TAMING

SERVICE

LEVEL

AGREEMENTS

Contents

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.

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.

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 Clients	🗑
Issue Equal Created	🗑

Actions

| Email ▾ | To: | Template: Gold Ticket Created ▾ | Add |

Action	
Set Field SLA to Gold	🗑
Email manager@mycompany.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:
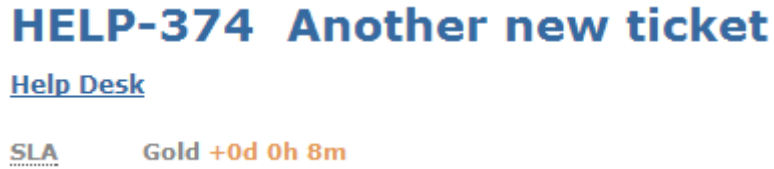

Fig 5.0 The SLA is shown beneath the title of the ticket

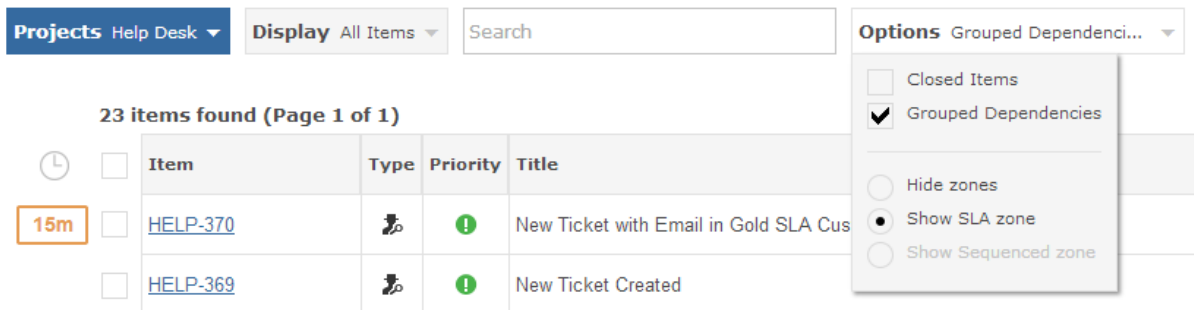The clock will keep counting down and we can see it when viewing the item or on the grid:

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:

Fig 6.1 Sorted SLA Grid

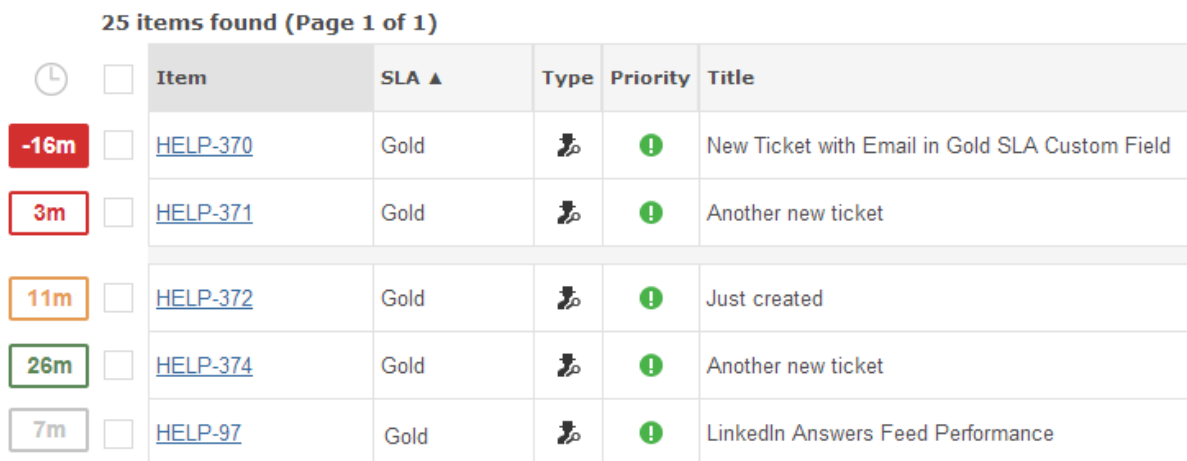Gemini will sort the SLA items by time remaining and the sequence of the SLA, so if we have two items with 10 minutes left the item with Gold SLA will be above the other since Gold is the top SLA for us. The items grid will color code each stage of the SLA to give you indication of how close it is to 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).

