Genesys Interactive Insights User's Guide

Using Cascading Prompts

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Using Cascading Prompts

By default, the user prompts in the GI2 reports do not observe interrelationships between the objects that users select for report generation even though direct relationships might exist within the contact center. (The one exception to this rule is described in Prompt Interrelationships.) Users can, for example, select any combination of agents against which to run a report regardless of the groups to which the agents belong and regardless of the agent groups which the report user selects. The GI2 8.1.1+ universe features agent and queue cascading prompts whose purpose is to limit user selections during report generation to only those members that belong to the selected agent group(s) or queue group(s). This functionality is delivered via either of the following methods:

- Customizing the agent and queue lists of values in the universe
- Customizing the reports to replace agent and queue user prompts with those cascading objects described in Table Universe Objects Used for Cascading Prompts. (Some of these objects are hidden.)

This section demonstrates how to implement cascading-prompt functionality within your reports using both methods and discusses the limitations associated with their use.

Table: Universe Objects Used for Cascading Prompts

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Universe Object		Description
Class	**Object**	
Service Objects	Agent Cascade dimension	Same as the Agent Name dimension except this object employs `agentcascade_lov` to populate values instead of `agentname_lov`.
	Agent Cascade condition	Same as the `Agent` condition except this object references the `Agent Cascade` dimension instead of the `Agent Name` dimension.
	Queue Cascade dimension	Same as the `Queue` dimension except this object employs `queuecascade_lov` to populate values instead of `queue_lov`.
	Queue Cascade condition	Same as the `Queue` condition except this object references the `Queue Cascade` dimension instead of the `Queue` dimension.

Modify the Universe LOVs

The benefit in the approach of modifying the agent and queue lists of values (lovs) in the universe to provide cascade functionality is that all reports (that employ agent and queue lovs) will reflect this change automatically. Any report that references the altered lovs will reflect cascading-prompt behavior. However, this approach also has the drawback in the scenario in which you want only a subset of reports to use cascade functionality. To add cascading prompts to a report using the modify-the-lov approach, perform the following steps:

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1. Within Designer, open the GI2 universe.
2. In the Activity class, open the properties of the Agent Name dimension.
3. On the Properties tab, in the Associate a List of Values frame, click Edit to open the Query Panel.
4. On the menubar, click SQL to modify the code for the agentname_lov list of value.
5. Change the code to the following, and click OK:

```
SELECT VALUE
FROM ( SELECT VALUE, 0 SEQ_NUM FROM GI2_CONSTANTS
WHERE TYPE='CONSTANT' AND VALUE ='ALL'
AND 'ALL' IN @Variable('Agent Group:')
UNION ALL
SELECT DISTINCT RESOURCE_NAME VALUE,1 SEQ_NUM FROM RESOURCE_
INNER JOIN RESOURCE_GROUP_FACT_
ON (RESOURCE_GROUP_FACT_.RESOURCE_KEY= RESOURCE_.RESOURCE_KEY)
INNER JOIN GROUP_
ON (GROUP_.GROUP_KEY=RESOURCE_GROUP_FACT_.GROUP_KEY)
WHERE RESOURCE_.RESOURCE_TYPE_CODE='AGENT'
AND
( ('ALL' IN @Prompt('Agent Group:','A','Activity\Agent
Group',Multi,Constrained,Persistent,{'ALL'},USER:9) )
OR
( GROUP_.GROUP_TYPE_CODE IN ('AGENT','UNKNOWN','NO_VALUE' )
AND GROUP_.GROUP_NAME IN @Variable('Agent Group:') )
)
) s
ORDER BY SEQ_NUM, 1
```

6. On the Query Panel, click OK to save the modified lov definition.
7. Click OK on the Properties dialog box of the Agent Name dimension.
8. Repeat Steps 2–7 to modify the queue_lov definition in the Queue class. Copy the SQL code from the queuecascade_lov—the lov associated with the Queue Cascade dimension. These two lov modifications affect the Agent Name and Queue dimensions in all classes in which the dimensions exist throughout the universe and in which they are paired with the agentname_lov and queue_lov lovs.
9. Save the universe and export your changes to the repository to make them available to the reporting community.
10. Within Web Intelligence, edit each affected report's query to remove a group condition—where it exists—and save the report. This includes the following conditions:
    - Group Combination
    - Group Combination ABN

- Group Combination ANS
- Group Combination Detail Session
- Group Combination Detail State
- Group Combination Rsn
- Group Combination Sess

Unless other significant modifications are made, do not remove the `Agent Group` condition from the Agent Group reports; these reports do not reference the `Agent Name` dimension.

Modifying the Report Query

To add cascading prompts to one or more reports by using the `modify-the-report-query` approach:

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1. Make a copy of the report you want to customize. Reports that include either or both the `Agent Name` and `Queue` conditions are conducive for incorporating agent- and queue-cascade functionality.
   Note that the `Agent Group` reports reference the `Agent Group` condition instead of `Agent Name`; these reports are not conducive for cascadeprompt customization without making other significant modifications as well.
2. Within Web Intelligence, edit the report's query to perform the following modifications. Where it exists:
   a. Replace the `Agent` condition with the `Agent Cascade` condition.
   b. Replace the `Queue` condition with the `Queue Cascade` condition.

      It does not suffice merely to add cascading objects to a report; you must remove the regular conditions.

   c. Remove any group condition from the report. (See Modify the Universe LOVs (step 10) for more information.)
   d. Save the report.

After you make these modifications, users of this report are prompted to select agents or queues from a particular group instead of from a listing of all agents (or queues) who belong to the tenant (or contact center).

Limitations on Cascading Prompts

You can design cascading prompts for contact-center relationships for any universe object that uses an lov and that can be used in conditions. The GI2 universe provides only the two mentioned in this section to retrieve:

- A listing of agents from a group of agents.
- A listing of queues from a group of queues.

Furthermore, when you modify a report as described in Modify the Universe LOVs and Modifying the

Report Query, the Report Info section in the report header no longer provides information about the selected agent and/or queue group.