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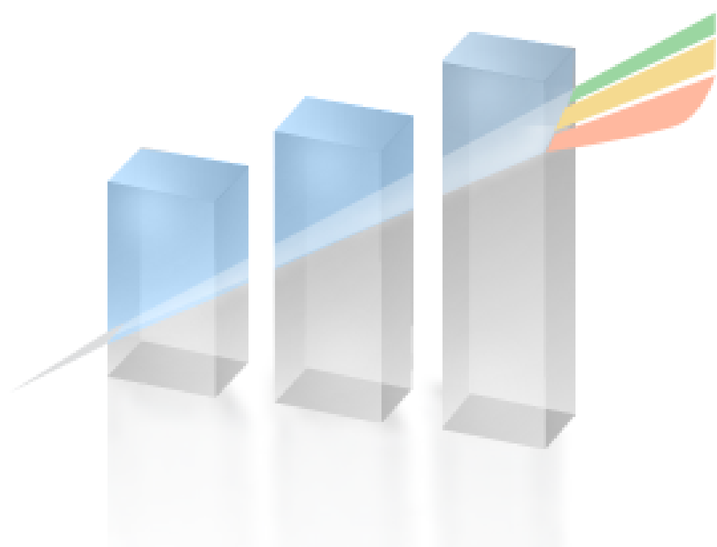

WorkIt! SLA Framework

Customization Guide

Winter ’11 Release

Revision 1.01

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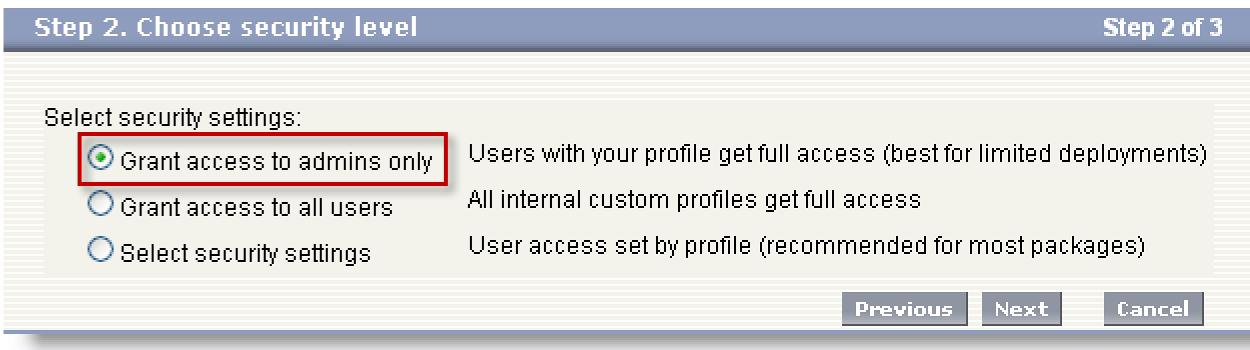
Installing the WorkIt! SLA Framework

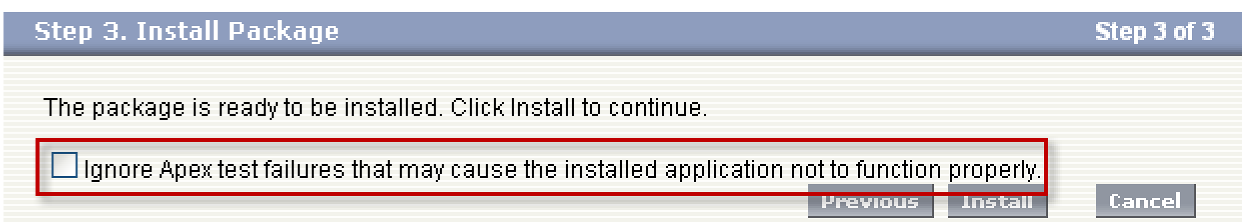
After you click the **Get It Now** button on the app's AppExchange page and log in with your Salesforce credentials, the installation wizard will start and guide you through the installation process.

On '*Step 1. Approve Package API Access*', click **Next**.

On '*Step 2. Choose security level*', choose **Grant access to admins only** and click **Next**. This will ensure no administrative permissions such as editing duration entries and modifying app settings are granted to your users.

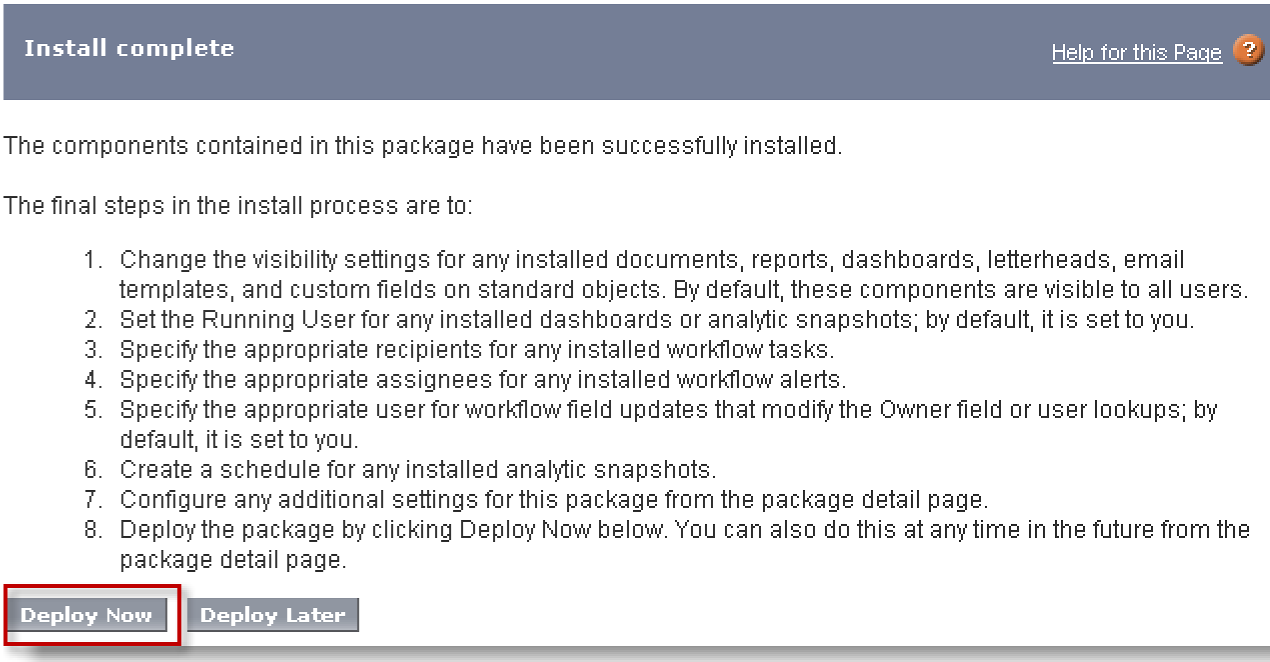


On '*Step 3. Install Package*', we recommend that you keep the **Ignore Apex test failures that may cause the installed application not to function properly** checkbox unchecked and click **Install**.



