Case Timer for Service Console User Guide

Introduction

The Case Timer for Service Console component records the time an agent spends on the record page of a Case Object and logs the time automatically in their name. Manual logs can also be created through the interface.

Note that this component only works for apps using ‘Console’ navigation - this is due to the reliance on the WorkspaceAPI, which is only supported by ‘Lightning Console apps’. For this same reason, the Mobile App is not supported, so only time spent using a desktop browser will be recorded.

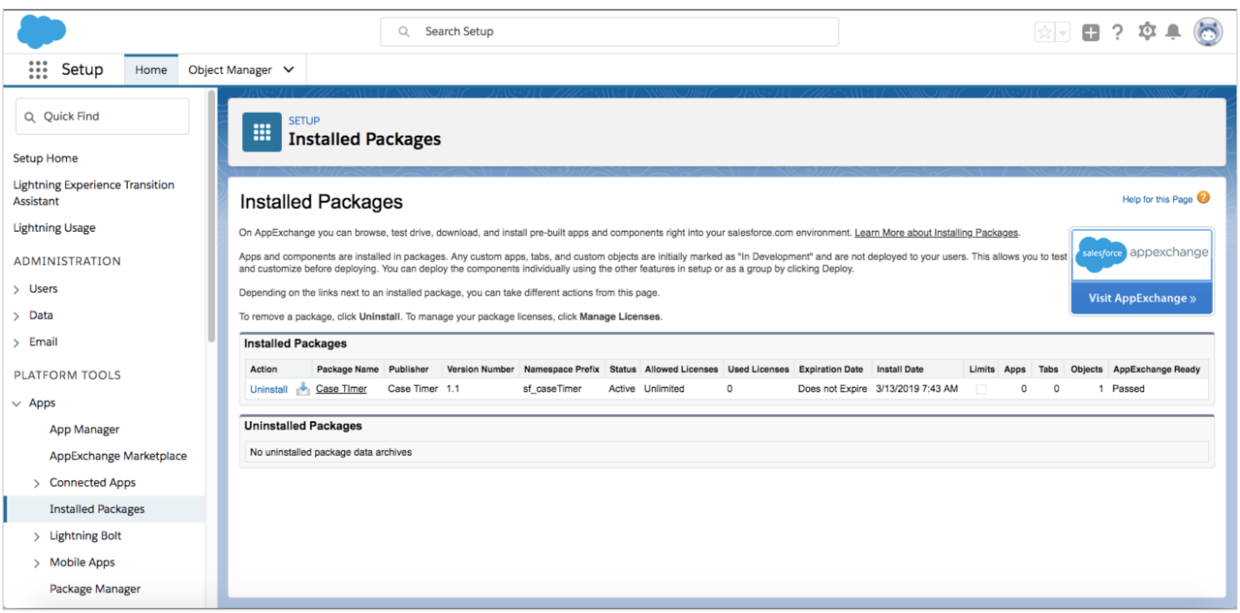
Please log any issues you have with this component in this Quip doc: LWC Service Console Case Timer Known Issues

Note - an unmanaged version of the package with no reports included can be installed from this link. (updated 22nd March 2023). After installing the unmanaged version, you will need to edit the ‘CaseTimeCount’ Apex Class to remove the namespace before this will work - instructions are in the class.

