



Versioning Solution

The screenshot shows a software interface with a top navigation bar containing tabs: Content, **Versioning**, Products/Categories, Tasks (0), Details, Attachments, Audit Log, Relationships, Notes, and Analytics. Below the navigation bar, there is a 'Publish On' field with the value '22/07/2017 13:40'. The main content area has two tabs: **Versions** and Version Log. Under the 'Versions' tab, there are action buttons: Add (with a plus icon), Open (with a folder icon), and Delete (with a red X icon), and an 'Options' dropdown menu (with a gear icon). Below these buttons is a table with the following data:

Version ID	Summary	Description	Publish Version?	Last Published
13025	New Product Launched V3	Some small changes		29/07/2017 13:30
13026	New Product Launched V4	Added new product	Yes	

Installation Manual

TABLE OF CONTENTS

Table of Contents	1
1 Overview	2
1.1 Introduction	2
2 Installation	3
2.1 Downloading the installation ZIP file	3
2.2 Importing Custom Objects	3
2.3 Importing Custom Processes	4
2.4 Creating Publish On Custom Field.....	4
2.5 Setting up Business Rules.....	5
2.6 Setting up the Workspace.....	7
2.7 Additional Considerations.....	8
3 Using Versioning	9
3.1 Publish an Answer without a Version	9
3.2 Create a Version.....	9
3.3 Publish a Version.....	9

1 OVERVIEW

1.1 Introduction

CX Builders has developed a free versioning solution that is simple yet powerful and can be easily implemented by any administrator within an hour. It can be used both in the console and in BUI. It comes with the following features;

- ✓ Create unlimited versions
- ✓ Versions include Summary, Question & Solution
- ✓ Schedule an answer for a specific time & day, with a 15 minutes time resolution
- ✓ Use scheduling to set an Answer to the public status
- ✓ Activate a new version on the scheduled date (one version per schedule)
- ✓ Historic log that keeps track of the versions that are published

In this manual the steps are described to install this versioning solution on your site.

2 INSTALLATION

2.1 Downloading the installation ZIP file

Before starting the installation download the installation ZIP file from the following location:

<http://cxbuilders.com/downloads/versioning/installation.zip>

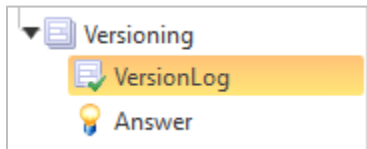
The ZIP file contains the following files that are needed during the installation;

- ✓ Custom Objects ZIP file
- ✓ Custom Process Model
- ✓ Reports (2x)
- ✓ Sample Workspace

Unzip the file and place it somewhere on your computer.

2.2 Importing Custom Objects

The Custom Objects contain the fields and tables that are required for Versioning to work. After completion the following objects should have been added in the Object Designer;

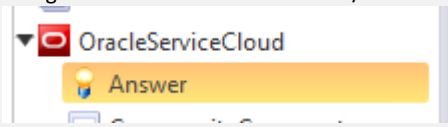


Steps to import Custom Objects

- ✓ Go to Navigation > Configuration > Database > Object Designer
- ✓ Click on Import in the Ribbon
- ✓ Navigate to the folder where you extracted the installation ZIP file
- ✓ Select the CO\Custom Objects.zip file and finish the wizard
- ✓ Click on Deploy in the Ribbon and finish Deploying.

2.3 Importing Custom Processes

The CPM is responsible for copying the content of the existing answer into a new version and publishing an answer.

<p>Steps to import Custom Processes</p> <ul style="list-style-type: none"> ✓ Go to Navigation > Configuration > Site Configuration > Process Designer ✓ Click on New in the Ribbon ✓ Click on the folder icon next to PHP Code File and select the file Versioning.php from the CPM folder ✓ Click Save ✓ Click Test & Click Save Again 	<ul style="list-style-type: none"> ✓ Navigate to the OracleServiceCloud / Answer <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;">  </div> ✓ Select Versioning under Create only <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Name</th> <th style="width: 40%;">Create</th> <th style="width: 30%;">Update</th> </tr> </thead> <tbody> <tr> <td>cxbuilders</td> <td>Versioning</td> <td>[No]</td> </tr> </tbody> </table> </div> ✓ Click Save ✓ Click Deploy and finish Deploying 	Name	Create	Update	cxbuilders	Versioning	[No]
Name	Create	Update					
cxbuilders	Versioning	[No]					

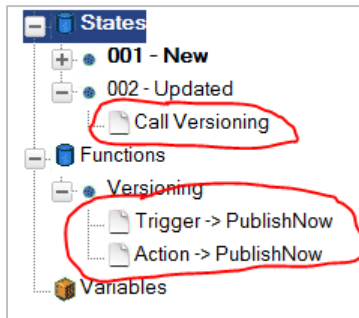
2.4 Creating Publish On Custom Field

By default the Publish On field in RightNow can only be set per day making it impossible to specify a specific time. In order to overcome this a custom Publish On field can be created, which in combination with some business rules makes publishing possible with a 15 minutes resolution.

