AMERICAN DATA COMPANY
Empowering Online Technology

American Data Company

Time Track Customization Guide

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tel 888 259-7345 | fax 310 622-9580
10390 Santa Monica Blvd. · Suite 215 · Los Angeles, CA · 90025
www.americandatacompany.com

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Installation and Configuration Guide

Installing from the AppExchange

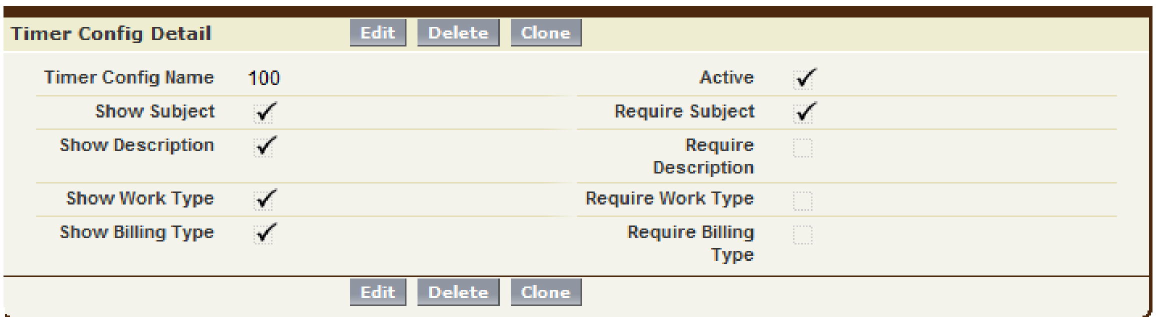
1. Navigate to the AppExchange and login using the credentials for the org in which you wish to install the Timer
2. Click the "Get It Now**"** button on the Timer's AppExchange listing page: **https://sites.secure.force.com/appexchange/listingDetail?listingId=a0N30000001qKTYEA2**
3. Carefully review the Terms & Conditions and select the "I have read…" checkbox at the bottom before proceeding
4. Verify the password of the org in which you wish to install the Timer
5. Review the package installation details, then Continue
6. Review the API Access settings, then Continue
7. Choose the appropriate security settings for your org, then Continue:
    a. Admin access only – This is the best option when testing out new applications from the AppExchange as it only exposes the changes to system administrators
    b. Grant access to all users – If all users in an org are to use the installed application with the same access rights, select this option
    c. Select security settings – If the access rights for the app will differ across the organization, select this option and modify the access rights as it applies to the different areas of the org
8. Leave the "Ignore Apex test failures…" checkbox unchecked as this is a good indicator as to whether or not the code present in the Timer application will be compatible with the installation org
9. Review the installation notes and select the Deploy Now option
10. Review the new custom objects to be installed and select the Deploy option
11. Proceed to the next section (Configuring Timer) for post-installation instructions

Configuring the Timer

After installation has completed, the Timer may be configured to meet specific business process needs.

Using Timer Config

The Timer Config object allows system administrators to determine which fields are visible in the Timer interface and whether or not those fields are required. Note that in order for a field to be required, it must be visible.



Only one Timer Config record may be set to Active at any given time. If there is a Timer Config record set as Active in the system and a new Timer Config record is created and set to Active, Apex validation will prevent the user from saving the record unless the Active checkbox is deselected.

If no Active Timer Config exists in the system, the default hard-coded configuration will be used. The default configuration displays all four fields and requires none.

Managing Picklist Values

The Timed Item object is a custom object and can be modified by system administrators in the same manner that any other Salesforce custom object can be. System administrators can perform the following steps to update picklist fields on the Timed Item object:

1. Navigate to Setup -> [App Setup] Create -> Objects to view a list of all custom objects in the org
2. Click on the “Timed Item” label to view the configuration components of that object
3. Click on the Field Label for either of the standard picklist fields (Billing Type or Work Type)
4. Manipulate picklist entries in the Picklist Values area of the custom field configuration page

Linking Timed Items to Objects

The Timer has been designed for use across any business department: sales, marketing, customer support, etc. As such, the Timer must have the capability of recording time across a wide range of standard and custom objects. The system administrator can modify the Timed Item's relationships to support whichever objects make most business sense for the company. The Timed Item is only related to the standard Case object by default.

