

# OSvC TECHNICAL SUPPORT WEBINARS:

## Wonderful World of Workspace Rules

*our experts are your guides*

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**ORACLE®**

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# Today's Agenda

1 **Why** workspace rules?

2 **What** are workspace rules?

3 **How** are workspace rules executed?

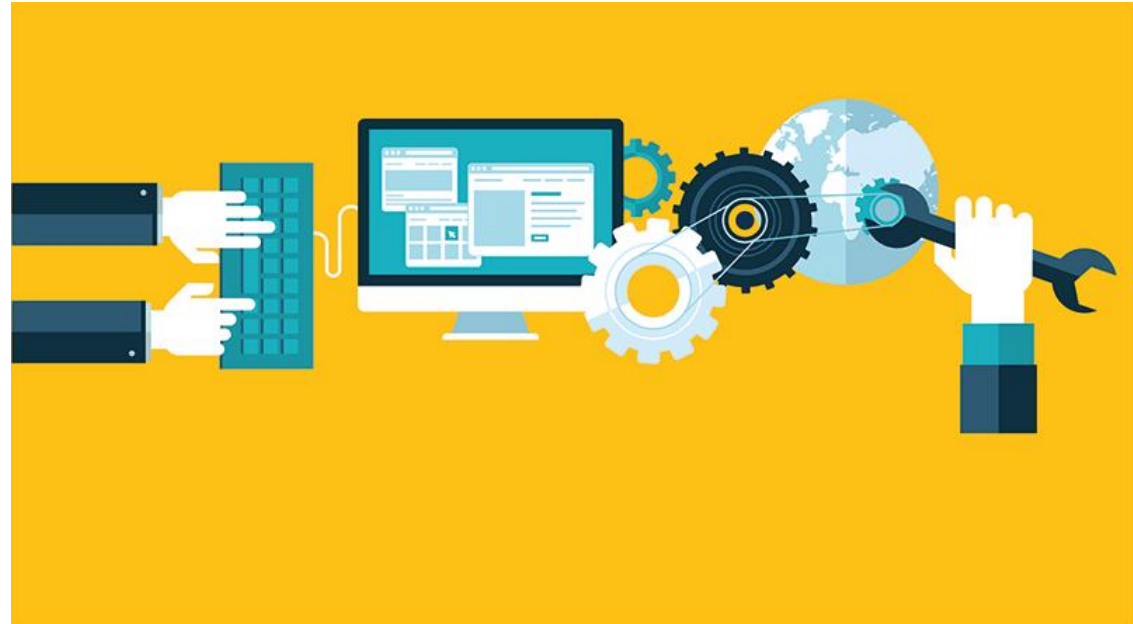
4 **When** are workspace rules getting confusing?

