



REACHING NEW HEIGHTS IN CUSTOMER EXPERIENCE

RIGHT
NOW
TECHNOLOGIES
SUMMIT 07

Advanced Business Rules

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Introduction

- Kenny Tietz
 - Tier 2 Technical Support
 - » Customer site troubleshooting
- Gretchen Dickie
 - RightNow Technologies Information Systems
 - » RightNow Internal Rules

Overview

- Scope
- What can business rules do?
- Version 8 additions
- Escalations
- Administration & Troubleshooting
- Best practices
- Examples Throughout

Discussion Scope

- Intended for advanced rules discussion:
 - Please stay if you are new to rules
- Questions welcome throughout the presentation
 - Prefer open discussion on topics
- May defer some questions to ATE room
 - Allows for more specific offline conversation

What Can Business Rules Do?

- Automate manual tasks:
 - Queue routing
 - Assignment
 - Email standard content to end user
 - Escalation
 - Notification
 - Set/increment custom fields
 - Email surveys/marketing mailings to contacts
 - Forward object to an individual
 - Create and assign SLA's/SLA instances
 - Manage Tasks

Version 8 Additions

- Rule Variables
- Task Rules
- Else Clause
- Expanded Condition/Action Operators
- Relative Time Condition Comparisons (>version 8.1)

Rule Variables

- 4 Data Types
 - Integer, Text, Date, Date/Time
- Can set default values
- Valid only during the run
- Useful for holding data values during rule run
 - Reset to default each time rules run
 - Can set/increment data in rule
- Rule variable increment example

Task Rules

- Condition processing based on
 - Task, Incident, Opportunity, Answer, Organization, Contact data
- Manage the rules based on the type of the task
 - Good application for functions.
- Task API runs first
 - Any changes made in other rules for current run will not be available for task rules
 - e.g. status change
- Example task rules

Else Clause

- Historically rules supported only IF/THEN logic
- In 8.0 began supporting IF/THEN/ELSE logic
 - Else clause optional
 - Rule log will indicate which clause fired
 - Independent of which clause fires, the next rule will be evaluated
 - Exception: “Stop Processing Rules” action exists
 - Possible to branch rules
 - Good for situations with only two choices

New Condition Operators

- Is Modified
 - Available for all data types
- Is NULL
 - Available for all data types
- In Range
 - Available for integer, date and date time data types
- Converse operators available
- Example

New Action Operators

- Available for specific data
 - Text, Integer, Date, and Date/Time fields:
 - Rule Variables
 - Custom Fields
 - Other Objects
 - date and date/time fields only

New Action Operators (Cont.)

- Action Operators
 - Equal
 - All data types
 - Sets absolute value similar to 7.x
 - Increment/Decrement
 - Integer, date and date/time data types.
 - Equal to the value of
 - All data types supported by the feature.
 - Permits setting equal to the current value of another field (same type)
 - Append/Prepend
 - Text data types only
 - Use of quotes to add spaces between appended/prepended text

Relative Time Conditions

- Condition comparison based on some offset (including 0) from 'Now', custom field value, rule variable value, or other defined field
- In range operator also supports the relative times
 - e.g. A rule that checks if a date field is in the range of
 - ✓ 2 hours before the incident.created
 - ✓ AND 6 hours after a date/time rule variable set time
- Absolute dates are still supported
- Example Relative Time Conditions

Escalations

- Can be the most confusing part of rules
 - Most common Tech Support rule incidents
- Best Practices:
 - Put escalations into function(s)
 - Place rules that call the escalation function in appropriate states
 - Keep escalations simple
 - Try to make escalations flow where possible
 - Rule escalation inner-dependency
 - Do not use “*previous*” fields in conditions
 - Do not revalidate well
 - Only in buffer
 - e.g. Incident.Previous Status

Escalations (Cont.)

- Can now escalate off of any defined date or date/time field
 - Previously only a handful of hard-coded dates available
 - Use in conjunction with relative date conditions
 - Significantly expands power of rule escalations
- Gotchas
 - Escalations across rule states
 - » Make sure escalation functions are called
 - Functions calls add data to rule log
 - Non-specific escalation conditions cause issues
- Audience Example

Administration & Troubleshooting

- Be very familiar with your rules
- Keep number of admins low (i.e. 1-2)
 - Communicate rule plan to all admins
- Avoid incomplete rule activations
- Completely test escalations
 - Answer #1231, 128, 2185, 2181
- Use the rule log
 - Compare times to transaction times
 - Answer #1873
- Review rules before making changes
 - One change can affect entire rule base

General Best Practices

- Define business need before creating rules
 - Consider future needs/changes
 - Helps define rule order
 - Design rule flow chart (i.e. queue/assignment routing)
- Use intuitive rule/state/function names
 - Use naming convention
 - » Number states/functions (e.g. "01) Initial state")
 - » Stick with it
- Use functions where possible
- Keep escalations simple

General Best Practices (Cont.)

- Be careful with “Else”
 - Only 2 possible choices
 - Anything that does not match conditions will fire “Else”
- Know rule abilities/limitations
- Make the most of rules... they can be a powerful tool
 - Effective rule bases minimize manual tasks
 - Consistent procedures reduce human error

Resources

- Ask the Experts Room
 - Thursday, August 29th
 - 7-9 AM, 10-11 AM, 1:30-3:10 PM
- RightNow.custhelp.com
 - Many good answers if you search for “rules” or “escalation”
 - RightNow Community
 - Forums - Customer to Customer interaction
 - Manuals in Customer Library
- Submit an incident

