

AllAi Productivity by OSF Digital

User Guide

User Guide V 1.0



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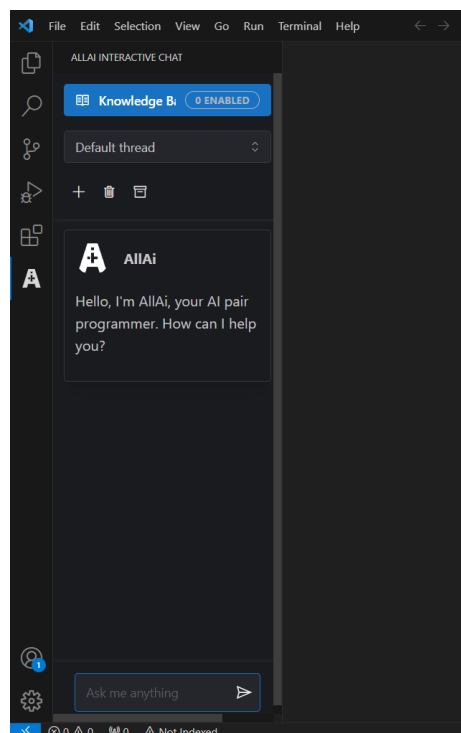
Introduction

An AI-powered platform for Salesforce professionals to maximize productivity, enhance efficiency, collaboration and time to market. Manage AllAI tools adoption from your SF org.

You will get important reports and dashboards with AllAi, the AI-powered solution for all team roles. From discovery to monitoring, this phase-based platform empowers Salesforce professionals to deliver projects with ease and quality, ensuring:

- Higher project outcomes and efficiency,
- Automatic reports, no more manual effort needed,
- Faster knowledge through intuitive NL search and chat functionalities,
- Draft test cases, scripts, and plans, identifying defects and breaking changes,
- Resolutions with intelligent suggestions, streamlining workflows for faster resolutions,
- Faster time to market with knowledgeable assistants and research capabilities, enabling swift planning and design,
- Reduction of defects through preventive measures and improved documentation,
- Expert guidance and code drafts for faster development, eliminating feedback waiting time,
- Integration with various tools, an efficient experience for Salesforce professionals across different roles.

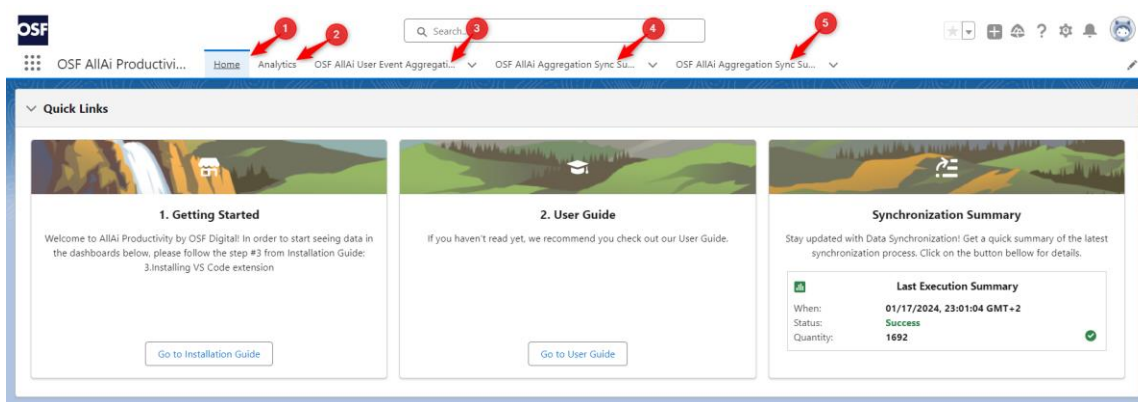
Stay tuned for more!



