MASTERING RULES & ACTIONS

COUNTERSOFT

Contents

Mastering Rules and Actions

Introduction

Gemini supports a powerful and flexible rules engine that allows you to inspect the item's details and perform actions on that item if a certain condition is met. The rules and actions engine doesn't limit you on the number of fields to test or the number of actions to take.

Gemini's rules and actions can escalate items and notify required stakeholders when a condition is met. It can also be used for dunning, where we need to communicate with the users involved with the item. For example, we can create a rule that when the due date for an item is tomorrow will execute an action to set the priority to medium and send an email to the item resources. Another rule can be created to check if the due date is today and if so to set the priority to high, email the resource and the user who has created the item. You could also use rules and actions to cancel (veto) an edit to an item, for example if the item is closed we cannot add a new comment unless we change the status. In such case Gemini will display the selected veto message to the end user who is trying to comment on the closed item.

Rules and actions are also used in Gemini to control Service Level Agreements (SLA) where you can set different levels of SLA each with different response time setting.

Gemini will execute rules in order from top to bottom, which is why the user interface allows you to reorder the rules so you can have a "catch all" rule at the bottom of the list.

For a comprehensive video showing rules and actions see:
http://www.countersoft.com/watch/?video=31

Creating Rules and Actions

Rules and actions can easily be created via the Customize -> Rules & SLA -> Rules page. Click on the "Add" button to create a new rule:

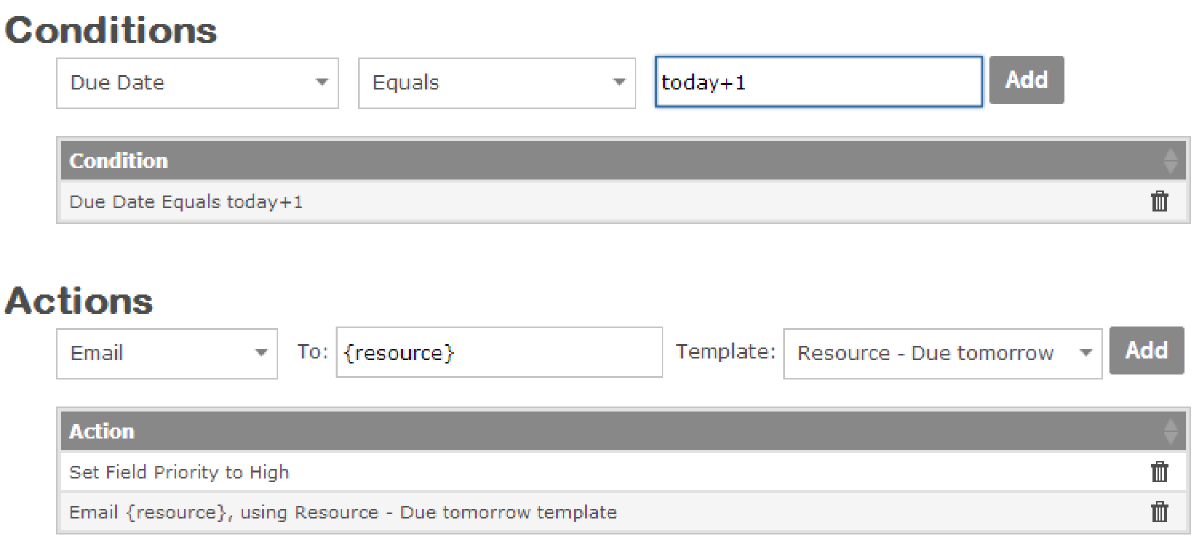


Figure 1 - Rule & Actions

Here you can add as many conditions as needed to satisfy your requirements. The available conditions are:

- Comment – Checks the contents of the newly created comment against a set value. It will check if the set value exists anywhere within the new comment.
- Commented – Check if a new comment has been created. Possible values are true or false.
- Comment Source – Check if the email of the stakeholder who has created the comment exists within a set list of a custom field. Gemini will perform a full match first followed by domain match.
- Comment Source Type – Check where did the comment originate from. The possible values are:
    - Breeze – Use this option when you'd like to check if the comment was created from an email that was sent in and converted by Breeze.
    - Email – Check if the comment was created by the "Email Reply" feature of Breeze.
    - Gemini – The comment was created from Gemini's web interface
- Description – Checks the contents of the description against a set value. It will check if the set value exists anywhere within the description.
- Due Date – This will perform a date test between the set value and the due date of the item. You can also use the following tokens for dynamic dates:
    - today – Today's date.
    - start-month – The 1st of the current month.
    - end-month – The last day of the current month.
    - start-week – The Sunday of the current week.
    - end-week – The Saturday of the current week.

