Reporting Technical Reference

7.6 Report Generation Assistant

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Preface

Welcome to the *Report Generation Assistant* book of the *Reporting Technical Reference* series. This document demonstrates how to set up and use Report Generation Assistant (or RG Assistant for short), which is the Genesys-designed Hyperion query document that is powered by Oracle Enterprise Performance Management (EPM) System. Using metadata from your Data Mart, RG Assistant facilitates the automatic generation of standard queries for charts, pivots, and reports that you can further tailor by using tools from the Oracle suite for final report output.

This guide is valid only for the Reporting 8.0 release(s).

Note: For versions of this document that have been created for other releases of RG Assistant, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

This preface provides an overview of this document, identifies the primary audience, introduces document conventions, and lists related reference information:

- The Reporting Technical Reference Series, page 5
- Intended Audience, page 6
- Chapter Summaries, page 6
- Making Comments on This Document, page 7
- Contacting Genesys Technical Support, page 7
- New in This Release, page 8

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 39.

The Reporting Technical Reference Series

This *Report Generation Assistant* book is the second of five books in the *Reporting Technical Reference* series. The other books are the following:

- *Reporting Technical Reference 8.0 Overview*

- *Reporting Technical Reference 8.0 Solution Reporting Templates*
- *Reporting Technical Reference 8.0 Customization*
- *Reporting Technical Reference 7.6 Data Mart Conceptual Data Model*

Some components of Reporting (such as RG Assistant and Data Mart) are associated with the 7.6 release, while others (such as CCPulse+ and the CCPulse+ reporting templates) are associated with the 8.0 release—hence, the difference in the release numbers that appear in the titles.

Intended Audience

This guide, which is primarily intended for report designers, assumes that you have a basic understanding of:

- Computer-telephony integration (CTI) concepts, processes, terminology, and applications.
- Relational databases and administration of your specific database-management system(s).
- Report and graph concepts.
- Your own network configurations.
- Basic Microsoft Windows concepts.

You should also be familiar with the content and structure of your organization's Data Mart, its access parameters, how report tables are organized within ETL Assistant, and operation of Hyperion Interactive Reporting Studio (HIRS) within the Oracle EPM System.

Chapter Summaries

In addition to this preface, this document contains the following chapters:

- Chapter 1, "Getting Started," on page 9, describes the preparatory steps for using RG Assistant.
- Chapter 2, "Navigating Through RG Assistant," on page 19, navigates you through the RG Assistant windows, explaining all fields and buttons.
- Chapter 3, "Generating Accurate Reports," on page 35, illustrates two misconfigurations that can lead to inaccurate results in your reports and how to correct them.

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Malaysia	1-800-814-472 (toll-free) +61-7-3368-6868	support@genesyslab.com.au
India	000-800-100-7136 (toll-free) +91-(022)-3918-0537	support@genesyslab.com.au
Japan	+81-3-6361-8950	support@genesyslab.co.jp
Before you contact Technical Support, refer to the *Genesys Technical Support Guide* for complete contact information and procedures.		

New in This Release

This section lists topics that are new or that have changed significantly since the 7.2 release of this document.

- Beginning with release 7.6, RG Assistant is provided on the Reporting Templates CD. Previous releases were available on the Reporting product CD.
- The previous requirement to obtain Hyperion licenses from Genesys Order Management has been lifted. When you have purchased Genesys Framework, you can readily install Oracle EPM System, which includes Hyperion Interactive Reporting (see page 9).
- RG Assistant 7.6 has been upgraded to function with Hyperion Interactive Reporting Studio (see page 10).
- Because Hyperion Solutions Corporation was acquired by Oracle in 2007, all references in this document to Hyperion's website have been replaced with Oracle-specific URLs.

Chapter

1 Getting Started

To use RG Assistant, you must complete the preparatory steps that are described in the following sections of this chapter:

- Install Oracle EPM System Software, page 9
- Upgrading RG Assistant and Other BrioQuery Documents, page 10
- Creating an ODBC User DSN, page 11
- Configuring the Database-Connection File, page 15

RG Assistant is a user interface application that runs on Microsoft Windows platforms. When you complete the preparatory steps that are described in this chapter, you will be able to use RG Assistant to connect to Data Mart operating on any of the supported platforms.

Install Oracle EPM System Software

You must install the Oracle Enterprise Performance Management (EPM) System (11.1.2.0.0) Media Pack for Microsoft Windows. Please refer to Oracle documentation to capture the correct set of packages to install Hyperion Interactive Reporting client-side software and for installation and/or upgrade instructions and the Hyperion CD for the installation package. You can access documentation on Oracle's website at the following URL:

`http://www.oracle.com/technology/documentation/index.html`

Please note that you are no longer required to obtain a Hyperion license from Genesys Order Management as was the case with previous releases of RG Assistant. Beginning with 11.1.2, this prerequisite has been lifted. The same restrictions, however, apply to its use—namely:

- You can use Hyperion tools to access the CC Analyzer data source only—specifically, the Data Mart.
- You can use Hyperion tools to run and manage the Genesys-provided reports or any custom reports that you might run against CC Analyzer–generated data.

- You can concurrently use as many Hyperion Interactive Reporting applications as the number of Genesys Customer Interaction Management (CIM) seats that you have purchased.

To obtain unrestricted licenses, or to use Hyperion Interactive Reporting to access non–CC Analyzer data sources, contact Oracle directly. Refer to your licensing agreement with Genesys for amplification of these and other details.

Upgrading RG Assistant and Other BrioQuery Documents

You do not install RG Assistant or run a special utility to upgrade it; you merely copy the following three files from the Reporting Templates 8.0 CD to a location that is accessible by your Hyperion environment and then open them:

- `RGAssistant.bqy`
- `RGTemplate.bqy`
- `RGCannedTemplate.bqy`

Because these three RG Assistant documents have already been upgraded to function in Hyperion Interactive Reporting Studio, you cannot use them with prior versions of Hyperion (or BrioQuery) software. You can, however, open `bqy` documents—including the RG Assistant documents—that were created with previous version of Hyperion software. You will encounter the dialog box that is shown in Figure 1.

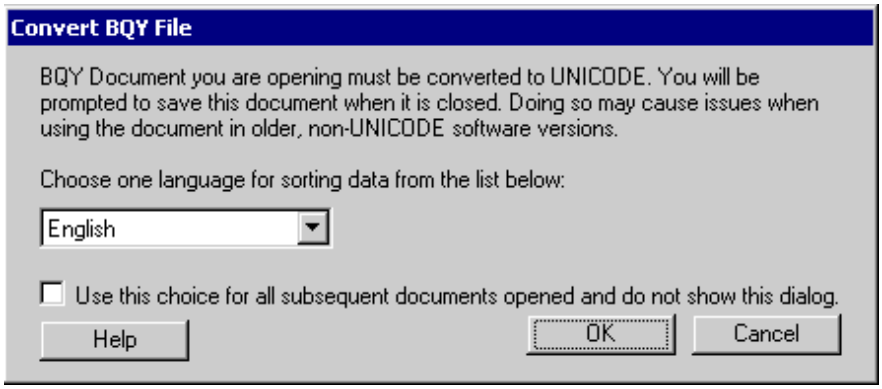

Figure 1: Converting Pre-11.1.2 BQY Documents

Genesys recommends that you use the three upgraded RG Assistant 7.6 documents that are provided with the Reporting Templates 8.0 CD instead of converting prior versions of the documents. The latest documents include interoperability improvements that cannot otherwise be realized.

Creating an ODBC User DSN

To connect to a Microsoft SQL Data Mart server, you must create an ODBC data source by using the Microsoft Windows Control Panel. (Refer to Oracle documentation for information about connecting to other RDBMS types.)

To create a new ODBC data source:

1. Open the Control Panel and double-click the `ODBC Data Sources` icon. The `ODBC Data Source Administrator` appears, as shown in Figure 2.

