Incremental
Group

Auto SLA Calculator
Release Notes

Contents

Section 1 - Introduction

Thank you for downloading and installing our Auto SLA Calculator solution.

This configuration document is for the Incremental Group Auto SLA Calculator solution v8.0.0.0, released on 7th January 2016.

Version v8.0.0.0 marks the latest official Release-To-Web (RTW) for Auto SLA Calculator for Microsoft Dynamics CRM..

1.1   Known Issues

There are no known issues for this release.

1.2   Version Notes

Here is the current version and release history of Auto SLA Calculator:

- » v8.0.0.0 - RTW for CRM2016
- » v7.0.0.1 - Fixed an issue with calculation direction when set to backwards
- » v7.0.0.0 - RTW for CRM2015
- » v6.0.0.2 - Fixed an issue identified with Rollup 1 that caused incorrect calculations
- » v6.0.0.1 - Upgraded for CRM2013 (16th October 2013)
- » v5.2.0.0 - Initial BETA Release (5th June 2013)
- » v5.2.0.1 - Added 'Hours' output fields to the Auto SLA Request record (13th June 2013)
- » v5.2.0.2 - Added 'Hours' output fields to the form of the Auto SLA Request record (26th July 2013)

Section 2 - FAQ

2.1   Why do I get some random results appearing instead of the correct SLA request result?

By default, the Auto SLA Calculator solution runs in trial mode. Please see the Trial Mode section 2.6 in this document for more information.

2.2   Why is my workflow not updating my desired field with the Auto SLA request result?

When you build your workflow that includes a create step for an Auto SLA Request record, you must include a wait step immediately after the create record step. The wait condition should be configured to wait until the chosen result field contains data on the Auto SLA Request record created in the previous step. If this is not done the workflow will progress to the next step before the Auto SLA Request record can complete its calculation and return a result.

2.3   What does the solution cost?

Auto SLA Calculator is £299. This is a flat fee per live organisation irrespective of user numbers or the number of development / test organisations which support the live organisation. Please visit our website at www.incrementalgroup.co.uk for information on obtaining a licence for your Microsoft Dynamics CRM Organisation.

2.4   How many environments does the Auto SLA Calculator licence cover?

You require 1 licence for each production Microsoft Dynamics CRM instance. License keys are provided free of charge for development and test instances. To acquire a new license key when upgrading a production instance, the product must be purchased again.

2.5   Does Auto SLA Calculator work with Microsoft Dynamics CRM Outlook in Offline Mode?

Auto SLA request records can be created while using the offline Outlook client but only if created via Jscript or a plugin. Workflow cannot run while in offline mode.

2.6   Trial Mode

By default, this solution runs in trial mode. Whilst running in Trial mode, approximately 1 in every 5 Auto SLA requests will generate a random result value. Trial mode can be removed by purchasing and applying a license key for your CRM Organisation

Section 3 - Installation

3.1   Prerequisites

3.1.1   On-Premise or Partner Hosted

You must have the following prerequisites installed before installing the Auto SLA Calculator for Microsoft Dynamics CRM On-Premise or Partner Hosted:

» A fully working installation of Microsoft Dynamics CRM
» A System Administrator security role for your Organisation

3.1.2   CRM Online

You must have the following prerequisites installed before installing the Auto SLA Calculator for Microsoft Dynamics CRM Online:

» An active Microsoft Dynamics CRM Online subscription
» A System Administrator security role for your Organisation

3.2   Installation Steps

Please use these steps to install the Auto SLA Calculator:

1. Navigate to Settings > Solutions, and import the Auto SLA Calculator solution
   Note: During import ensure you select the Activate Processes tick box.
2. Once imported, click on Publish All Customizations. Press F5 to Refresh your browser.

Section 4 - Upgrade Steps

4.1.1 Upgrading to a new version of CRM requires a new license key to be purchased for each production instance.

To upgrade from the CRM2013 version (6.x) follow the below steps.
NOTE: A new license key is required for the CRM2015/16 versions.

1. Navigate to Settings > Solutions, and import the Auto SLA Calculator solution.
   Note: During import ensure you select the Overwrite Customisations option.
   Note: During import ensure you select the Activate Processes tick box
2. When the import process has completed you may have some warnings related to SDK Message Process Steps, this is normal behaviour when SDK message processing steps are overwritten. Close the import window.
3. Once imported, click on Publish All Customisations. Refresh your browser.

4.2 Requesting a Licence Key

To request a licence key for your Auto SLA Calculator please follow these steps:

1. Navigate to the customisations area of CRM. Click on Customisations.
2. Click on Developer Resources.
3. Copy and paste the Organisation Unique Name send a licence key request to support@incrementalgroup.co.uk

4.3 Installing a Licence Key

To install a licence key for your Auto SLA Calculator please follow these steps:

1. Navigate to Settings > Interfaces
2. Open the Auto SLA Calculator License Key interface record
3. Double click to open the Licence Key interface parameter record
4. Copy and paste your licence key into the value field to replace the "Trial Version" value
5. Save and close the Interface Parameter. Auto SLA Calculator will now operate in licenced mode.

4.4 Uninstallation Steps

To remove Auto SLA Calculator please perform the following two steps. The steps apply to all current releases of Auto SLA Calculator.