In certain cases Apex tests may fail during installation if this checkbox is left unchecked (especially if you have custom validation rules on the Case object). However, this does not necessarily mean the application will not function correctly.

When the installation is complete, click **Deploy Now** and complete the deployment process.



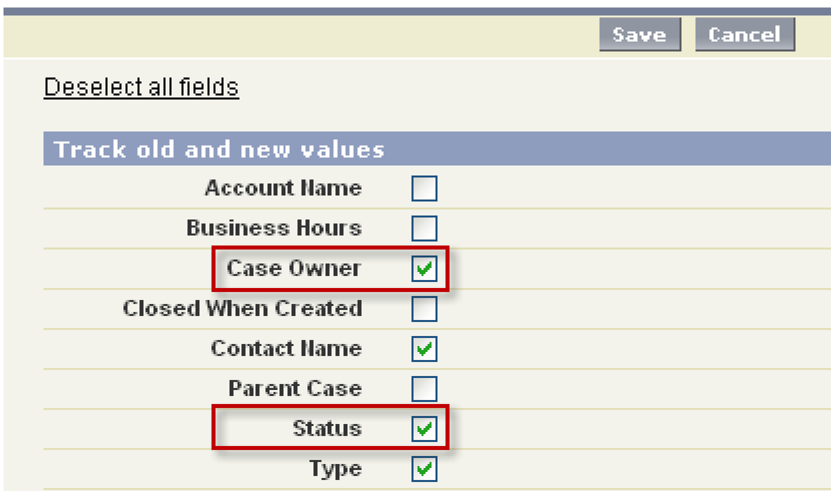
Quick Start

Follow those post-installation steps in order to allow status and ownership duration tracking:

Step 1: Verify Field History Tracking Settings

Go to **Setup** > **Customize** > **Cases** > **Fields** and click the **Set History Tracking** button at the top of the page.

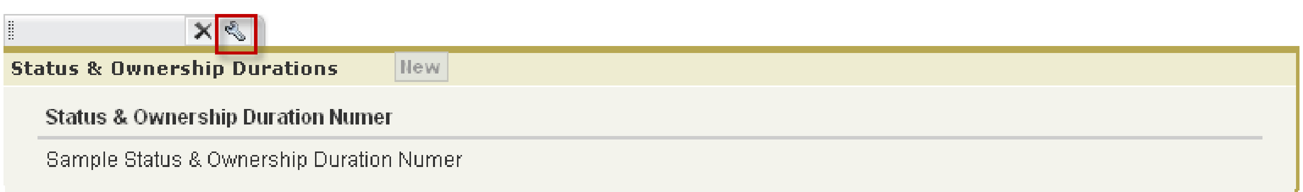
Make sure that History Tracking is enabled for the **Case Owner** and **Status** fields.



Step 2: Add the Status & Ownership Durations related list to your case page layout

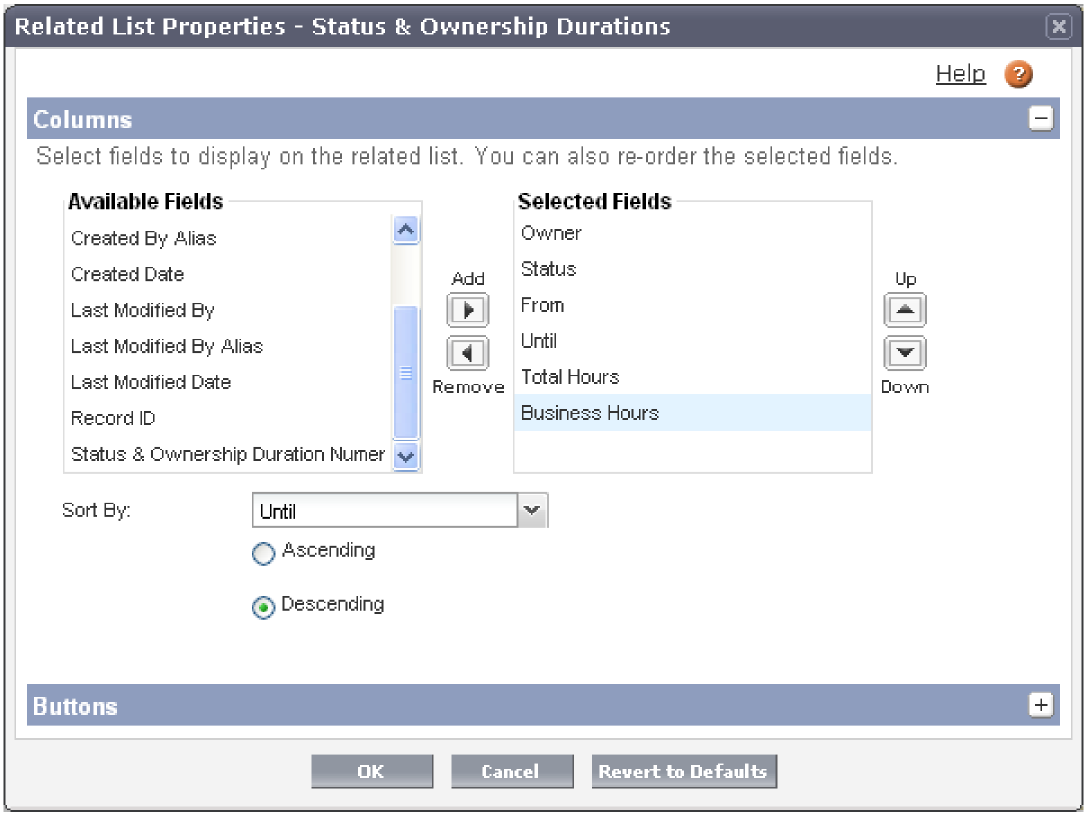
Edit your case page layout, and add the **Status & Ownership Durations** related list.