<p>Steps to setup custom Publish On field</p> <ul style="list-style-type: none"> ✓ Go to Navigation > Configuration > Database > Custom Fields ✓ Select Answer & Click New in the Ribbon ✓ Fill in 'Publish On' for the Name 	<ul style="list-style-type: none"> ✓ Select Date/Time for the Data Type ✓ Fill in 'publishon' for the Column Name ✓ Hit Save in the Ribbon.
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2.5 Setting up Business Rules

The business rules are required to schedule an answer using escalation rules. After completing this step the two following rules should be added;



Steps to setup Business Rules

- ✓ Go to Navigation > Configuration > Site Configuration > Rules
- ✓ Click on Edit & Click on Answer
- ✓ Under Function create a new function called Versioning
- ✓ Create the following two rules under Versioning (make sure you pick the custom Publish On field > last one):

Rule Name	Notes
Trigger -> PublishNow	

Add Options

If

1	Answers.Escalation Level	not equals	PublishNow Unspecified	<input type="checkbox"/> Delete Condition
2	Answers.Publish On	is not null		<input type="checkbox"/> Delete Condition

Logical Expression (& = and, | = or; e.g. 1 & (2 | 3))

1 & 2

Then

1	Escalate to Level	PublishNow
	+ 1 Minutes	
	<input checked="" type="checkbox"/> relative	Answers.Publish On
	<input checked="" type="checkbox"/> Revalidate	<input checked="" type="checkbox"/> Recalculate

Else

Rule Name		Notes	
Action -> Publish Now			
Add Options			
Add IF Condition Based On ▾		Add Action - Then ▾	
		Add Action - Else ▾	
If			
1	Answers.Escalation Level	equals ▾	<input checked="" type="checkbox"/> PublishNow <input type="checkbox"/> Unspecified <input type="checkbox"/> Delete Condition
Then			
1	Set Status to Public ▾		
2	Set Custom Field Publish On equals ▾ [] ▾		
3	Execute Object Event Handler Versioning ▾		
4	Clear Escalation Level		
Else			
Save Cancel			

- ✓ Create a rule that calls this function from a state where all answers are called (not the initial state);

Rule Name		Notes	
Call Versioning			
Add Options			
Add IF Condition Based On ▾		Add Action - Then ▾	
If			
Then			
1	Call Function Versioning ▾		
Else			
Save Cancel			

- ✓ Deploy & Activate the Business Rules

2.6 Setting up the Workspace

The sample workspace provided in the ZIP file contains all the functionality to make versioning work. This workspace can either be used as a starting point or as a reference on how to set this up. Since a version is just another type of answer, both normal answers and versions use this workspace, so it needs to cater for both. The following points are important for workspace / workflows when using versioning;

- ✓ In the answer workspace make sure to use the new Custom Publish On date and not the default one.
- ✓ A version must be saved when it is newly created from its parent answer. This ensures that the CreateAnswerVersion Custom Process is called, which copies the Summary, Question & Solution from the parent Answer into the new version. In the sample workspace this is done using a workspace rule. When using workflow make sure to include this (summary is a required field, so a dummy value can be provided for new versions prior to save)
- ✓ A version can be differentiated from normal answers by having the field ParentAnswer filled in. In a version this field contains the answer the version belongs to. This allows workspace rules to be used to change the workspace depending on if it is an answer or version. Same goes for workflow.
- ✓ The field PublishVersion is intended for the Version Workspace. This allows Content Managers to 'Arm' a version to be published on the next Publish On date of the answer.

