# OSVC TECHNICAL SUPPORT WEBINARS:

# Wonderful World of Workspace Rules

our experts are your guides

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# Why workspace rules?

- Companies want agents to be as efficient as possible
- Streamline the 'active' part of the business process and drive automation



## What are workspace rules?

- Conditional, automated actions that change the behavior of a workspace
- Automated actions that take place in the editor **before** data is committed\*

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## How are workspace rules executed?

Rules are executed in the order listed in the rules window from top to bottom.

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- Preceding rules may be overwritten by the ones which follow them
- More general rule should be set to execute first
- Avoid two rules using the same condition, just add multiple actions

🔧 Ado	d Rule 💖 Edit Rule 🗅 Cop	oy Rule 🔀 Delete Ru	le			Options	s -
Active	Name	When	If	Then	Else Actio	n	
	Not Assigned Message Box	The editor loads	An existing record is being edited AND Assigned is null	Display a message box	Edit	Copy , Delet	ete
	Alice's Incidents	The editor loads	The logged in account equals Alice Smith	Show Category AND Make Language required	Edit	Copy , Delet	<u>ete</u>
	Alice's Incidents - Primary	The editor loads	The logged in account equals Alice Smith AND The current editor is a primary editor	Hide Category	Edit	Copy Delet	<u>ete</u>
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	Other issues Prepay products g this way !	The record is saved Product changes	Disposition equals Other AND The record is not copied AND Queue not equals (exclude Product equals Prepay AND Category equals Device Issues	Set Severity to Low Set Status to include Updated, Waiting, Researchi		. Copy , Delet	
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## When are workspace rules getting confusing?

		🗅 Copy Rule 🔀 Delete					Options •		
Active	Name	When	If	Then	El Actio	-		•	
•	Not Assigned Mess	The editor loads	An existing record is being edited AND Assigned	Display a message box	Edit	G,	Print Preview		
	Alice's Incidents	The editor loads	The logged in account equals Alice Smith	Show Category AND Make Langua	Edit	Ð	Page Setup		
•	Alice's Incidents -	The editor loads	The logged in account equals Alice Smith AND T	Hide Category	Edit	۹	Forward		
•	Other issues	The record is saved witho	Disposition equals Other AND The record is not c	Set Severity to Low	Edit	6	Export	•	HTML
•	Prepay products	Product changes	Product equals Prepay AND Category equals Dev	Set Status to include Updated, Wai	Edit	1	Auto Format		PDF
•	New Rule	Assigned changes OR Sev	Severity in list Critical, Very High	Hide SLA Instance	Edit		Display Options		Excel HTML
•	New Rule	Asset changes	The current editor is a child editor	Execute Save & Close	Edit		Section Visibility		XML
	New Rule	The Guide finished	The logged in account's profile equals Sales	Add standard text 'Agent Greeting'	Edit	Q	Zoom		Image
						<i>#</i> 3	Find		Delimited +
						84	Find Next		
						1	Clear		
						-	Field Chooser		
						AT I	Sort		
						Z¢ V			
							Auto Filter		

- Test the workspace rules on a typical agent machine, don't limit yourself to your development environment.
- Rules execute on the client, lack of optimization and clarity of process can easily lead to performance issues.

#### If you have a large number of rules and find it hard to read through them, consider exporting the list.

Export Options		?	Х
File   Location D:\workspace_rules_export\Rules.html   ✓ Launch Application    Append date/time to file name using the following format: %Y-%m-%d %H.%M.%S    Save the selected directory as the default directory	Res	set	
Report Options Add report name to output			
HTML Options   Use absolute layout. The output will closely resemble the screen display. However, some browsers may not support printing with this layout.   Image: Strength Strengt Strengt Strength Strength Strengt Strength Strengt			
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# Conflicts?! I'm peaceful.



- Less is more limit the number of rules.
- Structure your workspace rules flow based on triggers.
- Think of the workspace rules' evil twin business rules when designing them.
  - Business rules are triggered on commits (eg. save) -> centralized logic
  - Workspace rules execute while editing. -> user interface streamlining.
- Other 'interferences': script rules, script branching rules, workflows.



# 6 Fun times. Demo. Questions.

- 1. Getting my hands dirty real-life scenarios.
- 2. Q&A (my favorite part)
- 3. Farewell and handshakes



#### **Oracle Service Cloud Support Webinars**

Upcoming Webinars

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Scheduled: Wed May 30th, 2018 9:00 am MDT Presenter: Andrei Vatamanu Description: After sharing best practices for setting up mailboxes, tips for troubleshooting delayed or seemingl...More

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Scheduled: Wed June 06th, 2018 9:00 am MDT Presenter: Johnny Meehan

#### Description:

Walk through the development of a CPM, including the idiosyncrasies of implementing a test harness....More Register

#### Managing and Monitoring OSvC Health New

Scheduled: Wed July 11th, 2018 2:09 pm MDT Presenter: Owen Sood-Giddings Description:

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Watch It Now

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Date Recorded: Thu January 25th, 2018 8:46 am MST Presenter: Levi Dyckman Description: Explore different options for adding data points into a site with custom fields and objects. Watch It Now

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