Similar in concept to the picklist instructions (above), adding relationships is done in the standard Salesforce way:

1. Navigate to Setup -> [App Setup] Create -> Objects to view a list of all custom objects in the org
2. Click on the "Timed Item" label to view the configuration components of that object
3. Click the New button in the Custom Fields & Relationships area
4. Select Lookup Relationship as the field type (do not use Master-Detail Relationship on the Timed Item object as this may cause unexpected behavior), click Next
5. Choose the related object from provided list, click Next
6. Fill out the name and label information, click Next
7. Configure field-level security for this new field, click Next
8. Add the new field to the Timed Item layout(s) of choice, click Next
    a. Note that adding fields to the Timed Item page layout(s) will not affect the Timer interface
9. Determine the related list label used for records using this relationship, click Save

Configuring Open Timer Button for Object Detail Page

To aid in keeping the Timer easily accessible, system administrators have the ability to create Detail Page buttons for the applicable objects that will allow users to open the Timer directly from the record to be worked on. When a user clicks on this button, the Timer will automatically load the parent record information so the stopwatch functionality will be usable immediately.

To create a custom button that will open the Timer:

1. Navigate to the desired object's Buttons and Links area
    a. For standard objects, Setup -> [App Setup] Customize -> *Object* -> Buttons and Links
    b. For custom objects, Setup -> [App Setup] Create -> Objects -> *Object*
2. Click the New button in the Custom Buttons and Links section

3. Label and name the button
4. Select “Detail Page Button” as the button type
5. Set the Behavior as “Display in new window”
6. Set Content Source to “URL”
7. Use the URL template below for the main body of the button configuration page:

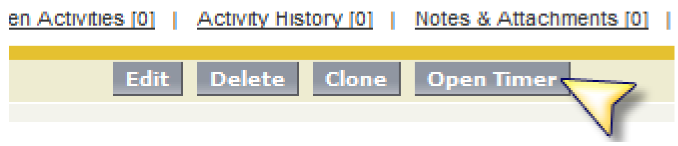
   `https://vftimer.`*`node`*`.visual.force.com/apex/Timer?recordId={!`*`Object`*`.Id}&parentObjectLabel=`*`ObjectLabel`*`&parentObject=`*`ObjectAPIName`*`&recordName={!`*`Object`*`.Name}`

   a. Where *node* is the Salesforce node of the org (i.e. na2)
   b. Where *Object* is the object the button will reside on (i.e. Opportunity, CustomObject__c)
   c. Where *ObjectLabel* is the label assigned to the object (see Singular Label in the object’s configuration), replacing any spaces with the HTML escape code “`%20`” (minus the quotation marks – i.e. `parentObjectLabel=My%20Custom%20Object`)
   d. Where *ObjectAPIName* is the API name of the object (see API Name in the object’s configuration)
   e. Note that for the Case standard object, the final parameter, recordName, will be `recordName={!Case.Subject}`, as opposed to `recordName={!Case.Name}`
8. Click Save
9. Click on the Window Open Properties button
10. Set Width (in pixels) to 408
11. Set Height (in pixels) to 455
12. Leave Window Position at “No Preference”
13. Select the Resizable checkbox
14. Click Save
15. The button is now available to be added to all applicable page layouts

Operations Guide

Opening the Timer

The Timer may be opened from an “Open Timer” link made available on the left side of the Salesforce.com Home Page after logging in, or as a custom link on an object detail page (see **Configuring Object Detail Button**).

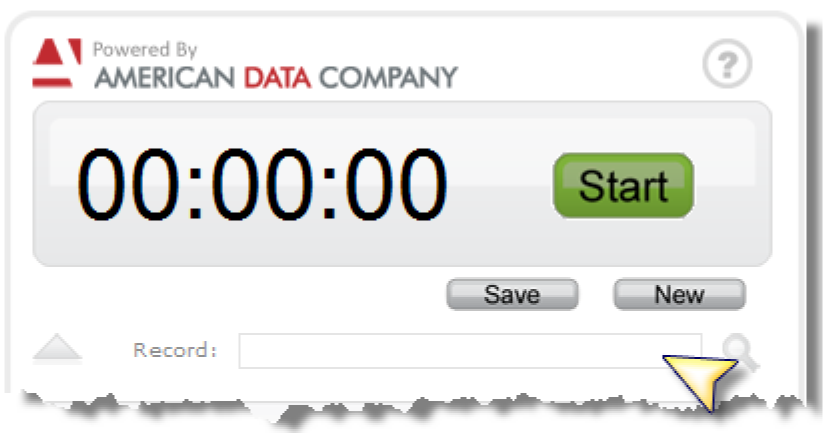


Selecting a Record

Every Timer entry must be associated to a parent record in Salesforce. The parent is the record on which the user is recording time against. For instance, a sales manager may open the Timer and search for Jon Doe, a Lead record; whereas a customer support rep may open the Timer and search for the latest support Case. The type of objects Timer entries can be associated with is configurable by Salesforce system administrators (see **Linking Timed Items to Objects** in the Configuration section).