  You can manipulate any of these by adding or subtracting days from them, for example: start-month+1 will be the 2nd of the current month.

- Emails Count – How many Breeze "Email Replies" where there for this item.
- Issue – Check if the item has been created or updated.
- Priority – Check the value of the priority field.
- Project – Check which project does the item belongs to.
- Resolution – Check the resolution value of the item.
- Resource – Check the resource value of the item.
- Severity – Check the value of the severity field.
- Source – Check if the email of the stakeholder who has created the item exists within a set list of a custom field. Gemini will perform a full match first followed by domain match.
- Source Type – Check how was the item created. The possible values are:
    - Api – Check to see if the item was created using Gemini's API.
    - Email – Check to see if the item was created by converting an email to a ticket using Breeze.
    - Gemini – The item was created using Gemini's web interface.
    - Repeat – The item was created from a repeating item. Eg. Item that is set to repeat every 1st of the month.
    - TestRun – The item was created by raise a bug from a test run.

- Start Date – Check the start date of the item. This works exactly the same as Due Date above.
- Status – Check the value of the status field.
- In SLA – Check if the item is participating in an SLA. Possible values are true or false.
- SLA – Check which SLA the item belongs to.
- SLA Time Left – Check how long is left for us to respond in HHH:MM format.
- SLA Time Passed – How long as passed since the SLA started in HHH:MM format.
- Title – Examine if the title of the item contains our value.
- Type – Check the value of the status field.
- Custom Fields – Check the value of the selected custom field. The possible values depend on the type of the custom field.

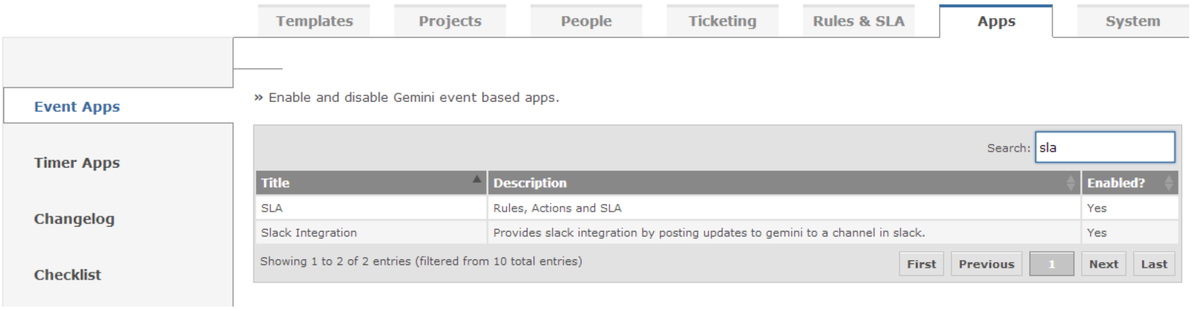
After adding the necessary rules, you can add the actions to take if <u>all</u> the rule's conditions are met. The available actions are:

- Email – Send an email using the selected generic email template to the list of email addresses to email to separated by a semi column. You can have the following tokens as well:
    - {resource} – The emails of the resources for the item.
    - {reporter} – The email of the user who has created the item.
    - {follower} – The emails of the followers for the item.
- Set Field – Set a "standard" Gemini field to a specific value. Date fields can take in dynamic date expressions as per rules above.
- Set Custom Field – Set a user defined field to a specific value. Date fields can take in dynamic date expressions as per rules above.
- Veto Action – Cancel the operation that was just performed. The end user will see the reason in the web user interface.
- Stop Clock – Mark the SLA as stopped and completed.
- Pause Clock – Pause the SLA clock. This is used when waiting on a customer's response.
- Resume Clock – Resume the SLA clock. Used when the customer has responded to our query.

The email action will only happen once per item to avoid emails being sent on any subsequent update to the item.

Enabling Rules and Actions

The rules and actions runtime engine is switched off by default in Gemini. If you are using rules and actions and would like to Gemini to start processing those rules then you need to make sure that you have enabled the "Rules, Actions and SLA" app:


Templates
Projects
People
Ticketing
Rules & SLA
Apps
System
Event Apps
Timer Apps
Changelog
Checklist
» Enable and disable Gemini event based apps.
Search: sla
Title
Description
Enabled?
SLA
Rules, Actions and SLA
Yes
Slack Integration
Provides slack integration by posting updates to gemini to a channel in slack.
Yes
Showing 1 to 2 of 2 entries (filtered from 10 total entries)
First
Previous
1
Next
Last