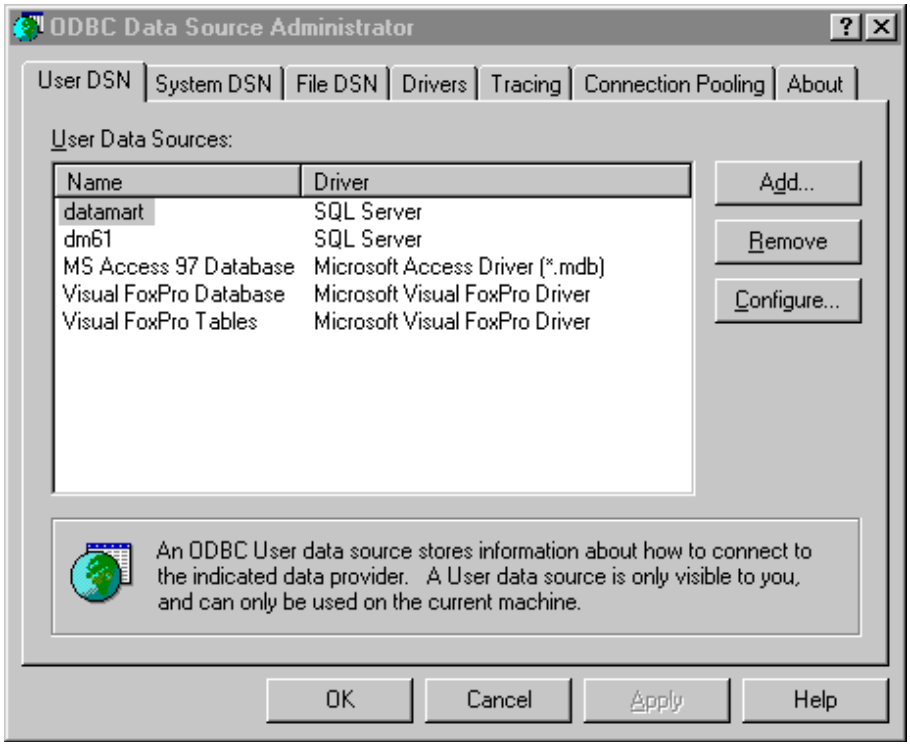

Figure 2: ODBC Data Sourcer Administrator

2. On the `User DSN` tab, click `Add` to add a data source name. The `Create a New Data Source` dialog box appears.
3. Select `SQL Server` in the list box, and click `Finish`.
4. At the `Create a New Data Source to SQL Server` dialog box:
   a. In the `Name` field, type a meaningful name for the data source that you are creating. Providing a description is optional.
   b. In the `Server` field, browse through the drop-down list of SQL servers, select yours in the list, and click `Next`.

   The dialog box that is shown in Figure 3, for example, illustrates the creation of the `datamart` ODBC data source with connection to the `IRYNAD` SQL Server.

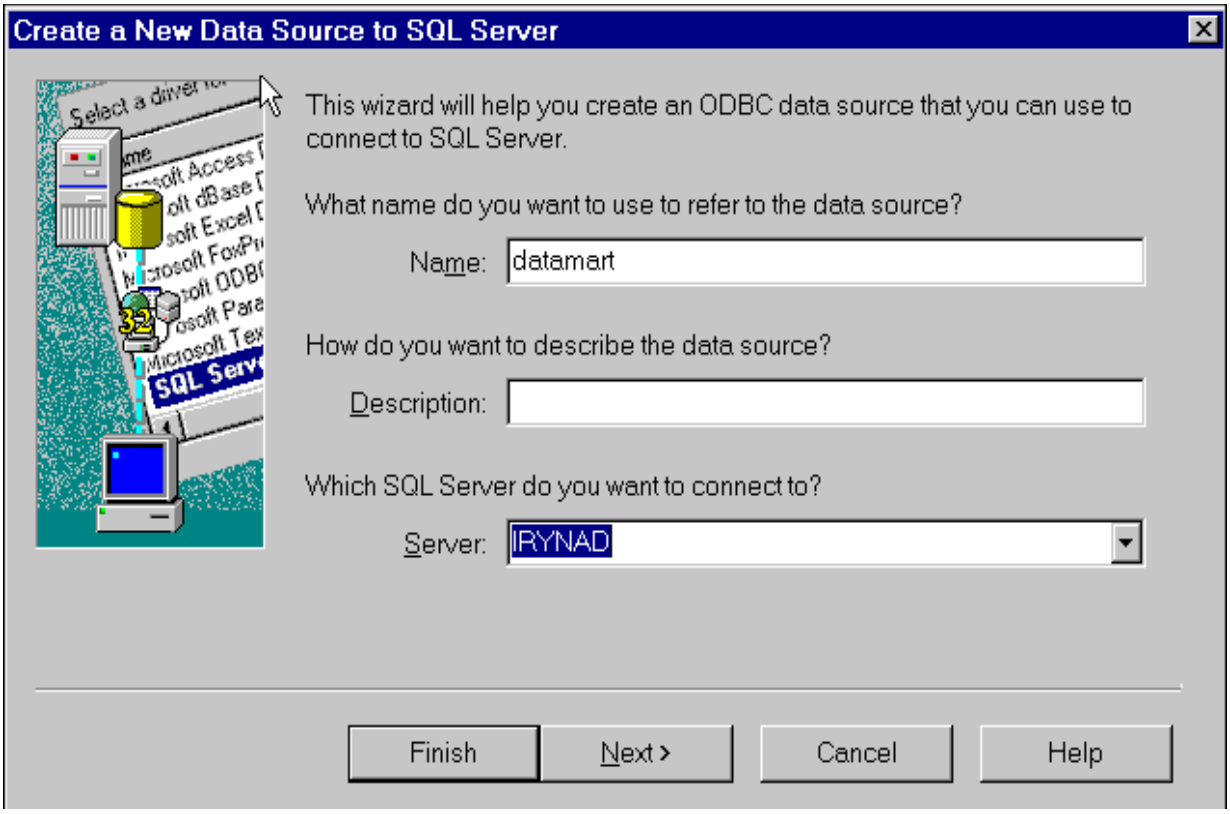

Figure 3: Describe Your New Data Source

5. In the next dialog box:
   a. Choose the option that has SQL Server authenticating the login ID and password that are provided by RG Assistant users (see Figure 4).
   b. Select the check box to have SQL Server obtain the default settings for additional configuration options.
   c. Type the Data Mart user's login ID and password in the appropriate fields.
   d. Click `Next`.

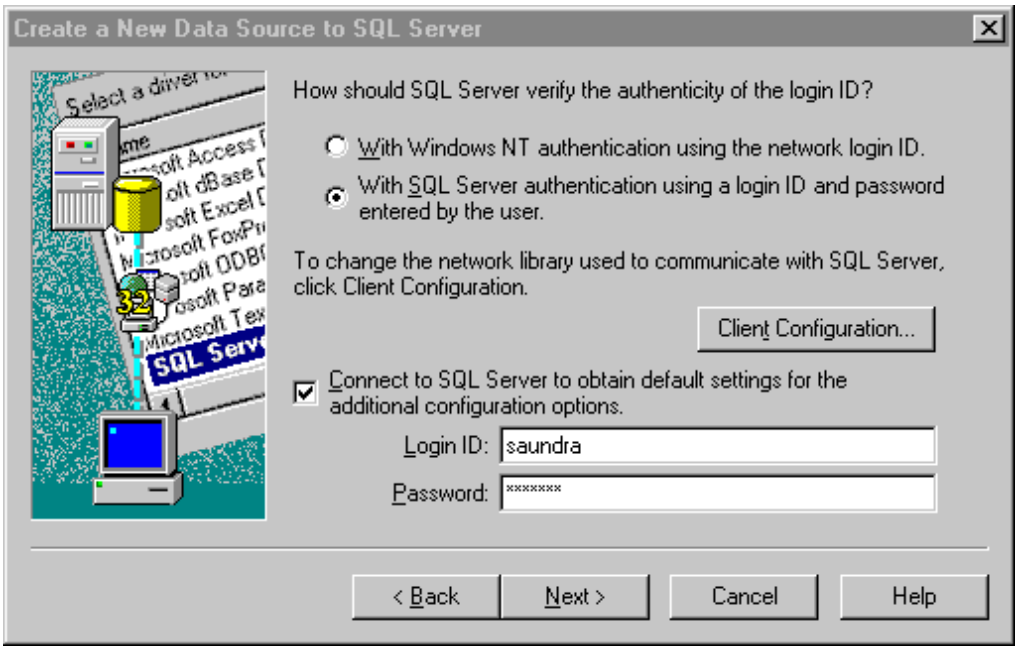

Figure 4: Setting Authentication and Connection Options

6. In the next dialog box, select the options as indicated in Figure 5, and click `Next`. Specify the data source name that you chose in Step 4a.