Once the list is added to the layout, click on the wrench icon to modify its settings.

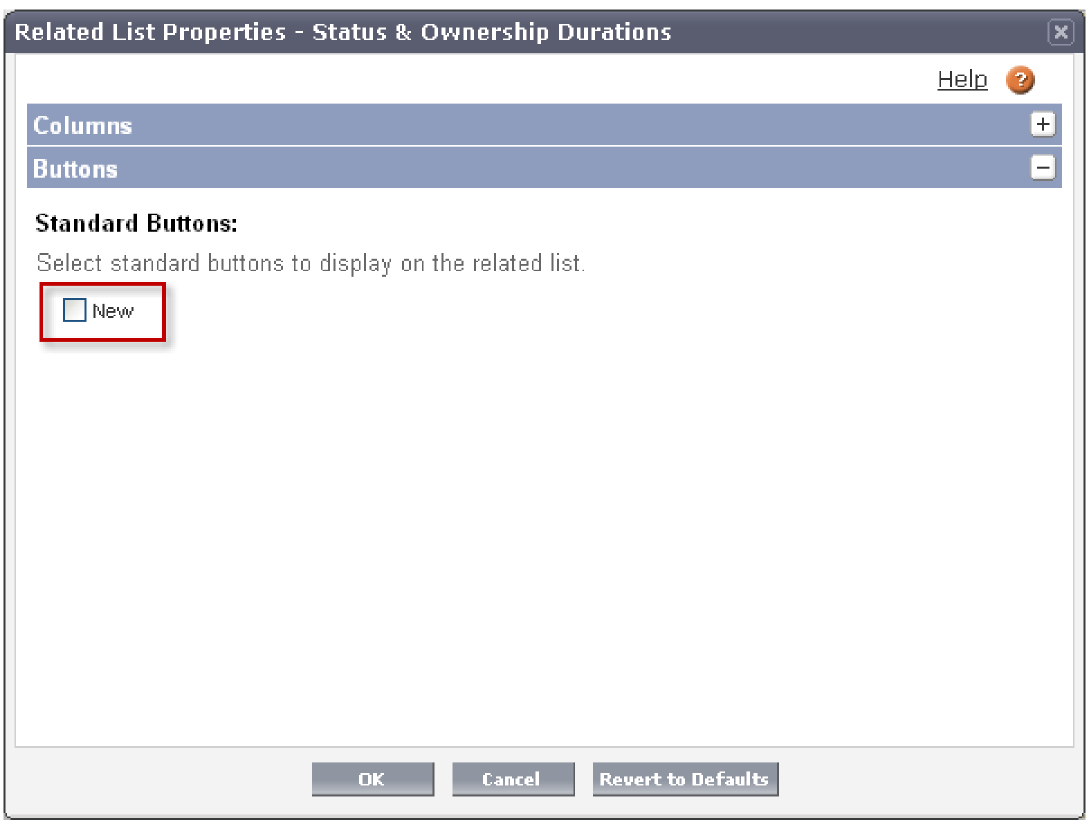


In the Columns sections, remove the **Status & Ownership Durations Number** field from the Selected Fields list, add the following fields and order them respectively: **Owner**, **Status**, **From**, **Until**, **Total Hours**, and **Business Hours**.

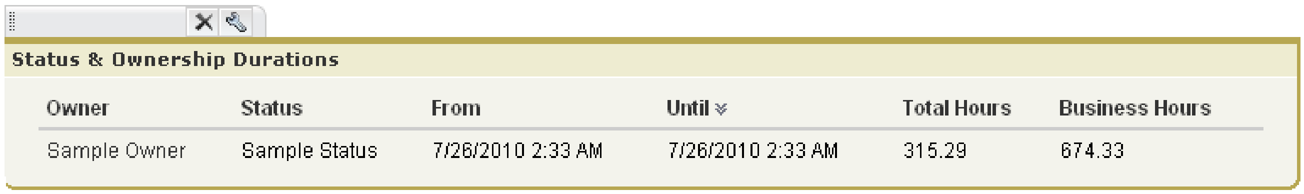
Under Sort By, specify the **Until** field with Descending ordering.



Next, expand the Buttons section and uncheck the **New** button.



Click OK, the related list on the page layout editor should now look like this:



Save the case page layout in order to apply the changes.

Step 3: Enable read access for the Status & Ownership Duration custom object (optional)

In order for users to be able to see the Status & Ownership Durations related list on the case page, read access for the Status & Ownership Duration custom object must be enabled for their user profiles. Edit your user profiles and grant the read access to the Status & Ownership Duration custom object where needed.

Please Note: Make sure that only read access is granted to your users in order to avoid accidental deletion or modification of duration entries.

Status & Ownership Duration tracking for cases is now enabled in your Salesforce org!

Duration Tracking Overview

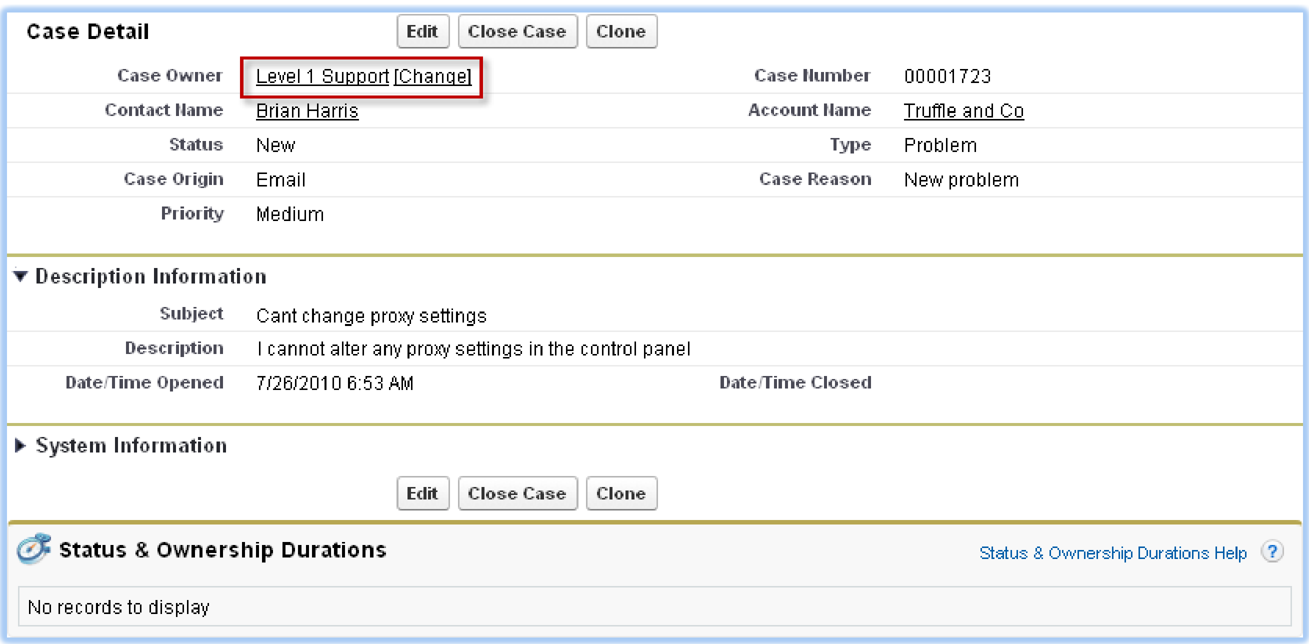
With the WorkIt! SLA Framework installed in your Salesforce org, every change in a case's Status or Owner fields will automatically trigger the creation of a new entry in the case's Status & Ownership Durations related list. Each duration entry indicates the Status and the Owner of a case during a specific timeframe. Every time a duration entry is created, the business hours for the respective timeframe are calculated based on the Business Hours that are associated with the parent case.

