TAMING SERVICE LEVEL AGREEMENTS



Contents

Taming Service Level Agreements	2
What we're going to cover	.2
Multiple SLA Definitions	.2
Setting up SLAs – Base Configuration	.3
Defining SLAs	.3
Dunning Level SLAs	.6
SLA Tracking and Reporting1	1

Taming Service Level Agreements

What we're going to cover

Gemini can be deployed to manage various use cases wither in isolation or in combination, the most common being help desk ticketing, Agile project tracking, bug/issue tracking and ITIL/ITSM service desks. In some these, most notably with help desks, the elements of time and responsiveness come into play, most commonly where a contractual Service Level Agreement exists. When you need to go beyond a simple acknowledgement that an issue has been raised and is being dealt with, Gemini's service level agreement functionality comes into play.

Using Gemini's Rules and Actions engine you can set any user-defined SLA to be set when one or more conditions are. The same Rules and Actions can be used to pause the clock (usually when have responded and are waiting on the client), resume the clock, and stop the clock when the item in question has been resolved and the matter closed.

Multiple SLA Definitions

You can define multiple SLAs with different response times and rules for initiation, pause, resumption and closure. For example, one SLA might exist for key accounts with a rapid response time, high priority and escalation, and another for non-key accounts that allow longer response times and/or different levels of priority and different escalation paths.

Because SLA's are simply a specific implementation of Rules and Actions if you haven't read the guide on Mastering Rules and Actions please do so now. If you are new to this topic we also recommend you see the video for a walkthrough of SLA creation: http://www.countersoft.com/watch?video=32

Setting up SLAs - Base Configuration

Please ensure that you have enabled the SLA field in the viewing screen for the Project Template on which the projects that are subject to SLA are based. To do this you must have the Gemini Administrator privilege. Setting this field allows users to enable the SLA Sequence Zone in the Grid view, which shows the SLA Time countdown and prevents items that are approaching or in breach from being filtered from view.

Navigate to: Customize...Templates...Process...Screens.

Define who can create, edit and view data for Investigation.

Creating	Editing	Viewing			
Attributes	Attributes	Attributes			
🖩 🗸 🖭 Туре	Ш у .▼ Туре	III V IIA			
III 🗸 🖭 Title	III 🗸 🖭 Title	III V Item Key			
E Description	Description	Ш 🗸 உ⊽ Туре			
Attachments	▼ Attachments	▼ Ittle			
E Component	▼ Component				
E Priority	₩ 🖌 🖭 Priority	III V LV Customer (Custom)			
Status	III V Status	III V LV Component			
Set Visibility		III V Priority			
Comments		III V LV Status			
Dependencies					
Followers					
Severity	III V Due Date	III V Start Date			
Source	Image: Image	🖩 🗸 💵 Due Date			

Fig 1.0 SLA is enabled in the top right column under Viewing. Please note it has been drag-drop positioned there for this screen shot and can appear anywhere in the Viewing column in your Gemini instance.

Defining SLAs

To define a SLA you must have the Gemini Administrator privilege.

Navigate to: Customize...Rules & SLA...SLA.

Name	Gold
Description	Gold level <u>SLA</u> for our key clients
Applies 24x7	
Response Time	000:30
Day starts	00:00
Day ends	00:00
	Save Cancel

Fig 2.0 Sample SLA definition

Creating a new SLA only requires the name, description and response time in HHH:MM format. In the example above we defined an SLA that will run 24x7. In a later example we will create an SLA that doesn't apply 24x7.

Once we have the SLA created we need to define what conditions start, stop, pause and resume it. This is done by using Rules and Actions. In the example below, we have specified that when a new ticket is created and the domain of the email address of the client is in the list of the "Gold Clients" custom field then we will set the SLA level to Gold and send an email to the team to alert them that a gold level ticket has come in:

Conditions

Comment	*	Equals	•	Add
Condition				÷
Source Equal Gold C	lients			ΰ
Issue Equal Created				節

Actions

Email	▼ To:	Template: Gold T	ricket Created 🔹 Add
Action			\$
Set Field SLA to Go	old		Û
Email manager@m	ycompany.com	;gold@mycompany.com, using Gold Ticket Created	template 🛍

Fig 3.0 The definition of the Gold level SLA

The definition of the "Gold Clients" custom field can be seen below:

Custom Field Type	Dropdown List 👻
Custom Field Name	Gold Clients
Screen Label	Gold Clients
Screen Tooltip	Gold Clients
Can Filter	Yes
Select Lookup Type	SQL Driven Static
Static Lookup Data	©countersoft.com @somecompany.com @anothercompany.com
Add Blank Entry	Yes
Auto-complete	Yes
Show with Attributes	Yes

Fig 4.0 The definition of the Gold Clients Field as a Dropdown List that contains a list of domains

In the Gold Level example, any email address with the domain of countersoft.com, somecompany.com or anothercompany.com, will trigger the Actions associated with the SLA.

