GENESYS™

iWD Deployment Guide

Working with Task Attributes and Interaction Properties

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Contents

Working with Task Attributes and Interaction Properties

These topics describe the task and attribute properties that are supported in iWD 9.0.

Task Attributes

Most of the iWD task attributes can be set when a task is created or updated through a Capture Point, although some, such as interaction ID, are set by iWD components or by Interaction Server. Most of the task attributes are displayed in the **Attributes** tab when a task is selected in the Global Task List. These attributes are maintained as pieces of attached data of the interaction, as it is stored in the Interaction Server's interactions database table. Some of the attributes are stored in independent columns in that database table, while others are stored in a binary (BLOB) format in a column in the interactions table called **flexible_properties**.

There are many reasons to update or access the data stored in the iWD task attributes, including:

- Setting the value of one or more task attributes as part of an iWD message such as `CreateTask`, when working with a capture point.
- Reading or updating task attributes in business rules.
- Using the data in the **Condition**, **Order**, and **Segmentation** tabs of Views in Genesys Business Processes.

> ### Important
> You cannot use properties with a `Timestamp` data type on the **Segmentation** tab.

- Reading or updating the data contained in task attributes within a routing strategy.
- Making the data available to an agent or knowledge worker desktop application, either to display to the agent or to facilitate a screen pop.
- Filtering the display of the Global Task List.

Core Attributes

Core attributes describe the fundamentals of a task. These attributes are used in assembling tasks in the Global Task List, based on the business value and priority that are defined within iWD. Core attributes are either set automatically by iWD, or provided by the source system (through the Capture Point interface). The following are some iWD core task attributes:

- `activationDateTime`
- `assignedDateTime`
- `assignedToUser`

- businessValue
- captureId
- category
- completedDateTime
- dueDateTime

- expirationDateTime
- heldDateTime
- interactionid
- mediaType
- priority

- queue
- queueTarget
- queueType

Extended Attributes

Extended attributes provide additional context about a task, enabling you to tailor the service-level agreement (SLA) rules for managing tasks on the Global Task List. They can also aid in customizing current-day and historical reporting. For example, use of several capture dates allows an organization to measure performance against the date and time at which an order or loan application was received by the source system or was submitted by the customer via a web form. The following are some extended task attributes:

- customerId
- customerSegment
- productSubtype
- productType
- requestedAgent

- requestedSkill
- resultCode
- sourceCreatedDateTime
- sourceDueDateTime
- sourceFirstCreatedDateTim

- e
- sourceProcessSubtype
- sourceProcessType
- sourceTenant

Task Attribute Mapping

Task Attribute	Description	Column Name in Interactions Table	Type	Interaction Attached Data Key	Label in Global Task List	CP Direction
Core Attributes						
Age		• received_at • moved_to_queue_at • queue • completed_at	String	• ReceivedAt • MovedToQueueAt • Queue • CompletedAt	Age	Out
ActivationDateTime	IWD_activationDateTime	Timestamp	IWD_activationDateTime	Activation D/T	In/Out
AssignedDateTime	assigned_at	Timestamp	assigned_at	Assigned D/T	Out
AssignedToUser	assigned_to	String	RTargetAgentSelected	Assigned To	Out
BrokerId	Id	String	InteractionID	ID	Out
businessCalendarId	IWD_business CalendarId	String	IWD_business CalendarId	Business Calendar ID	Out