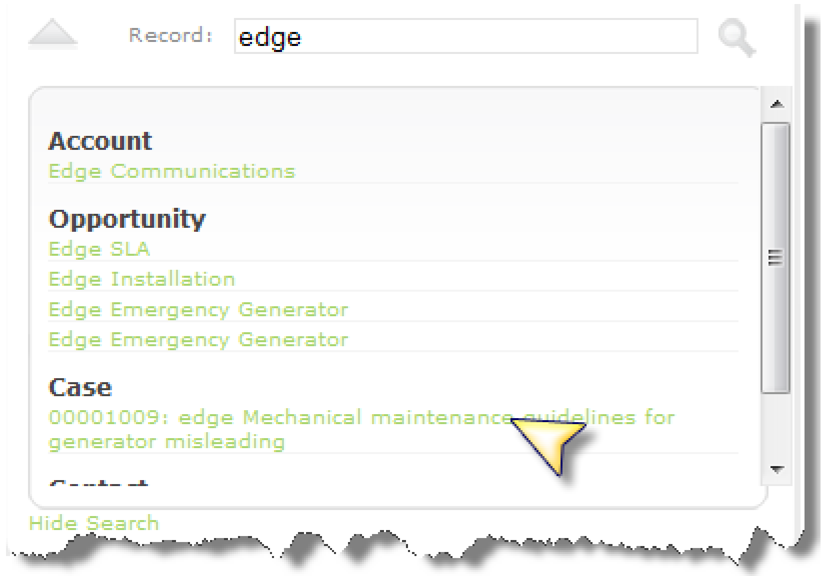
Searching For a Record

The search bar is located on the top portion of the Timer, below the stopwatch display.



To use the search functionality, simply type in a simple word or short phrase and press the search icon . The area below the search bar will re-render with all results found using the entered search token. Note that search tokens must be at least two characters in length.

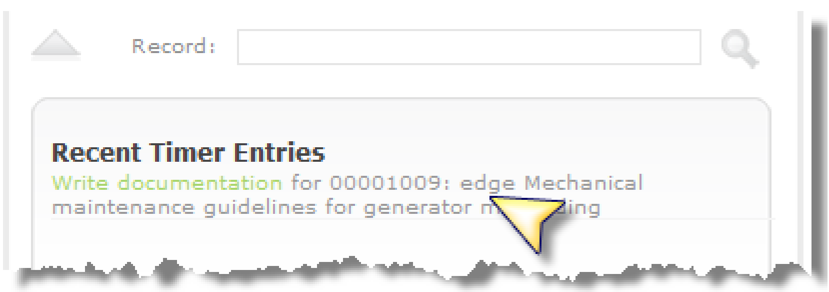
Click on the desired search result to activate it.



Note that the Timer will only search the objects that the Timed Item object is related to (see **Linking Timed Items to Objects** in the **Configuring the Timer** section for details on how to set up relationships).

Loading an Existing Timer Entry

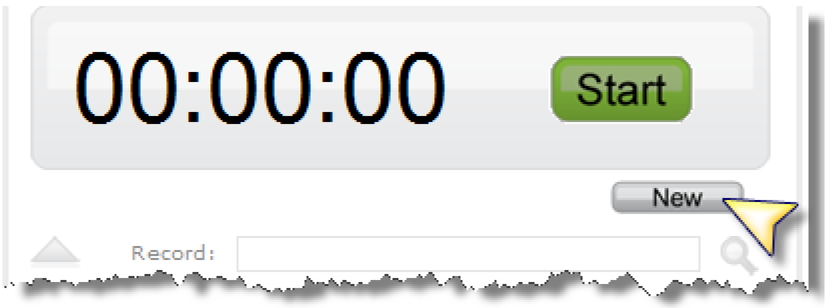
Sometimes, a specific work item may be revisited throughout the work day. For these situations, selecting one of the Recent Timer Entries will allow the user to get up and running more quickly.



Loading an existing Timer entry will pre-populate the Timer with any previously specified values.