Fig 7.0 Using Rules and Actions we can base more actions on the time to respond running out. Please note the ability to specify a Response Template (Gold 10 Minutes Left), 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):

Conditions

| Source Type ▼ | Equals ▼ | Email ✕ | **Add** |

Condition	
Issue Equals Created	🗑
Source Type Equals Email	🗑

Actions

| Email ▼ | | **Add** |

Action	
Set Field SLA to Silver	🗑

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 is the first in the list, which can be ordered by using drag and drop</u>. 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":

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:

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 ✕ | Add |

Condition	
SLA Equal Silver	🗑
Status Equals Closed	🗑

Actions

| Email ▾ | To: | Template: ▾ | Add |

Action	
Stop Clock	🗑

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

HELP-100450 Cannot paste images

Help Desk

SLA   Silver +0d 16h 0m

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

[Hide]

Hi,

I am trying to paste an image in the rich text editor and it is not working.

Please help 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.
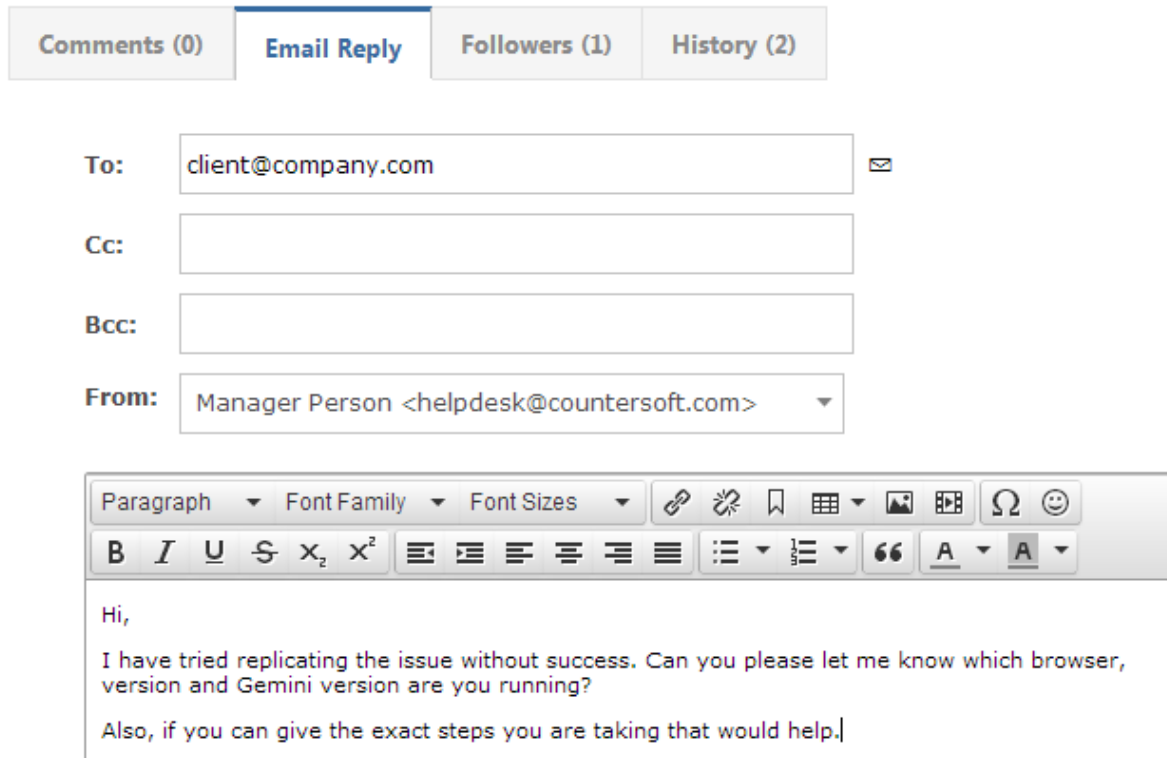
Fig 10.0 The Breeze Reply add-on

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

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.
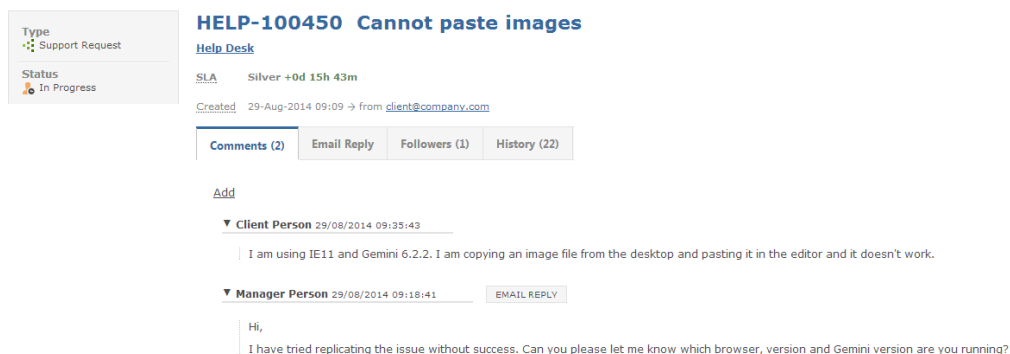

Fig 11.0 Ongoing email communication building up as comments on the ticket

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.

SLA Tracking and Reporting

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

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