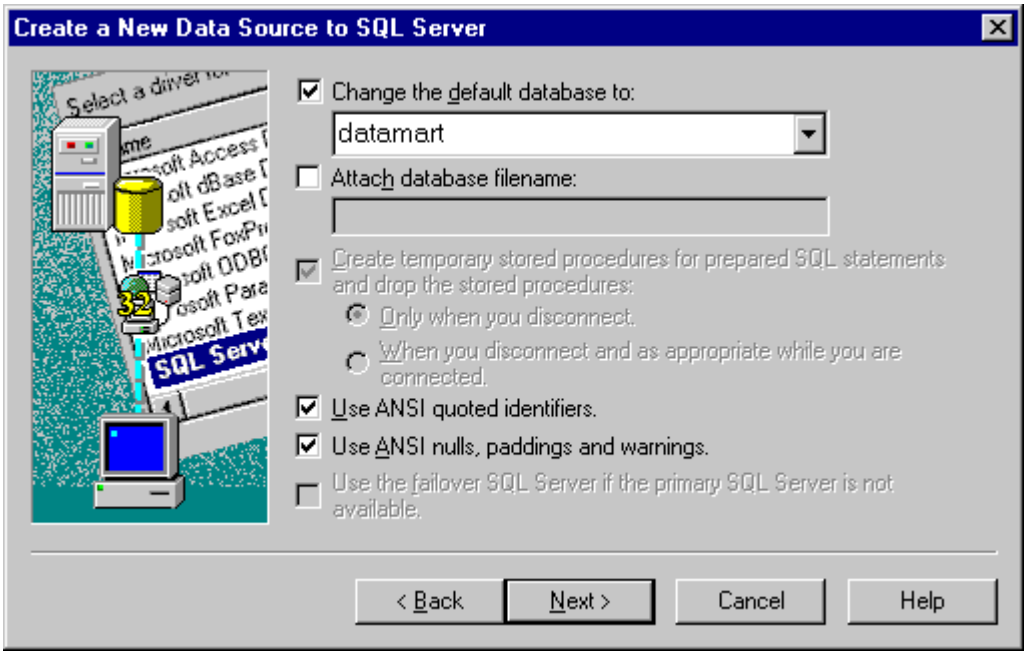

Figure 5: Setting ANSI Options

7. In the next dialog box, mark the options as indicated in Figure 6, and click `Next`.

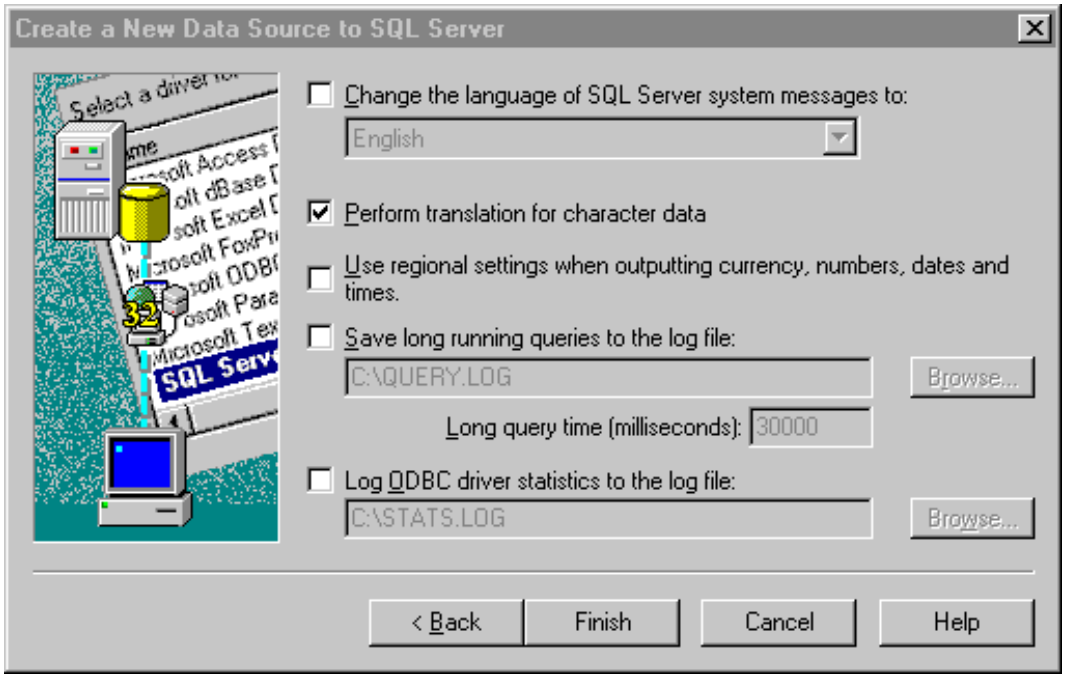

Figure 6: Setting New Data Source Options

The `ODBC Microsoft SQL Server Setup` dialog box appears, listing the configuration parameters that you specified for the ODBC data source that you created (see Figure 7).

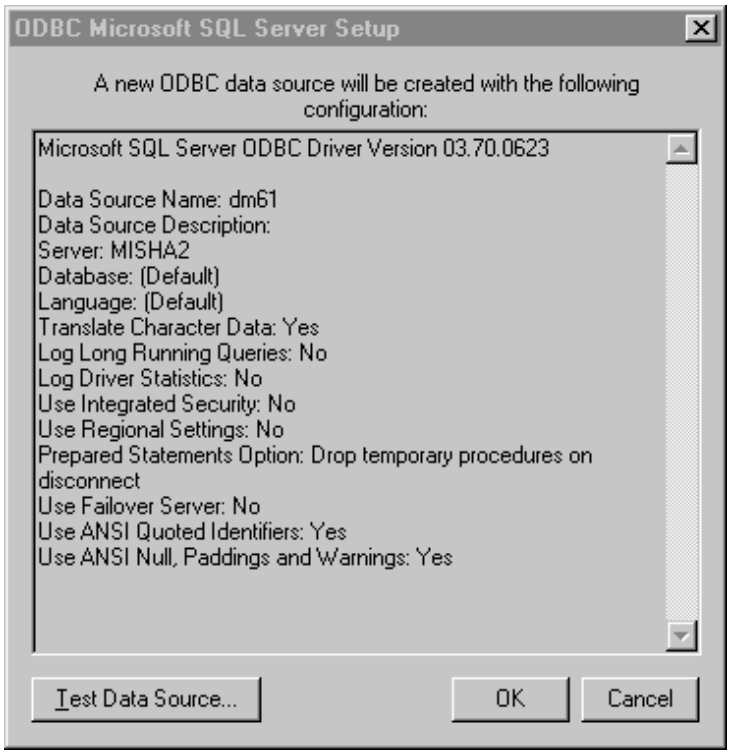

Figure 7: ODBC Microsoft SQL Server Setup Dialog Box

8. Click the `Test Data Source` button to verify your connection to SQL Server. After it runs connectivity tests, Windows returns the `SQL Server ODBC Data Source Test` dialog box, which states the test results.
9. Click `OK` to close this dialog box, and then click `OK` again to close the `ODBC Microsoft SQL Server Setup` dialog box.

You have now created and tested an ODBC data source for connection to your Data Mart. Before you can use RG Assistant to generate reports, you must configure a database-connection file, which is discussed in the next section.

