



Service Cloud Swarming Reports and Dashboards



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ABOUT THIS GUIDE

The Swarming reports package consists of Reports & Dashboards based on the standard objects Case, Swarm and Swarm Members. These reports have been designed to be used with Lightning. This guide gives insight into the latest updates to the app, what's been added, and how it works in the Lightning UI.

EDITIONS

Available in Lightning Experience.

- Enterprise
- Developer
- Performance
- Unlimited

USER PERMISSIONS

To install and customize the Service Cloud Swarming Reports and Dashboards package:

- Download AppExchange Packages

To create or update reports and dashboards:

- Manage Dashboards in Public Folders
- Manage Reports in Public Folders

To view reports and dashboards:

- View Dashboards in Public Folders
- View Reports in Public Folders

Overview

The Swarming reports package consists of Reports & Dashboards based on the standard objects Case, Swarm and Swarm Members.

They are intended to help track the use of Swarming inside an organization, such as number of Participants and Requestors, percentage of cases with Swarming, etc.

Install and Configure

Before installing and configuring the Swarming reports package, make sure:

- Swarming, Slack, and the Service Slack App is enabled in your org. [Learn More](#).
- Access additional help in the Salesforce [help center](#).

Report Types

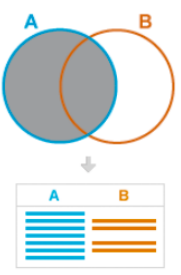
Report Types are the foundation to reports bringing the right information together to enable admin and users with permission to create reports based on that data.

Cases with or without Swarms

Object Relationships [Edit](#) [Object Relationships Help ?](#)

Cases (A)

with or without related records from **Swarm Members (B)**



Fields Available for Reports [Edit Layout](#) [Preview Layout](#) [Fields Available for Reports Help ?](#)

Source	Selected Fields
Cases	26
Swarm Members	26

Cases Edit Delete			
Account Name	Asset	Business Hours	Case ID
✓ Case Number	Case Origin	Case Owner	Case Reason
Closed	Contact Name	Created By	Date/Time Clo...
Date/Time Ope...	Description	Escalated	Last Modified...
Last Modified...	Parent Case	Priority	Status
Subject	Type	Web Company	Web Email
Web Name	Web Phone		

Swarm Members Edit Delete			
Assigned Date...	Completed Dat...	Created By	Created Date
Help Needed	Last Modified...	Last Modified...	Swarm
Swarm Member ID	✓ Swarm Membe...	Swarm Member ...	Swarm Member ...
🔍 Collaborati...	🔍 Collaborati...	🔍 Created By	🔍 Created Date
🔍 Ended Date ...	🔍 Last Modifi...	🔍 Last Modifi...	🔍 Started Dat...
🔍 Swarm ID	🔍 Swarm Name	🔍 Swarm Owner	🔍 Swarm Status
🔍 Full Name	🔍 Full Name		

Swarm members

Swarm Members (A)

