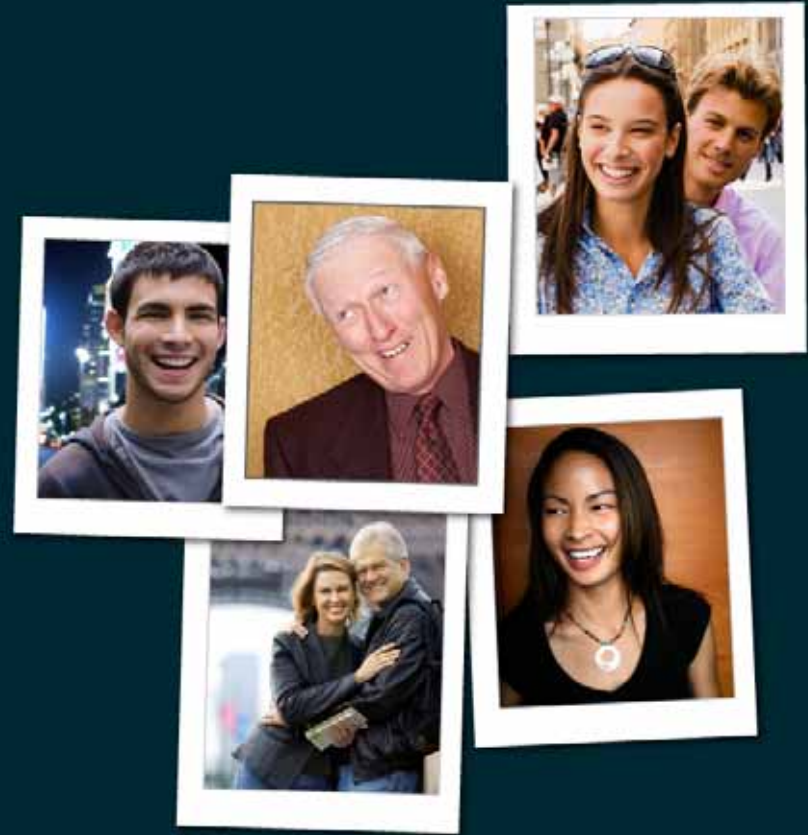




SUMMIT 08



ADVANCED WORKSPACE DESIGN

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**RIGHT
NOW.**

- Little Known (But Important!) Features
- Contextual Workspaces
- Agent Scripting
- Questions

1. Everything is in a Table
2. Summary Panel - when you shrink the workspace vertically the area above the tabs moves down into a new Summary tab
3. Multi Select to Delete/Change Properties
4. Profile Based Options
5. Hot Keys
6. Special Ribbon Buttons
 - a. Info Button
 - b. Links Button
 - c. Expand Button
7. Most controls/fields that use a report allow you to change the report used

- Not related to server side rules
 - Workspace rules are executed on the desktop, in the UI, before a record is saved
- Rules can execute when you
 - Load or save a record
 - Change the value of a field
- A rule action can control
 - Field/Control visibility
 - Field/Control read-only setting
 - Field required setting
 - Field value
 - Available menu items in menus
- Ability to modify a workspace based upon
 - Edited Record's Information
 - Logged in Account or Profile
 - Editor Mode (Create/Edit)

- This new feature lets you embed a script component in a workspace
- A script is a series of pages which contain questions, text, fields, etc. (i.e. things you can currently put on a workspace)
- You can use branching logic to guide agents to different pages based on actions they take on a script page

QUESTIONS?

RIGHT
NOW.



Reports on Workspaces can be configured so they are filtered based on the record currently edited.

1. Make sure the report has an editable filter on the id column that you want to filter by (e.g. contacts.c_id)
2. When editing a record the Workspace code will look at all the identifiers for the current record and sub records.
3. The report is executed and a search value is passed in for each identifier found
4. The server code matches the passed in search values with the report's actual filters

- Export/Import can be used to
 - Export Workspace from a test site and import into production
 - Export/Import Workspaces between sites
 - Share Workspaces between customers (e.g. through our Forum)
 - Troubleshooting
 - Backup
 - etc.
- You export a Workspace from the Workspace Designer
- Export format is XML
- The Import is done from the Create New Workspace screen
- Can Import file as exported Workspace type, or as different type
 - If imported as different type, fields that don't apply are replaced with spacers
 - Importing as different type can be used if you want to just export/import the “look and feel” of a workspace