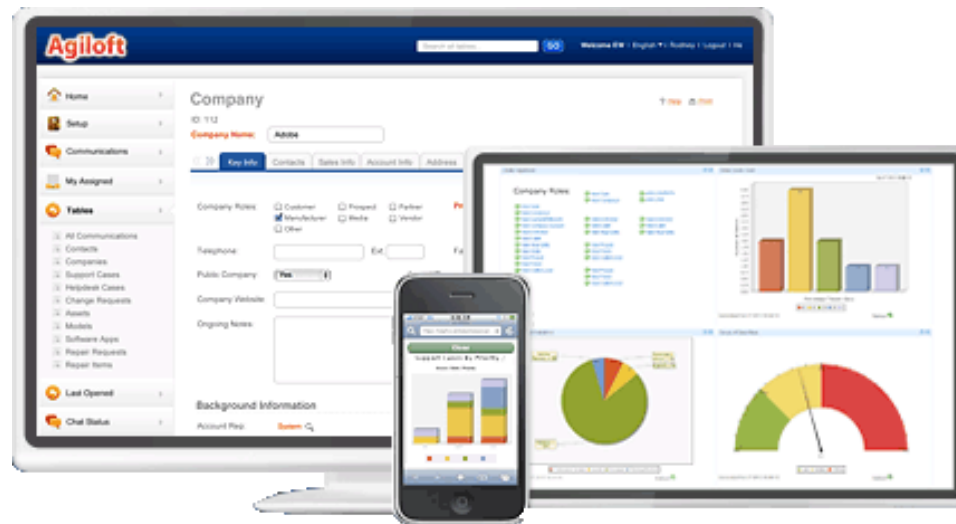


Unit 17: Global Variables

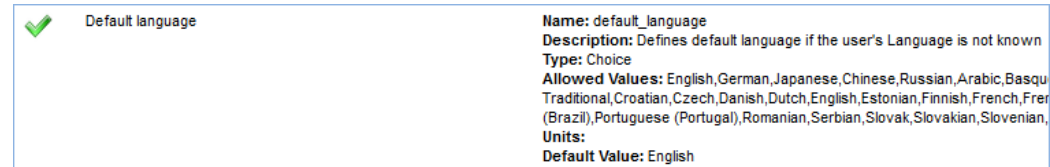
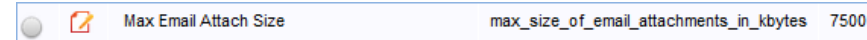
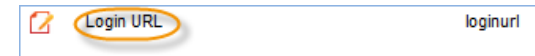


Questions Covered

- What are global variables?
- How are global variables used?
- Can we customize global variables?
- Can we create new global variables?

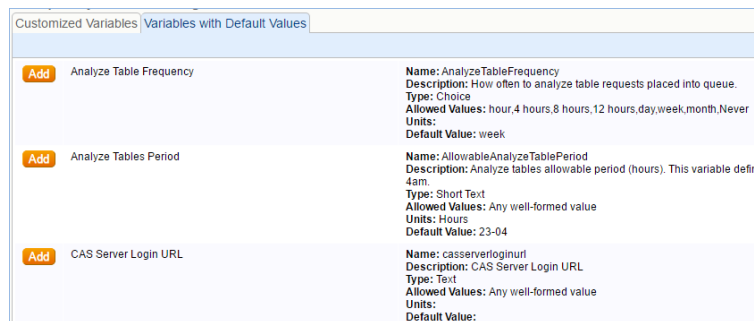
What are Global Variables?

- Global Variables are values stored in predefined formats that can be customized by the user and will be applied throughout the knowledgebase wherever the variable appears.
- They can determine a wide variety of settings in the KB, including:
 - The title wording displayed in the open tab of the browser.
 - The URLs for logging in and logging out of the KB.
 - The maximum size of email attachments.
 - The displayed product name.
 - The default language.
 - The maximum column length per row in tables.
 - Whether attached PDF files containing text fields with an OCR option should have the OCR included in the attachment.
 - How long a record will stay locked when a user opens it for editing.