A

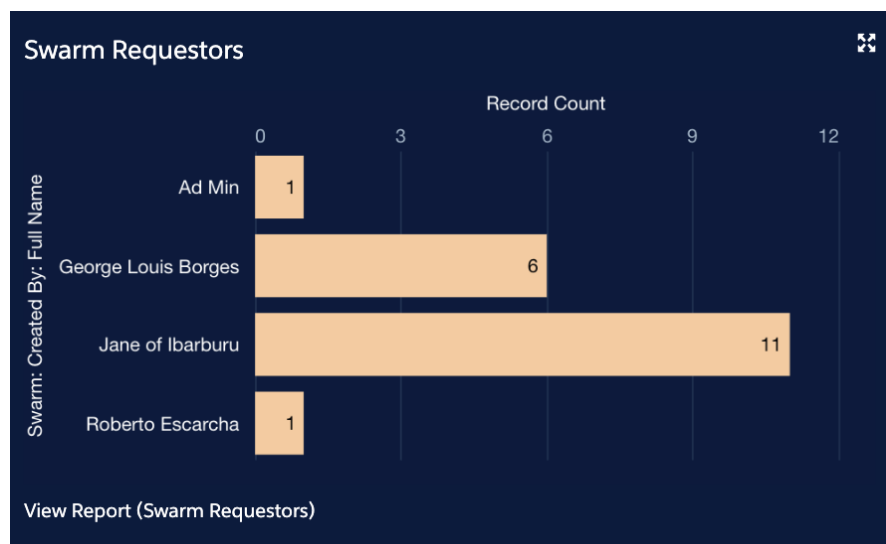
↓

A

Swarm Members			Edit Delete
Assigned Date...	Completed Dat...	Created By	Created Date
Help Needed	Last Modified...	Last Modified...	Swarm
Swarm Member ID	✓ Swarm Membe...	Swarm Member ...	Swarm Member ...
 Full Name	 Collaborati...	 Collaborati...	 Created By
 Created Date	 Ended Date ...	 Last Modifi...	 Last Modifi...
 Started Dat...	 Swarm ID	 Swarm Name	 Swarm Owner
 Swarm Status			

Reports

Swarm requestors



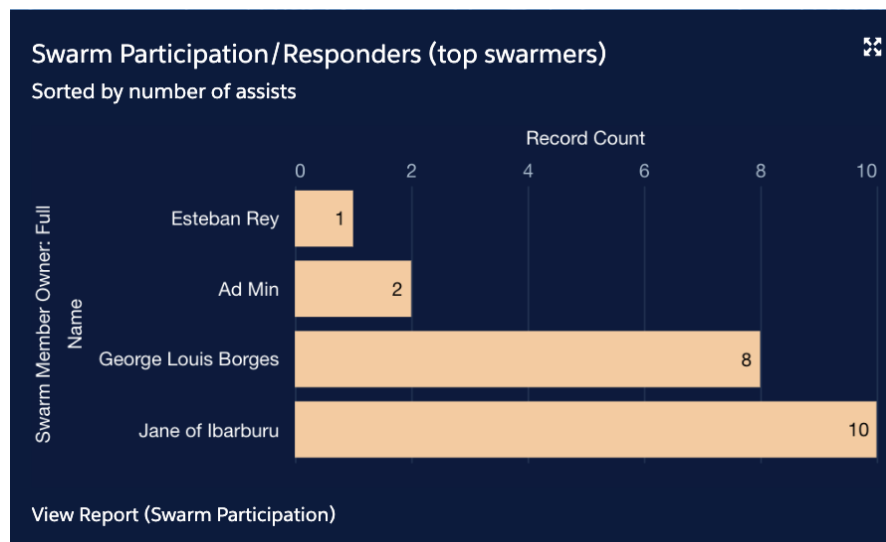
This report is designed to count the number of Swarm Requests created by each user.

Report type: “Cases with or without swarms”

Filters: Cross filter - “Cases with Swarm Members”

Group By: “Swarm: Created By”

Swarm participation/responders

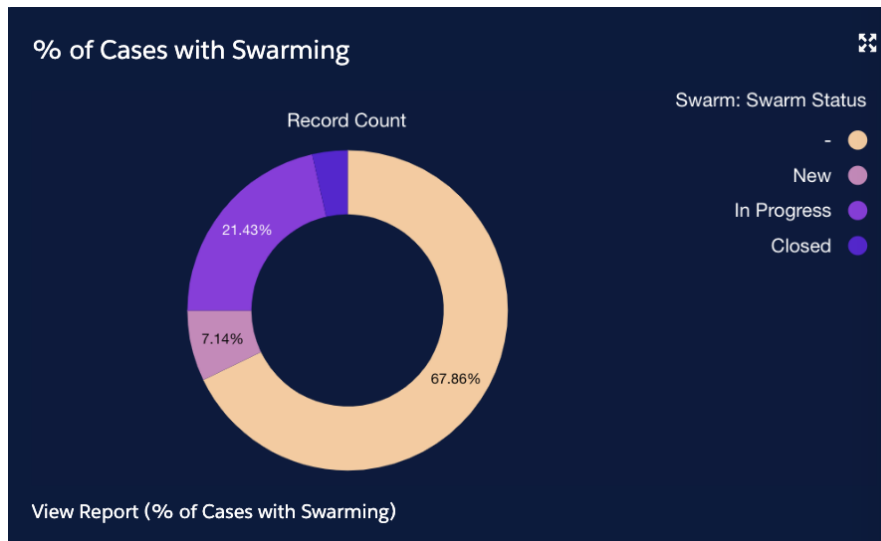


This report counts the number of times a User has assisted in Swarm Requests.

