Wonderful World of Workspace Rules

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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.

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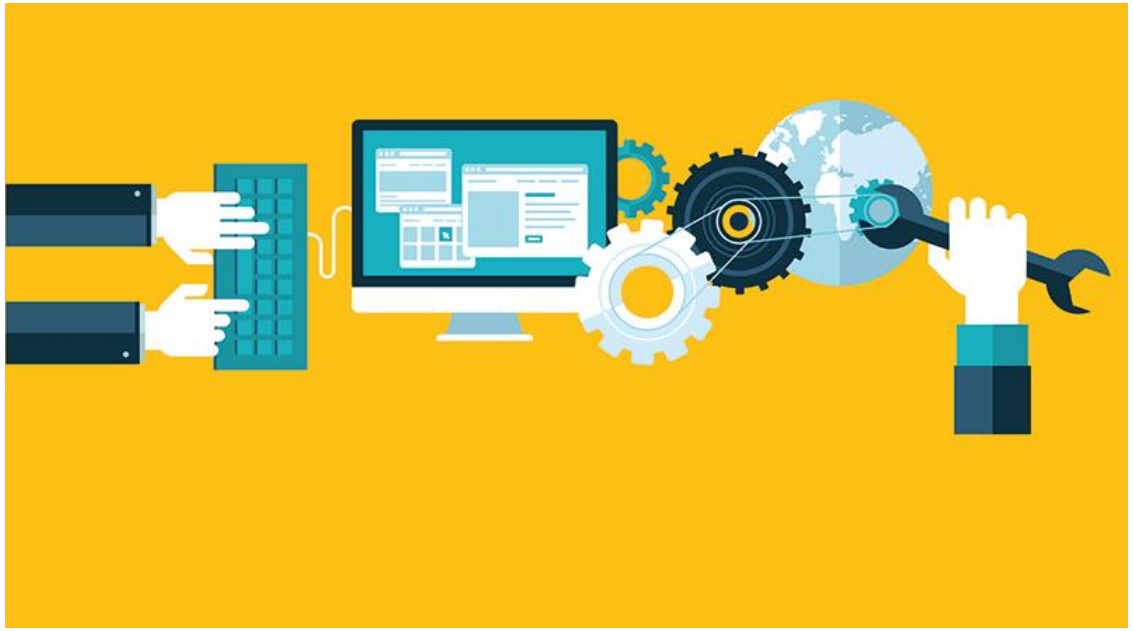
1 Why workspace rules?

