

# Pinter



## Select Sampler

*Workflow Series*

Version 2.0.2

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### Overview

The *Workflow Series* of products from First Choice Software, Inc. is designed to make frequently repeated Clarify tasks easier to perform, and more efficient. The **Select Sampler** enhances the capabilities of several Clarify select forms to provide additional selection criteria that are commonly desired. These augmented forms are:

- Dispatch form (#425)
- Assign form (#443)
- Select Employees form (#702)
- Select Queues form (#727)

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### Dispatch

The *Dispatch* form has been augmented with the ability to display queues based on queue members or queue supervisors. This means that you can now perform the query “Please display all queues that Fred is a member of”, or “Display all queues that Fred is the supervisor of.” In addition, the form retains all previous functionality, including the ability to display the results of auto-destination rules and the ability to query on queue name.

### Select Queues

The *Select Queues* form has been similarly modified. A user can now query the system to display the queues that a particular employee belongs to or supervises.

### Assign

The *Assign* form has also had a new selection criteria added to it. You can now select employees to assign to based on their workgroup. As with the dispatch dialog, all standard Clarify functions, including auto-destination, are supported on this new form.

### Select Employees

The *Select Employees* form has also been augmented with the *Select By Workgroup* functionality. All normal functions for this form are still supported, including the ability to call this form from the Clear Basic method *App.ShowSelect*.

### Advantages

Simply put, the Select Sampler will allow your users to do their work involving queues and employees more efficiently and intuitively.

The Select Sampler removes no existing Clarify functionality – it is simply an enhancement of functionality that Clarify already provides.

### What's New in Version 2.0.2

This version adds support for Clarify 9.0 and later. A new form is provided, samp425-90.dat. If you have Clarify 9.0 or later, import this form into your system, and recompile the code.

### What's New in Version 2.0.1

A small bug was found in the Select Employees form and Select Queues form. When using those forms, the next employee and previous employee buttons (on the employee form) were disabled. This patch fixes that issue. Due to the nature of the forms, there are still two small issues (that cannot be corrected). The first is that it is possible to disable the prev/next buttons (by opening an

employee/queue, and then (while the item is open) selecting another employee/queue in the Select form). This is a small hole, and one unlikely to ever come up. The other is that it is only possible to turn on the Next/Previous button for the filters that Clarify has pre-defined. In other words, it is not possible to scroll through the employees via workgroup (or the queues via employee/supervisor) with the Prev/Next buttons. But you can with all other filters.

To install the patch, simply replace the samp702.cbs and samp727.cbs file with the new versions, and recompile.

## Implementation

This section provides details requirements, what files are including in this product, installation and other implementation considerations.

### Requirements

This version of the Select Sampler requires the following:

**Clarify Version:** 4.0 or later

**Clarify Tools:** Data Dictionary Editor (ddeditor)  
User Interface Editor (uieditor)  
Clear Basic Compiler (cbex)  
Data Exchange (dataex)

**Other Tools:** None

**Note:** If you wish to use the new Select Employees form with the Clear Basic call App.ShowSelect, you must run Clarify 4.5 or later because the ShowSelect API is not provided by Clarify until the 4.5 level.

### Packaging

The Select Sampler is shipped as a zip file:

### Installation Tree

It is recommended that the zip file containing the Select Sampler files be uncompressed into a fchoice subdirectory created at the top of the Clarify install tree. For example, on NT, if the target Clarify server install tree is "c:\clarify", then:

Switch to "c:\clarify" directory.  
Create a "fchoice" directory, if necessary.  
Switch to "fchoice" directory.  
Create a "selsamp" directory, if necessary.  
Switch to "selsamp" directory.  
Unzip into "c:\clarify\fchoice\selsamp" directory.