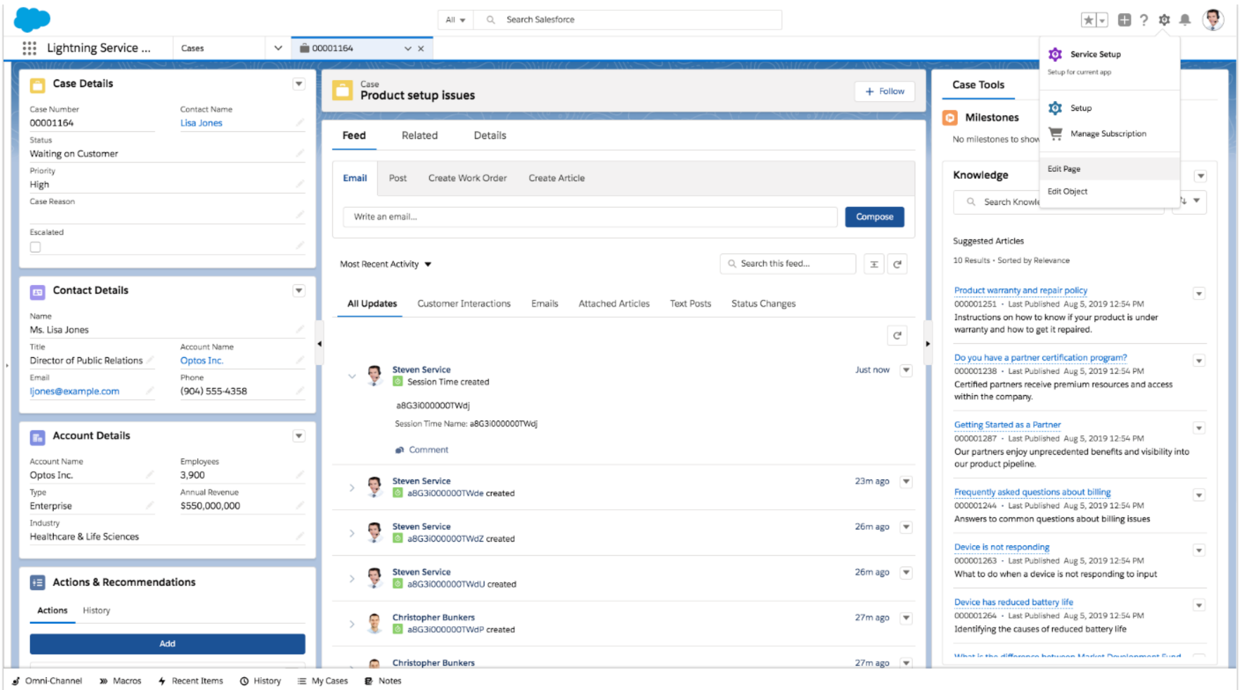
Setup Instructions

Select ‘Install for Admins’ when installing this component from the AppExchange

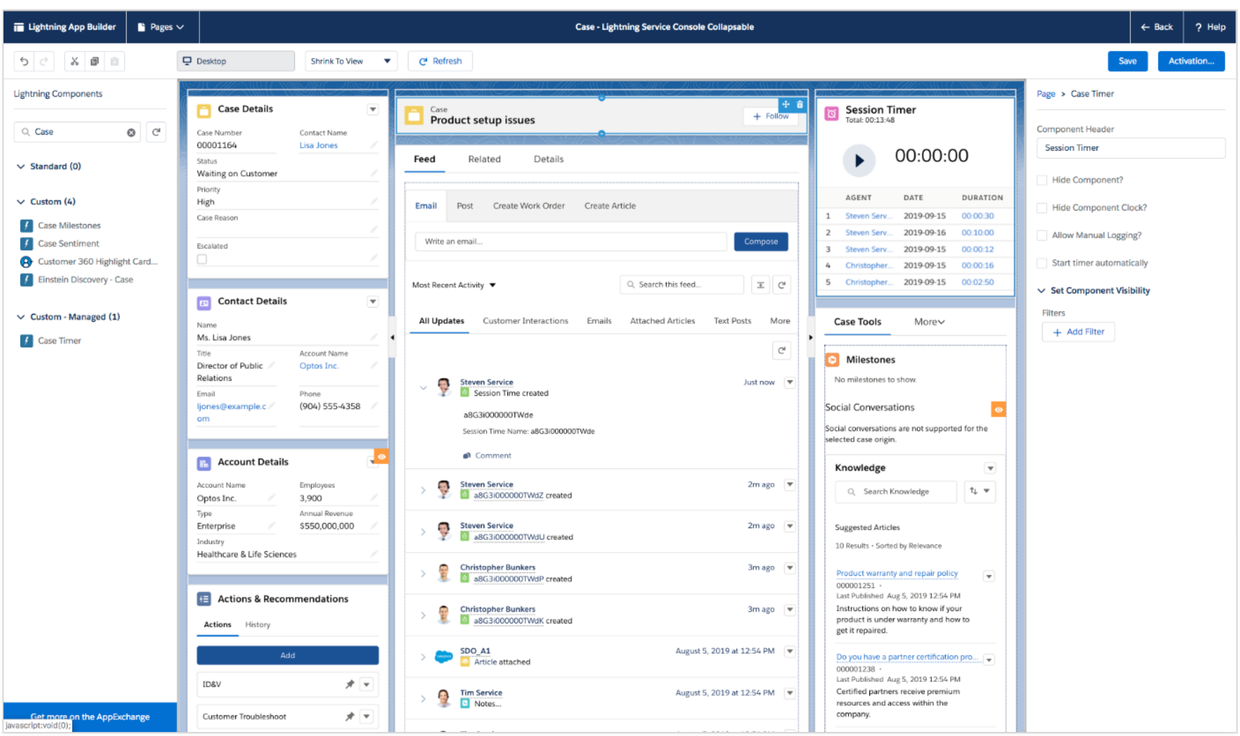
Once done, the package details should be located under “installed packages” in the setup menu under ‘Case Timer’.