Report type: “Swarm Members”

Group By: “Swarm Member Owner”

% of cases with Swarming



This report calculates the percentage of Cases that have Swarming attached, grouped by Swarm Status.

Report type: "Cases with or without swarms"

Filters: "Status not equal to Closed"

Group By: "Swarm Status"

% of Cases Closed with and without Swarm



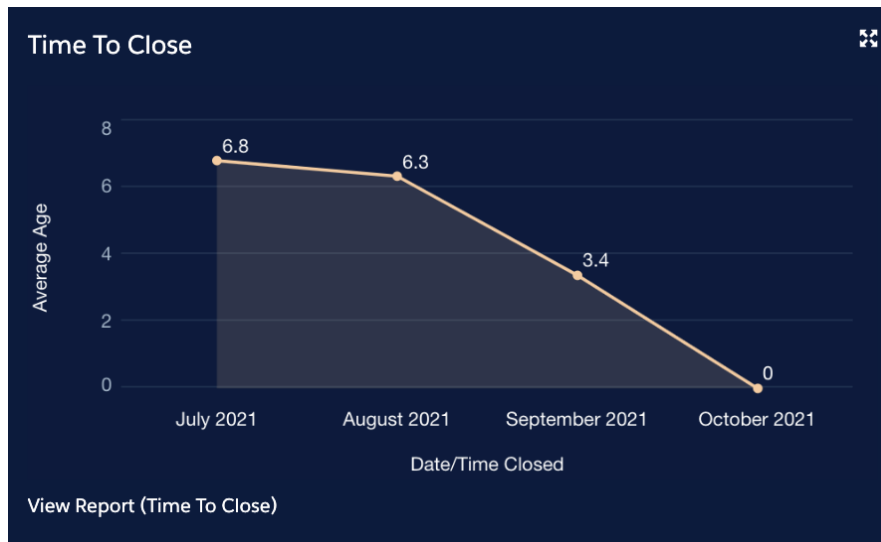
This report shows how many Cases in Closed State have and don't have Swarming attached.

Report type: "Cases with or without swarms"

Filters: "Status equals Closed"

Group By: "Date/Time Closed" AND "Swarm Count"

Time to Close



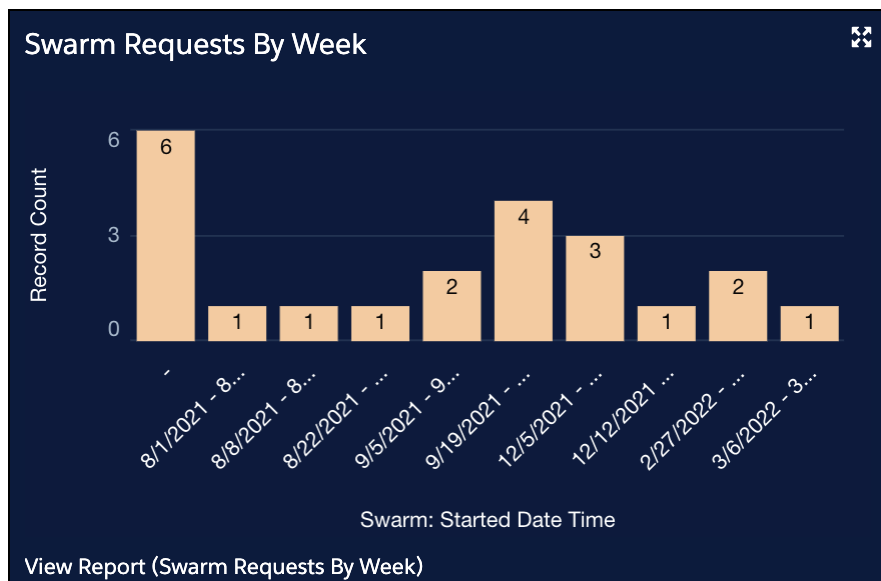
This report calculates the average age of Closed Cases by month.