OSF AllAi Productivity Navigation

By selecting OSF AllAi Productivity from the App Launcher on your Salesforce org you are guided to the landing page of the application. Besides the Home page (1), the application presents the following navigation items:

- Analytics (2)
- OSF AllAi User Event Aggregations (3)
- OSF AllAi Aggregation Sync Summaries (4)
- OSF AllAi Aggregation Sync Summary Items (5)



OSF AllAi Aggregation Sync Summaries is the tab of the custom object that will serve as a container to store summary of all synchronizations made with to OSF AllAi Platform servers. On the other hand, the OSF AllAi Aggregation Sync Summary Items is the custom object representing the data about interaction for each synchronization process.

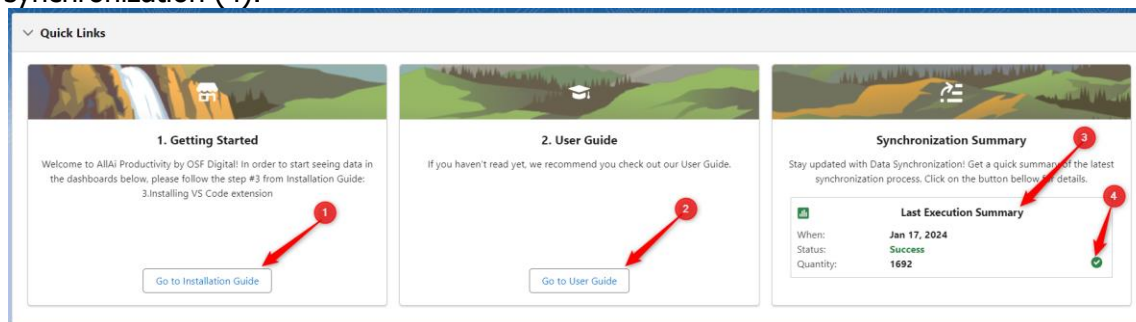
Home Page

To get started with the OSF AllAi Productivity you should click on the "Go to Installation Guide" call to action on the "Getting Started" section (1).

A new browser tab will be opened, and the downloading of the application installation guide will begin.

To find out more on how to enhance your understanding of the AllAi Productivity and its functionalities you should click on the "Go to User Guide" call to action on the User Guide section (2).

Finally, in the Synchronization Summary section, you will be provided with the information from the most recent synchronization process. The primary objective is to present you with the events that transpired during the last synchronization process and to confirm that the updated data continues to originate from the **OSF AllAi Code Platform** server (3). The color and the shape of the status icon will quickly indicate the status of the last synchronization (4).



User Classification Setup (for Admin users only)

Salesforce Admins may manage parameters to identify users' classification based on the number of interactions or usability of the AllAi Productivity – Code functionality. Currently, standard classifications are set as following:

- **Not installed:** Never used AllAi Productivity - Code functionality
- **Installed/Inactive:** Total number of monthly intentional interactions < 30
- **Casual user:** Total number of monthly intentional interactions >= 30
- **Active user:** Total number of monthly intentional interactions >= 90
- **Power user:** Total number of monthly intentional interactions >= 300

Your company may have different parameters to classify users interactions and usability of AllAi Productivity – code functionality according to your own business requirements.

To do so, Admins should go to Salesforce Setup console. Insert the "Custom metadata types" text in the Quick Find on the Salesforce Setup Home page (1) and navigate to the Custom Metadata Types page by clicking on the corresponding tab (2). After clicking on the "Manage records" action for the User classification setting custom metadata type (3), you will be able to change the classification range for every user category.

The screenshot shows the 'Custom Metadata Types' page in the OSF setup interface. Red arrows and numbers indicate the following steps:

- 1**: Points to the 'Setup' tab in the top navigation bar.
- 2**: Points to the 'Custom Metadata Types' link in the left sidebar.
- 3**: Points to the 'Edit | Manage Records' link in the table for the 'OSF AIAI User Classification Setting'.