Tip: If you have teams that operate in several time zones, you can use escalation rules to assign different sets of Business Hours to cases based on specific rule criteria.

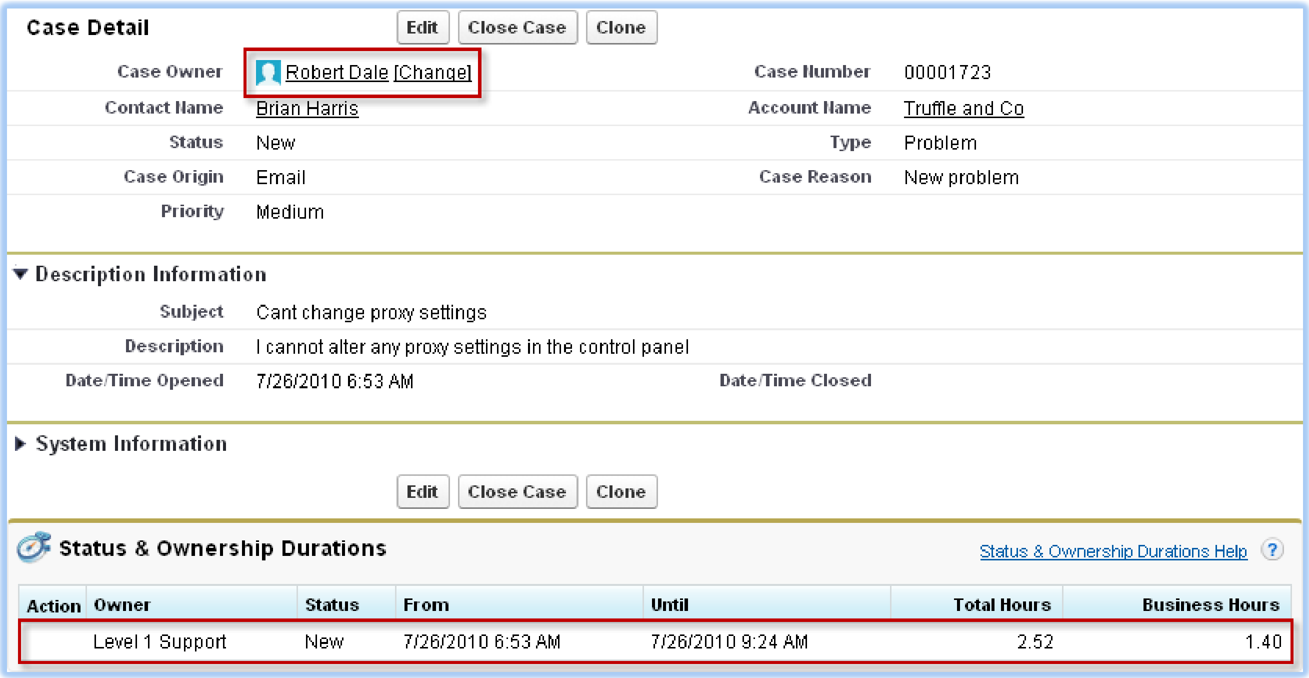
Example

In this example we'll show how the Status & Ownership Durations related list behaves during a case's life-cycle.

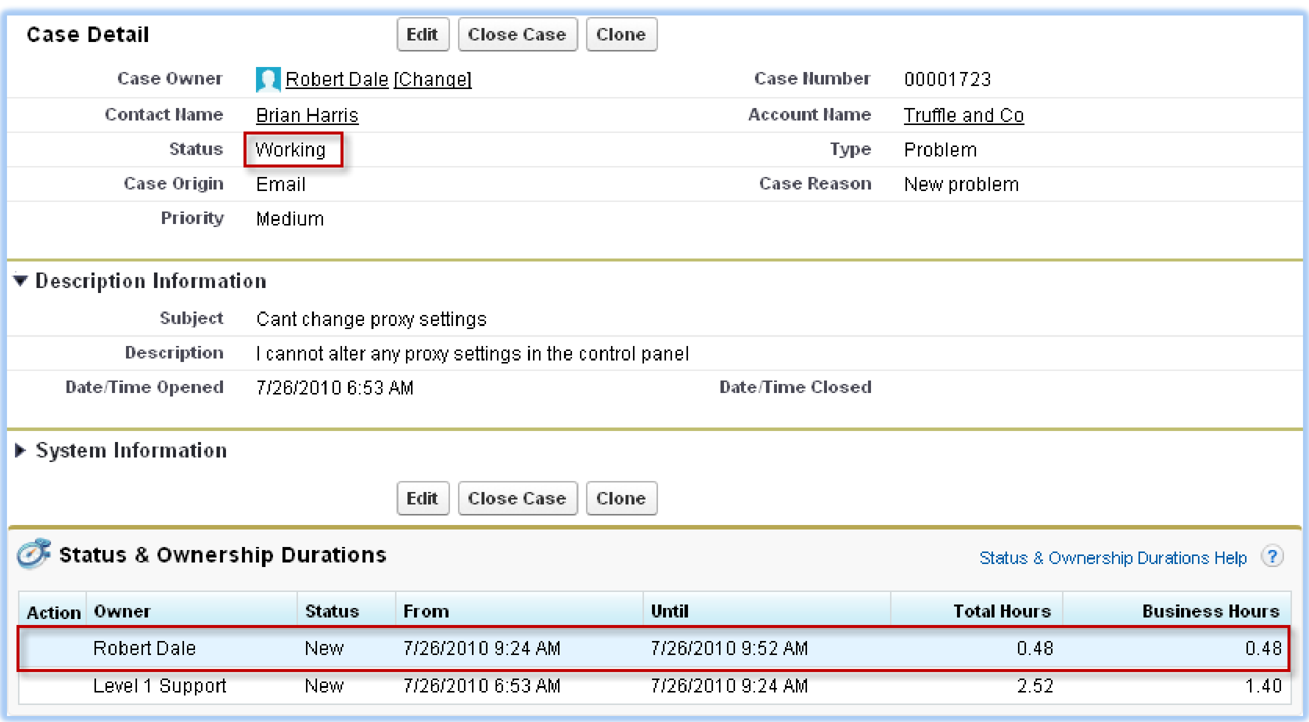
A new case is created and is assigned to the Level 1 Support queue.



