Web Services and Applications Configuration Guide

Customer Case

4/4/2025

Customer Case

The concept of a Customer Case enables the grouping of all the information about the active interactions of all types for a single customer in one location. The Customer Case facilities enable agents to store all information about the following actions in one location, as well as:

- Handle two voice calls simultaneously.
- Toggle between two calls.
- Transfer/conference one or all interaction(s).

Evolution and Behavior of Attached Data or Case Data

Attached data that is relevant to a call evolves and changes as a call progresses through the system in a contact center. For example, during a Transfer or Conference, information about who transferred a call and when, is attached to the case data.

Use the following configuration option when the decimal symbol in the regional settings of the agent's workstation or browser is different from the one provided by the database: case-data.float-separator. Typical float separators are: '.' ',' '\'

Editing Case Information

You can configure Workspace Web Edition to have the ability to edit the case and interaction information that is attached to an interaction. You can specify which key-value pairs are editable by an agent by adding a new section called `interaction-workspace` to the attribute of the key-value pair in Genesys Administrator Extension, and then defining its properties. When you define the properties of an attribute in a Business Attribute, you can also specify whether it has the property `readonly` or not. Attributes that are not `readonly` can be edited by agents.

An agent can only edit case information key-value pairs of those attributes that are displayed to the agent. The table **Editing Case Information** lists the case information business-attribute keys that can be configured to be editable. For each key-value pair attribute, add a new section named `interaction-workspace`, then define the options according to the type (Boolean, string, integer, list, float, and date) of the attribute.

Editing Case Information

Attribute type	Option	Valid Values	Default Value	Description
Boolean	display-type	bool	bool (for this type)	
	read-only	true, false	true	Specifies whether this key name can be modified
	mandatory	true, false	false	Specifies whether this key name is mandatory
	bool.default-value			
	bool.false-value		false	Value accepted for false
bool.true-value		true	Value accepted for true	
string	display-type	string	string (for this type)	
	read-only	true, false	true	Specifies whether this key name can be modified
	mandatory	true, false	false	Specifies whether this key name is mandatory
	string.default-value			
	string.max-length	0 to Max Length	255	Maximum number of characters that are accepted for this option
integer	display-type	int	int (for this type)	
	read-only	true, false	true	Specifies whether this key name can be modified
	mandatory	true, false	false	Specifies whether this key name is mandatory
	string.default-value			
	int.min-value	integer	0	Minimum value accepted
	int.max-value	integer	9007199254740992	Maximum value accepted

Attribute type	Option	Valid Values	Default Value	Description
enum	display-type	enum	enum (for this type)	
	read-only	true, false	true	Specifies whether this key name can be modified
	mandatory	true, false	false	Specifies whether this key name is mandatory
	enum.default-value			
	enum.business-attribute	(link to business attributes)	(none)	Link to a business attribute that defines the enum value. Items in this list are sorted alphabetically.
float	display-type	float	float (for this type)	
	read-only	true, false	true	Specifies whether this key name can be modified
	mandatory	true, false	false	Specifies whether this key name is mandatory
	float.default-value			
	float.min-value	float	0	Minimum value accepted
float.max-value	float	1.7976931348623157e308	Maximum value accepted	
date	display-type	date	date (for this type)	The date is stored in the UTC format: YYYY-MM-DDThh:mm:ssTZD (refer to http://www.w3.org/TR/NOTE-datetime). The display is based on the local from the browser.
	read-only	true, false	true	Specifies whether this key name can be modified
	mandatory	true, false	false	Specifies whether this key

Customer Case

Attribute type	Option	Valid Values	Default Value	Description
				name is mandatory

Displaying Active URLs in Case Information

You can configure Interaction Workspace Web Edition to render some key-values as clickable hyperlinks in the Case Information area and also enable previewing of web pages by tooltip on the clickable hyperlinks.

Use the following configuration options to control the way that hyperlinks are displayed (whether they are active or not) and to enable the display of a tooltip that displays a preview of the web page.

- expression.url: This option is configured by default to display most valid URLs as clickable hyperlinks.

- interaction.case-data.enable-hyperlink: This option controls whether Workspace displays hyperlinks.

To control the display of hyperlinks in the **Case Information** area, format the attached data:

- If the attached data contains a raw URL, the hyperlink will be displayed as a raw URL (for example, http://<your web site>).

- If the attached data is formatted as follows, the TITLE is displayed as a clickable hyperlink, and the target is the URL:

  - <a href="URL" title="TITLE" />

  - <a href="URL">TITLE<a/>

- If the attached data is formatted as follows, the WEB_SITE_NAME is displayed as a clickable hyperlink, the TITLE is used for the tooltip on mouse over, and the target is the URL:

  - <a href="URL" title="TITLE">WEB_SITE_NAME<a/>

- In the hyperlink tag, you can use the target attribute to determine the name of the tab or the window used to display the related page. If a tab or a window is already based on this name, the browser reuses it. For example:

  - <a href="URL" title="TITLE" target="WINDOW_NAME"/>

  - TITLE

  - WEB_SITE_NAME

  If Protected mode is enabled in the Microsoft Internet Explorer 10 and 11 web browser, when the agent clicks the hyperlink for attached data configured with a named target, the browser always opens the target of the link in a new window or tab. To prevent this, add the hyperlinked website and the Web Services and Application URL to the list of trusted sites. Protected mode is disabled by default for trusted sites. Adding the websites to the list of trusted sites ensures that both sites have the same integrity level. For more information, see https://msdn.microsoft.com/library/ms534659(v=vs.85).aspx.

> **Important**
>
> Setting the `target` attribute to *_self* , *_parent* and *_top* doesn't change the default behavior of the hyperlink.

Add Key-Value Pair to the Case Information

You can enable the ability to edit the case information to add key-value pairs that are missing from the case information. For example, the country or region contact information might be missing. If the agent obtains this information, the agent can edit the Case Information view to add the data value.

Prerequisite:

- To enable a key to be added, the key must be configured as editable (refer to Editing Case Information).