Configuring the Database-Connection File

You configure an OCE (Open Catalog Extension) file to store connection parameters to your Data Mart server. You need only configure an OCE file once for each Data Mart server in your environment. After creation, all HIRS (`*.bqy`) documents, including RG Assistant (`RGAssistant.bqy`), reference this file for connectivity to Data Mart. Your connection file should be named `CCAnalyzer.oce` and it must be located in the same directory as the RG Assistant `*.bqy` documents in order for RG Assistant to function properly. Configuring the OCE file might entail creating an ODBC data source and/or installing an RDBMS client.

To configure your database connection file:

1. Open the `RGAssistant.bqy` document within Hyperion Interactive Reporting Studio.
2. In the `Tools` menu, select the `Connection` menu item, and then select `Create` from its submenu. The Database Connection Wizard opens, as shown in Figure 8.

Figure 8: Database Connection Wizard

3. In the first list box, select `ODBC` as the connection software to use for Microsoft SQL Server. Select your Data Mart's DBMS type from the options that are available in the second list box, and then click `Next`.
4. In the Wizard's next window, type the name and password of your Data Mart user. Then, select the appropriate host in the `Host` list box and click `Next`.

   The value that you specify for `Host` should be the ODBC User DSN that you previously created on page 11. Figure 9 illustrates data entry in this dialog box.

Figure 9: Specifying Connection Parameters

5. Click `Finish` in the final dialog box of the Database Connection Wizard. A message box prompts you to save your OCE file.
6. Click `Yes`. Then, specify the name and destination for this file.

   Genesys recommends that you save the file as `CCAnalyzer.oce` in the same folder as `RGAssistant.bqy`. If you use multiple database connections, however, you could choose any valid file name that has an .oce file extension.

Refer to Hyperion Interactive Reporting documentation for even more information about creating database connections.

Chapter

2 Navigating Through RG Assistant

After you have installed Hyperion Interactive Reporting and configured an `OCE` file, you are ready to use RG Assistant to design and run reports that are based on data in your Data Mart. To assist in the qualification of parameters for report generation, the RG Assistant document, `RGAssistant.bqy`, when opened, displays a series of EIS windows, which are described in the following sections of this chapter:

- EIS Connect Window, page 20
- EIS Select Tenant Window, page 20
- EIS Select Object Type Window, page 21
- EIS Select Layout Window, page 22
- EIS Select View Window, page 23
- Query Assistant, page 27
- Navigation Assistant, page 29
- Report Assistant, page 31

EIS (Executive Information System) is a Hyperion term that indicates the approach that Oracle has taken to providing a GUI for database querying and scripting.

EIS Connect Window

The first window in RG Assistant (Figure 10) prompts you to connect to your Data Mart and log in.

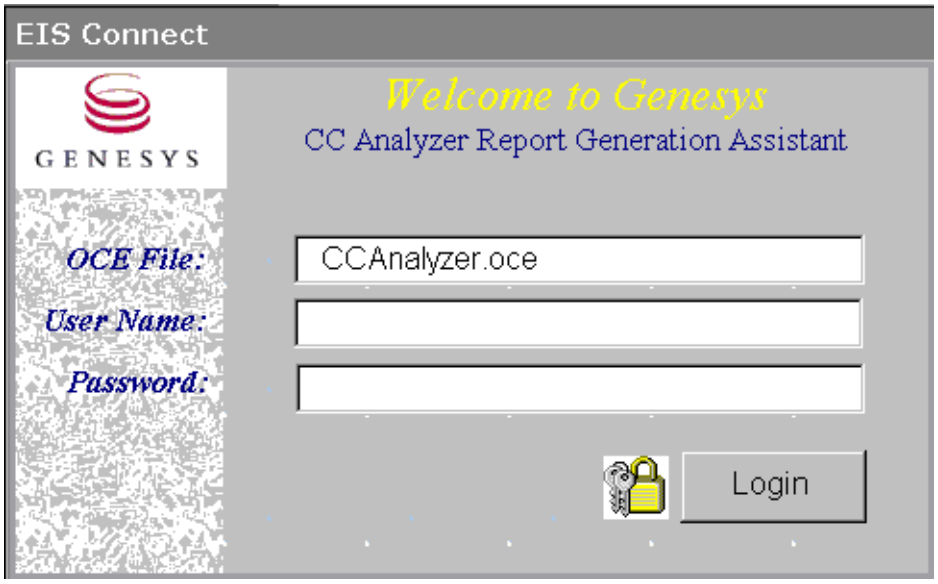

Figure 10: EIS Connect Window

1. In the `OCE File` field, type the name of your database-connection file (if it is it is different from the default name that is that is provided.)

   Note: You might have to supply the full path to the file, if the file is not located in the same directory as `RGAssistant.bqy`.

2. Type the user name and password, in their respective fields, to access Data Mart.
3. Click `Login`.

If you supplied valid parameters and your Data Mart DBMS server is up and running, you session will be connected. Depending on whether your Reporting environment contains multiple tenants or just one tenant, RG Assistant next displays either the `EIS Select Tenant` window or the `EIS Select Object Type` window respectively.

EIS Select Tenant Window

If your contact center has defined multiple tenants with more than one tenant identified in the Data Mart, after you connect to your Data Mart server, RG Assistant displays the `EIS Select Tenant` window in Figure 11. This

window prompts you to specify the tenant for which you want to generate reports.

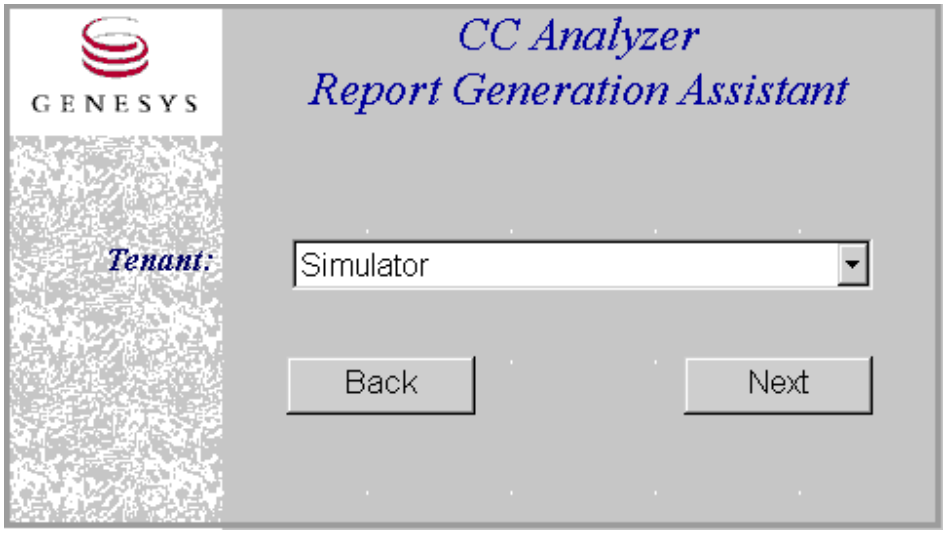

Figure 11: EIS Select Tenant Window

In the `Tenant` drop-down list, select the desired tenant, and click `Next`. RG Assistant displays the `EIS Select Object Type` window, described below.

EIS Select Object Type Window

In the `EIS Select Object Type` window, specify an object type on which to generate a report (see Figure 12).