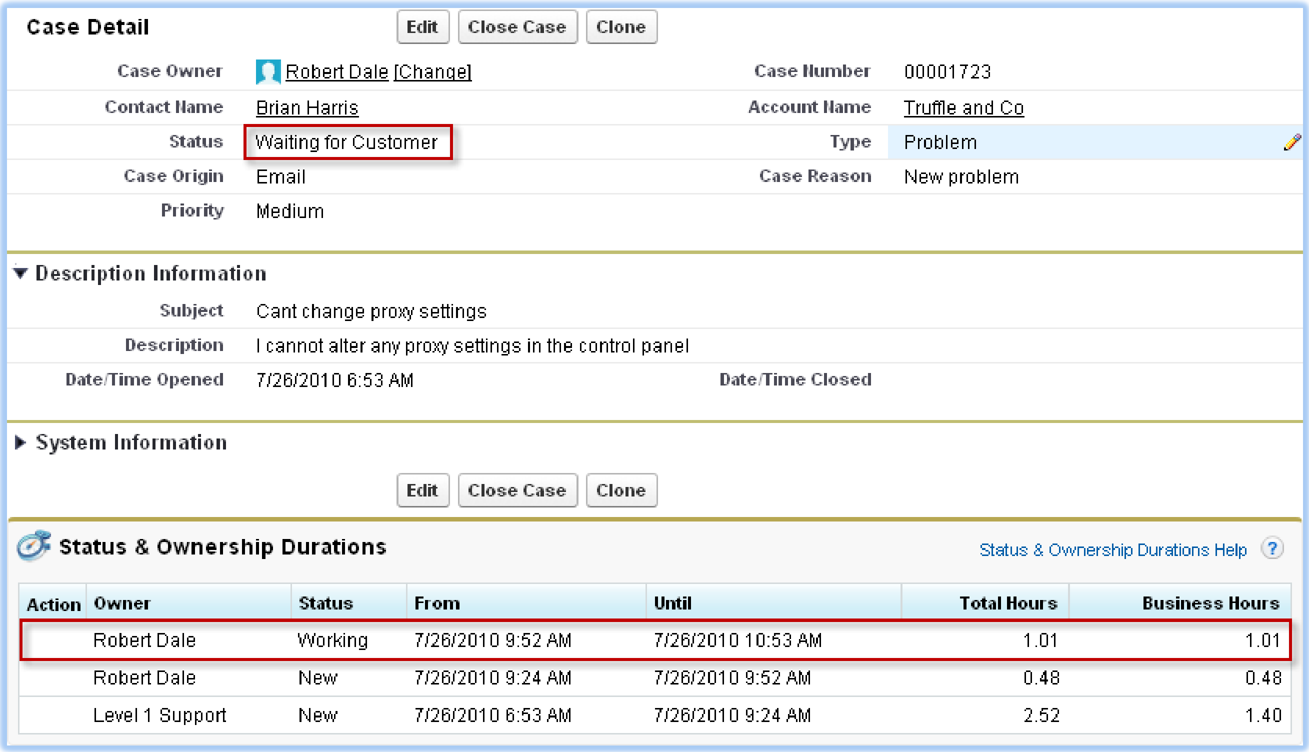
When Robert accepts this case from the queue, a new duration entry is created, representing the timeframe during which the case was owned by the Level 1 Support queue. Note that since the business day in this example starts at 8:00am, only part of the time is accounted as business hours.



Approximately half an hour after accepting the case, Robert starts working on a resolution, below we can see that when the case's status is changed to Working, a new duration entry is created to represent the timeframe during which the case was in the New status (and owned by Robert).