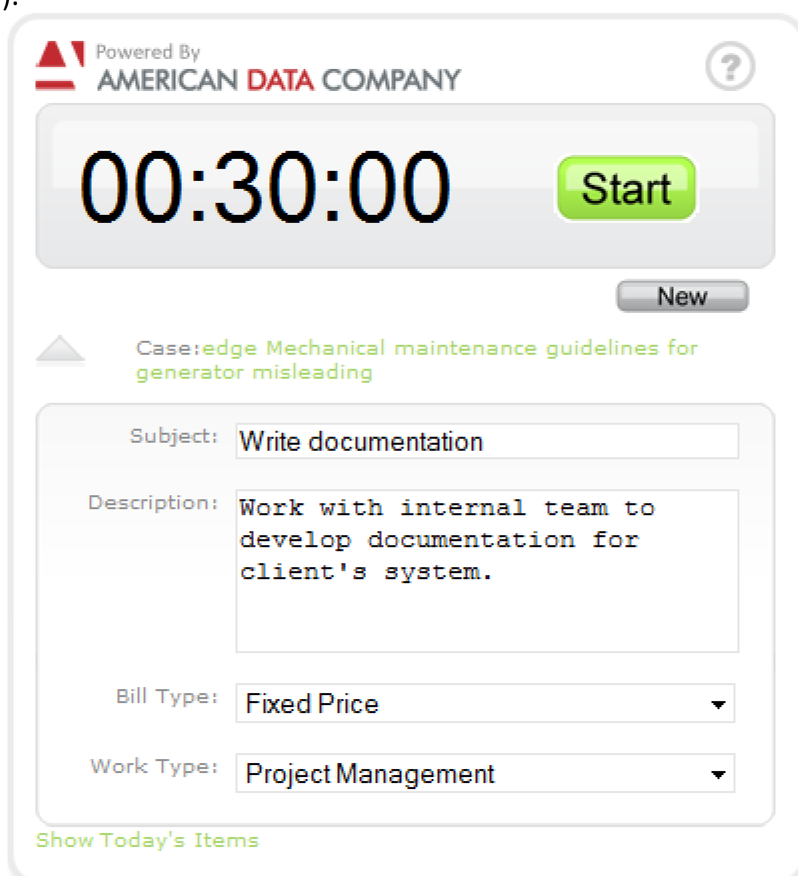
Creating a New Timer Entry

To create a new Timer entry, press the "New" button near the top of the Timer window.



Manipulating the Active Timer Entry Screen

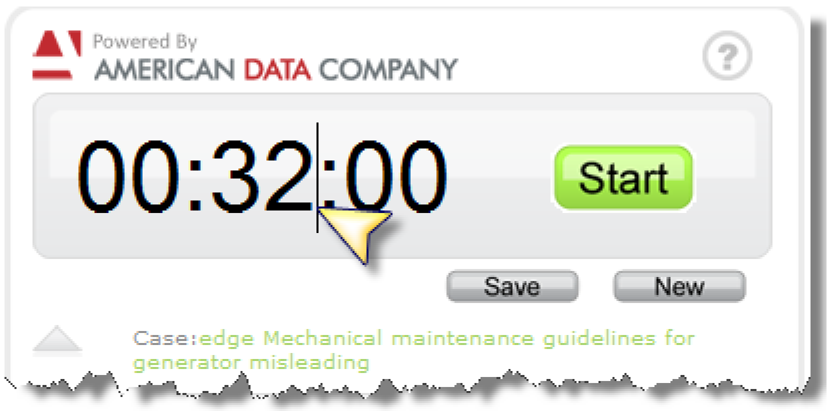
The Active Timer Entry Screen displays all of the information for the current Timer entry that is being worked on. From here, the Subject, Description, Bill Type and Work Type can be adjusted (assuming all fields are present – see **Using Timer Config** for configuring field visibility).



The Subject and Description fields are open text fields where any alphanumeric combination is valid. The Subject is limited to 80 characters and the Description is limited to 255 characters. The Bill Type and Work Type fields are picklists where only one of the pre-specified values can be selected (see **Managing Picklist Values**).

Manually Updating Time

Time may be only adjusted when the stopwatch is inactive. To change the time, click on the time value; it will change to an input area. Enter time in HH:MM:SS (Hour:Minute:Second) format.



Note that time is stored in Salesforce in hour units and fractions thereof. For example, if the Timer has a Time value of 01:30:00 (one hour and thirty minutes), the associated Timed Item record will have a value of 1.50.