Task Attribute	Description	Column Name in Interactions Table	Type	Interaction Attached Data Key	Label in Global Task List	CP Direction
BusinessValue		IWD_businessValue	Integer	IWD_businessValue	Business Value	In/Out
CaptureID		external_id	String	ExternalId	Capture ID	In/Out
CapturePointID		IWD_capturePoint	String	IWD_capturePointId	Capture Point (value is shown instead of ID)	Out
Category		IWD_category	String	IWD_Category	Category	In/Out
Channel		IWD_channel	String	IWD_channel	Channel	In/Out
CompletedDateTime		completed_at	Timestamp	CompletedAt	Completed D/T	Out
CreatedDateTime		received_at	Timestamp	ReceivedAt	Created D/T	In/Out
DepartmentId		IWD_departmentId	String	IWD_departmentId	Department (name is shown instead of ID)	Out
DueDateTime		IWD_dueDateTime	Timestamp	IWD_dueDateTime	Task Due D/T	In/Out
ExpirationDateTime		IWD_expirationDateTime	Timestamp	IWD_expirationDateTime	Expiration D/T	In/Out
HeldDateTime		held_at	Timestamp	HeldAt	Held D/T	Out
InteractionID		Id	String	InteractionID	ID	Out
mediaType		media_type	String	MediaType	Media Type	In/Out
Moved to Queue D/T		moved_to_queue_at	Timestamp	MovedToQueueAt	Moved to Queue D/T	Out
Priority		priority	Integer	Priority	Priority	In/Out
ProcessId		IWD_processId	String	IWD_processId	Process (name is shown instead of ID)	In/Out
Queue		queue	String	Queue	Queue	Out
Queue Target		• agent_id • agent_group_id • place_id • place_group_id	String	• WorkbinAgentId • WorkbinAgentGroupId • WorkbinPlaceId • WorkbinPlaceGroupId	Queue Target	Out

Task Attribute	Description	Column Name in Interactions Table	Type	Interaction Attached Data Key	Label in Global Task List	CP Direction
Queue Type		• workbin • agent_id • agent_group_id • place_id • place_group_id	String	• Workbin • WorkbinAgentId • WorkbinAgentGroupId • WorkbinPlaceId • WorkbinPlaceGroupId	Queue Type	Out
ReprioritizeDateTime		IWD_reprioritizeDateTime	DateTime	IWD_reprioritizeDateTime	Reprioritization D/T	Out
SolutionId		IWD_solutionId	String	IWD_solutionId		Out
Status		• queue • state • is_locked	String	• Queue • State • IsHeld	Status	Out
TenantId		IWD_tenantId	String	IWD_tenantId	Tenant	Out
Extended Attributes						
CustomerSegment		IWD_ext_customerSegment	String	IWD_ext_customerSegment	Customer Segment	In/Out
CustomerId		IWD_ext_customerId	String	IWD_ext_customerId	Customer ID	In/Out
ProductType		IWD_ext_productType	String	IWD_ext_productType	Product	In/Out
ProductSubtype		IWD_ext_sourceProductSubtype	String	IWD_ext_productSubtype	Subproduct	In/Out
RequestedAgent		IWD_ext_requestedAgent	String	IWD_ext_requestedAgent	Requested Agent	In/Out
RequestedAgent Group		IWD_ext_requestedAgentGroup	String	IWD_ext_requestedAgentGroup	Requested Agent Group	In/Out
RequestedPlace Group		IWD_ext_requestedPlaceGroup	String	IWD_ext_requestedPlaceGroup	Requested Place Group	In/Out
RequestedSkill		IWD_ext_requestedSkill	String	IWD_ext_requestedSkill	Requested Skill	In/Out
ResultCode		IWD_ext_resultCode	String	IWD_ext_resultCode	Result Code	In/Out
SourceCreated Date/Time		IWD_ext_sourceCreatedDateTime	DateTime	IWD_ext_sourceCreatedDateTime	TOS Created D/T	In/Out
SourceDue Date/Time		IWD_ext_sourceDueDateTime	DateTime	IWD_ext_sourceDueDateTime	TOS Due Date D/T	In/Out
SourceFirstCreated Date/Time		IWD_ext_sourceFirstCreatedDT	DateTime	IWD_ext_sourceFirstCreatedDT	TOS First Created D/T	In/Out

Task Attribute	Description	Column Name in Interactions Table	Type	Interaction Attached Data Key	Label in Global Task List	CP Direction
SourceProcessType		IWD_ext_sourceProcessType	String	IWD_ext_sourceProcessType	TOS Process Type	In/Out
SourceProcessSubtype		IWD_ext_sourceProcessSubType	String	IWD_ext_sourceProcessSubtype	TOS Subprocess	In/Out
SourceTenant		IWD_ext_sourceTenant	String	IWD_ext_sourceTenant	TOS Tenant	In/Out
Custom Attributes						
Archive Destination	Archive Destination was maintained from iWD 8.0 and 8.1.0 releases. However, due to changes in task archiving, it is no longer necessary to populate this attribute through business rules.	in flexible_properties	String	ArchiveDestination	Archive Destination	
IWD_isContactServer	Used for inner purposes of iWD BP	IWD_isContactServer	Integer	IWD_isContactServer	Is Contact Server	
IWD_isDone	Used for inner purposes of iWD BP	IWD_isDone	Integer	IWD_isDone	Is Done	

Configuring Custom Attributes

Overview

When you capture a task from a source system and that task has custom attributes in it, you will need to configure the system properly so that each custom attribute is recognized. If a custom attribute is recognized, it:

- Appears on the Global Task List with a user-friendly label and can be used in advanced and custom filters.