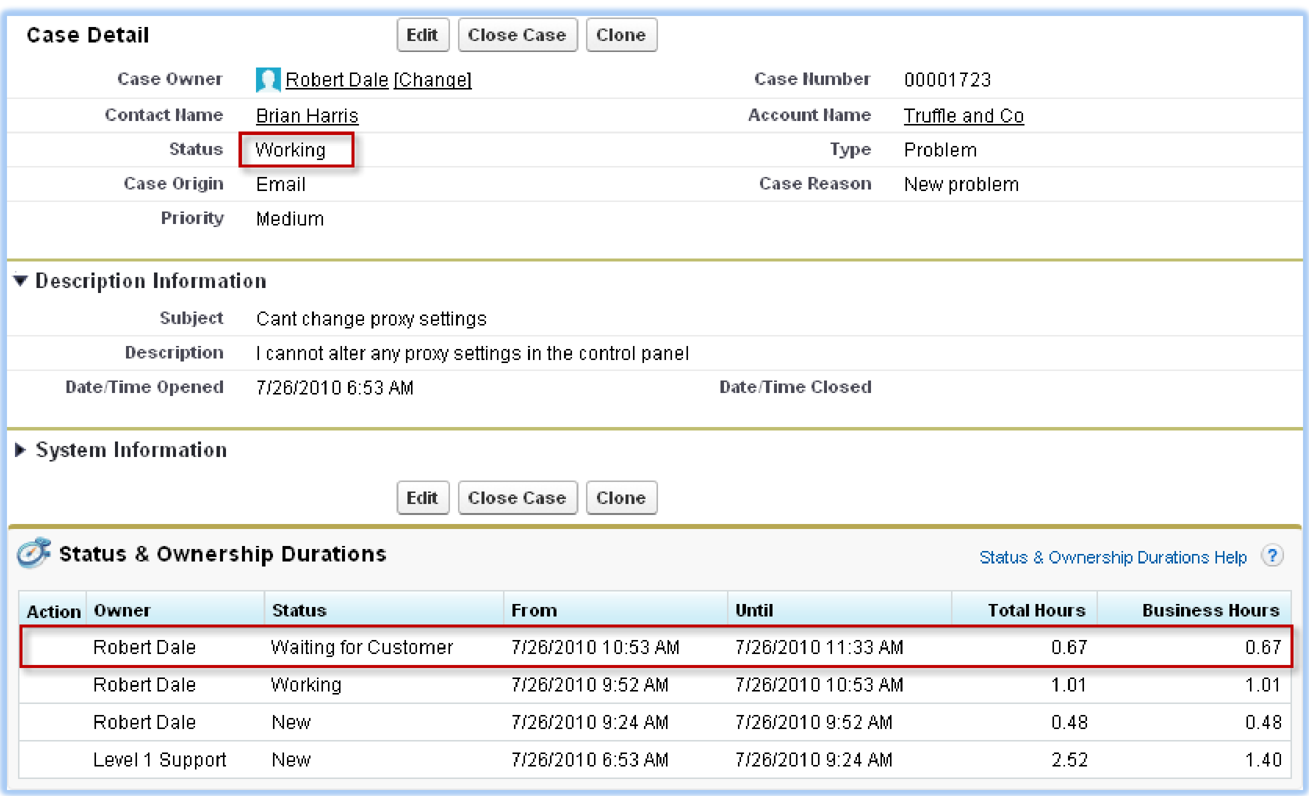


Next, after spending an hour looking into the problem, Robert needs some input from the customer, and changes the case's status to Waiting for Customer.



Action	Owner	Status	From	Until	Total Hours	Business Hours
	Robert Dale	Working	7/26/2010 9:52 AM	7/26/2010 10:53 AM	1.01	1.01
	Robert Dale	New	7/26/2010 9:24 AM	7/26/2010 9:52 AM	0.48	0.48
	Level 1 Support	New	7/26/2010 6:53 AM	7/26/2010 9:24 AM	2.52	1.40

When the customer replies, the case's status is changed back to Working, and we can see the time spent while waiting, in the newly created duration entry.



Action	Owner	Status	From	Until	Total Hours	Business Hours
	Robert Dale	Waiting for Customer	7/26/2010 10:53 AM	7/26/2010 11:33 AM	0.67	0.67
	Robert Dale	Working	7/26/2010 9:52 AM	7/26/2010 10:53 AM	1.01	1.01
	Robert Dale	New	7/26/2010 9:24 AM	7/26/2010 9:52 AM	0.48	0.48
	Level 1 Support	New	7/26/2010 6:53 AM	7/26/2010 9:24 AM	2.52	1.40

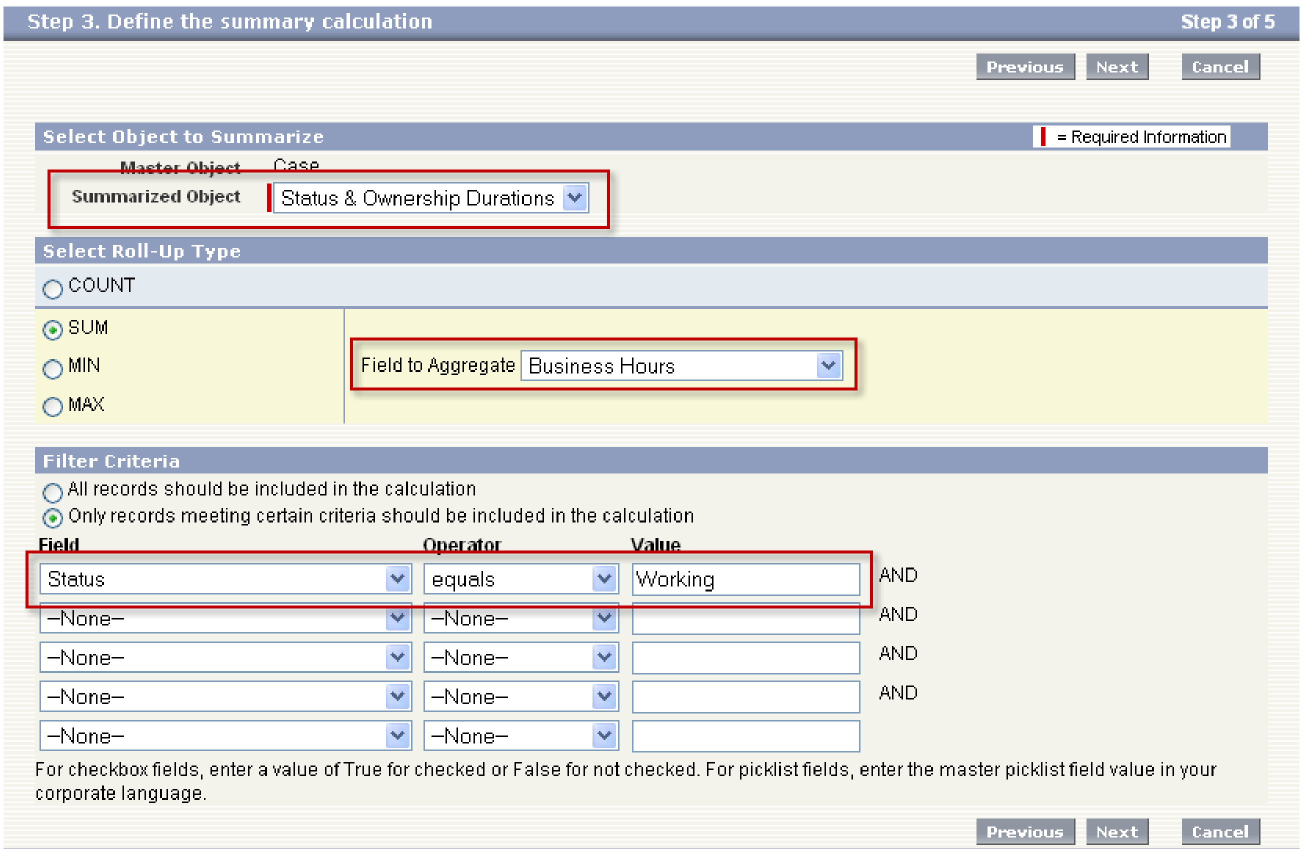
Using Roll-up Summary fields to aggregate Durations

As the Status & Ownership Duration custom object is related to the case object via a master-detail relationship, you can take advantage of roll-up summary fields to calculate various metrics on the case level.