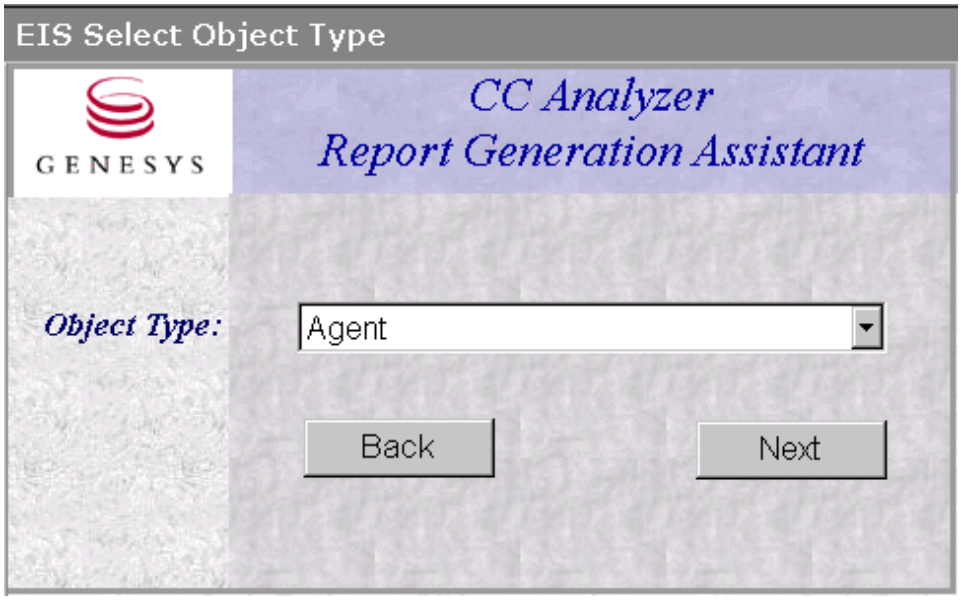

Figure 12: EIS Select Object Type Window

In the Object Type drop-down list, select an object type, and click Next. RG Assistant displays the EIS Select Layout window, in which you must select a report folder.

Note: To create a report that is based on more than one object type, you must design a custom report by using Hyperion Interactive Reporting Studio (HIRS) or another report-generation tool, or choose from the existing .bqy files that were previously generated by RG Assistant in the final step of report generation.

EIS Select Layout Window

After you select an object type, specify the report folder on which to generate a report in the EIS Select Layout window (see Figure 13).

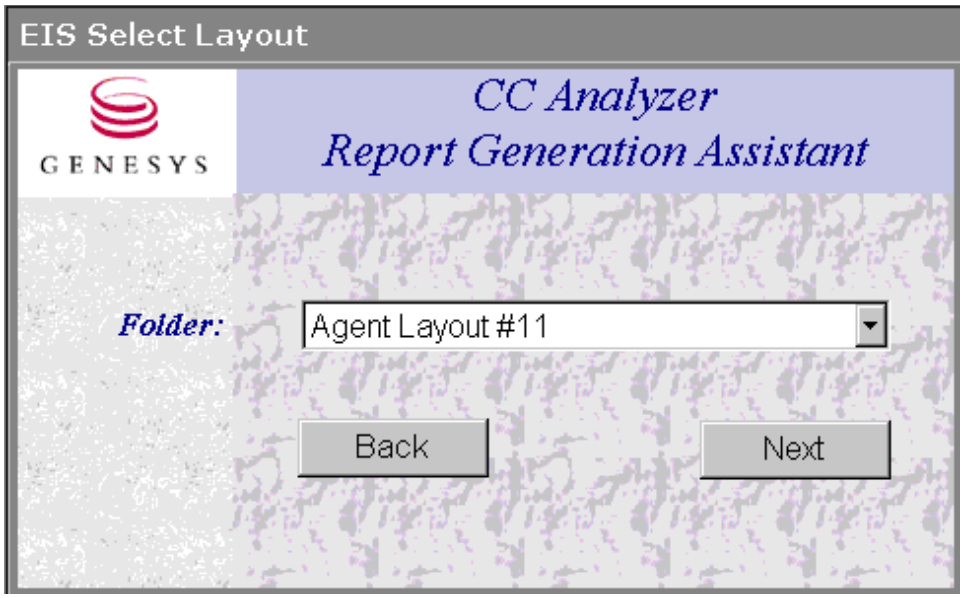

Figure 13: EIS Select Layout

The Data Mart contains a report folder for each report layout in the Operational Data Storage (ODS). The layout number (11, in the preceding figure) corresponds to the folder ID that is indicated when you view the report layout in ETL Assistant (see Figure 14).

Report layouts specify the metrics for which objects should be collected.

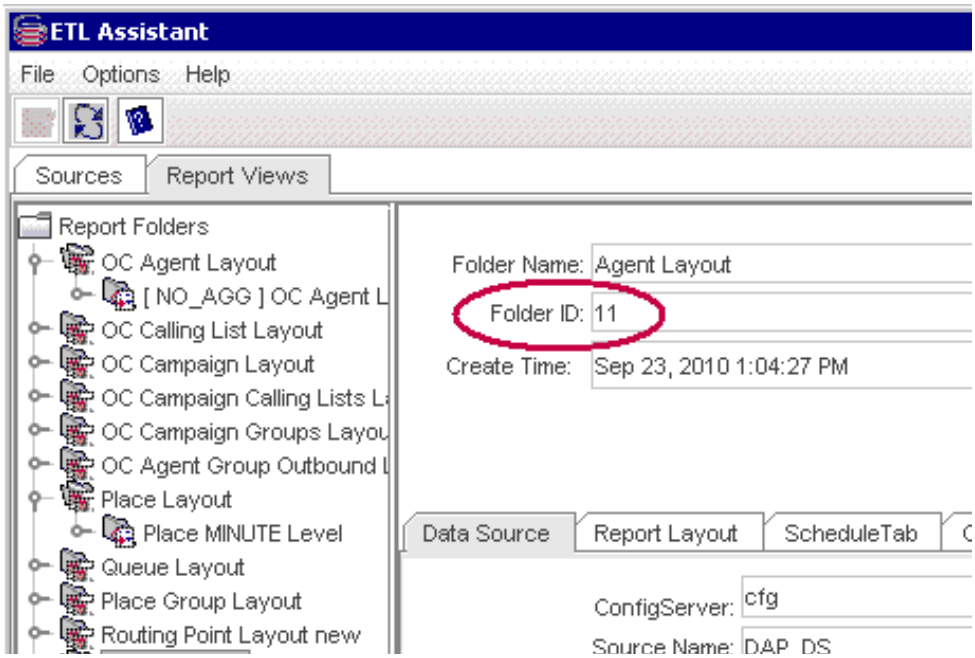

Figure 14: Folder ID in ETL Assistant Determines Report Layout Number

In the `Folder` drop-down list (Figure 13), select a report folder, and click `Next`. RG Assistant displays the `EIS Select View` window where you can choose one or more aggregation levels and specify report-view parameters.

`Note:` To create a report that is based on information from more than one report layout, you must design a custom report by using HIRS or another report-generation tool, or choose one of the .bqy files that were previously generated by RG Assistant in the final step of report generation.

EIS Select View Window

After you select a report layout, you must specify report-view parameters in the `EIS Select View` window (Figure 15). The fields in this window are described in Table 1.

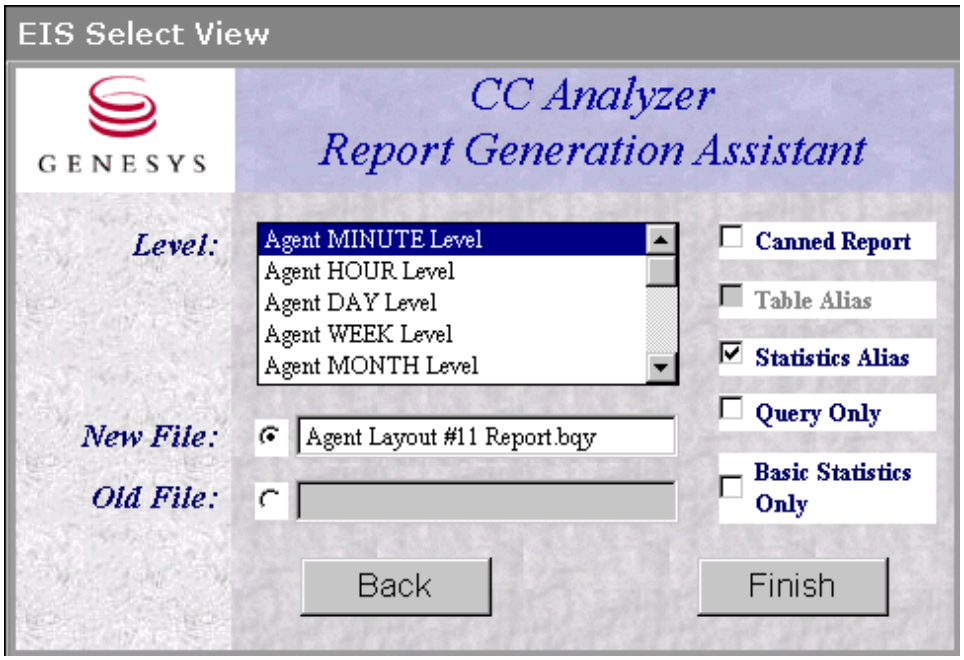

Figure 15: EIS Select View Window

To specify report-view parameters:

1. In the `Level` list box, select one or more aggregation levels. [Hold down the `Control` key to select (or unselect) more than one.]
2. In either the `New File` or `Old File` field, indicate the name of the report that is to be generated.
3. As appropriate, mark or clear the five check boxes that appear along the right-hand side of the window.
4. Click `Finish`.

`Note:` The processing that RG Assistant performs after you click `Finish` can be lengthy, depending on your selections.

If you selected the `Canned Report` check box, RG Assistant next displays the Report Assistant. Otherwise, RG Assistant displays a login window, followed by either:

- The Query Assistant, for you to qualify your custom query.

or

- The Navigation Assistant, if you had previously defined and processed your query.

Table 1: Fields of the EIS Select View Window

Field	Description
Level	Indicates the aggregation level(s) for which data will be displayed in your generated report.
New File	Specifies the name of the file that will contain the generated report. This file must contain the .bqy extension. After creation, you can edit this file by using Hyperion tools.
Old File	Indicates the name of the existing file that contains a generated report. Use this option to add one or more aggregation levels to an existing document. Specify its full path in the provided box. This field is not applicable if you selected the `Canned Report` check box. You cannot add aggregation levels to canned reports, because such reports only allow two levels of aggregation: the one that you originally specified plus the next lowest level.
Canned Report	Indicates whether RG Assistant should use a Genesys-provided report template or your custom report specifications. Note that canned reports have associated with them only two levels of aggregation: summary and details. When this check box is marked, you select only one aggregation level in the `Level` list box. This level is used for summary results. The canned report itself processes the next lowest level of aggregation to provide detail results. For example, if you selected `Agent DAY Level` in the `Level` list box, your generated report will contain summary information for the days that you specify and detailed information for each hour of that day. (You specify the date range in the Report Assistant window.) If the `Canned Report` check box is cleared, you may specify up to five aggregation levels, but you will not have drill-down capability. The generated report will contain the necessary queries for every selected level of aggregation. **Note:** If you select this check box, you should specify only an output file in the `New File` field.

Table 1: Fields of the EIS Select View Window (Continued)

Field	Description
Table Alias	If you select this check box, RG Assistant sets aliases for the table names that are used in the queries. If you clear it, the generated query contains the actual table names. If your Data Mart contains more than one tenant, RG Assistant disables this check box because the aliases for different tenants might be the same. RG Assistant also disables this check box if you select the `Canned Report` check box. **Note:** Genesys recommends that you select this check box for single-tenant environments, so that the generated report can be used within other Data Marts.
Statistics Alias	If you select this check box, RG Assistant creates statistic names using the descriptions that were specified during the data-modeling process. If you clear this check box, RG Assistant uses the column name of the corresponding Data Mart table as the name of the statistic. **Note:** If the generated alias is too long, you can modify it later by editing the `Request` line in the query section. Refer to Hyperion Interactive Reporting documentation for information on performing this task. **Note:** RG Assistant does not permit you to clear this option for canned reports.
Query Only	If you select this check box, RG Assistant generates only the query section of your report. If you clear it, RG Assistant generates also sample pivot and graphic sections. Obviously, processing more than just the query section consumes more time. Refer to Hyperion Interactive Reporting documentation for information on performing this task.
Basic Statistics Only	If you select this check box, RG Assistant generates a report that contains simple statistics only. Composite statistics such as averages and percentages are not included. If you clear this check box, composite statistics are included in the generated report. **Note:** Composite statistics are unavailable for custom report layouts. As such, RG Assistant disables this check box. You can use other Hyperion tools to incorporate composite statistics into your reports. Refer to Hyperion Interactive Reporting documentation for information on performing this task.

Query Assistant

After you have specified report-view parameters, further qualify your query in the Query Assistant (see Figure 16). This window appears only if you previously cleared the `Canned Report` check box in the `EIS Select View` window.

To specify parameters in this window:

1. Indicate the desired aggregation.
2. Indicate the desired time interval.
3. Select the appropriate report folder.
4. Indicate the desired objects on which to report.
5. Specify whether your report is to contain detail information.
6. Process the query.

After you have defined and processed your query, RG Assistant displays the Navigation Assistant (Figure 17 on page 30), so that you can fine-tune your report specifications.

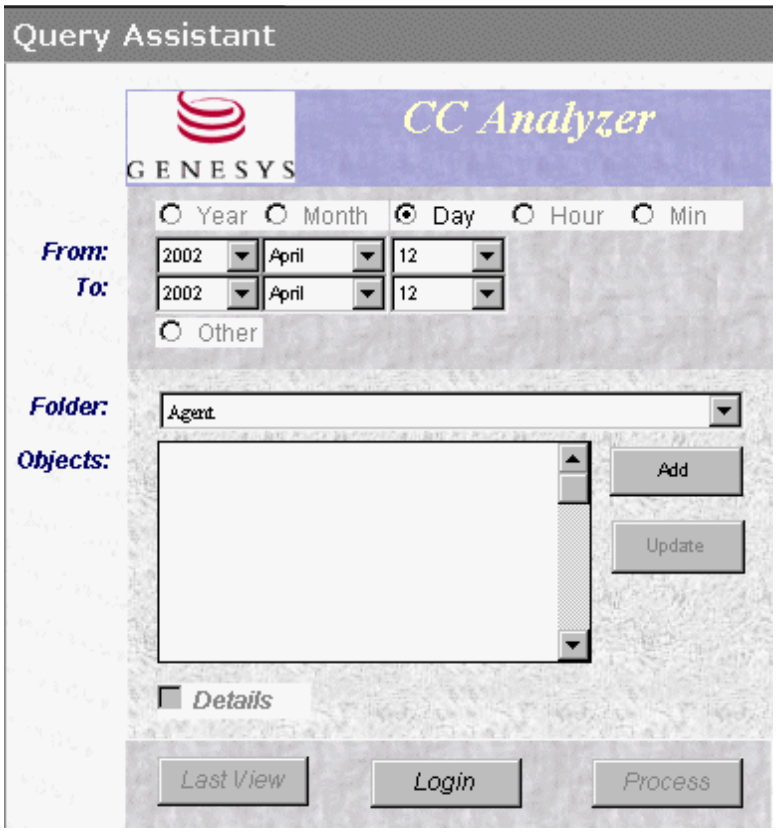

Figure 16: Query Assistant

Table 2 describes the fields in this window. Refer to the Hyperion Interactive Reporting documentation set for additional information about specifying limits.