Now when an email goes to Gemini or a new ticket is created using the web interface from an email address in the "Gold Clients" list, the ticket will be marked as Gold SLA and the clock will start:

HELP-374 Another new ticket

<u>Help Desk</u>

SLA Gold +0d 0h 8m

Fig 5.0 The SLA is shown beneath the title of the ticket

The clock will keep counting down and we can see it when viewing the item or on the grid:

Projects	i Help Desk 🔻 🛛	Display All Items	▼ Sea	rch	Options Grouped Dependenci 👻		
	23 items found	~	Closed Items Grouped Dependencies				
\bigcirc	Item	Туре		Hide zones			
15m	HELP-370	370 🏂		New Ticket with Email in Gold SLA Cus	$\overline{\bullet}$	Show SLA zone	
	HELP-369	*	0	New Ticket Created		Show Sequenced 2016	

Fig 6.0 The ticket in Gold SLA on the grid. You only see the SLA clock if the SLA Zone is enabled.

You can sort the SLA items by clicking on the clock icon:

	25 it	25 items found (Page 1 of 1)												
Ŀ		Item	SLA 🔺	Туре	Priority	Title								
-16m		HELP-370	Gold	*	0	New Ticket with Email in Gold SLA Custom Field								
3m		HELP-371	Gold	*	0	Another new ticket								
11m		HELP-372	Gold	2	0	Just created								
26m		HELP-374	Gold	*	0	Another new ticket								
7m		HELP-97	Gold	*	0	LinkedIn Answers Feed Performance								

Fig 6.1 Sorted SLA Grid

Gemini will sort the SLA items by time remaining and the sequence of the SLA, so if we have two items with 10 minutes left the item with Gold SLA will be above the other since Gold is the top SLA for us. The items grid will color code each stage of the SLA to give you indication of how close it is to being breached. There is a special zone at the top of the grid (shown as a grey line between HELP-

371 and HELP 372 in the image above) which will always show tickets that are about to breach or have breached the SLA, so no balls are dropped.

The color codes are:

- 1. Red background The ticket (HELP-370) has breached its SLA response time.
- 2. Red border The ticket (HELP-371) is about to breach, there is less than 10% of the response time left.
- 3. Orange border The ticket (HELP-372) has less than 70% and more than 10% of the response time left.
- 4. Green border The ticket (HELP-374) has more than 70% of the time left to respond.
- 5. Grey border The SLA is paused for the ticket.

We define rules for when to pause, resume and stop an SLA in exactly the same way as we define the rule to start it, by specifying conditions.

Dunning Level SLAs

Just as companies use dunning levels to send out increasingly hostile letters based on the age of the debt so you can tell Gemini to perform actions that escalate tickets based on a declining amount of response time. You can do this quite simply through the standard Rules & Actions engine, not the SLA, and you can do this because one of the data elements that Rules and Actions allows you to base actions on is the SLA Time Left (see example below).

Conditions

Comment	▼ Equals	•	Add
Condition			\$
SLA Equal Gold			<u>ش</u>
InSLA Equal true			節
SLATimeLeft Less Th	an Or Equal 000:10		Ü

Actions

Email	*	To:	Template	Gold 10 minutes left	- Add
Action					
Email manag	ger@mycor	npany	om;{resource}, using Gold 10 minutes left te	mplate	Û

Fig 7.0 Using Rules and Actions we can base more actions on the time to respond running out. <u>Please note the ability to</u> <u>specify a Response Template (Gold 10 Minutes Left)</u>, which allows you to completely tailor your email communications.

Let's look at an example where we have a silver level SLA with a response time of 2 working days:

Name	Silver
Description	Silver level SLA for all other clients
Applies 24x7	
Response Time	016:00
Day starts	09:00
Day ends	17:00

Fig 8.0 Setting up the Silver SLA

The Silver SLA in the example above has a 16 hour response time and only applies between 9am and 5pm. This means that <u>outside of these hours the SLA clock is automatically paused by Gemini</u>.

Next we will set the start SLA rule to be when an item is created from an email (any email as opposed to the Gold where we defined its source):

Со	nditions							
	Source Type	~	Equals		•	Email X	Add	
	Condition							\$
	Issue Equals Created							Û
	Source Type Equals Email							Ū
Act	tions							
	Email 🔻			Add				
	Action							♦
	Set Field SLA to Silver							Ŵ

Fig 8.1 Setting up the Silver SLA

As you can see the rule here sets assigns any item created by email to the silver SLA. However, if the customer is part of the Gold SLA clients then the gold level SLA will be set <u>because the gold level SLA</u> is the first in the list, which can be ordered by using drag and drop. In other words, Gemini will implement the FIRST SLA rule it comes to that matches the item and then stop.



Fig 8.2 The Gold SLA is set before the Silver SLA because it is first. Drag handles to the left of the Name allow you to sort this

The pause rule will be set to check when the status is "Waiting for Client":

Conditions Add Status -Equals Ŧ Waiting for Client 🗙 Condition SLA Equal Silver Ŵ Status Equals Waiting for Client Û Actions Add Email ▼ To: Template: Action Pause Clock Û

Now if we have a silver level SLA ticket and we set the status to "Waiting For Client" Gemini will automatically pause the SLA clock. The resume rule (below) checks if the client has responded and if matched will set the status to In Progress:

Conditions

Comment Source Type 🔻	Equals	▼ Breeze	e X	Add	
Condition					♦
SLA Equal Silver					Ŵ
Comment Source Type Equals	Breeze				Û

Actions

Set Field	•	Status	Ŧ	In Pro	ogress	Ŧ	Add	
Action								\$
Resume Clock								Û
Set Field Statu	s to In Pro	ogress						Ŵ

The Comment Source Type = Breeze in the condition above can be translated as there has been an email from the client related to the item. This is because all ongoing commentary to a ticket created from an email is tracked on the ticket as commentary and to distinguish email comments from those that can be manually added Gemini tracks the comments as having different Sources.

