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 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 through either of the following methods:

- Modify the Universe LOVs—Customize the agent and queue lists of values in the universe.

- Modify the Report Query—Customize the reports to replace agent and queue user prompts with those cascading objects described in the table, Universe Objects Used for Cascading Prompts. (Some of these objects are hidden.)

This page 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) reflect this change automatically. Any report that references the altered LOVs will reflect cascading-prompt behavior. However, this approach also has a 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. In the Information Design Tool, open the GI2 universe.

2. In the **Business Layer** list, click the **Parameters and List of values** class.

3. From the **List of Values** list, select agentname_lov.

4. Click **Edit Query**. The **Query Panel** opens, where you can modify the code for the **agentname_lov** list of value.

5. Click **View Script**, and enable **Use custom query script**.

6. Replace the code in the **[Query] script** field with the following, and click **OK**:

```
select CONST_VALUE from
 (
   select CONST_VALUE, 0 SEQ_NUM
    from CONSTANTS2_GI2 where CONST_TYPE='CONSTANT' and CONST_VALUE=' ALL'
    and ' ALL' IN @Prompt('Agent Group:','A','Activity\Agent Group',Multi,Constrained,Persistent,{' ALL'},User:9)
   union all
    SELECT distinct AGENT_NAME CONST_VALUE, 1 SEQ_NUM
     FROM
     RESOURCE_GI2 INNER JOIN RESOURCE_GROUP_FACT_ ON (RESOURCE_GROUP_FACT_.RESOURCE_KEY=RESOURCE_GI2.RESOURCE_KEY)
     inner join        GROUP_ on (GROUP_.GROUP_KEY=RESOURCE_GROUP_FACT_.GROUP_KEY )
     WHERE
     RESOURCE_GI2.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 @Prompt('Agent Group:','A','Activity\
Agent Group',Multi,Constrained,Persistent,{' ALL'},User:9))
) ) s order by SEQ_NUM, 1
```

7. On the **Query Panel**, click **OK** to save the modified LOV definition.

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. In Web Intelligence, for each affected report, edit the 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.
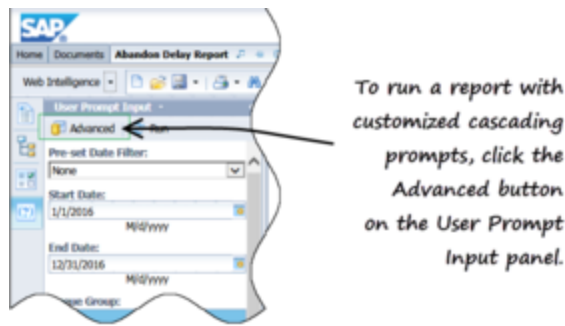
Modify the Report Query

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 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 suitable for cascade prompt customization unless you make other significant modifications.

2. In Web Intelligence, edit the report 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.

To run a report with customized cascading prompts, click the Advanced button on the User Prompt Input panel.

Accessing the Advanced Prompts Panel

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

   d. Save the report.

After you make these modifications, users of this report who run the report using the Advanced Prompt Panel (as shown in the figure **Accessing the Advanced Prompts Panel**) 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.