Where are Global Variables Defined?

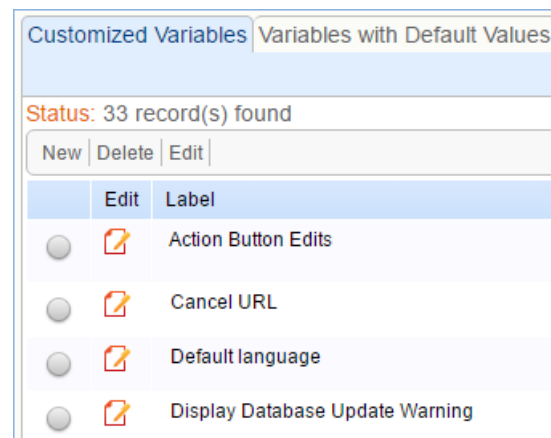
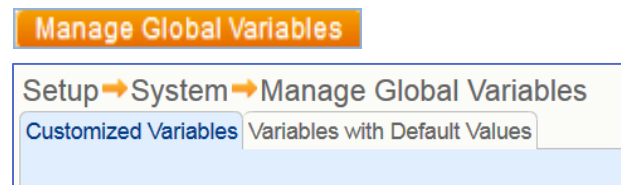
- Global variables can be configured within a knowledgebase by navigating to **Setup > System > Manage Global Variables**.
- The Global Variable wizard consists of two tabs:
- **Customized Variables** – Contains the list of variable that have been enabled for customization in the KB.
 - Variables in this tab can be created, edited or deleted.
- **Variables with Default Values** – Contains the entire list of variables, including those which have been customized and those which have only default values.



Customized Variables	Variables with Default Values
<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Name	Description	Type	Allowed Values	Units	Default Value
Analyze Table Frequency	How often to analyze table requests placed into queue.	Choice	hour,4 hours,8 hours,12 hours,day,week,month,Never		
Analyze Tables Period	Analyze tables allowable period (hours). This variable defaults to 4am.	Short Text	Any well-formed value	Hours	23-04
CAS Server Login URL	CAS Server Login URL	Text	Any well-formed value		

- Variables which are left with their default values are indicated with an **Add** button, and variables which have been customized are indicated with a checkmark icon.

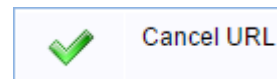


Customized Variables	Variables with Default Values
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Status: 33 record(s) found

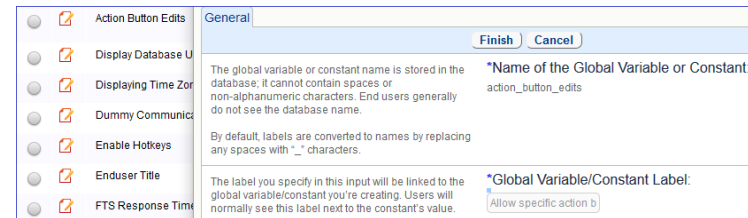
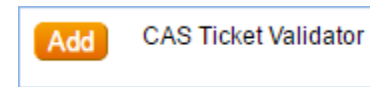
New | Delete | Edit

	Edit	Label
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Action Button Edits
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cancel URL
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Default language
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Display Database Update Warning



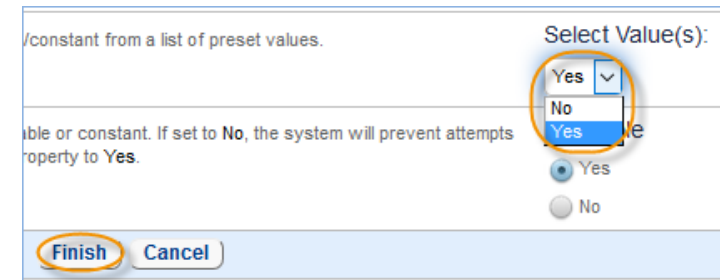
Adding, Editing, and Deleting Variables

- In the **Variables with Default Values** tab, click **Add** to enable the variable in the **Customized Variables** tab.
- To edit the variables in the **Customized Variables** list, click the **Edit** button to open the Manage Global Variables and Constants dialog with the settings for that variable.
- Settings that are not configurable will be greyed out.
- Edit the relevant settings and click **Finish** to set the global variable.
- In order for the new settings to take effect, the session must be refreshed, usually by logging out and in again.
- Deleting a variable customization requires that the **Deletable** value be set to **Yes**. Additionally, a deleted variable is not actually removed – it will still be available in the **Variables with Default Values** tab where it can be customized again if needed.