The main content area is titled 'All Custom Metadata Types' and contains a table with the following data:

Action	Label	Namespace Prefix	Visibility	API Name	Record Size	Description
Del Manage Records	OSF AIAI User Classification Setting		Public	UserClassificationSetting__mdt_177	177	This custom metadata type will store the ranges for user classification based on the utilization of the OSF AIAI Platform tools.

Click on the "Edit" action for the selected user classification category.

The screenshot shows the 'OSF AIAI User Classification Settings' page. A red arrow points to the 'Edit' link in the 'Active User' row of the table.

Action	Label	OSF AIAI User Classification Setting Name	Namespace Prefix
Edit Del	Active User	ActiveUser	
Edit Del	Casual User	CasualUser	
Edit Del	Installed/Inactive	InstalledInactive	
Edit Del	Power User	PowerUser	

Set the preferred minimum (1) and maximum value (2) for the selected classification category. While setting the values, remember that the configured range for one user classification should not overlap with another user classification. Save the changes.

OSF AllAI User Classification Setting Edit Save Save & New Cancel

Label ⓘ

OSF AllAI User Classification Setting Name ⓘ

Namespace Prefix ⓘ

Protected Component ⓘ ☐

Event Count Range

Minimum Event Count ⓘ

Maximum Event Count ⓘ

Save Save & New Cancel

I = Required Information

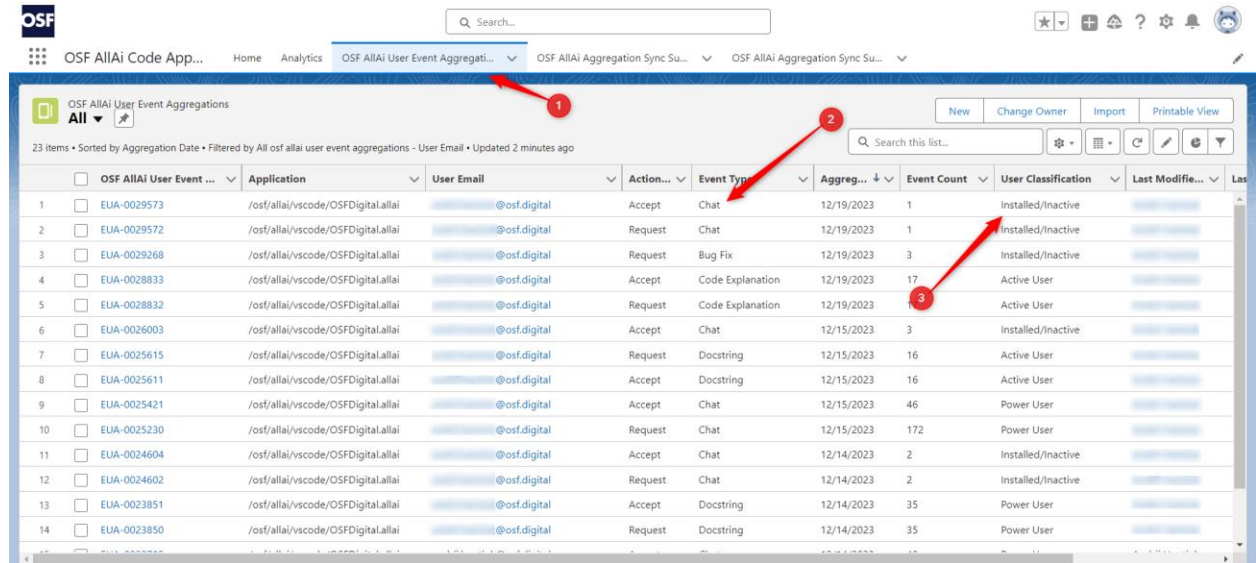
After the user classification is set up, the information about the OSF AllAI Code Extension for Visual Studio Code is visualized in reports and dashboards.

These reports are derived from the OSF AllAI User Event Aggregation custom object.