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



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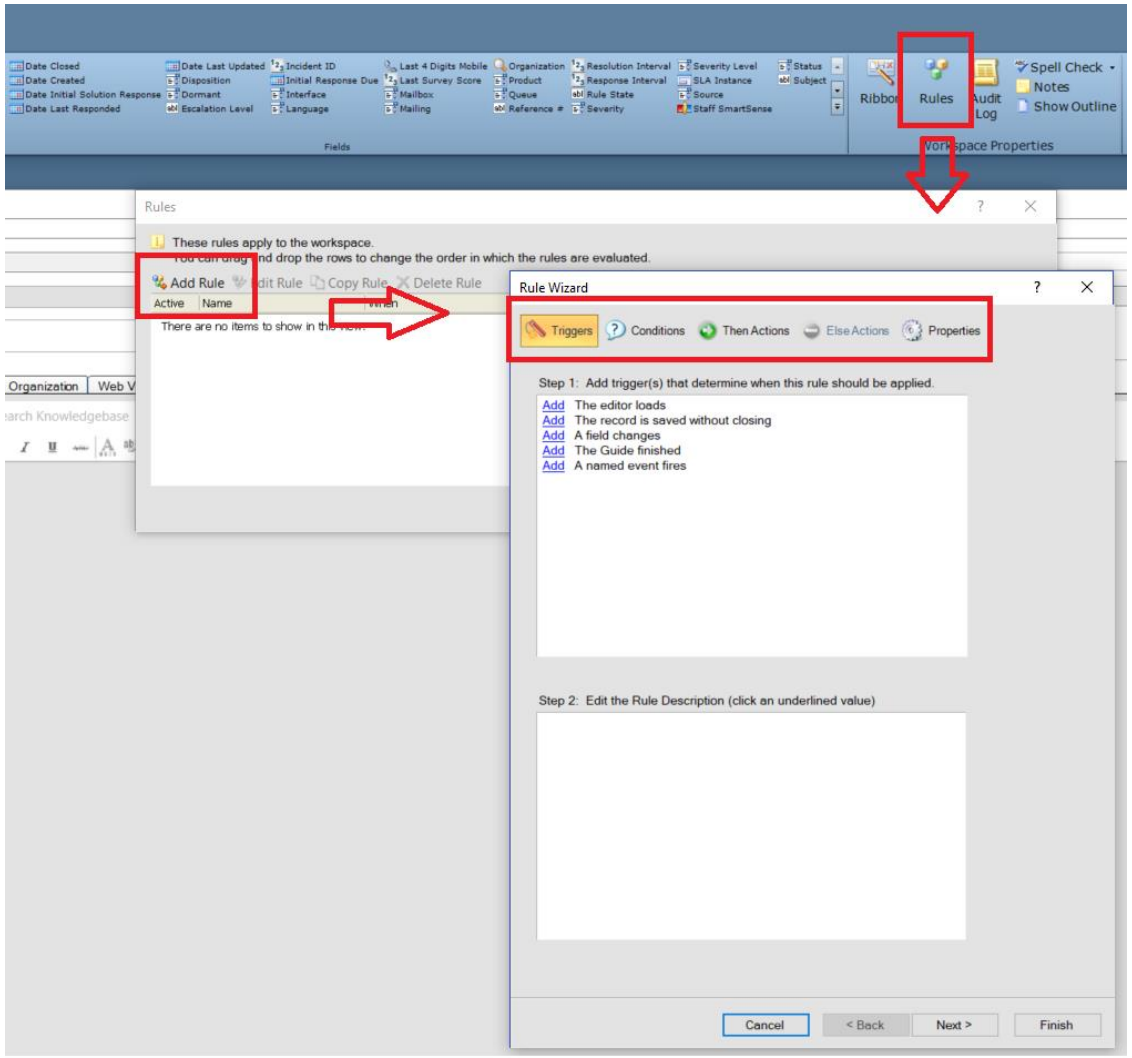
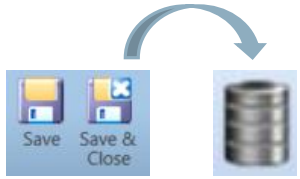
2 What are workspace rules?