5 **Conflicts?! I'm peaceful.**

6 Fun times. Demo. Questions.

# 1 Why workspace rules?

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

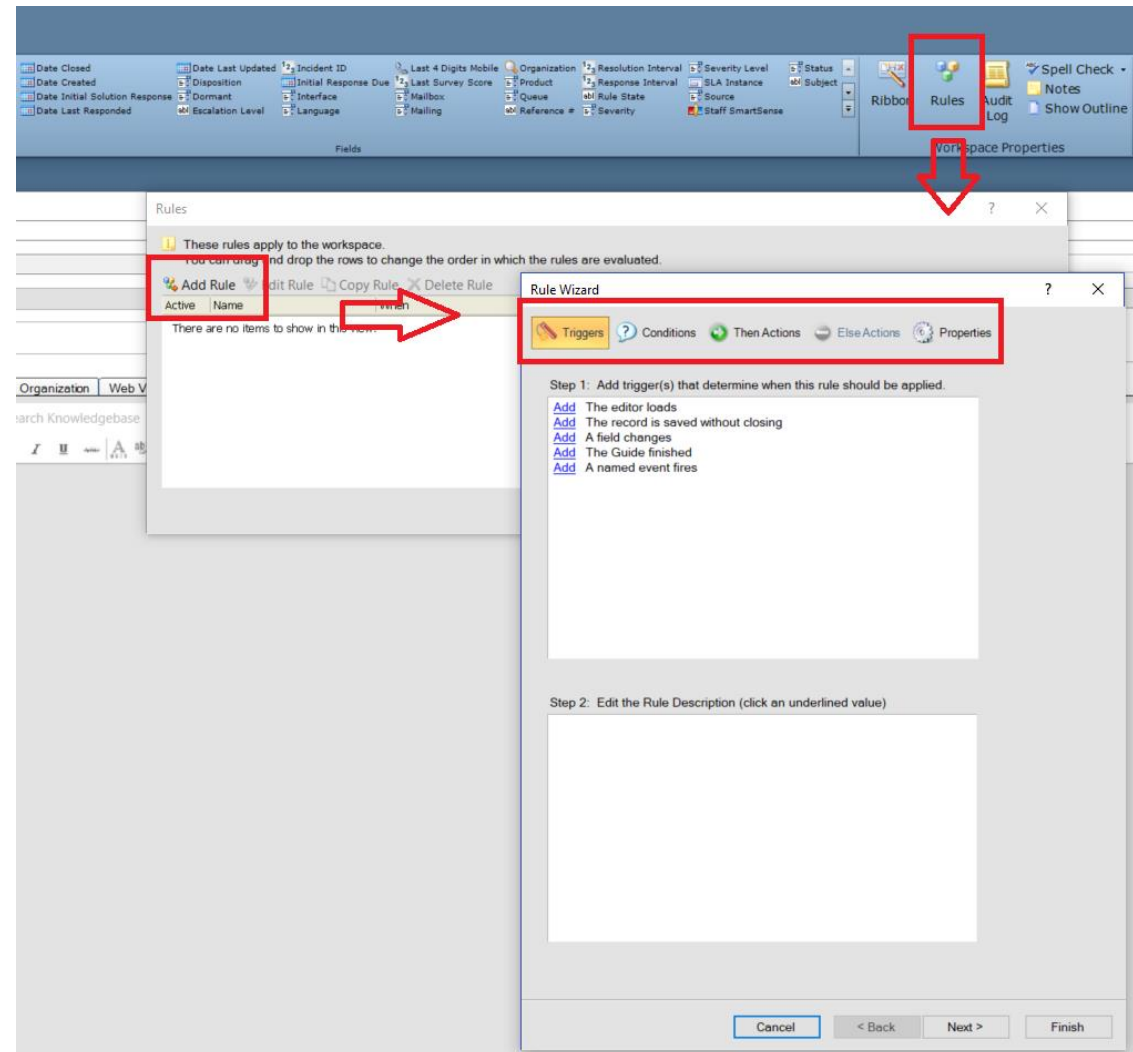
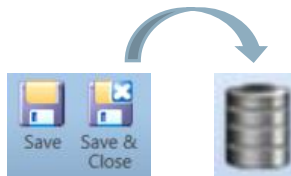