Table 2: Fields of the Query Assistant

Field	Description
Aggregation frame	Indicates the aggregation levels (year, month, day, hour, or minute) that are available for your generated report. You can select more than one level if you specified more than one level in the `EIS Select View` window. Nonapplicable levels are disabled.
From	Indicates the start time of the generated report. Define your start time in the drop-down combo lists.
To	Indicates the end time of the generated report. Define your end time in the drop-down combo lists.
Other	Allows specification of aggregation levels other than those that you specified in the `Aggregation` frame. When this option is selected, the following events take place: • A combo drop-down list appears to the right filled with relevant values that are based on the aggregation levels that you specified in the `EIS Select View` window. Select your desired aggregation level. • The `Aggregation` frame is cleared. • The `From` and `To` fields are cleared. Select (or reselect) your desired time interval. **Note:** You can specify aggregation level(s) either within the `Aggregation` frame or in the `Other` field, but not in both.
Folder	Indicates from which report folder to gather results. Select from the drop-down combo list.
Objects frame	Displays the objects that you have added to your query definition.
Add	Allows you to add objects to your query definition. Click this button to display the `Limit` dialog box and make your selection.
Update	Clears the `Objects` frame and displays the `Limit` dialog box for you to make your selection.
Details	Indicates whether RG Assistant will generate detailed information in the report. This check box is disabled for single-aggregation-level reports or if `Other` is selected.

Table 2: Fields of the Query Assistant (Continued)

Field	Description
Last View	Displays the Navigation Assistant. This button is disabled if you have not previously processed your query.
Login	Allows login to a different Data Mart.
Process	Performs the following: 1. Constructs a query that is based on the aggregation level, time interval, report folder, and objects that you have specified. 2. Sends the query to your Data Mart to retrieve qualified data. 3. Calls the Navigation Assistant. This button is disabled when the `Objects` frame is empty.

Navigation Assistant

After you have defined and processed your query, you can view its charts, pivots, and results in the Navigation Assistant (see Figure 17).

To specify parameters in this window:

1. Indicate the desired objects on which to report.
2. Specify a section.
3. View your results.

The Navigation Assistant is the last in the series of windows that define parameters for custom report generation. From here, you can perform any of the following:

- Save your query definition and exit.
- Return to the `EIS Select View` window to process a different aggregation level or another file.
- Return to the Query Assistant to redefine and further refine report parameters for the current file.

Table 3 briefly describes the fields in this window. Refer to the Hyperion Interactive Reporting documentation set for additional information about charts, pivots, results and sections.

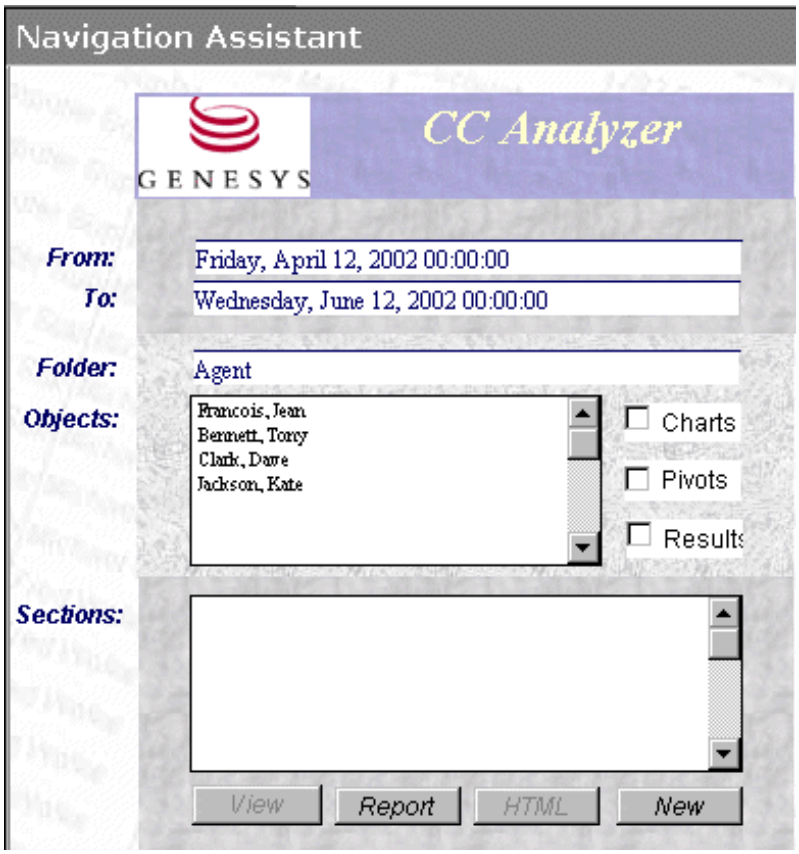

Figure 17: Navigation Assistant

Table 3: Fields of the Navigation Assistant

Field	Description
From	Displays the start time of the generated report that you previously selected in the Query Assistant. This field is not editable.
To	Displays the end time of the generated report that you previously selected in the Query Assistant. This field is not editable.
Folder	Displays the report folder previously that you selected in the Query Assistant. This field is not editable.
Objects frame	Displays the objects that you have added to your query definition.
Charts	Changes the items in the `Sections` frame to list applicable charts for your query definition.
Pivots	Changes the items in the `Sections` frame to list applicable pivots for your query definition.

Table 3: Fields of the Navigation Assistant (Continued)

Field	Description
Results	Changes the items in the `Sections` frame to list applicable results for your query definition.
Sections	Displays the charts, pivots, and/or results that are available to you to select for report generation, depending on your selections in the `Charts`, `Pivots`, and `Results` check boxes. Double-click an item in the frame to view the results of your query, or click the `View` button.
View	Displays charts, pivots, or results of your query based on your selections in the `Objects` and `Sections` frames. This button is disabled if a section has not been selected.
Report	Displays the report section for your file.
HTML	Saves the display of data for the selected section as an HTML document to the `Program` subdirectory of the program folder that you created during installation. RG Assistant names the file after the selected section and overwrites any previously existing file of the same name without confirmation.
New	Calls the Query Assistant for definition of a new query.

Report Assistant

After you have specified report-view parameters, you must further qualify your query by using the Report Assistant (see Figure 18).

This window appears only if you selected the `Canned Report` check box in the `EIS Select View` window. To specify parameters in this window:

1. Indicate the desired time interval.
2. Indicate the desired objects on which to report.
3. Mark the `OnDemand` button to prepare your report, tuned for publishing, to the Oracle EPM System Workspace.

   The `Broadcast` option is applicable only for publishing to the Brio Broadcast server, which is a feature that was available with Brio 6. If you select this option, your document will be published to the Oracle EPM System Workspace.
4. Process the query.

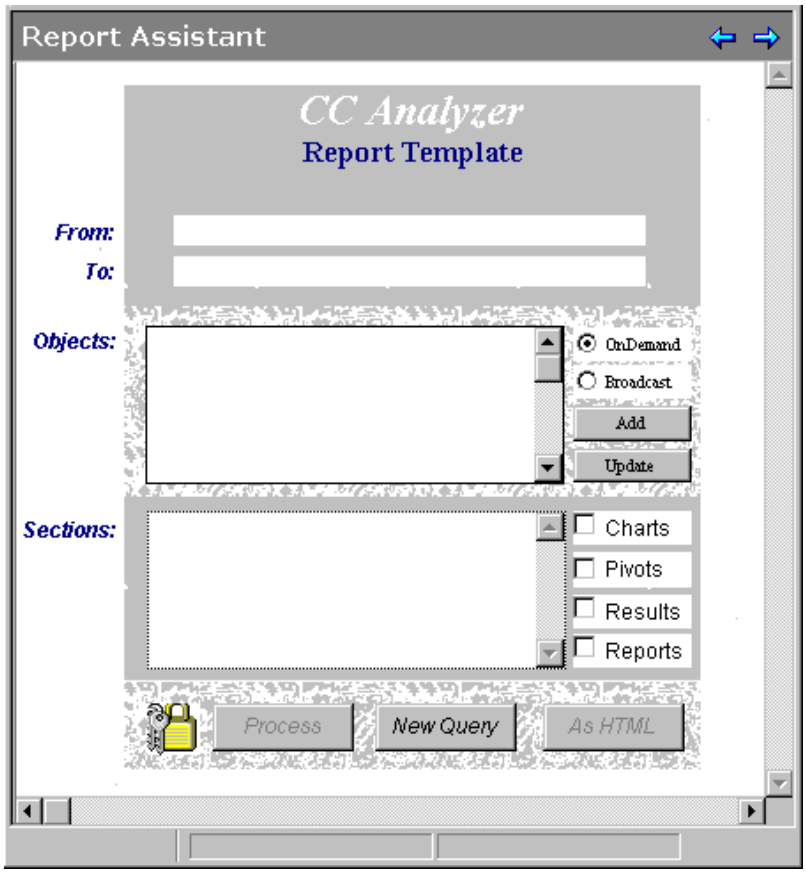

Figure 18: Report Assistant

Report Assistant is the last in the series of windows that define parameters for generating canned reports. You can save your definition and exit at this point or return to the `EIS Select View` window to process another file.