Example 1: Business Hours

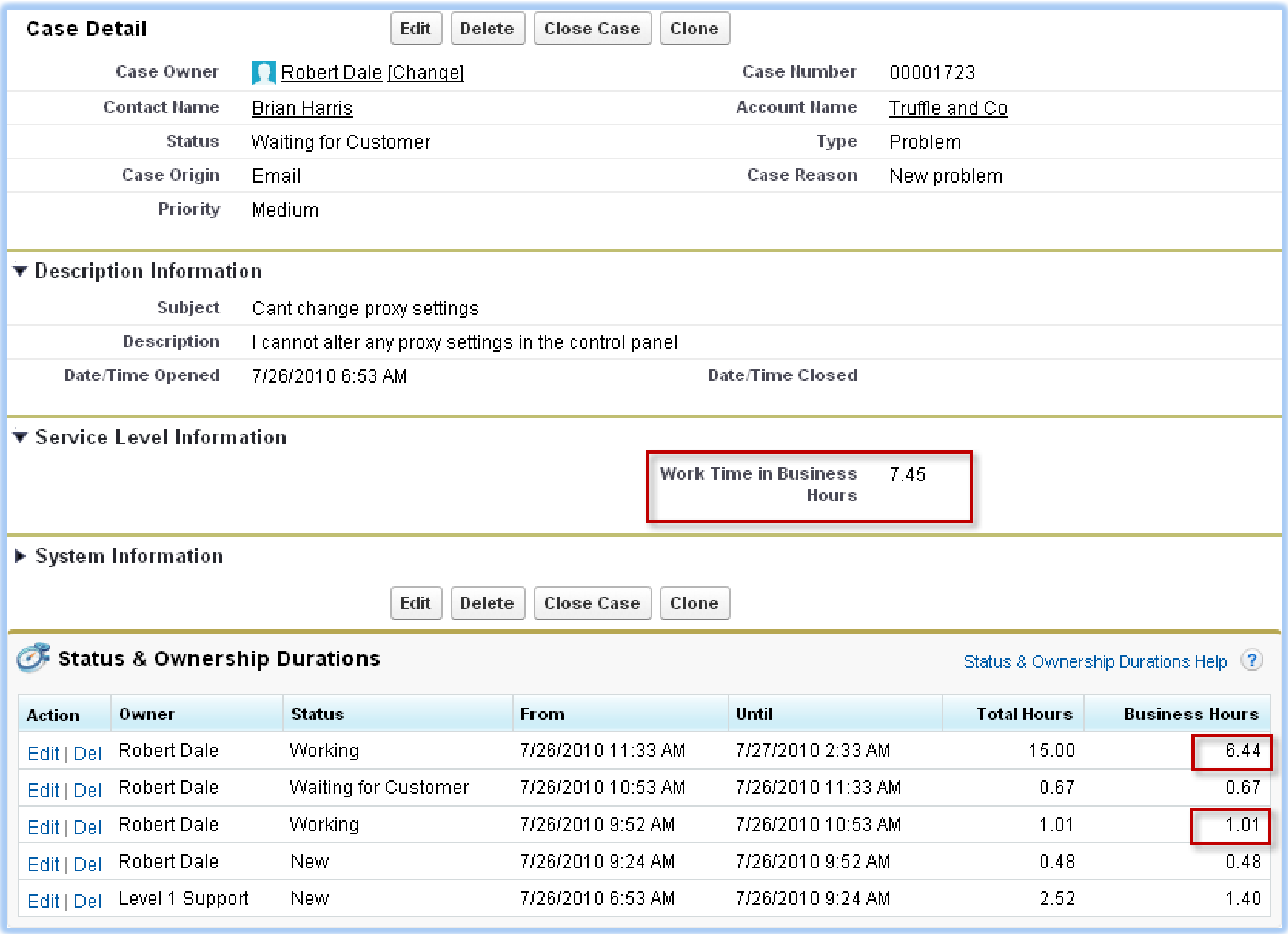
In this example we'll create a roll-up summary field that will aggregate the total working (when a case was in the Working status) business hours for a case.

In the New Custom Field Wizard (**Setup** > **Customize** > **Cases** > **Fields**), we create a new roll-up summary field, and use the setting below.