OSF AllAi User Event Aggregation object

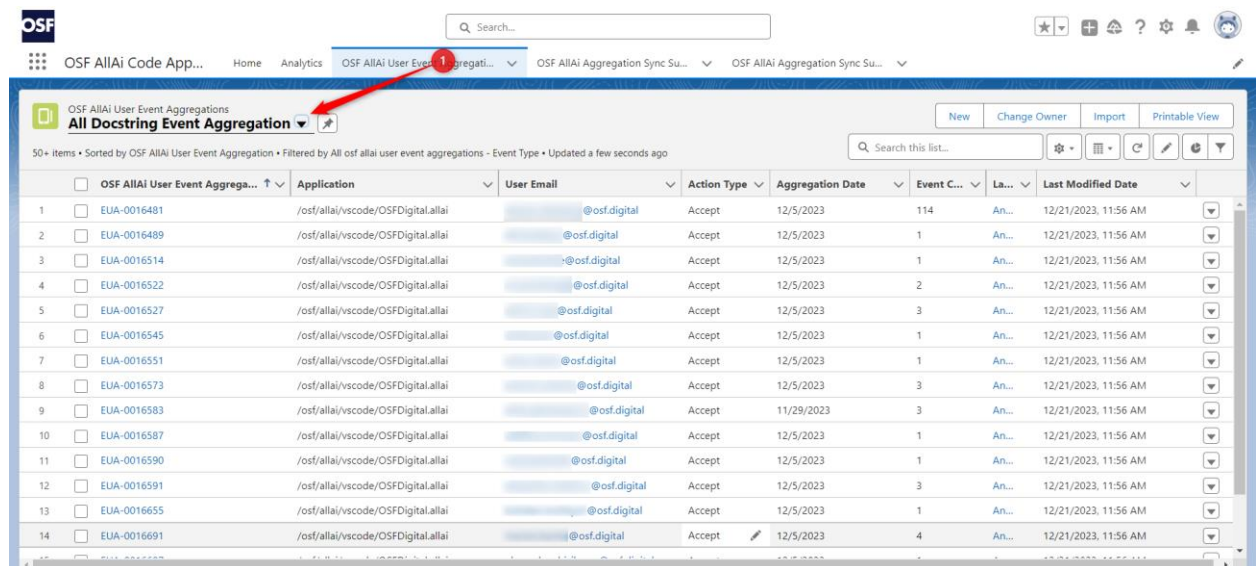
OSF AllAi User Event Aggregation object (1) consolidates the data received from the OSF AllAi Platform servers regarding user interactions with the AllAi Code extension. A scheduled job is in place to automatically refresh the data within this object.

The data reflects the type of user interaction with the extension (2) and the current user classification category (3).



	OSF AllAi User Event ...	Application	User Email	Action...	Event Type	Aggreg...	Event Count	User Classification	Last Modifi...
1	EUA-0029573	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	Chat	12/19/2023	1	Installed/inactive	
2	EUA-0029572	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Request	Chat	12/19/2023	1	Installed/inactive	
3	EUA-0029268	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Request	Bug Fix	12/19/2023	3	Installed/inactive	
4	EUA-0028833	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	Code Explanation	12/19/2023	17	Active User	
5	EUA-0028832	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Request	Code Explanation	12/19/2023	3	Active User	
6	EUA-0026003	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	Chat	12/15/2023	3	Installed/inactive	
7	EUA-0025615	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Request	Docstring	12/15/2023	16	Active User	
8	EUA-0025611	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	Docstring	12/15/2023	16	Active User	
9	EUA-0025421	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	Chat	12/15/2023	46	Power User	
10	EUA-0025230	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Request	Chat	12/15/2023	172	Power User	
11	EUA-0024604	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	Chat	12/14/2023	2	Installed/inactive	
12	EUA-0024602	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Request	Chat	12/14/2023	2	Installed/inactive	
13	EUA-0023851	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	Docstring	12/14/2023	35	Power User	
14	EUA-0023850	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Request	Docstring	12/14/2023	35	Power User	

By selecting the appropriate list view (1), it is possible to review the data for each event type individually.