Lastly we will set the stop rule to check if the status of the ticket is set to closed:

Conditions

Status	•	Equals	Closed X	Add
Condition				\$
SLA Equal Silver				Ŵ
Status Equals Closed				Ŵ

Actions

Help Desk

Email	•	To:	Templat	e: 🔹	Add
Action					
Stop Clock					Ŵ

Now let us look at the scenario when a customer sends an email to us:

HELP-100450 Cannot paste images

	-
SLA	Silver +0d 16h 0m
Created	29-Aug-2014 09:09 → from <u>client@company.com</u>
[Hide]	
Hi,	
I am tryir	ng to paste an image in the rich text editor and it is not working.
Please he	Ip ASAP.

Fig 9.0 The inbound email

Once Gemini converts the email to a ticket, the SLA configuration will check the condition and assign the appropriate SLA level, silver in this case, as the client's email domain is not in the "Gold Clients" list.

Assume a support engineer starts working on the ticket but cannot replicate the issue and needs further information from the client. He or she uses the Breeze Email Reply function to send an email query from the ticket itself. This keeps all commentary ON the ticket and avoids having bits and pieces of information relating to a single topic in a mixture of emails and ticketing systems.

mments	(0)	Email Reply	Followers (1)	History (2)	
To:	clien	t@company.com	1		
Cc:					
Bcc:					
From:	Mar	nager Person <h< td=""><td>elpdesk@counter</td><td>soft.com></td><td>r</td></h<>	elpdesk@counter	soft.com>	r
Paragra	aph	▼ Font Family	▼ Font Sizes ▼	8 22 □ ■	
BI	Ū	÷ x₂ x² ≣			• 66 <u>A</u> • <u>A</u> •
Hi,					
I have versior	tried n and	replicating the iss Gemini version ar	ue without success. e you running?	Can you please l	et me know which browser,
Also, if	you o	can give the exact	steps you are takir	ng that would help	o.
			Fig 10.0 The Breeze R	eply add-on	

The engineer now sets the status to "Waiting for Client", which pauses the SLA clock.

Type Support Request	HELI Help De	P-100450 Cannot paste images
Status & Waiting for Client	SLA	Silver Paused +0d 15h 51m
	Created	29-Aug-2014 09:09 → from <u>client@company.com</u>

Please note that Gemini has time tracking capabilities so users can enter (and report on) the time spent on each ticket.

When the client responds to the query by email, Gemini attaches the response to the ticket as a comment from Source Type Breeze, this resumes the SLA clock and sets the status to "In Progress" automatically.

Type Support Request	HELP-100450 Cannot paste images								
Status	<u>SLA</u> Silver +0d 15h 43m								
	Created 29-Aug-2014 09:09 → from client@company.com								
	Comments (2) Email Reply Followers (1) History (22)								
	Add								
	▼ Client Person 29/08/2014 09:35:43								
	I am using IE11 and Gemini 6.2.2. I am copying an image file from the desktop and pasting it in the editor and it doesn't work.								
	▼ Manager Person 29/08/2014 09:18:41 EMAIL REPLY								
	Hi, I have tried replicating the issue without success. Can you please let me know which browser, version and Gemini version are you running?								

Fig 11.0 Ongoing email communication building up as comments on the ticket

Now the engineer has the full details on how to recreate the issue. He or she can inform the customer on how to overcome the issue and set the status to "Closed", at which point the SLA clock stops.



HELP-100450 Cannot paste images

Help Desk

 SLA
 Silver Finished +0d 15h 37m

 Created
 29-Aug-2014 09:09 → from client@company.com

 Closed
 29-Aug-2014 09:56

SLA Tracking and Reporting

Gemini has integration with <u>Geckoboard</u> which can show you a dashboard view of your tickets and their SLA status:

SLA STATUS BREAKDOWN			AVERAGE RESPONSE TIME		• OPEN		BREACHED ITEMS		
SLA GOLD 3 SLA SUPER 3 SLA VIP 1 SLA BAT 1 SLA SILVER 0		0 0 0 1		SLA Premium SLA GOLD SLA Silver SLA Bronze Non Sla	32m 56m 1h 30m 3h 25m 1d 2h 30m	SLA Premium SLA GOLD SLA Silver SLA Bronze Non Sla	2 3 6 30 7	SLA SUPER Intra-20012 Intra-20013 Intra-50002 SLA GOLD Intra-30003 Intra-30004	Can't save form Data Import Wizard Button not visible Page not loading CF tool tip

This is fully configurable and can show any number of statistics for your team.