Note: A report's legend may block a portion of its chart if the legend contains a large number of elements or if axis labels are lengthy.

Table 4 briefly describes the fields in this window. Refer to the Hyperion Interactive Reporting documentation set for additional information about limits, charts, pivots, results, and sections.

Table 4: Fields of the Report Assistant

Field	Description
From	Indicates the start time of your generated report. Click this field to display the `Limit` dialog box and make your selection. This field is disabled when you choose the `Broadcast` option.
To	Indicates the end time of your generated report. Click this field to display the `Limit` dialog box and make your selection. This field is disabled when you choose the `Broadcast` option.
Objects frame	Displays the objects that you have added to your query definition.
OnDemand	Indicates that your query will be published to a file that is sent to the Oracle EPM System Workspace and processed upon demand instead of scheduled for a later execution.
Broadcast	Indicates that your query will published as a job that is sent to the Oracle EPM System Workspace and scheduled for a later execution instead of upon demand.
Add	Allows you to add objects to your query definition. Click this field to display the `Limit` dialog box and make your selection.
Update	Clears the `Objects` frame and displays the `Limit` dialog box for you to make your selection.
Sections frame	Depending on your selection on the right-hand side of this frame, this frame displays the charts, pivots, results, or reports that are available to select for report generation. This frame is empty if you have not yet processed your query. Double-click an item in the frame to view the results of your query.
Charts	Changes the items in the `Sections` frame to list applicable charts for your query definition.
Pivots	Changes the items in the `Sections` frame to list applicable pivots for your query definition.
Results	Changes the items in the `Sections` frame to list applicable results for your query definition.
Reports	Changes the items in the `Sections` frame to list applicable reports for your query definition.

Table 4: Fields of the Report Assistant (Continued)

Field	Description
Process	Constructs a query that is based on the time interval and objects that you have specified and sends the query to your Data Mart to retrieve qualified data.
New Query	Calls the `Limit` dialog box three times, prompting you for the `From` date, the `To` date, and the objects, respectively; then, sends the query to your Data Mart to retrieve qualified data. This button is disabled when you choose the `Broadcast` option.
As HTML	Saves the display of data for the selected section as an HTML document to the `Program` subdirectory of the program folder that you created during installation. RG Assistant names the file after the selected section and overwrites any previously existing file of the same name without confirmation.

Chapter

3 Generating Accurate Reports

Duplicate Presentation Names

If you suspect that your generated report contains more than the expected results, check for duplicate presentation names. Your contact center, for example, might have two John Smiths. The generated report for the first John Smith might contain data for the second John Smith, as well as his own data and vice versa because RG Assistant uses the object's presentation name (`OBJECT.PRESENTATION_NAME`) to generate the report. This field is not unique.

To generate an accurate report under this circumstance, you must change the query to reference a unique field, such as `OBJECT_ID`. Refer to Hyperion Interactive Reporting documentation for information on redefining report queries.

Running Reports Inside the Two-Day Window

Alternatively, it could be that your generated report contains erroneous data because you are running reports on data inside the minimum two-day window by using CC Analyzer's default configuration. For example, assume that you have configured CC Analyzer by using all of the default settings and that you are running daily reports on today's activities. Because today has not yet ended, and because today falls within the minimum two-day window, your reports might generate erroneous data.

Refer to the business scenario, "Partial-Period Reporting" in the *Reporting 8.0 Reference Manual* for an extended discussion and description of this problem and its resolution.

Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

Reporting Templates 8.0

- The *Solution Reporting Templates* book in the *Reporting Technical Reference* series, which provides in-depth descriptions of the Genesys-provided reporting templates.

Reporting 8.0

- The *Reporting 7.6 Data Modeling Assistant Help*, which will help you understand what report layouts are and provide information about the data-modeling process
- The *Reporting 7.6 ETL Runtime User's Guide*, which will help you understand how ETL Runtime organizes data into report folders that are stored in the Data Mart
- The *Reporting 7.6 ETL Assistant Help*, which will help you understand how to access report folders in Data Mart
- The *Reporting 7.6 Physical Data Model* for your RDBMS type, which will help you understand the tables and fields of a Sybase, Microsoft SQL, Oracle, or DB2 Data Mart
- The *Reporting 8.0 Master Index*, which will help you find where other related topics are documented

Genesys

- The *Genesys Technical Publications Glossary,* which ships on the Genesys Documentation Library DVD and provides a comprehensive list of the Genesys and CTI terminology and acronyms that are used in this document.
- The *Genesys Migration Guide,* which ships on the Genesys Documentation Library DVD and provides documented migration strategies for Genesys product releases. Contact Genesys Technical Support for more information.
- The Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at http://genesyslab.com/support.

Information about supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- The *Genesys Supported Operating Environment Reference Manual*
- The *Genesys Supported Media Interfaces Reference Manual*

Consult these additional resources, as necessary:

- The *Genesys Hardware Sizing Guide,* which provides information about Genesys hardware sizing guidelines for the Genesys releases
- The *Genesys Interoperability Guide,* which provides information on the compatibility of Genesys products with various Configuration Layer Environments; Interoperability of Reporting Templates and Solutions; and G*plus* Adapters Interoperability
- The *Genesys Licensing Guide,* which introduces you to the concepts, terminology, and procedures that are relevant to the Genesys licensing system

For additional system-wide planning tools and information, see the release-specific listings of System Level Documents on the Genesys Technical Support website, accessible from the system level documents by release tab in the Knowledge Base Browse Documents Section.

Genesys product documentation is available on the:

- The Genesys Technical Support website at http://genesyslab.com/support.
- The Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthands for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. The following is a sample version number:

76rtr_rga_10-2010_v7.6.001.00

You will need this number when you are talking with Genesys Technical Support about this product.

Screen Captures Used in This Document

Screen captures from the product graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. The text that accompanies and explains the screen captures corrects such errors, *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if the name of an option contains a usage error, the name would be presented exactly as it appears in the product GUI; the error would not be corrected in any accompanying text.

Type Styles

Table 5 describes and illustrates the type conventions that are used in this document.

Table 5: Type Styles

Type Style	Used For	Examples
Italic	• Document titles • Emphasis • Definitions of (or first references to) unfamiliar terms • Mathematical variables Used also to indicate placeholder text within code samples or commands, in the special case in which angle brackets are a required part of the syntax (see the note about angle brackets on page 40).	Please consult the *Genesys Migration Guide* for more information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where *x* stands for . . .

Table 5: Type Styles (Continued)

Type Style	Used For	Examples
Monospace font (Looks like `teletype` or `typewriter text`)	All programming identifiers and GUI elements. This convention includes: • The *names* of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages. • The values of options. • Logical arguments and command syntax. • Code samples. Used also for any text that users must manually enter during a configuration or installation procedure, or on a command line.	Select the `Show variables on screen` check box. In the `Operand` text box, enter your formula. Click `OK` to exit the `Properties` dialog box. T-Server distributes the error messages in `EventError` events. If you select `true` for the `inbound-bsns-calls` option, all established inbound calls on a local agent are considered business calls. Enter `exit` on the command line.
Square brackets ([ ])	A particular parameter or value that is optional within a logical argument, a command, or some programming syntax. That is, the presence of the parameter or value is not required to resolve the argument, command, or block of code. The user decides whether to include this optional information.	`smcp_server -host [/flags]`
Angle brackets (< >)	A placeholder for a value that the user must specify. This might be a DN or a port number that is specific to your enterprise. **Note:** In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.	`smcp_server -host <confighost>`

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