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



* committed = 

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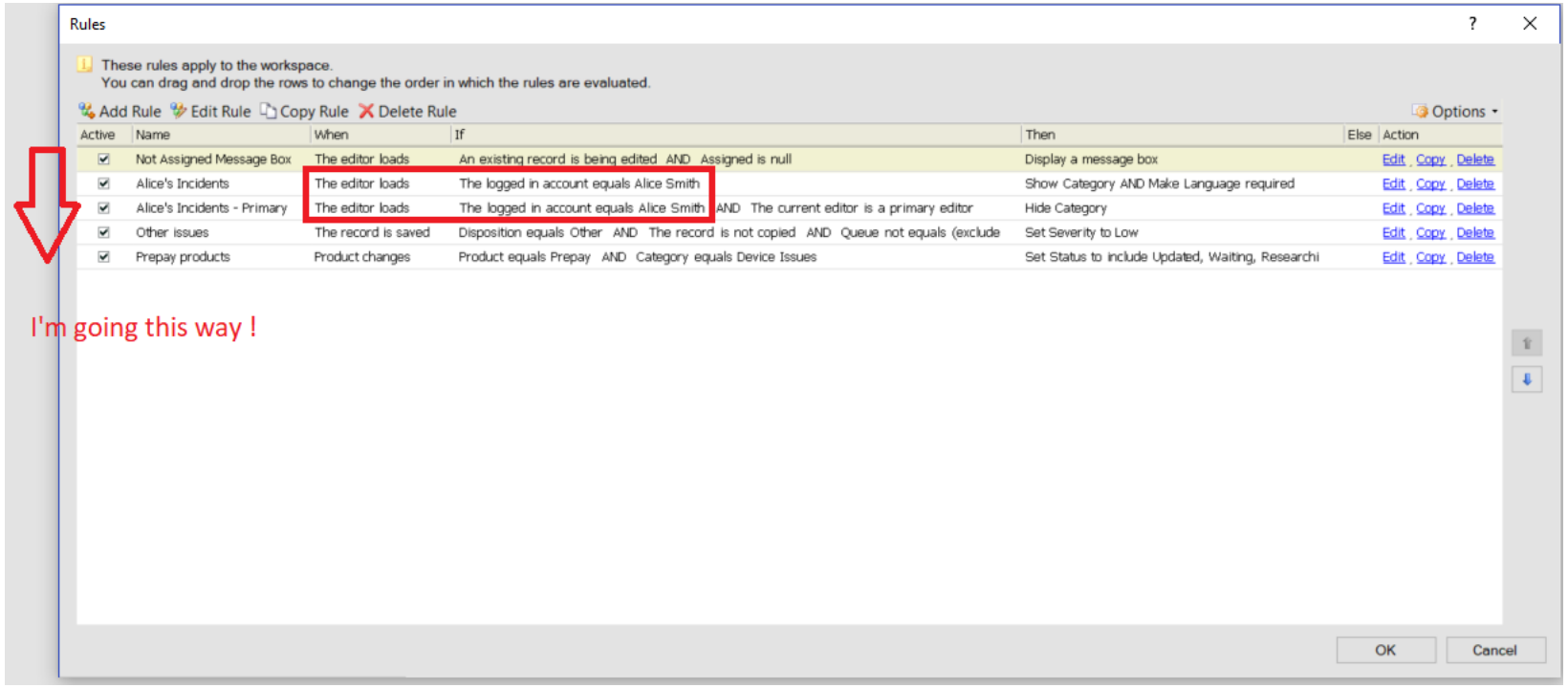
3 How are workspace rules executed?

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



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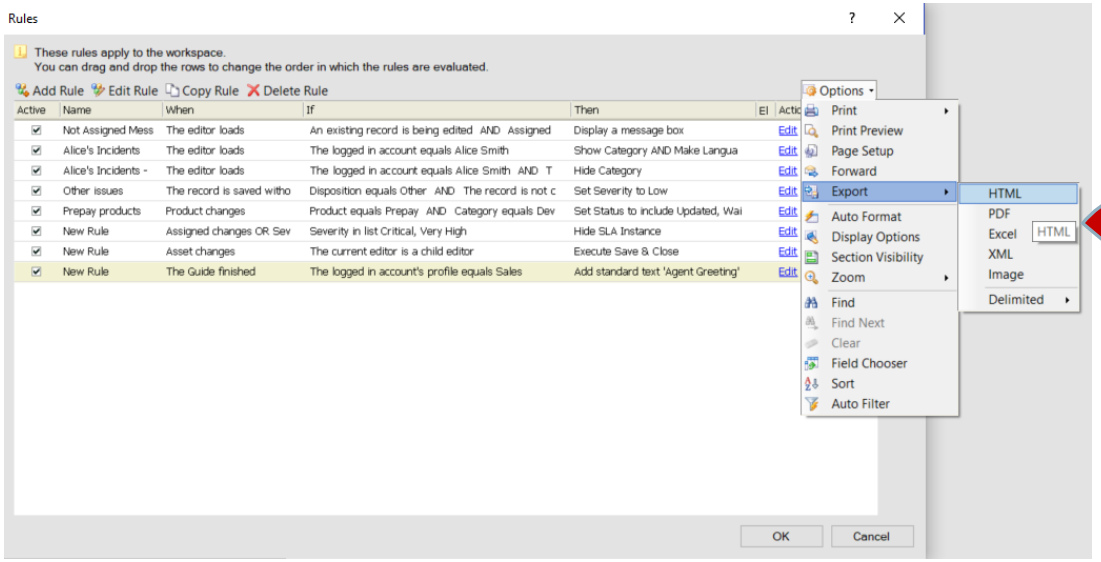
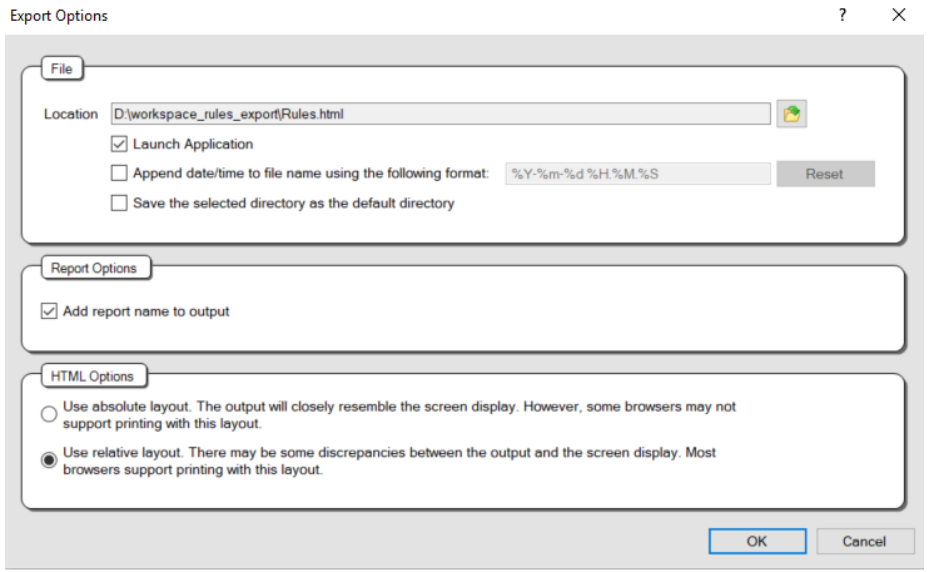
4 When are workspace rules getting confusing?