After uncompressing, the following installation tree would be established:

c:\clarify\fchoice\selsamp

The following files are provided with this product:

File Name	Purpose
selsamp.doc	This document
samp425.dat	New Dispatch form – Clarify 8.x and earlier
samp425-90.dat	New Dispatch form – Clarify 9.0 and later
samp443.dat	New Assign form
samp702.dat	New Select Employees form
samp727.dat	New Select Queues form
samp425.cbs	Clear Basic code for Dispatch form
samp443.cbs	Clear Basic code for Assign form
samp702.cbs	Clear Basic code for Select Employees form
samp727.cbs	Clear Basic code for Select Queues form
samp.dir	Clear Basic directives file for compiling code

### Installation

The Select Sampler files may be installed on any machine that can execute the Clarify data exchange tool (dataex) and the Clarify Clear Basic Compiler (cbex). You will also need to run the Clarify Data Dictionary Editor (ddeditor) and the User Interface Editor (uieditor). The Clear Basic source files (\*.cbs) should be installed in the same directory as the directives file (samp.dir).

**Note:** You may install one of the customizations in the Select Sampler, some of them, or all of them. Each customization comes with a form (.dat file) and a Clear Basic code file (.cbs file).

**Note:** It is highly recommended that you first install the Select Sampler on a test system and play with it first before installing it on a production system.

### Data Dictionary Modifications

The Select Employees form customization requires one modification be made to the Clarify Data Dictionary. If you are not implementing this customization you may skip the rest of this section.

## New Fields Added to Existing Views

Add the following new view fields :

View Name	View Field Name	Object Name	Object's Field Name
empl_user	employee_work_group	employee	work_group

To add the view field, follow the following steps:

1. Start the Data Dictionary Editor.
2. Choose *Database Views* from the *Select* menu.
3. Type **empl\_user** and press the *List* button.
4. Select *empl\_user* and press the *Open* button.
5. Press the *New* button.
6. Scroll in the *Available Fields* list and find *employees.work\_group*.
7. Press the *Copy>>* button.
8. Press the *Update Field* button.
9. Press the *Done* button.
10. Press the *Replace View* button.
11. Exit the Data Dictionary Editor.

### User Interface Modifications

The forms provided with this product must be imported into the database with the data exchange tool. If not all of the customizations are to be implemented in your database, only those files for the customizations you are implementing need be imported.

The form files are imported with the following command:

```
<path>\dataex -user_name <user>
               -password <pass>
               -db_server <serv>
               -db_name <db>
               -imp <file>
```

Where:

<path> Is the path to the dataex program  
<user> Is the system administrator user  
<pass> Is the system administrator password  
<serv> Is the database server name  
<db> Is the database name  
<file> Is the form file (.dat extension)

**Note:** The slash between *<path>* and *dataex* should be a forward slash for UNIX systems.

**Note:** If the *<file>* is not in the current directory, it must be preceded by the path to the directory it is in.

**Note:** Each file should import with 0 errors and 0 warnings. If there are any errors or warnings, the *dataex.mes* file should be investigated for the reason.

**Note:** If you have Clarify 8.x or earlier, use the *samp425.at* form. For Clarify 9.0 and later, use the *samp425-90.dat* form

After all of the form files have been imported successfully, the new forms must be added to the proper resource configuration(s) in UI Editor. You must decide which user or groups of users should see the new versions of the imported forms.

To add the forms to the resource configuration(s):

1. Start the User Interface Editor.
2. Choose *Resource Configs...* from the *Select* menu.
3. Press the *List* button.
4. Select the resource configuration you want to modify and press the *Open* button.
5. Type **ssamp** in the text box to the right of the starts with dropdown list and press the *List* button.
6. Select the form(s) you wish to add to the resource configuration from the left grid control, and press the *Copy>>* button.
7. If any confirmation dialogs appear, press the *OK* button to continue.
8. Press the *Replace* button. After the save is completed, press the *Done* button.
9. Repeat steps 4-8 for any other resource configurations you wish to modify.
10. Exit the User Interface Editor.

### Clear Basic Code Compilation

You must now compile the supplied Clear Basic code against the forms you have imported.

To compile the code modules, make sure that the code modules (\*.cbs) and the directives file (*samp.dir*) are located in the same directory. Enter the following command to compile the code:

```
<path>\cbex -dir samp.dir
           -batch
           -overwrite
```

Where:

<path> is the path to the cbex program.