## 2

## 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\*

\* committed =

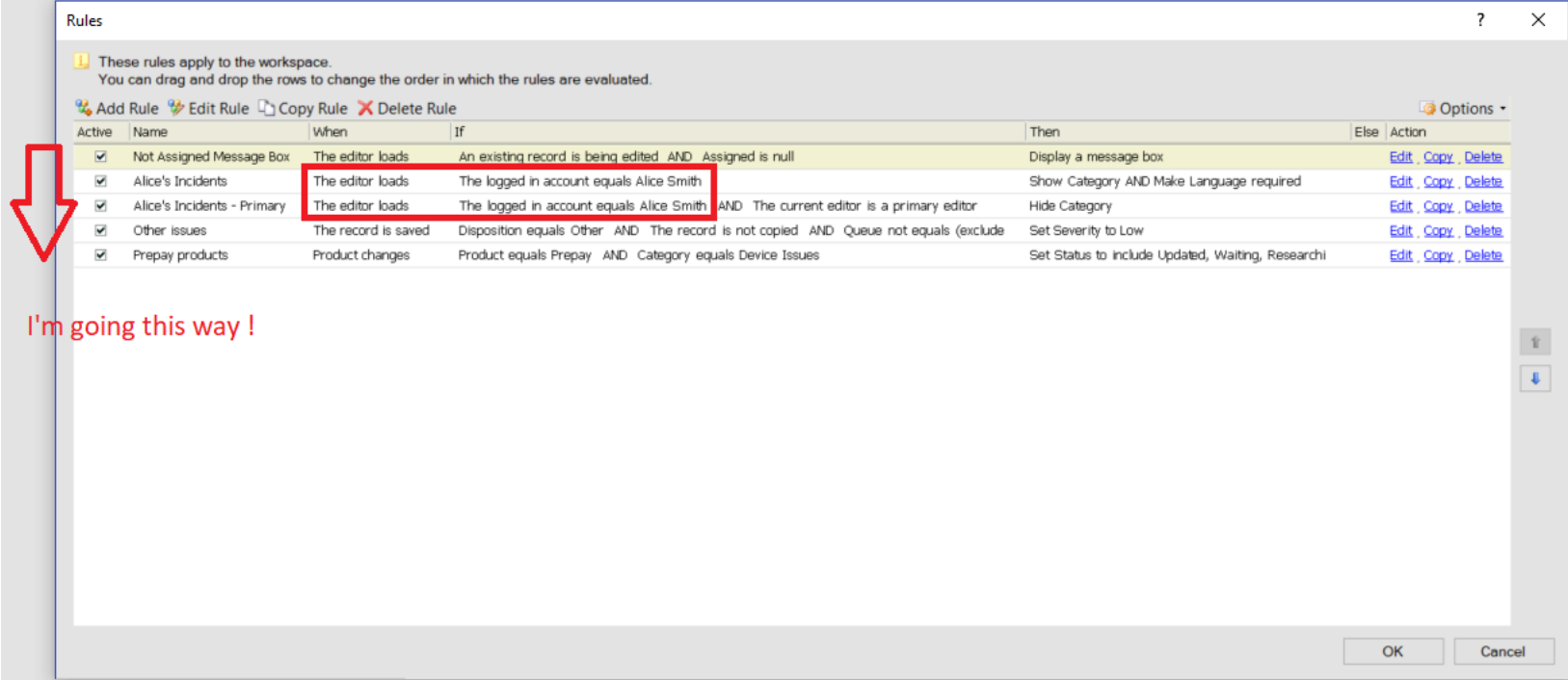


## 3

## How are workspace rules executed?

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

- 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



Rules

These rules apply to the workspace.  
You can drag and drop the rows to change the order in which the rules are evaluated.

Add Rule Edit Rule Copy Rule Delete Rule Options

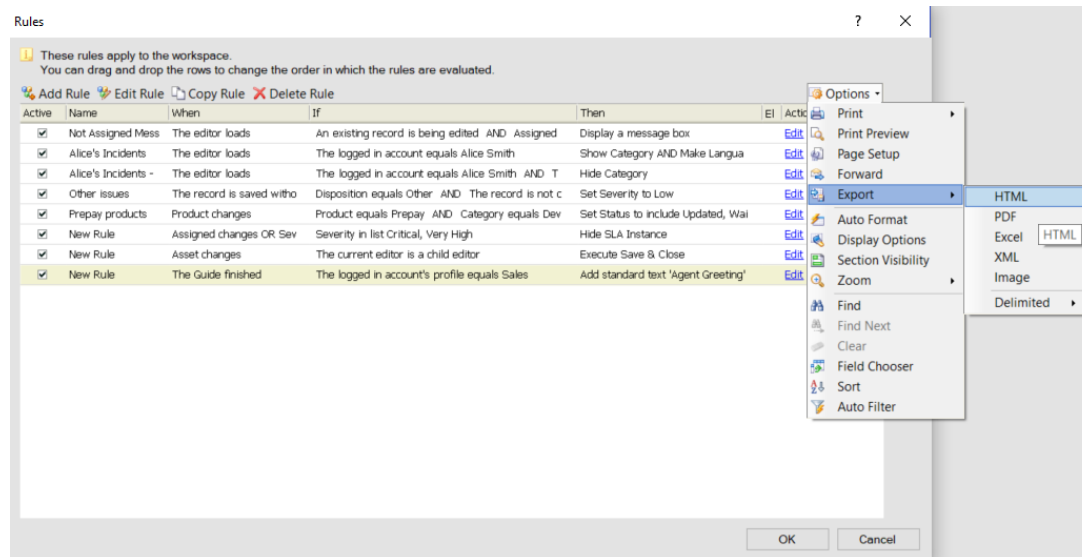
Active	Name	When	If	Then	Else	Action
<input checked="" type="checkbox"/>	Not Assigned Message Box	The editor loads	An existing record is being edited AND Assigned is null	Display a message box		Edit Copy Delete
<input checked="" type="checkbox"/>	Alice's Incidents	The editor loads	The logged in account equals Alice Smith	Show Category AND Make Language required		Edit Copy Delete
<input checked="" type="checkbox"/>	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 Delete
<input checked="" type="checkbox"/>	Other issues	The record is saved	Disposition equals Other AND The record is not copied AND Queue not equals (exclude	Set Severity to Low		Edit Copy Delete
<input checked="" type="checkbox"/>	Prepay products	Product changes	Product equals Prepay AND Category equals Device Issues	Set Status to Include Updated, Waiting, Researchi		Edit Copy Delete

I'm going this way !