	OSF AllAi User Event Aggrega...	Application	User Email	Action Type	Aggregation Date	Event C...	La...	Last Modified Date
1	EUA-0016481	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	114	An...	12/21/2023, 11:56 AM
2	EUA-0016489	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	1	An...	12/21/2023, 11:56 AM
3	EUA-0016514	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	1	An...	12/21/2023, 11:56 AM
4	EUA-0016522	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	2	An...	12/21/2023, 11:56 AM
5	EUA-0016527	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	3	An...	12/21/2023, 11:56 AM
6	EUA-0016545	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	1	An...	12/21/2023, 11:56 AM
7	EUA-0016551	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	1	An...	12/21/2023, 11:56 AM
8	EUA-0016573	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	3	An...	12/21/2023, 11:56 AM
9	EUA-0016583	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	11/29/2023	3	An...	12/21/2023, 11:56 AM
10	EUA-0016587	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	1	An...	12/21/2023, 11:56 AM
11	EUA-0016590	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	1	An...	12/21/2023, 11:56 AM
12	EUA-0016591	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	3	An...	12/21/2023, 11:56 AM
13	EUA-0016655	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	1	An...	12/21/2023, 11:56 AM
14	EUA-0016691	/osf/allai/vscode/OSFDigital.allai	@osf.digital	Accept	12/5/2023	4	An...	12/21/2023, 11:56 AM

It is also possible to review the data received only within the selected time frame (2).

OSF AllAI Code App... Home Analytics OSF AllAI User Event Aggregati... OSF AllAI Aggregation Sync Su... OSF AllAI Aggregation Sync Su...

OSF AllAI User Event Aggregations
All Event User Aggregation Last Week

28 items • Sorted by OSF AllAI User Event Aggregation • Filtered by All osf allai user event aggregations - Aggregation Date • Updated a few seconds ago

	OSF AllAI User Event Aggregation ↑	Application	Us...	Action Type	Event Type	Aggregation Date	Even...	La...	Last Modified Date
1	EUA-0034869	/osf/allai/vscode/OSFDigitalallai	es...	Display	Code Completion	12/31/2023	27	Te...	1/2/2024, 2:57 PM
2	EUA-0034870	/osf/allai/vscode/OSFDigitalallai	mi...	Display	Code Completion	12/31/2023	22	Te...	1/2/2024, 2:57 PM
3	EUA-0034871	/osf/allai/vscode/OSFDigitalallai	da...	Accept	Code Completion	12/31/2023	22	Te...	1/2/2024, 2:57 PM
4	EUA-0034872	/osf/allai/vscode/OSFDigitalallai	da...	Accept	Code Completion	12/31/2023	17	Te...	1/2/2024, 2:57 PM
5	EUA-0034873	/osf/allai/vscode/OSFDigitalallai	ca...	Display	Code Completion	12/31/2023	17	Te...	1/2/2024, 2:57 PM
6	EUA-0034874	/osf/allai/vscode/OSFDigitalallai	fra...	Request	Chat	12/31/2023	11	A...	1/1/2024, 12:00 AM
7	EUA-0034875	/osf/allai/vscode/OSFDigitalallai	fra...	Display	Chat	12/31/2023	11	A...	1/1/2024, 12:00 AM
8	EUA-0034876	/osf/allai/vscode/OSFDigitalallai	u...	Request	Code Completion	12/31/2023	10	Te...	1/2/2024, 2:57 PM
9	EUA-0034877	/osf/allai/vscode/OSFDigitalallai	m...	Accept	Code Completion	12/31/2023	10	Te...	1/2/2024, 2:57 PM
10	EUA-0034878	/osf/allai/vscode/OSFDigitalallai	da...	Request	Chat	12/31/2023	8	A...	1/1/2024, 12:00 AM
11	EUA-0034879	/osf/allai/vscode/OSFDigitalallai	da...	Display	Chat	12/31/2023	8	A...	1/1/2024, 12:00 AM
12	EUA-0034880	/osf/allai/vscode/OSFDigitalallai	u...	Request	Chat	12/31/2023	6	A...	1/1/2024, 12:00 AM
13	EUA-0034881	/osf/allai/vscode/OSFDigitalallai	u...	Display	Chat	12/31/2023	6	A...	1/1/2024, 12:00 AM
14	EUA-0034882	/osf/allai/vscode/OSFDigitalallai	lu...	Accept	Code Completion	12/31/2023	6	Te...	1/2/2024, 2:57 PM

After clicking on the User event aggregation field, the record page is opened.