To start using this package, navigate to the Case record page and click ‘Edit Page’ from the setup menu



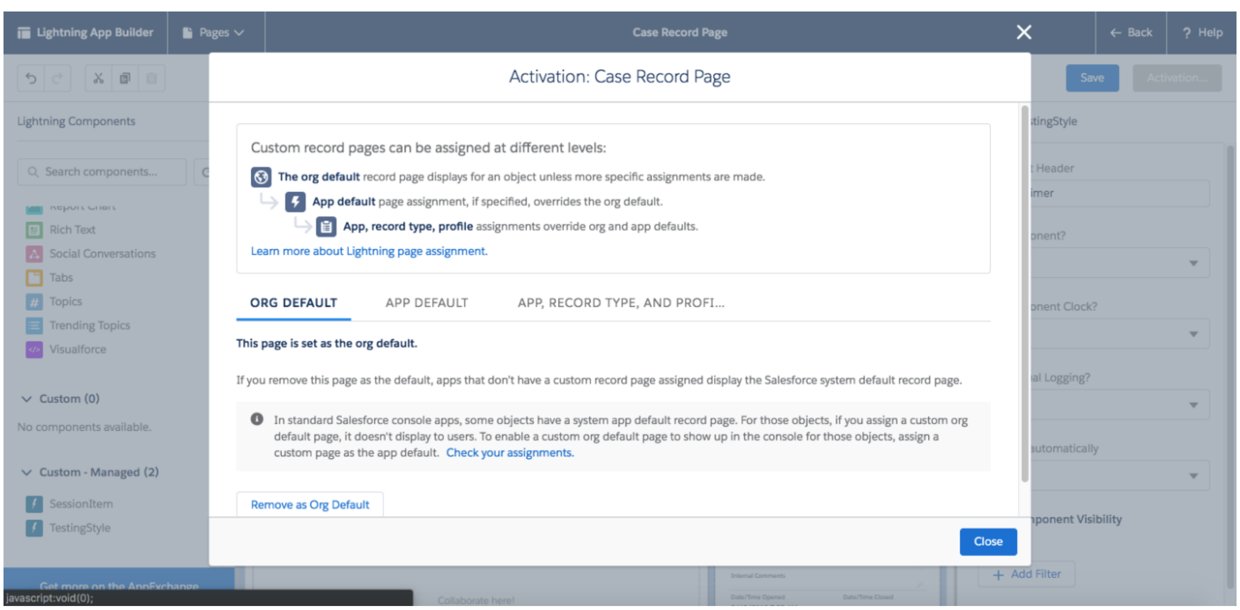
Drag the Lightning Component Named: Case Timer to anywhere on the page to display the Lightning Component on the page - ensure it is on the main part of the page and not on any tabs that aren't displayed when the page is loaded.



There are customization filters on the right hand side, here are some more detailed descriptions:

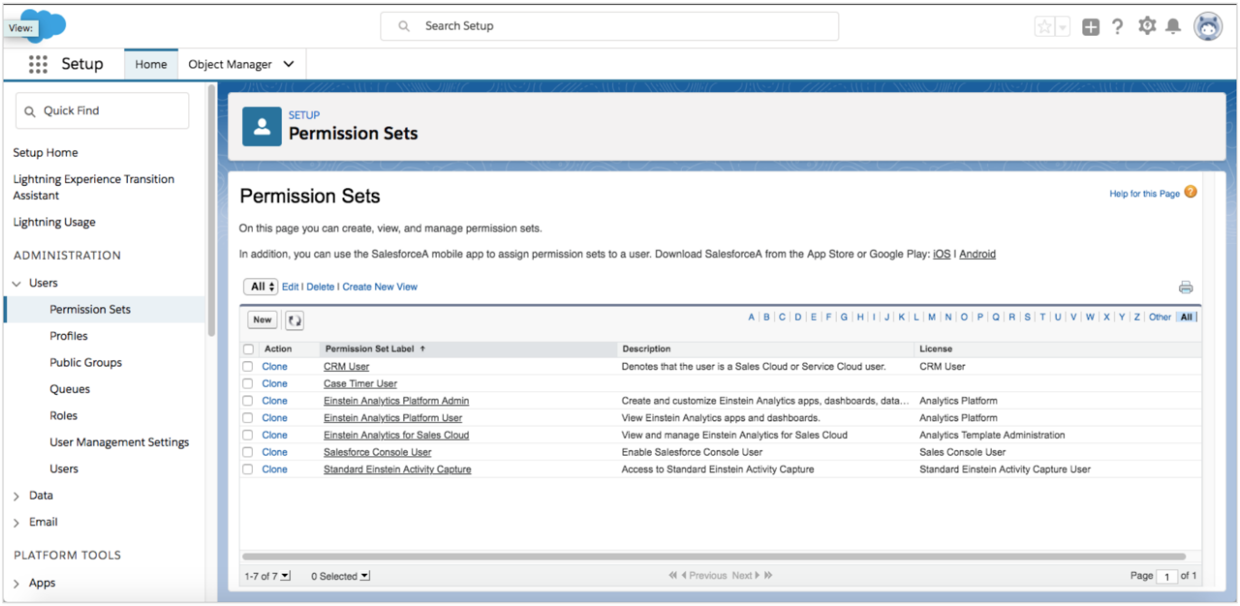
Field	Description	Default
Component Header	The text to have in the header of the component. Irrelevant if component is hidden	Session Timer
Hide Component	Whether the component is visible to the user or not. If hiding the component, put it at the bottom of the page or it will leave whitespace Recommended you start with this as False to understand how the component behaves, and then hide later one once you know how it works.	FALSE
Hide Component Clock	Hides the clock from view - this will also hide the start/stop button Irrelevant if component is hidden	FALSE
Hide Session List	Hides the list of Session Times from view Irrelevant if component is hidden	FALSE
Buffer (in seconds)	If time spent on the case is less than this, then don't write a session. Recommended to be 5-10 seconds to prevent duplicates and where the case is accidentally opened.	5
Allow Manual Logging?	Determines if the 'New' button is available to manually log time against the case	FALSE
Start timer automatically	Determines if time starts as soon as the page is loaded, or needs to be manually started. Must be true if you are hiding the component, or the component would never do anything	TRUE
Don't log time when case is closed	Determines whether any time is recorded against a case if the status of that case is a closed status/state.	FALSE
Pause when browser loses focus	Determines if the timer is paused when the user navigates from the browser window that Salesforce is running in. For example, opening up an email application or a different browser window.	FALSE

Once you have setup the page, make sure to save the changes (and activate the page if needed). If you have different Lightning Record Pages that are activated, you will need to add this component to all of the ones that are used in the org to ensure no time is missed by users using different apps, profiles, or on different record types.



Make sure to assign the Permission Set: 'Case Timer User' for users that will be recording time.
This perm set gives user the ability to create records of type "Session Timer", as well as execute the required Apex Classes. It is assumed that the user will have access to the case via other permissions already.

For ease of use for future, you may want to include this in any Permission Set Groups you have so it's not forgotten when new Users are added to the system.



User Guide

Once you have everything setup (including the permission set assigned) you will note that the Case Timer starts timing the amount of time a user actively spends on a case.

From the time a user opens a case record to time they either close or navigate away from the case, time spent on the case will be recorded (assuming it is set to auto-start and isn't manually paused). Navigation away refers to moving to a new tab or sub-tab in console navigation, or a new browser tab - i.e. if at any point, the Case Detail page is not in focus within the Salesforce Console, the timer will pause. The timer will start again once the Case Detail page is in focus. If you close the console tab, sub-tab, browser tab, refresh or navigate away from the url, the timer will be stopped and the session will be saved.

If you have checked the box to 'Pause when browser loses focus' then the time will also pause when the browser window that Salesforce is running in loses focus (e.g. change focus to a different application like Outlook, or a different browser window).

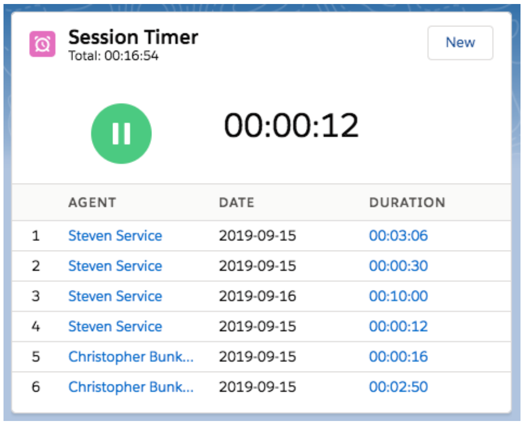
Note: A new session will also be written when the case status is updated.