Saving a Timer Entry

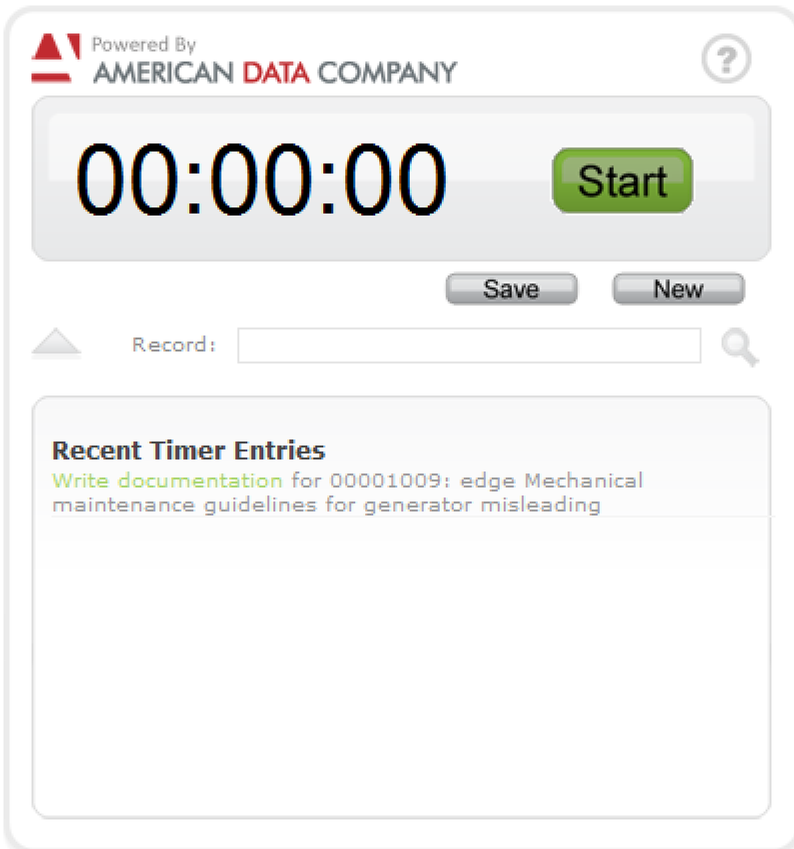
The save process will take the information currently in the Timer window and save it to a Timed Item record in Salesforce. The Timed Item will be related to the specified parent record. If the Timed Item does not currently exist in Salesforce, a new record will be created. If there is an existing Timed Item record in Salesforce with the specified information, the existing record will be updated. Saves occur during the following interactions:

- The "Stop" button will stop the stopwatch and save the current Timer entry data to Salesforce
- The "New" button will save the current Timer entry data before refreshing the Timer

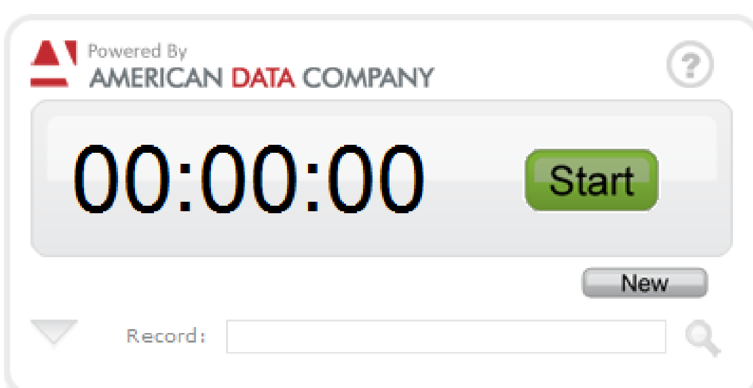
Collapsed and Expanded Views

The Timer interface can be collapsed or expanded to hide or show, respectively, pertinent fields. To toggle between the two views, simply select the or arrow on the left side below the stopwatch.

Expanded View



Collapsed View



Compatibility

The Timer has been designed to work with the following browsers and platforms:

- Firefox 3.x (cross-platform)
- Internet Explorer 8 (Windows)
- Chrome 2.x (Windows)

About American Data Company

American Data Company is a business process and technology consulting firm specializing in cloud computing. As a certified Salesforce.com Consulting Partner and AppExchange Partner, American Data Company provides expert guidance to clients ranging from high-growth startups to Fortune 500 companies.

Learn more about American Data Company by visiting **www.americandatacompany.com** or contacting us at 310-996-0300.

Support

American Data Company provides fee-based services to assist in Timer installation, best practices and time tracking strategy, and customization for your organization.

To inquire about services please contact us at 310-996-0300 x 1.