**Note:** If you only wish to compile some of the modules, you may comment out the other modules by preceding them with a single quote character. For example:

```
samp727.cbs F 727 5.0 ssamp1.0
samp425.cbs F 425 5.0 ssamp1.0
```

When the compilation is completed, you should look at the *cbex.log* file to check on the status of the compilation. There should be two rows for each file compiled that start with the word **SUCCESS**. If there are any failures (and there shouldn't be), check the above instructions to make sure that your compilation environment is set up correctly.

**Note:** The Clear Basic compiler requires that the user who performs the compilation be a member of a resource configuration that includes the forms compiled against. Example: If user *sa* compiles the CB code, he must be a member of a resource configuration that holds the new forms.

**Note:** The slash between *<path>* and *cbex* should be a forward slash for UNIX systems.

After you have finished compiling the code, you are ready to use the customizations.

**Note:** Any users who are currently running on the system should either stop Clarify and start it up again, or choose the *Update Desktop* menu item on the *Desktop* menu.

### Limitations

There is only one known issue with the Select Sampler.

If you are using the older XVT client from Clarify, the Dispatch form (#425) will not paint completely properly. This is due to a limitation with XVT. XVT cannot paint modal dialogs properly if you customize them at all. The dispatch form is one of the very few modal forms that Clarify has defined.

Note that this is a display issue only. The customization will still operate properly with the XVT client. If you use the newer MFC client, the painting problem will not appear.

### Performance

Several of the baseline forms that are customized in the Select Sampler have considerable C-language code written behind them by Clarify. This is to maximize performance for the Clarify users who have a very large number of queues or many employees using the system (in the several thousand range), and who perform multiple object dispatch or assign.

If you have many thousands of users (not contacts, but users), or thousands of queues, you may want to investigate the performance of Select Sampler on your system.

If you have smaller numbers of queues and users, you should be able to use Select Sampler without performance issues.

We have found that the following optional indexes will improve the performance for Select Sampler:

Table	Column(s)	Index Name	Unique?
mtm_queue4_user23	queue2user	q_user1	No
mtm_queue4_user23	user_assigned2queue	q_user2	No
mtm_queue5_user24	queue_supvr2user	q_user3	No
mtm_queue5_user24	supvr_assigned2queue	q_user4	No
employee	work_group	emp_wg	No

### Year 2000

The Select Sampler was designed to be Year 2000 compliant. All date/time comparisons are performed using database-supplied routines. All date/time storage is in the Clarify database using date/time fields. No Year 2000 issues are expected.

### Internationalization

The Select Sampler extends baseline Clarify forms, and some of those forms are dependent on the strings contained within the pre-defined dropdown lists. Thus, First Choice has not internationalized these forms. When the baseline Clarify forms are internationalized, the Select Sampler will be extended to allow for full translation.

### Examples

The Select Sampler is very simple to use – just use the Clarify forms that you would normally use, but change the selection criteria as needed.

**Example 1.** You want to assign a subcase to someone in the Networking group, but you don't know who belongs to that group. Bring up the *Assign* form, and change the selection to *Workgroup*. Type in the workgroup name, and press the *List* button. The employees who work in that group are now displayed.

**Example 2.** Mary has changed job responsibilities, and you must modify the set of queues that she belongs to. But you don't want to have to open each queue to see if she is a member or not. Bring up the *Select Queues* form and filter on *Member*. Type **Mary** in the text box and press the *List* button.

**Note:** Maintaining queues is a common problem for Clarify customers. For more information about making this job easier, see the Related Products section below.

**Example 3.** You want to dispatch a case to a queue where you know that Henry will see it, but you don't know which queues Henry belongs to. You can now bring up the *Dispatch* form, change the selection to *Member*, type **Henry** in the text box, and press the *List* button. All of the queues that Henry belongs to will be listed.

**Example 4.** You want to make sure that all of your employees are in the proper workgroups. Start the *Select Employees* form and change the filter to *Workgroup*. Type in a workgroup name and press the *List* button. View the list of employees and repeat with other workgroups.

## How to Contact Us

For more information about other First Choice Software, Inc. products, or if you have any questions about the Select Sampler product, please contact us at:

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