I recommend you initially start with the Component showing to understand how it works and when it pauses, and writes new records. Once comfortable, you can then hide the component and just use the reports to track the time spent.

Total: Displays total time spent on the case by the user in hh:mm:ss format

Agent Column: Displays Agent Name. The link on this column will take you to the relevant User record.

Date Column: Displays Date of Event occurring in the



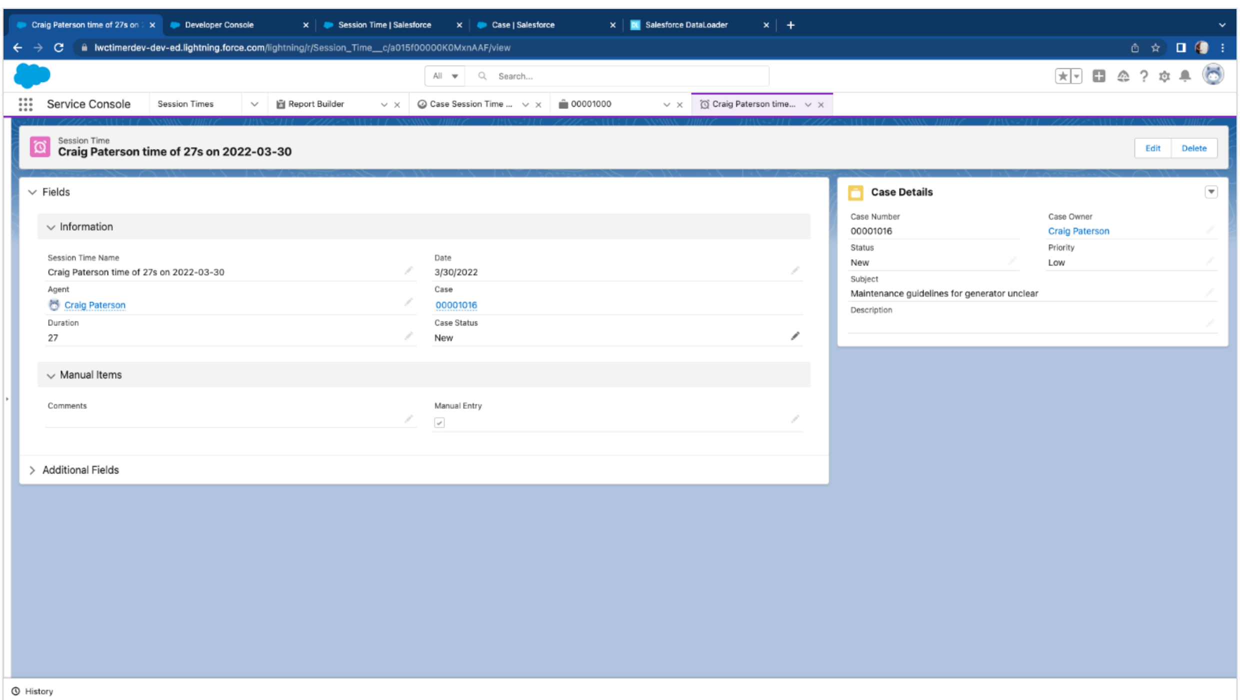
user's local time zone

Duration Column: Amount of time spent on the case in hh:mm:ss format. The link on this column will take you to the Session Time record.

Here is the page layout of the Session Time record when you open one up - note that the 'Case Details' section will be missing after the install, I recommend that you:

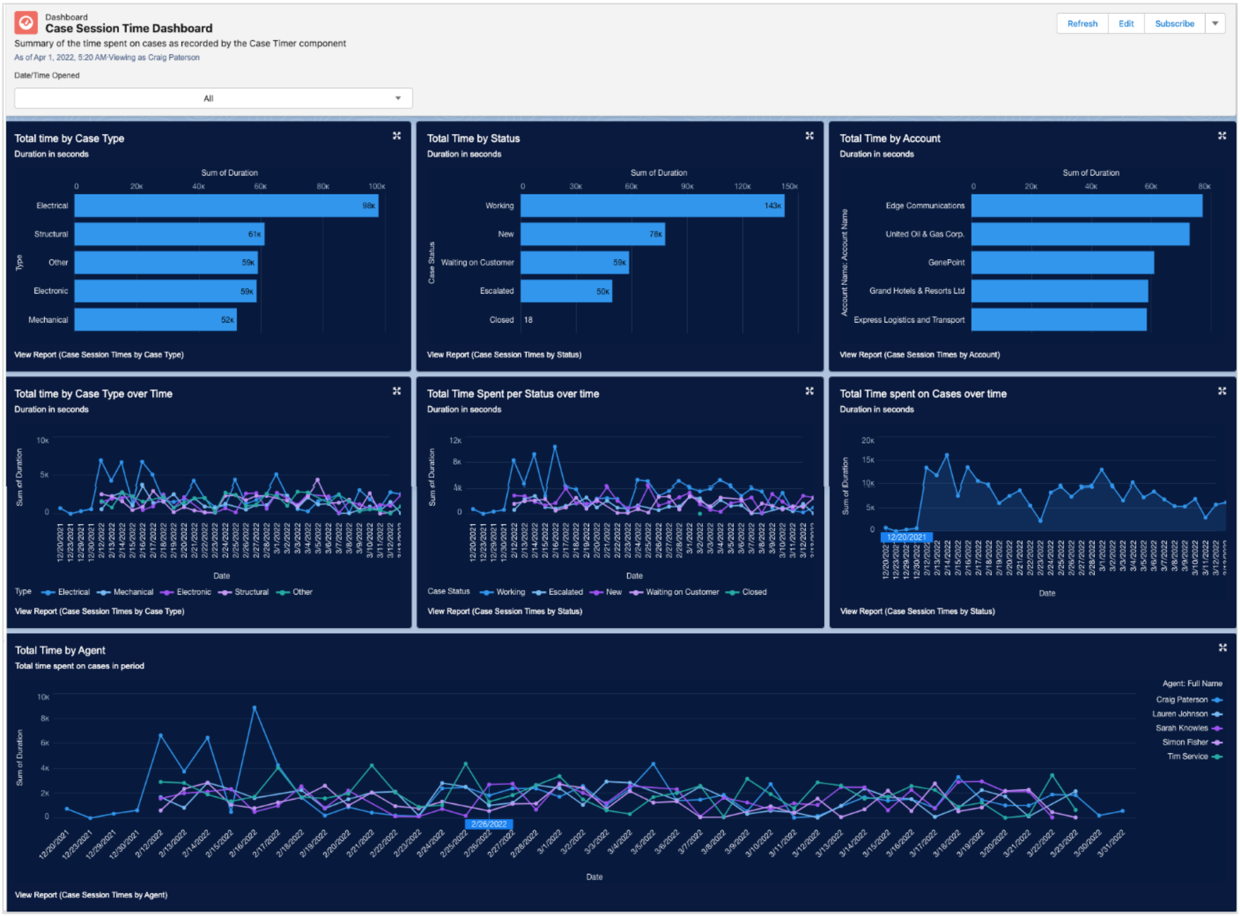
- Edit the Page
- Drag on the 'Related Record' component
- Click 'Edit Lookup Field' and select 'Case'
- Save changes

(Note this was unable to be included in the package by default due to this restriction)



Reports and Dashboards

Included in the package are some reports and a dashboard - these can be found in the 'Case Session Reports' and 'Case Session Dashboards' folders as appropriate.



Appendix

PERMISSION SET

The ‘Case Timer User’ Permission Set includes

- Objects
  - Session Times
    - Read & Create Access
    - View All Access (to see others that have worked on the case)
    - View all fields
- Apex Class Access
  - CaseTimeCount
  - CaseTimeCountTest

Future update ideas

- Support other record types
  - Chat Transcript
  - Messaging Session
  - Voice Call
  - Others? Generic/any Object? (issue with joining to that object via reporting)
- Support for non-console apps
  - The Workspace API that this component relies heavily on only works on Console Apps, and using browser events has so far been unreliable, but may be able to be revisited
- Configurable columns shown on component

Migration from old version

1. Remove the existing component from your Case page layout
2. Extract all of the data you want to keep (I suggest just a few months worth) using usual Salesforce Data Extraction tools (e.g Dataloader.io)
   a. Columns to keep: Agent, Case, Created By ID, Created Date, Date, Duration, Manual Entry, Session Time Name
3. Uninstall the existing package from ‘Installed Packages’ in Setup
4. Install the new package from the AppExchange and follow the setup instructions above
5. Import the data you want to keep from your earlier extract back into Salesforce