OSF AllAI User Event Aggregation
EUA-0018450

User Email: @osf.digital Event Type: Chat Aggregation Date: 12/5/2023 Event Count: 20

Related Details

OSF AllAI User Event Aggregation
EUA-0018450

Application: /osf/allai/vscode/OSFDigitalallai

User Email: @osf.digital

User Classification: Active User

Event Information

Action Type: Accept

Event Type: Chat

Aggregation Date: 12/5/2023

Event Count: 20

System Information

Owner: [User Icon]

Created By: [User Icon] 12/5/2023, 8:51 PM

Last Modified By: [User Icon] 12/22/2023, 10:19 AM

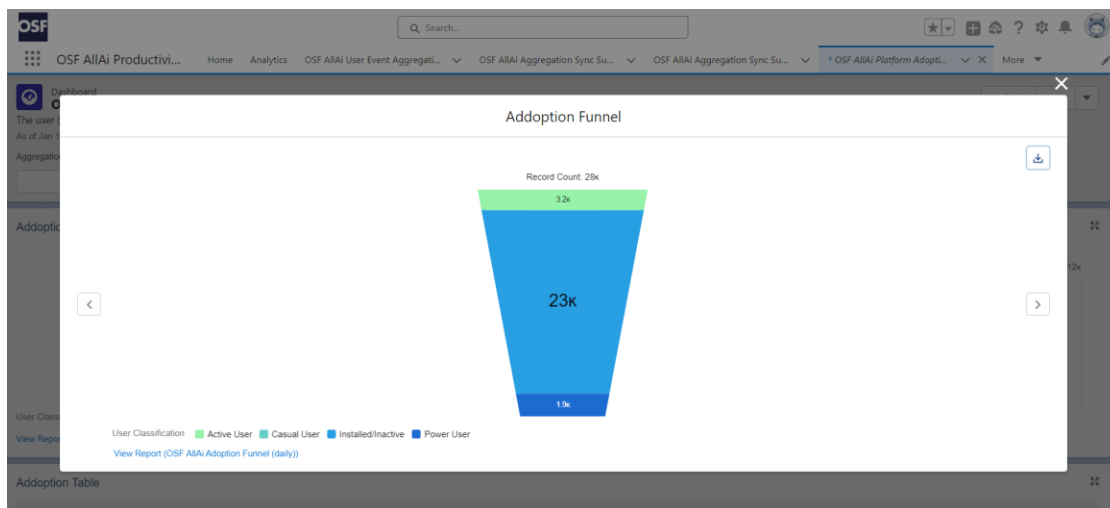
Reports and Dashboards

OSF AllAi Code Extension for Visual Studio Code incorporates a variety of reports that showcase the usage of the OSF AllAi Code Extension for Visual Studio Code.

Additionally, it provides a comprehensive dashboard that visually represents the adoption of the platform among users (developers) within the organization. The AllAi Code Adoption Dashboards can be accessed directly from the Homepage and consist of the following components:

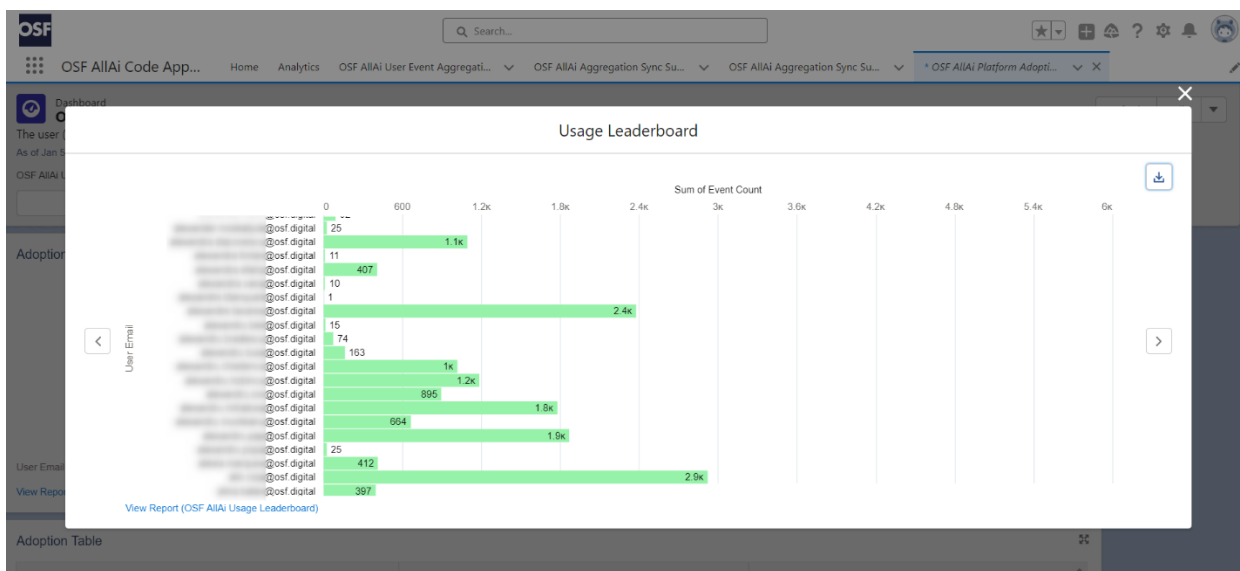
1. Adoption Funnel

The component shows the number of users (developers) in each user classification category for a specific period of time.



2. Usage Leaderboard

The bar chart presents the quantity of interactions performed by developers with the OSF AllAi Code Extension for Visual Studio Code within a specified time frame.