Report type: "Cases"

Filters: "Status equals Closed" AND "Units Days"

Group By: "Date/Time Closed"

Swarm Requests By Week

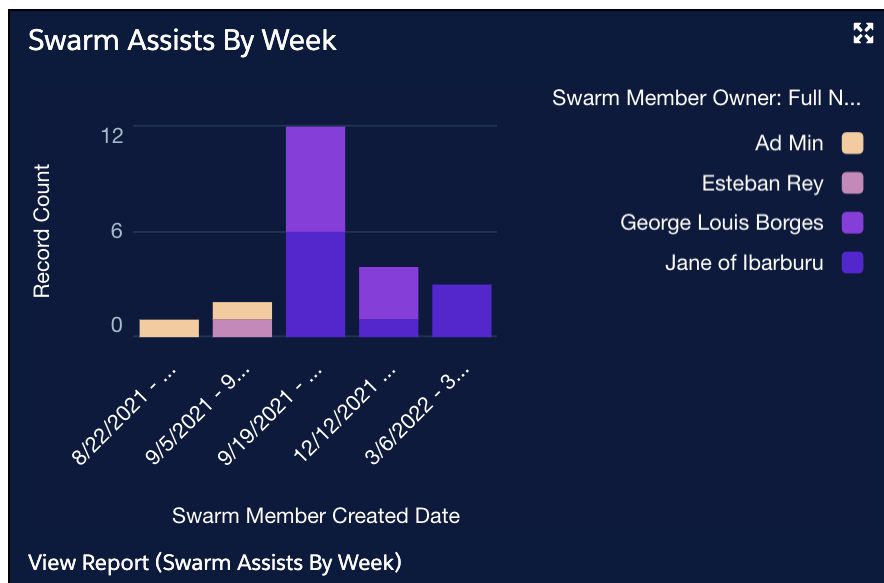


This report shows how many Swarm Requests are created by week.

Report type: "Swarm Members"

Group By: "Swarm: Started Date Time"

Swarm Assists By Week



This report shows how many times each User assists in Swarming by week.

Report type: "Swarm Members"

Group By: "Swarm Member Created Date" AND "Swarm Member Owner"

Age of Open Swarm Requests

Age of Open Swarm Requests

f_x Age ↑	Record Count
0 - 5 days	1
06 - 10 days	1
11 - 15 days	1
More than 15 days	7

View Report (Age of Open Swarm Requests)

This report shows the age of Swarm Requests that are in open status.

Report type: "Swarm Members"

Filters: "Swarm Status not equal to Closed"

Group By: "Age"

Swarms Average Age



This report calculates the average age of all closed Swarms.

Report type: "Swarm Members"

Filters: "Swarm Status equals Closed"

Group By: "Swarm Member Owner"

Number of Swarm Assists



This report calculates the total of Swarm assists.

Report type: "Swarm Members"

Group By: "Swarm Member Owner"

Number of Swarm Requests



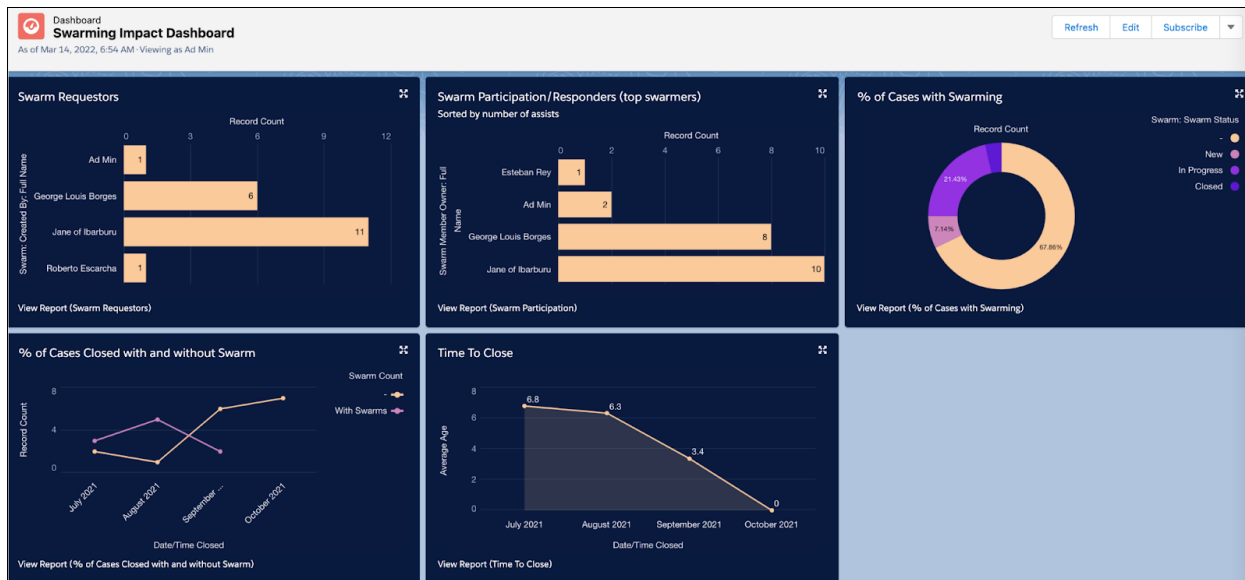
This report calculates the total of Swarm requests.

