ORACLE SERVICE CLOUD

Wonderful World of Workspace Rules: Unanswered Questions Answered

Question	Answer	Asked by:
Assume, my incident status is Waiting and i want to create a rule - if last update date =Sysdate-5 then a reminder should be send to the customer.	Using business rules would be more appropriate for this scenario. I believe that an escalation rule would do the trick. Here is a link to a KB answer about this topic: https://cx.rightnow.com/app/answers/detail/a_id/2181	Bhawna Patni
Can we restrict the category based on product in the customer portal as well, as you did it in the console? I mean if the rule can work in the same way in the customer portal as well.	Please keep in mind that the workspace rules run on the client (in the console), but the product-category linking takes effect on the customer portal as well (because that's a stand-alone functionality). Eg. if I setup product x linking to category y, then on the customer portal, if I select product x, only category y will be available to select in from the list. This is out-of-the box. Here is a link to our documentation on the topic: https://documentation.custhelp.com/euf/assets/devdocs/cloud19b/olh/CoreFeatures/topicrefs/c_Product_linking_be1197120.html?hl=product%2Ccategory%2Clinking	Bhawna Patni
Are Workspace rules part of BUI yet?	Yes, workspace rules are usable in BUI and should present the same behavior as in the .NET console. There are some restrictions, though, in terms of the available actions that can performed. Here is a KB answer that contains a comprehensive list of the currently supported features in BUI (related to	santhosh xavier

6/7/2019

	workspace rules, of course): https://cx.rightnow.com/app/answers/detail/a_id/9028	
I use ctrl+f to search the workspace rules from the agent desktop without exporting. You said there is no way to search the rules from the agent desktop. What is the difference?	You are correct, Ben, you can use ctrl+f, but if the search term is found, the entire 'cell' will be highlighted. I just find it easier to export and use search in the browser (this way, I can see other useful info such as no. of results, etc), especially in a very long list of rules. Of course, it's up to you if you decide to use this.	Ben Palmer
Miruna, I do not think the email address is available in workspace rules as there is three, main, alt 1 and alt 2. I have never been able to find the fields in workspace rules. They do appear in business rules though. Am I correct in saying this? would like to be proved wrong... :)	I have done some testing around this and Alistair is correct, the email address is not directly exposed in the incident workspace rules. I've been able to set this up using a bit of customization magic. I have created a simple custom process which pushes the email addresses of the contacts attached to an incident in a custom field. After that, I've setup a workspace rule which checks that field for specific values and shows a message. You might be better off by using business rules and regular expressions to match email addresses in case you don't have that much experience with custom processes.	Alistair Caw
We have a very customized WS's and an WF's specifically the script for processing check requests, embedded into our primary WF. The problem that I am having is that based on the setup, an existing incident cannot trigger the processing of a check. I have an instance in which it actually did and I am having a terrible time trying to figure out how this happened as historically the invalid request would NOT trigger the event for HODC	Asia, please raise a service request with us and we`ll try and figure out what's going on. Make sure to include as many details as possible and very importantly, expected vs actual behavior.	Asia Johnson
Does the Business Rules drive the Workplace Rules?	Not really. Business Rules are evaluated and executed on a database commit (eg. when you create/update a record), while Workspace	Sonja Willis

	Rules are running in realtime, inside the workspace you are working in. A very simple example of this would be: Agent works in the incident workspace and his/her interactions with the console trigger workspace rules. Upon saving, the business rules come into play.	
Is a custom process to set a value on update less memory intensive then a series of work space rules to do the same thing?	In theory, yes. But remember - workspace rules are running on the client, while custom processes are running on the server site (upon some sort of commit).	Michael A Burke
How many workspace rules is too many?	I cannot provide you with a number. There are many things to consider such as how many tabs / fields / reports the workspace has and also the triggers used in the rules. For example, if the workspace is very complex and you also have a lot of rules which run when the editor loads, that could slow down the workspace. Just try to optimize the rules as much as possible and remember that less is more. In case you have severe performance issues, please raise a SR with us and we`ll be happy to help. *Note from @Bill Utter.. we have 42 rules on 2 WS's and have not seen a slow down to the extent that it impacts the agent level of efficiency..*	Adrianna Gutierrez
Do disposition links override workspace rules in the same way product/category links override them?	Yes, product-disposition linking works the same as product-category with regards to this.	Chris Weisgram
Is it better to delete a rule or uncheck Active if rules is no longer is used?	It's always a good idea to disable the rule instead of deleting it. What I would do is disable the rule, test the workspace and only delete it if no unexpected behavior appears.	Pete Magana
Scenario: In answer workspace ,If the product changes to lets say X then can we have a dialog box popping up. The gist is to trigger a rule from the reports (example products/category) tab . The	The reason why you cannot find the product/category fields in the workspace rules is that what you see in that tab is actually a control, not a set of fields. Unfortunately, I	savan singh

current set of triggers don't allow that. Question is How to trigger a rule from a change happening in tabs in answer work space?	don't see a standard way of achieving that, but surely a customization can help out.	
Can we identify the field values which are changed by Workspace rules?	No, not out of the box. This is because the rules run on the client before the changes are committed to the database. One way to achieve that would be via a customization which saves the current value of a field (before updating the record) and then compare it with the new value.	Praveen Shakkarval
When you have maxed out the workspace rules, is there an alternative way to set up workflow on a workspace?	Firstly, what I would try to do is optimize the existing rules (see if I can add more actions instead of new rules). Secondly, if the performance of the workspace is still not what you expect, I would consider using a workflow and multiple - more lightweight - workspaces instead. This is suggested in the KB answer: https://cx.rightnow.com/app/answers/detail/a_id/2824	Adrianna Gutierrez
What does Add in do? Please give a brief overview	The desktop add-ins framework lets users extend the reach of the Oracle Service Cloud agent desktop by creating custom controls, components and applications that live within the desktop. An overview of this framework, examples and sample code can be found here: http://documentation.custhelp.com/euf/assets/devdocs/unversioned/Connect_AddIn_Framework/Default.htm	Bhawna Patni