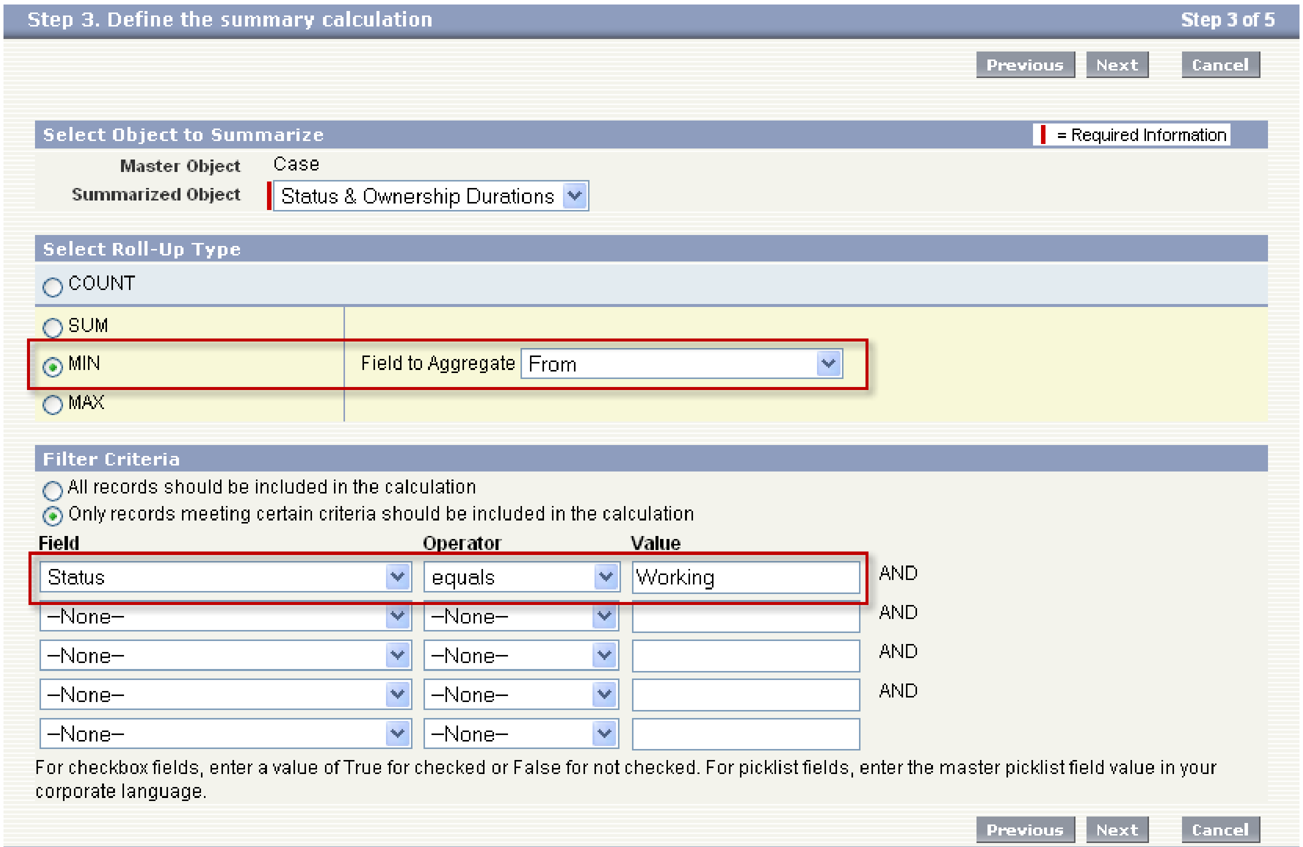
We only include durations that have their Status field's value equal to Working. We also use the Business Hours field for the aggregation since we're interested in the business hours potion of the total time spent.

As a result we have a field that aggregates the total business hours that the case spent in the Working status.

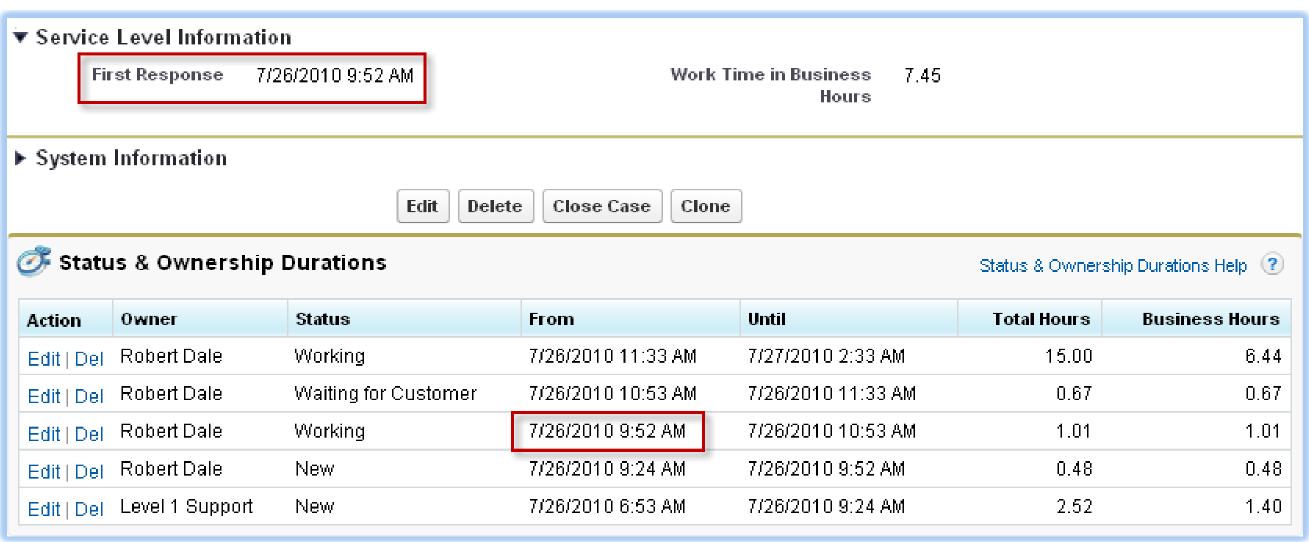


Example 2: First Response

In this example we use a MIN type of roll-up to calculate when a case's status was first change to Working (indicating the First Response time by the support team for that case).



The result:



Action	Owner	Status	From	Until	Total Hours	Business Hours
Edit | Del	Robert Dale	Working	7/26/2010 11:33 AM	7/27/2010 2:33 AM	15.00	6.44
Edit | Del	Robert Dale	Waiting for Customer	7/26/2010 10:53 AM	7/26/2010 11:33 AM	0.67	0.67
Edit | Del	Robert Dale	Working	7/26/2010 9:52 AM	7/26/2010 10:53 AM	1.01	1.01
Edit | Del	Robert Dale	New	7/26/2010 9:24 AM	7/26/2010 9:52 AM	0.48	0.48
Edit | Del	Level 1 Support	New	7/26/2010 6:53 AM	7/26/2010 9:24 AM	2.52	1.40

Reporting

When you want to include duration data in your reports, use the **Cases with Status & Ownership Durations** report type under Customer Support Reports.

Then, you'll be able to summarize the time in the report by the Owner and Status from the duration records associated with each case.

				Status			Grand Total
	Case Number	Owner		New	Waiting for Customer	Working	
☐	00001723	Level 1 Support	Sum of Total Hours Sum of Business Hours	2.52 1.40	0.00 0.00	0.00 0.00	2.52 1.40
		Robert Dale	Sum of Total Hours Sum of Business Hours	0.48 0.48	0.67 0.67	16.01 7.45	17.16 8.60
		Sub Total	Sum of Total Hours Sum of Business Hours	3.00 1.88	0.67 0.67	16.01 7.45	19.68 10.00
		Grand Total	Sum of Total Hours Sum of Business Hours	3.00 1.88	0.67 0.67	16.01 7.45	19.68 10.00

Contacting Support

At The Forcemeister, we love to create great Force.com based apps. But seeing customers use those apps to succeed is our true passion.

Should you experience any problems with the WorkIt! SLA Framework or have any questions or suggestions, you are most welcome to contact us via:

Email: support@forcemeister.com

Phone: +1-877-887-5656