Report type: "Swarm Members"

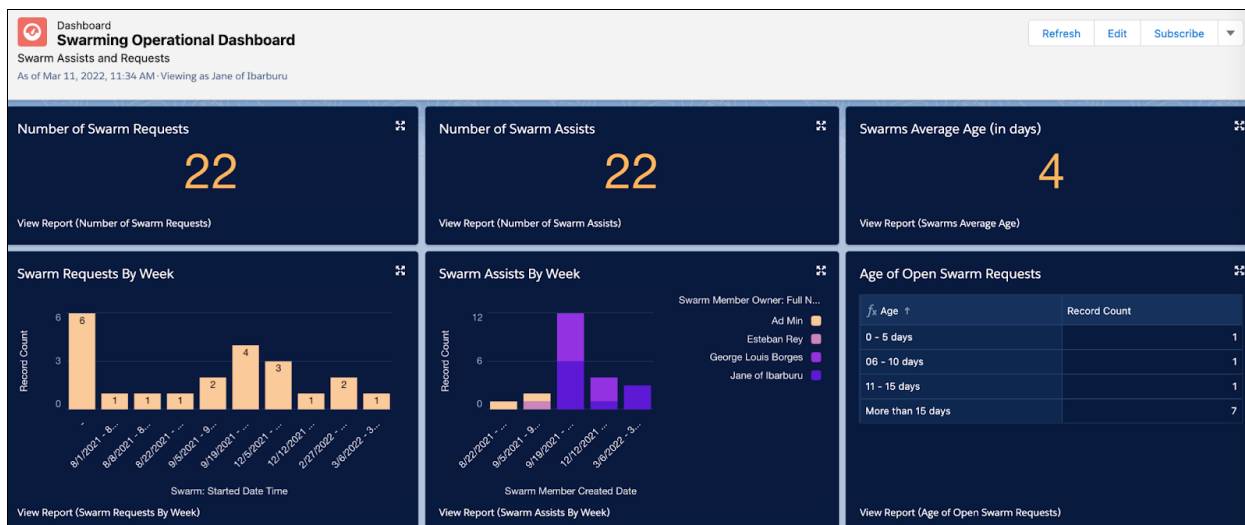
Group By: "Swarm Owner"

Dashboards

Swarming Impact Dashboard



Swarming Operational Dashboard



Folders

- 1 Dashboard folder: Service Swarming reports
- 1 Reports folder: Swarming Dashboard

Application Changelog

[1.2] - March 21, 2022

Added	• Swarming Operational Dashboard • Number of Swarm Requests Report • Number of Swarm Assists Report • Swarms Average Age Report • Swarm Requests By Week Report • Swarm Assists By Week Report • Age of Open Swarm Requests Report
Changed	• Fields in Cases with or without Swarms Report Type • Fields in Swarm Members Report Type
Fixed	• Swarm Participation Report

[1.1] - October 5, 2021

Added	• % of Cases with Swarming Report • % of Cases Closed with and without Swarm Report • Time To Close Report
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[1.0] - October 2021

- First version of the package