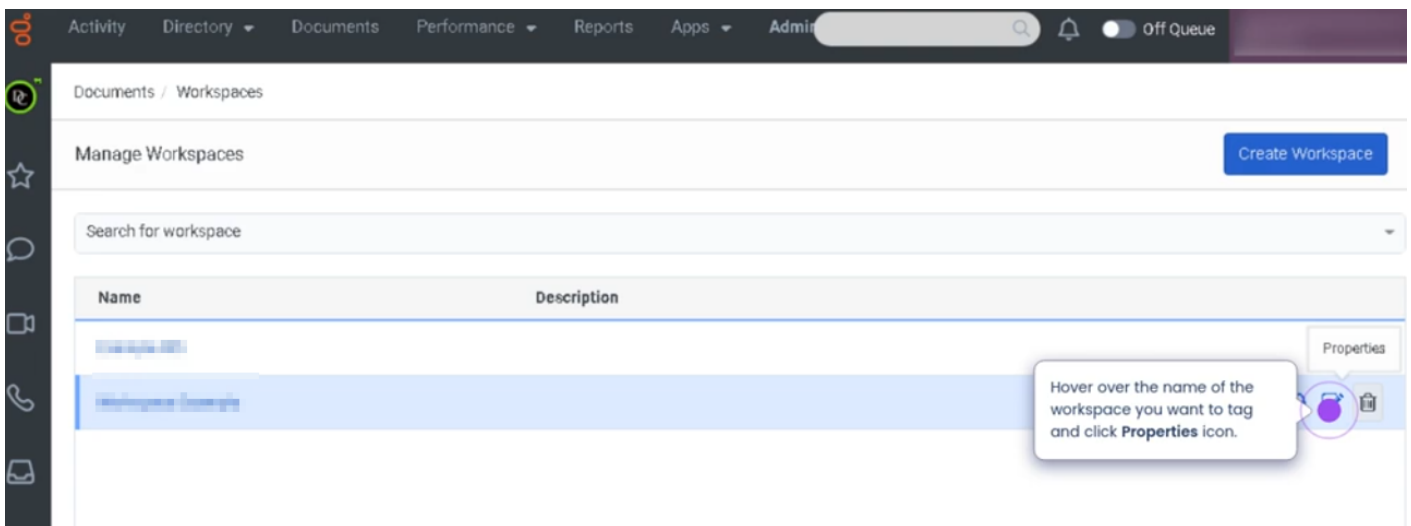
| Practice | Reason |
|--------------------|---------------------------------------|
| Use lowercase tags | Prevents duplicate variations |
| Keep tags short | Easier filtering and readability |
| Standardize naming | Ensures consistency across teams |
| Limit tag count | 3-5 tags per workspace is recommended |

Example Tag Structure for Large Environments

| Tag Type | Example |
|------------|-----------|
| Department | support |
| Function | incident |
| Region | latam |
| Project | migration |