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.

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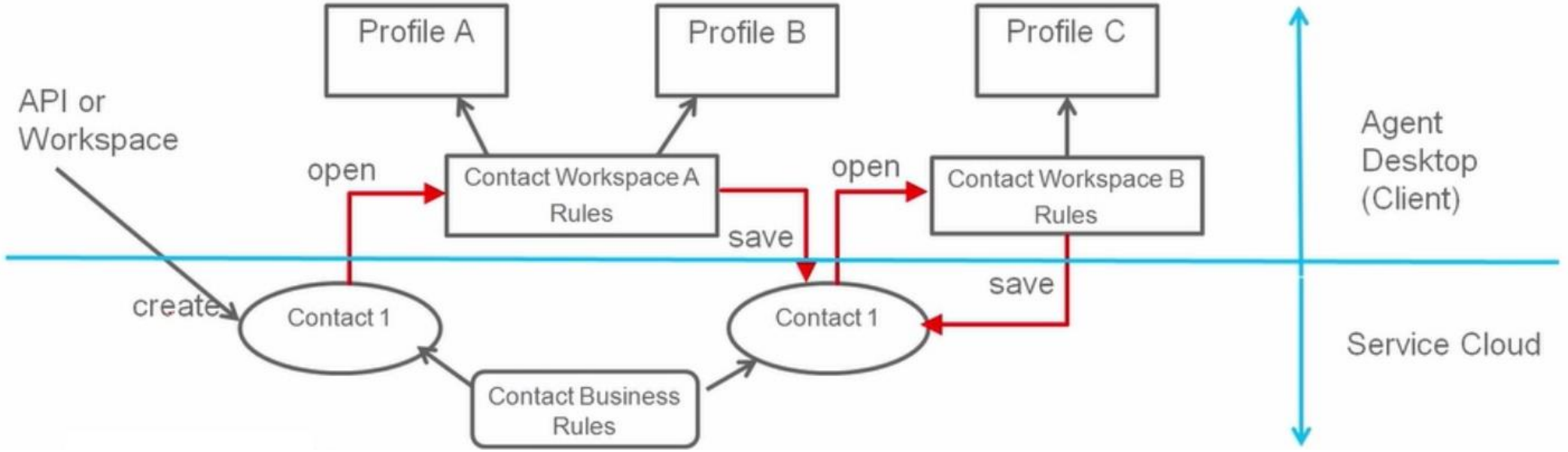
5 Conflicts?! I'm peaceful.