- Can be properly populated in iWD Data Mart.

- Can be used in the Condition, Order and Segmentation tabs of Views in Genesys Business Processes (except for attributes with Timestamp data type).

If you want a task attribute inside the binary data in the **flexible_properties** column to be recognized, you must create an Interaction Custom Property that corresponds to that attribute.

Prerequisites

- The custom attribute (referred as a Custom Interaction Property) is configured using the procedures in the eServices Interaction Properties Reference Manual.

> ## Important
>
> iWD treats both section and option names defined in the **Attributes Values** option as case sensitive.

Procedure

1. In GAX, open **Business Attributes**, expand **Interaction Custom Properties** and open its **Attribute** values.

2. In your new attribute value, go to the **Annex** tab and create section **[iWD]**.

3. In the new **[iWD]** section, create an option called `type`, with value `string`, `int` or `date` for string, number or timestamp column respectively. This option affects how your attribute will be treated in **Global Task List** and **Filters** tabs in iWD Manager.

4. If required, configure user-friendly labels for any custom attribute, that will appear in the Global Task List's **Attributes** tab, in the list of **Advanced Filters**, and the list of attributes that are used when you are building custom filters. See the **Editing the iWD Manager's Resource File** tab on this page.

> ## Important
>
> If the `type` option is not specified, the attribute will be treated as `string`.

> ## Important
>
> There are specific columns in the **interactions** table that you should not change.
> Please refer to Chapter 8, "Interaction Properties", in the eServices 8.1 User's Guide.

Editing the iWD Manager's Resource File

By default, the on-screen labels you will see on the Global Task List's **Attributes** tab of the **Task Details** panel for all custom task attributes will be the interaction user data keys. These labels may not be very user-friendly. For example they might include multiple words concatenated, or they might use underscore characters or have odd capitalization.

To configure user-friendly labels for custom task attributes by adding into a resources file, the labels that you want to see and that will be used by iWD Manager.

1. Stop your application server.

2. Navigate to **\config\evo\cmc\ui\resources**.

3. Create a new text file called **resources_custom.properties** (if it does not already exist).

4. In the **resources_custom.properties** file, add a line for each custom attribute for which you want to define an on-screen label, by using the following format: TASK_attribute_key=Attribute Label where: attribute_key matches the interaction user data key of the custom attribute. Attribute Label is the user-friendly string you want to display on the Global Task List. For example, if your custom attribute's user data key is MyAttribute, but you want it to display as My Custom Attribute on the Global Task List, your entry would look like this: TASK_MyAttribute=My Custom Attribute.

> ### Important
> This label will be used in the following places in the Global Task List:
>
> - As the label for this attribute on the **Attributes** tab of the **Task Details** panel.
>
> - In the **Select** columns to add drop-down list on the **Filters** page.
>
> - As the column header if you add this custom attribute as a column in the task table when you are creating a custom filter.

5. In the same **resources_custom.properties** file that was used in the **Adding new database column(s) and Interaction Custom Property for each Custom Attribute procedure**, add a new line for each custom attribute, by using the following format: FILTER_ATTR_attributedb_column_name=Attribute Label where: attributedb_column_name matches the column name that you added to the interactions table. Attribute Label is the user-friendly string you want to display in the Global Task List. For example, if the name of the database column is my_attribute, this line in the **resources_custom.properties** file would look like this: FILTER_ATTR_my_attribute=My Custom Attribute.

> ### Important
> This label will be used in the following places in the Global Task List:
>
> - In the **Advanced Filters** drop-down list.
>
> - In the **Attributes** drop-down list that you use to add a custom attribute in a filter criterion, when you are creating or editing a Global Task List filter.

6. Restart the **iwd_manager** application on your application server for the changes to become effective.