Steps to import required Reports

- ✓ Go to Analytics / Report Explorer
- ✓ Click on New Report in the Ribbon
- ✓ Click on Import existing Report and select a report in the Reports folder
- ✓ Save the report
- ✓ Repeat above steps for second report

Steps to import the sample Workspace

- ✓ Go to Application Appearance > Workspace / Workflows
- ✓ Click on New Workspace in the Ribbon
- ✓ Click on Import Workspace and select the file Workspace/Answer Versioning.xml
- ✓

- ✓ In the new Workspace navigate to the Versioning / Versions tab
- ✓ Select the report in the Versions tab and click Report in the Ribbon
- ✓ Select the uploaded report from the previous step called 'Answer Versions'
- ✓ Select the report in the Version Log tab and click Report in the Ribbon
- ✓ Select the uploaded report from the previous step called 'Version Log'
- ✓ Save Workspace
- ✓ Link Workspace to profile(s)

2.7 Additional Considerations

The custom Publish On date in combination with the escalation rules requires that no other escalations on answers are executed during the scheduling of an answer. This would make it possible to overwrite the schedule date by other escalations. Although the custom Publish On date makes it possible to schedule with a 15 minutes resolution instead of one day, it is not required for versioning to work. When other escalations are in place and versioning with a one day resolution is fine, the versioning can be called during the regular publishing of an answer as well. This would basically remove step 2.4 and 2.5 and requires setting up the following business rule, to execute publishing of a version during the regular publishing of an answer;

The screenshot shows a business rule configuration interface with two main sections: 'If' and 'Then'.

If Section:

- Condition: Answers.Updated from [Select Operator]
- Rule list:
 - Agedatabase - Close waiting incidents
 - Agedatabase - Answer review
 - Agedatabase - Answer publish
 - Agedatabase - Answer decay
 - Dbstatus Rule escalation

Then Section:

- Action: 1 Execute Object Event Handler
- Parameter: Versioning

Since Versions are Answers as well, make sure that you exclude versions in reports that should only show answers. This can be done by adding a simple filter to exclude any answers that have the ParentAnswer set;

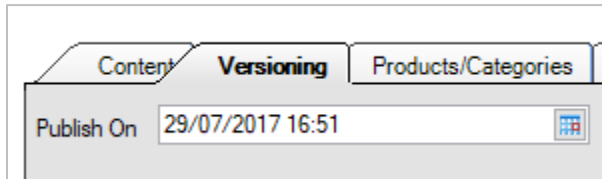
The screenshot shows the 'Add Filter' dialog box with the following configuration:

- Name: Parent Anser Is Null
- Type:
 - Make this filter selectable at run time.
 - Label this filter [] in search box.
 - Required. Make this filter require a value before a search can be done.
- Definition:
 - Expression*: answers.Versioning\$ParentAnswer
 - Operator: is null (Use this to compare the Expression with the Value)

3 USING VERSIONING

3.1 Publish an Answer without a Version

Answers can have a Publish On date without any version created. This is the same as using the out of the box Publish On field. Once this date is reached the answer will automatically have its status switched to public. This is useful for new answers that need to be made public on a specific date/time. Contrary to the original Publish On field, a date and a time can be specified.



3.2 Create a Version

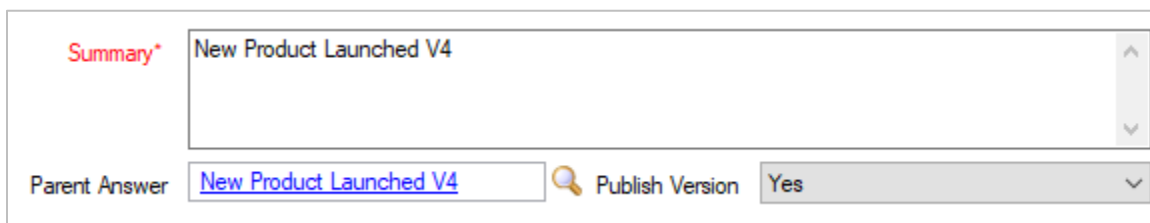
Each answer can have multiple versions. When a new version is created a copy of the Summary, Question and Solution are made from the answer and stored in the new version. To create a new Version follow the steps below;

- ✓ Navigate to the Versioning / Versions Tab
- ✓ Click on Add / Add New
- ✓ Make required Changes to the Summary, Question and Solution
- ✓ Describe the change of this version in the Notes

3.3 Publish a Version

In order for a version to be published two criteria must be met;

1. The answer must have a Publish On date set in the future
2. One version must have the Publish Version set to yes



Only one version can be published per schedule date. Although it is possible to have multiple versions that have their Publish Version set to yes, only one will be published. When the Publish On date is reached, the following happens;

- ✓ The answer status is switched to public
- ✓ The first version (lowest ID) that has Publish Version set to yes is used to copy its summary, question and solution to the answer
- ✓ Above version Publish Version is set to No Value
- ✓ Above version Last Publish date is set to current date
- ✓ A log entry is made into the Version Log with the answer, version and current date