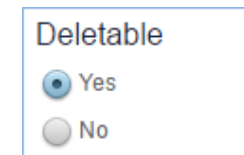
The dialog box shows the 'General' tab with the following fields and options:

- Name of the Global Variable or Constant:** action_button_edits
- Global Variable/Constant Label:** Allow specific action b



The 'Select Value(s):' dropdown menu is open, showing the following options:

- Yes (selected)
- No
- Yes

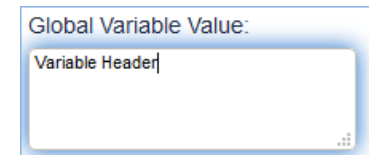
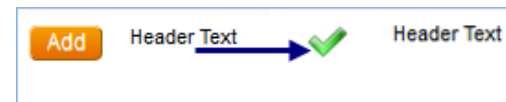


The 'Deletable' section shows the following radio button options:

- Yes (selected)
- No

Customizing Text Variables

- Let's practice by adding the Header Text variable. The Header Text is custom text that can be placed at the top of the screen between the search box and the username.
- Navigate to **Setup > System > Manage Global Variables**.
- Select the **Variables with Default Values** tab and scroll down to the Header Text variable.
 - Click **Add**.
 - The **Add** button is replaced by a check.
- Return to the **Customized Variables** tab, scroll to the **Header Text** variable and click **Edit**.
- In the Manage Global Variables and Constants dialog, enter the text "Variable Header" in the **Global Variable Value** field.
- Click **Finish**.



Customizing Text Variables (cont.)

- Next, edit the Staff Title in the **Customized Variables** tab.
- In the **Global Variable Value** field, enter “Sample Training KB”.
- Click **Finish**.
- In order to refresh the session and make the global variable setting take effect, hover over the language option in the top right and reselect your language.

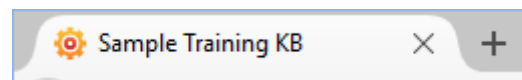


💡 This is a quick way to refresh the session without having to log out and back in again.

- At the top right of the screen, the text “Variable Header” is visible to the right of the search box.



- In addition, the Sample Training KB text is visible in the browser tab. Note that this may depend on your browser and its settings.



Setting Limits on Email Attachments

- Now let's set a limit on email attachments and see where the global variable appears.
- Navigate back to the **Customized Variables** tab of the Global Variables wizard.
- Edit the Max Email Attach Size variable.
- Change the **Global Variable Value** field to 10. This will limit email attachments to 10 KB in size.
- Click **Finish** and refresh the session, as before.

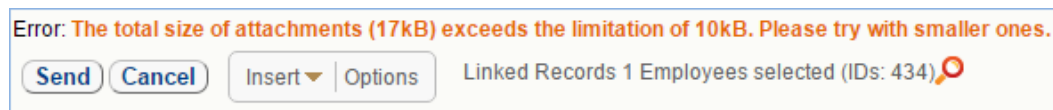
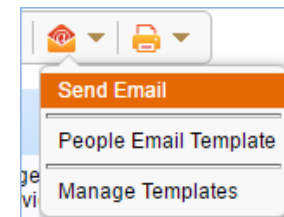
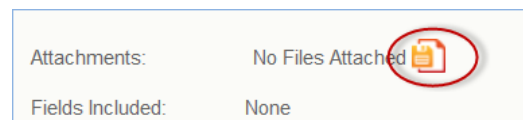
The screenshot shows the 'General' tab of a wizard. At the top right are 'Finish' and 'Cancel' buttons. The form is divided into several sections:

- Name of the Global Variable or Constant:** max_size_of_email_attachments_in_kbytes
- Global Variable/Constant Label:** maximum attachments size
- Constant Notes:** maximum attachments size for email sending (KB)
- Supports localization:** Yes (selected), No
- Global Variable Value:** 10 (highlighted with an orange circle)

Other text in the form includes: 'The global variable or constant name is stored in the database; it cannot contain spaces or non-alphanumeric characters. End users generally do not see the database name.', 'By default, labels are converted to names by replacing any spaces with "_" characters.', 'The label you specify in this input will be linked to the global variable/constant you're creating. Users will normally see this label next to the constant's value.', 'Fill any notes about the constant you need to be stored.', and 'Allow to save different constant values under different languages.' The bottom section says 'Use this input to enter the value of this global variable or constant.'

Send an Email

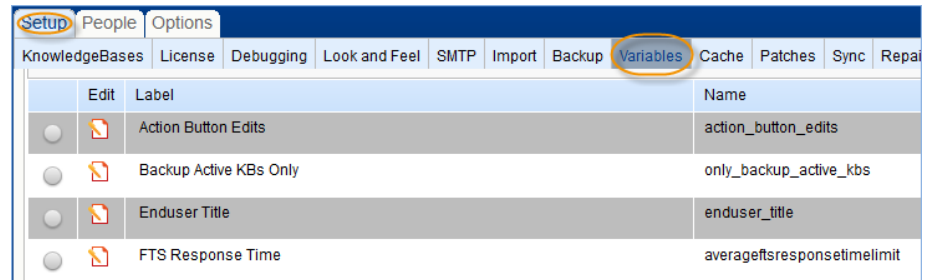
- Navigate to the People table, select a recipient and click **Send Email**.
- Enter a value for the From and Reply-To addresses.
- Click the **Attachments** icon.
- In the Attachments window, click **Attach Files**.
- Navigate to any attachable file over 10KB (such as the agreement-draft.docx from the Unit 13 import.zip file) and open it. Click **Finish**.
- Click **Send**.
- An error message will appear notifying you that the total attachment size exceeds the limitation of 10KB.



- Exit the email screen and navigate back to **Setup > System > Manage Global Variables**.
- Edit the Max Email Attach Size variable and set the **Global Variable Value** back to 7500. Click **Finish**.

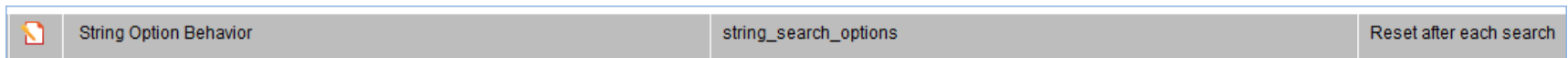
Global Variables in the Admin Console

- With access to an admin console – which applies to situations where the KB is hosted on premise – you can also define variables within the admin console by navigating to **Setup > Variables**.



Edit	Label	Name
<input type="radio"/>	Action Button Edits	action_button_edits
<input type="radio"/>	Backup Active KBs Only	only_backup_active_kbs
<input type="radio"/>	Enduser Title	enduser_title
<input type="radio"/>	FTS Response Time	averageftsresponsetimelimit

- Setting a global variable in the admin console makes that setting active for all KBs on that server.
- If a global variable exists in a KB, the setting for that variable in the KB takes precedence over the variable setting in the admin console.
- If a referenced variable is not activated in a particular KB, the admin console’s setting for that variable takes precedence.
- Some variables must be set in the admin console, and cannot be changed in the normal KB.
 - For example, the admin console includes a global variable for “String Option Behavior” which is typically set to “Reset after each search”. Allowing the string option to be saved for each search could cause performance issues on a shared server. These types of advanced settings are only available for customers installed on dedicated or on-premise servers.