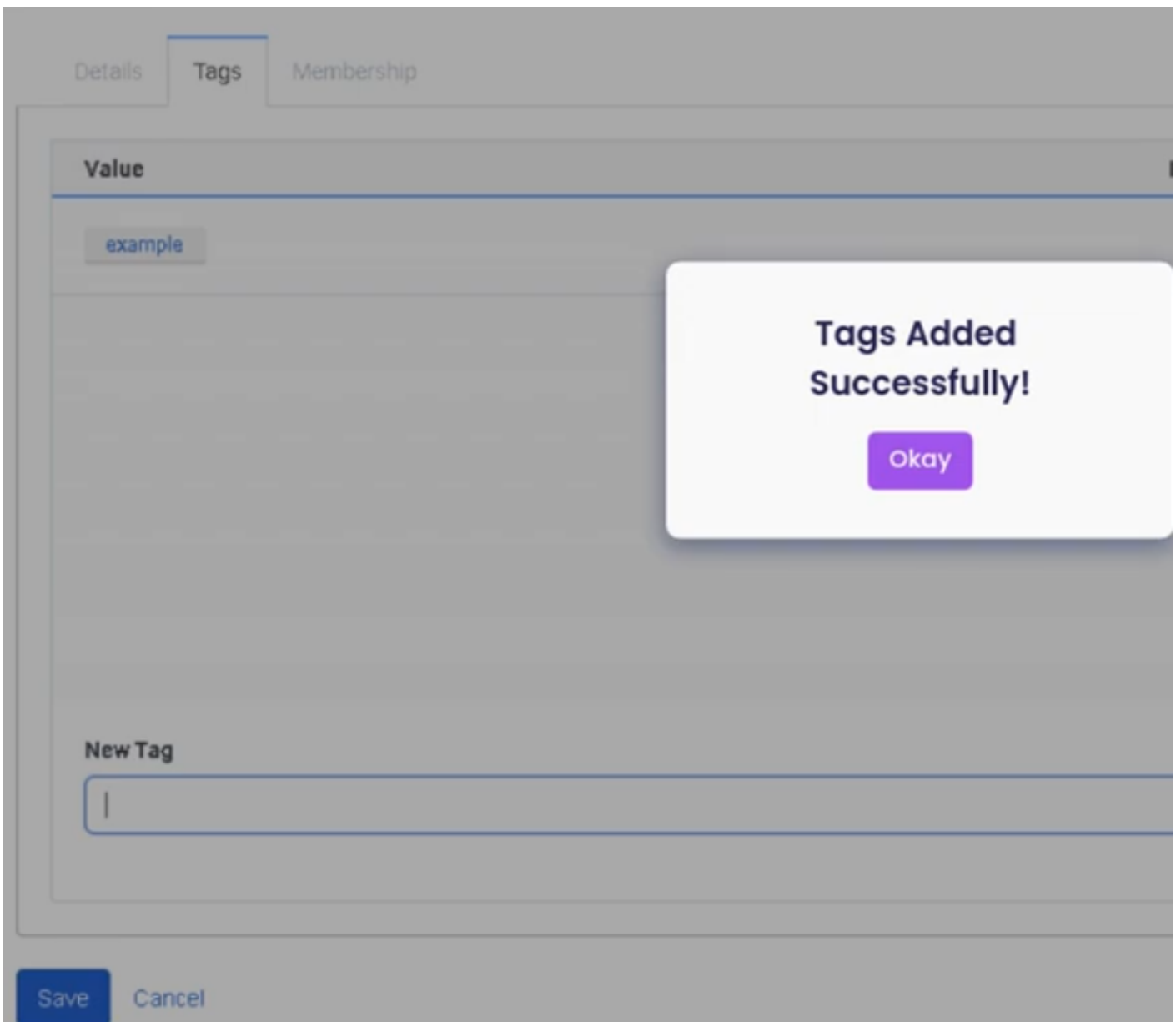
Add tags to a group workspace

Navigate to workspaces and click on properties icon for your workspace



Navigate to tags tab and add your new tag

The image shows a screenshot of a software interface. At the top, there is a dark navigation bar with the text "Activity", "Directory", "Documents", and "Per". Below this, a breadcrumb path reads "Documents / Workspaces". A section titled "Edit Workspace:" is followed by a blurred text field. Below this, there are three tabs: "Details", "Tags", and "Membership". The "Tags" tab is selected. Underneath the tabs, there is a "New Tag" section with a text input field. A purple circle highlights the input field, and a callout box points to it with the text: "In the **New Tag** box, type the keyword and click **Add**." On the left side of the interface, there is a vertical sidebar with several icons: a red infinity symbol, a green circle with a white 'R', a star, a speech bubble, a video camera, a telephone, and a document.



Why You Need to Assign Users to Workspaces (Membership)

Brief Summary

You assign **users to a workspace (group membership)** so they can **access and participate in that workspace**.

Membership controls **who can see the group, join conversations, receive notifications, and collaborate with the team**.

If a workspace is **Private**, users **must be members** to access it.

Why Membership Is Required

| Reason | Explanation |
|-------------------|---|
| Access Control | Only members can access private workspaces |
| Collaboration | Members can participate in workspace conversations |
| Notifications | Members receive activity updates from the workspace |
| Team Organization | Ensures communication stays within the appropriate team |

Access Levels

| Role | Description | Typical Use Case |
|--------------------|---|---|
| Owner | Full administrative control of the workspace. Can edit the group, manage members, and delete the group. | Team leads, supervisors, administrators |
| Contributor | Can participate in conversations, share files, and collaborate within the workspace. Cannot manage group configuration. | Regular team members |
| Viewer | Can view workspace content but cannot actively contribute or post messages. | Stakeholders, auditors, observers |

Role Permissions Overview

| Capability | Owner | Contributor | Viewer |
|------------------------------|-------|-------------|--------|
| View Workspace | ✓ | ✓ | ✓ |
| Participate in Conversations | ✓ | ✓ | ✗ |
| Share Files / Content | ✓ | ✓ | ✗ |
| Add or Remove Members | ✓ | ✗ | ✗ |
| Modify Group Settings | ✓ | ✗ | ✗ |

| Capability | Owner | Contributor | Viewer |
|------------------|-------|-------------|--------|
| Delete Workspace | ✓ | ✗ | ✗ |

Best Practice

| Recommendation | Reason |
|--|--|
| Limit Owners | Prevents accidental configuration changes |
| Use Contributor for most users | Enables collaboration without administrative control |
| Use Viewer for monitoring roles | Allows oversight without interaction |

Assign users

Navigate to Documents / Workspaces / Properties of your workspace / Membership tab / Search for user and add, select role and save

Activity Directory Documents Performance Reports

Documents / Workspaces

Edit Workspace: [Redacted]

Details Tags Membership

Search current workspace members

[Redacted Profile]

Search for individuals or Groups to Add

Save Cancel

Search current workspace members [Access Level Legend](#)

Test User

Revision #2

Created 10 March 2026 15:18:29 by Cesar Gzz

Updated 11 March 2026 21:39:46 by Cesar Gzz