- 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.



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6 Fun times. Demo. Questions.

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

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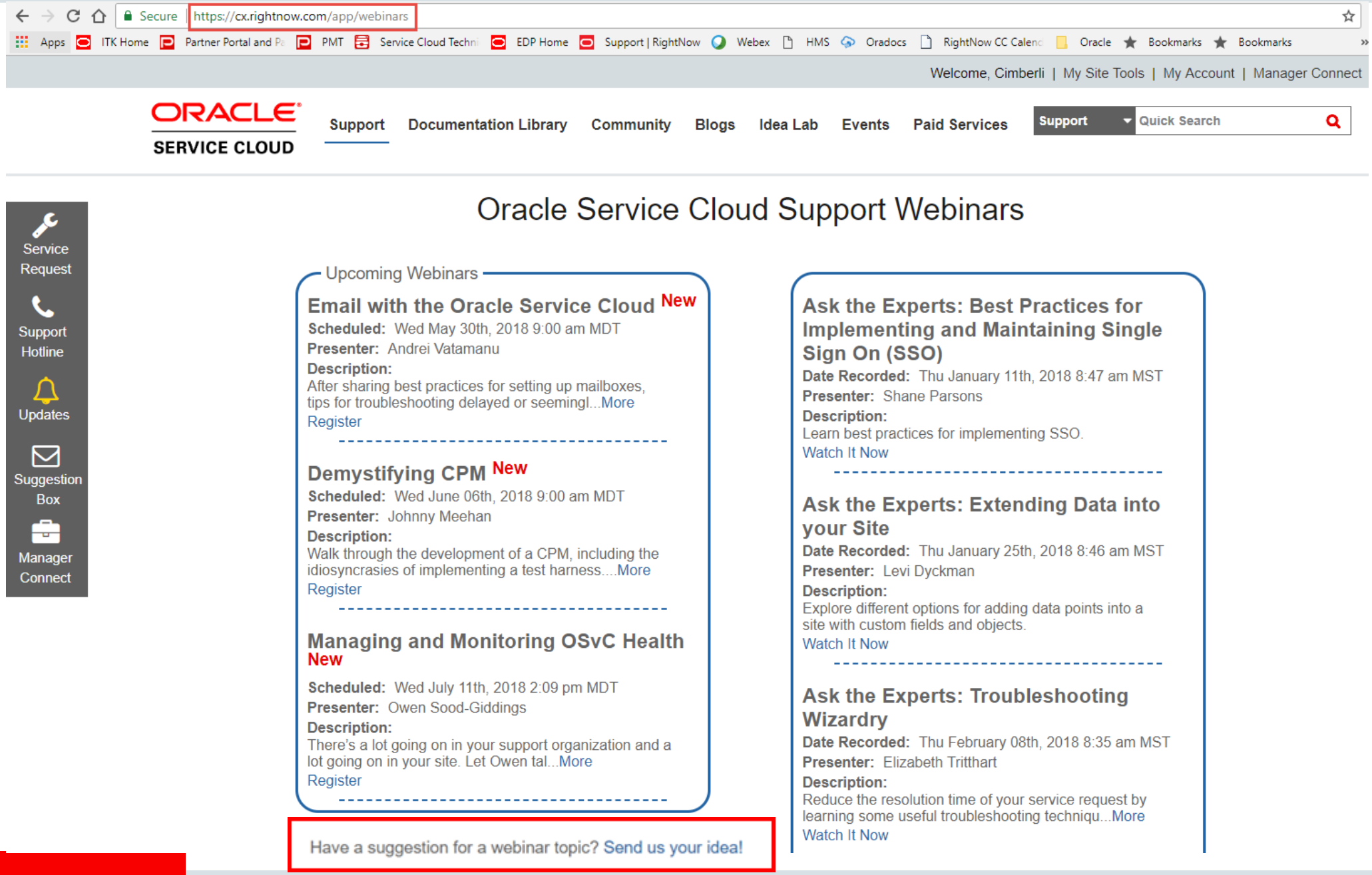

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