<input type="radio"/>	String Option Behavior	string_search_options	Reset after each search
-----------------------	------------------------	-----------------------	-------------------------

Frequently Customized Global Variables

- Among the available Global Variables, some are more frequently customized in a KB. What follows are descriptions of some of the most commonly customized variable types.
- **Time Zones:** For international companies, the time zone variables are frequently used to make clear where the user is located. When users log in, the time zone variables use their browser time to recognize and display the time zone appropriately for each user. Time zone variables include:
 - **Displaying Time Zone Label next to Field:** Specifies when you would like to see the Time Zone label next to a field.
 - **Time Zone of date/time values:** Specifies which time zone to display for date/time value fields.
- **Max Email Attach Size:** Maximum size of attached files when sending emails from the KB.

Redirection and URL Variables

- **Error/Exit/Cancel URL:** These variables define the URLs where users are redirected when they encounter an error, log out of the system or exit from a hotlink, or cancel out of a record after logging in through a hotlink. The values may be any well defined URL, but are typically set to the same value as the custom login page. Customers normally have custom login pages, so it is important that they will be taken to the login page when they log out.
- **Hotlink Server Root URL:** This is the URL that is prefixed to email hyperlinks. It defaults to the URL of the server that the system detects as its host and this is correct in almost all cases. It should only be necessary to set this variable if the DNS is misconfigured or if the application is told that it is listening on the wrong port. This variable should always use an HTTPS URL, and the server root should be set to the DNS entry, such as *customername.agiloft.com*.
- **Login URL:** The URL where users are redirected after a failed login.

Text Variables

- **Product Name** (for Partners): Used for branding to replace “Agiloft” with the relevant company’s product name everywhere it is visible. This is set on a per-KB basis.
- **Staff Title**: The wording that appears in the tab or browser window’s top header.
- **Dummy Communications**: Create a communication record if the To or From fields are blank.
- **End User Title**: This defines the title bar in the browser in the End User Interface. This is only applicable to the Legacy EUI, as the modern one with EUI templates are customized in the template records.
- **Text Auto Completion**: Allow text auto-completion. This is already enabled in most systems. It is turned off rarely in situations where there is a chance that an extremely large number of records will require auto-completion and slow down the system to an unacceptable degree.

Security Variables

- **Security: Check Session Match:** Require matching session and passed cookie. If the session ID does not match the cookie associated to that session when the user first logs in, the connection will be rejected. This guards against a hacker who is able to see the user's browser from manually entering the URL.
- **Security: Show Stack Trace:** Show the stack trace button on the SoD window. For added security this should be set to No to prevent users from seeing the stack trace information. However this feature can be very useful for testing a KB in order to troubleshoot errors.
- **Security: Allowed External Hosts:** If the constant is set, the system will only allow redirection to URLs at one of the specific hosts, which will guard against [XSL attacks](#).

Refresh Rates and Timeout Periods

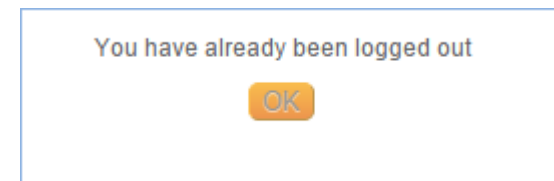
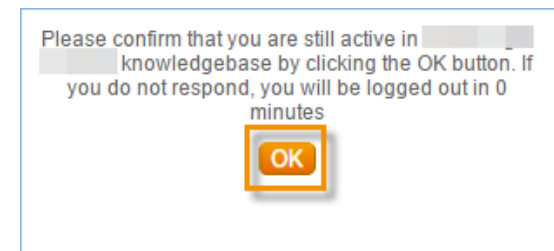
- **Chat Refresh Rate:** Sets the maximum frequency at which the chat window can refresh. The default value is a 5 minute refresh delay and must be customized for implementations that make use of the Chat feature.
- **Timeouts:** Timeout variables should be considered for the business environment that they will be used in. Generally speaking we do not recommend setting the **Disconnect due to Inactivity** timeout below 20-30 minutes, as it can cause frustration when users leave their stations for a short break and come back to find that their work is lost.
- This is particularly the case for **Record Lock Expiration**; however, it also depends on the type of records being edited. For a support ticket, the record probably doesn't need to be open for longer than 30 minutes. However, contract record editing takes much longer and it is important that users do not lose valuable work by having somebody else work on the ticket and unknowingly overwrite their edits. We recommend consulting with the customer to determine their user preferences on this issue.