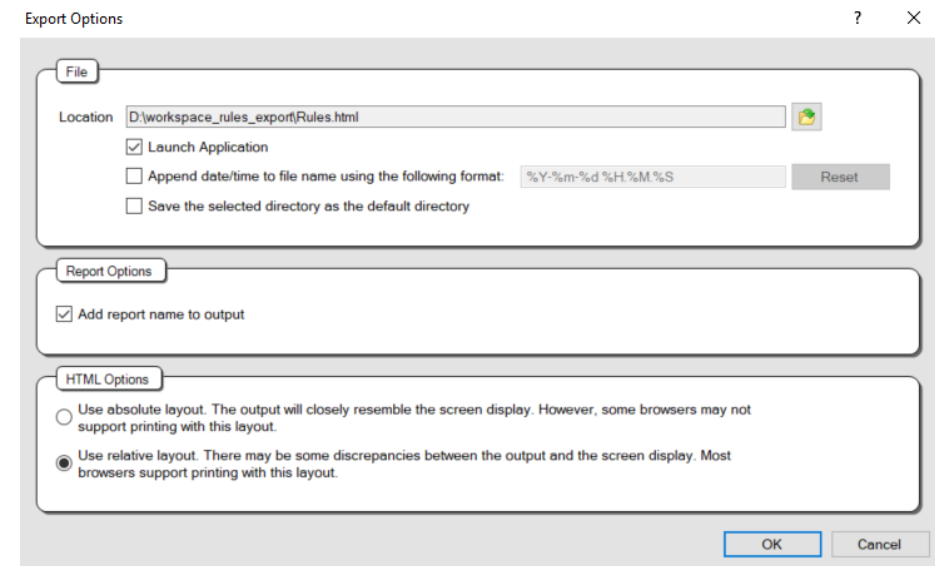
OK Cancel

# 4

## When are workspace rules getting confusing?



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



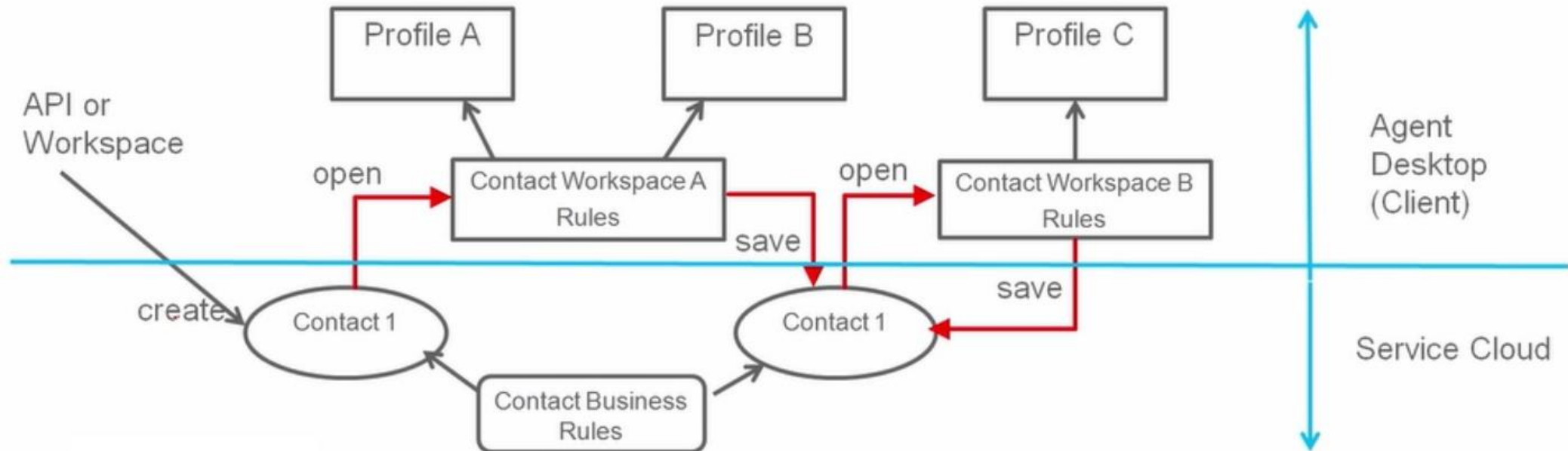
- Test the workspace rules on a typical agent machine, don't limit yourself to your development environment.
- Rules execute on the client, lack of optimization and clarity of process can easily lead to performance issues.

## 5

## 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.





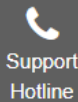
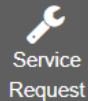
## Fun times. Demo. Questions.

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

#### Email with the Oracle Service Cloud **New**

**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](#)

[Register](#)

#### Demystifying CPM **New**

**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:**

There's a lot going on in your support organization and a lot going on in your site. Let Owen tal...[More](#)

[Register](#)

Have a suggestion for a webinar topic? [Send us your idea!](#)

#### Ask the Experts: Best Practices for Implementing and Maintaining Single Sign On (SSO)

**Date Recorded:** Thu January 11th, 2018 8:47 am MST

**Presenter:** Shane Parsons

**Description:**

Learn best practices for implementing SSO.

[Watch It Now](#)

#### Ask the Experts: Extending Data into your Site

**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](#)

#### Ask the Experts: Troubleshooting Wizardry

**Date Recorded:** Thu February 08th, 2018 8:35 am MST

**Presenter:** Elizabeth Trithart

**Description:**

Reduce the resolution time of your service request by learning some useful troubleshooting techniqu...[More](#)

[Watch It Now](#)