3. Adoption Table

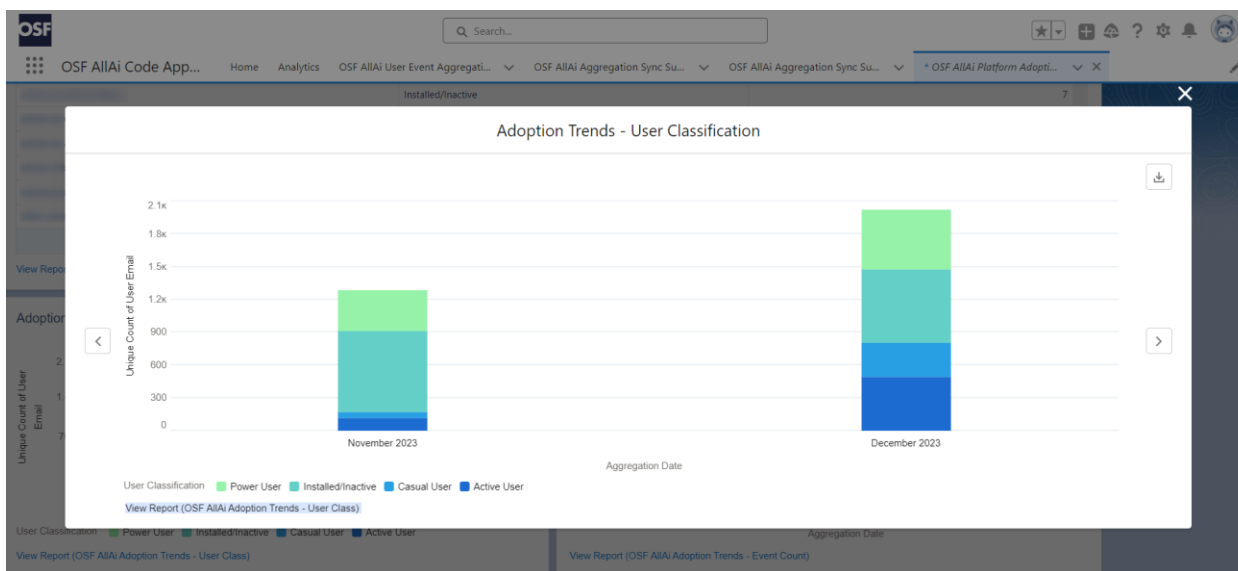
Adoption Table

User Email	User Classification	Event Count
@osf.digital	Installed/Inactive	8
@osf.digital	Active User	16
@osf.digital	Active User	13
@osf.digital	Power User	49
@osf.digital	Installed/Inactive	1
@osf.digital	Power User	126
@osf.digital	Installed/Inactive	2
@osf.digital	Installed/Inactive	4
@osf.digital	Installed/Inactive	1
@osf.digital	Active User	17
@osf.digital	Active User	17
@osf.digital	Power User	14

View Report (OSF AllAI Adoption Table)

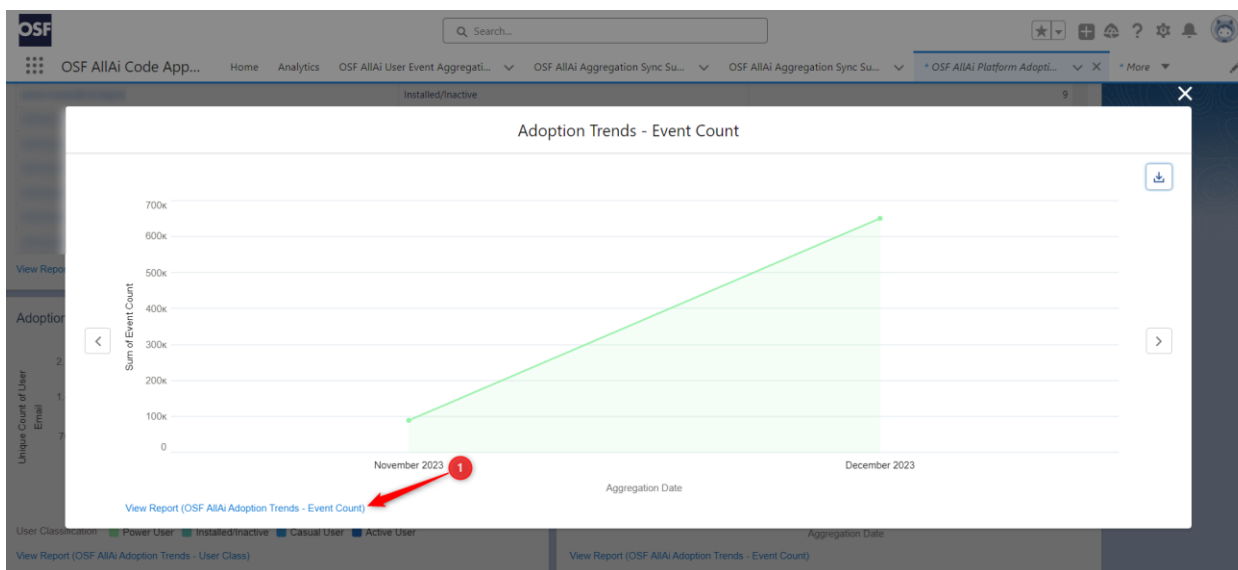
4. Adoption Trends - User Classification

The stacked column chart displays the quantity of users for each classification category grouped by the months of the current year.



5. Adoption Trends - Event Count

This dashboard shows the total amount of events triggered by the users (developers) grouped by the month of the year. To navigate the source report simply click on the link at the bottom of the component.



If you have any questions, contact us at allai@osf.digital.