Configuring Timeout Variables

- To test the timeout variables, navigate to the **Customized Variables** tab of the Global Variables wizard.
- Edit the Timeout:Disconnect Due to Inactivity variable.
 - In the **Global Variable Value** field enter 3.
 - Click **Finish**.
- Edit the Timeout:Warning Period variable.
 - In the **Global Variable Value** field enter 1.
 - 💡 The Timeout:Warning Period variable indicates how many minutes the Disconnect warning will appear before the user is disconnected due to inactivity. In other words, if the Disconnect Due to Inactivity variable is set at 5 (minutes) and the Timeout Warning Period is 1, the warning will appear one minute before the user is disconnected.
 - Click Finish.
- Refresh the KB by selecting **English** from the Language drop-down at the top.

Configuring Timeout Variables (cont.)


- Navigate back to the **Customized Variables** tab.
- Wait for two minutes.
- The timeout warning will appear as a popup window or as a pop-under (in which case you might not see it and should pay attention to your browser activity).
- If you choose to ignore the warning, you will be logged out in a minute.
- However, click **OK** before the system logs you out.
- Edit the Timeout:Disconnect Due to Inactivity variable.
 - Set the **Global Variable Value** field to 120 and click **Finish**.
- Edit the Timeout:Warning Period variable.
 - Set the **Global Variable Value** field to 30 and click **Finish**.
- Refresh the KB by selecting **English** from the Language drop-down at the top.

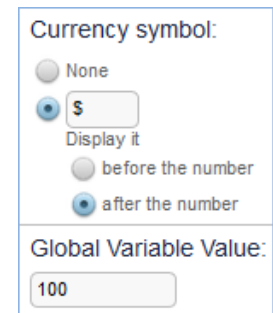
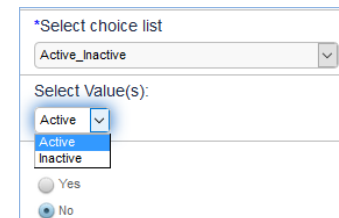
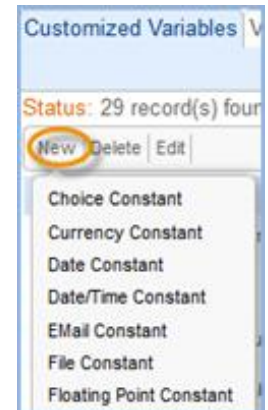


Creating New Global Variables

- Custom global variables are often created in conjunction with script actions where you could have a single script running on a server with multiple KBs, which makes use of different values depending on which KB is running the script.
- For instance, let's say you have a script action which takes the values from a record in Agiloft and pushes them into an external system to generate a record there, and you have multiple KBs each with their own matching external systems. You might then set up a *text constant* global variable which gives the address of the external system on a per-KB basis, and write the global variable into your script.

Creating New Global Variables (continued)

- New global variables can be added in the **Customized Variables** tab of the Global Variable wizard.
 - Hover over **New** to view a list of variable types.
 - Selecting one from the list opens the Manage Global Variables and Constants dialog with the options for that variable type as well as non-editable variable fields.
 - For instance, the Choice Constant dialog contains drop-downs of choice lists and corresponding value(s) where you can select the values that will display for the list.
 - Alternately, the Currency Constant dialog contains a **Currency Symbol** option and a **Global Variable Value** field.
 - Once the variable fields and other options have been entered, click **Finish** to close the dialog box and return to the global variables list. The new variable will be active.
-  The information in this slide also applies to creating global variables from within the Admin Console.



Global Variables Summary

- In this unit we learned what **global variables** are in Agiloft.
- We practiced customizing variables in the Global Variable wizard.
- We learned about the most important and commonly used global variables, including their recommended settings and purpose.
- We learned how and why you can create new global variables.