1. Navigate to the Auto SLA Definitions entity in the Settings area. Click on each Auto SLA Definition and press the delete key to remove this record.
2. Remove any workflow steps that reference the Auto SLA Request record.
3. Navigate to the Solution area in Settings. Click on Auto SLA Calculator, click delete and follow the instructions.
4. If any Jscript or plugins were subsequently developed that created Auto SLA Request records, modify or remove these.

Section 5 - Configuration

5.1.1   Information

The Incremental Group Auto SLA Calculator Solution provides a flexible way to calculate Service Level Agreement date/time values and also working time duration between two date values. This means 'respond by' date/time values and elapsed durations can be calculated to allow the CRM user to prioritise their workload and performance metrics to be available for reporting.

Auto SLA Definition records are created to configure which days are classed as 'working days' and the start/end of each working day can be configured. An unlimited number of Auto SLA Definition records can be created to represent different site working hours, shift patterns, or contractual service levels (i.e. Monday to Friday 9-5, 24/5, 24/7, etc).

After defining these definition records, an 'Auto SLA Request' record can be created using workflow, Jscript, Plugins or using the SDK which requires input values such as the start time and number of days/hours/minutes to add or subtract. To return working or elapsed duration values, both a start and end date/time must be passed to the Auto SLA Request record.

On create of the Auto SLA Request record, a plugin will fire and perform the calculation before returning the results to results fields on the Auto SLA Request record. This can then be used for example in subsequent workflow steps if created in this way.

SLA Date/Time Example: An Auto SLA Definition is configured whereby Monday to Friday are work days with a start time of 9am and 8hrs work time for each day (i.e. 9am to 5pm).

Users create a case record which contains a 'Respond By' date/time field, and marks the case as high priority. A workflow has been configured whereby if a case has a high priority, then a 4-hour response time is required.

An Auto SLA Request record is created via a workflow and dynamically passes the start date/time as the case created on time, which happens to be Thursday the 18th of April at 4pm. The Auto SLA Request also contains an input to add 4 hours to the start date/time.

The Auto SLA Request record once created calculates the result as Friday the 19th of April at 12pm because the work time finishes at 5pm on the Thursday and begins again at 9am on the Friday. The workflow waits until the Auto SLA request record's 'Result' field contains data then uses this value to update the 'Respond By' field on the case as 19/04/2013 12:00.

Business Minutes Duration Example: An Auto SLA Definition is configured whereby Monday to Friday are work days with a start time of 9am and 8hrs work time for each day (i.e. 9am to 5pm).

A workflow is configured to run when a case is resolved with the aim of populating a 'Case Duration' field. Within this workflow, an Auto SLA Request record is created which passes a start date/time and an end date/time, waits for the Business Minutes Duration result field on the Auto SLA Request record to contain data, then updates the Case Duration.

The case is created on the 19/04/2013 at 1pm and is resolved on the 20/04/2013 at 10am. The workflow, after successfully running, updates the Case Duration with 5 hours.

5.1.2 Creating a new Auto SLA Definition record

To create a new Auto SLA Definition, follow these steps:

1. Navigate to the Auto SLA Definition entity within the Settings area, and click new
2. Enter a name for the Auto SLA Definition
3. Define which week days are 'working' days and configure suitable start time and durations for each day.

5.1.3 Creating a new Auto SLA Exception record

Auto SLA Exception records are designed to enable the definition of business closures within an Auto SLA Definition record. These can be used for public holidays or other closures and simply provide a start date/time and end date/time within which non-working time exists. So for example, a half day business closure (assuming 9-5 working time) for Christmas eve would have an Auto SLA Exception record with a start date of 24/12/2013 13:00 and an end date of 24/12/2013 17:00.

NOTE: Auto SLA Exceptions are for specific dates so are not designed to be recurring. You could however create a simple workflow to timeout and automatically create new Auto SLA Exceptions annually.

5.1.4 Security Requirements

There is a security role available within the Auto SLA Calculator Solution called "Auto SLA Generation (for All Users)". This security role must be given to all users who require the ability to generate Auto SLA Requests when creating new records.

The creation of Auto SLA Definitions is assumed to be a system administrative task therefore any delegation of creating these records to non-system administrative users must be dealt with via your security roles in use.

Section 6 - Operation

6.1   How to enable logging

Auto SLA Calculator for Microsoft Dynamics CRM 2013 provides two levels of run-time logging, Event Logging and Trace Logging. Please note, for Live operation logging should always be disabled unless outside of core business hours due to the high volume of records created by the trace log.

If you require support, you could be asked to enable to enable logging for Auto SLA Calculator which is based on the following steps;

1. Navigate to Settlings > Interfaces
2. Open the Auto SLA Calculator interface.
3. In the Interface Options and Parameters section click to enable the logging type required, save and close.
4. Create an Auto SLA Request record either manually, via a workflow, a plugin, Jscript or the SDK.
5. Open the interface record again. You should now see a new Interface Job record. Double click to open the Interface Job Record for detailing logging information.

6.2   Support

When the Auto SLA Calculator is purchased, you will receive 12 months of support. This can be renewed annually at a cost of 20% of your Auto SLA Calculator order. If you require support for our Auto SLA Calculator for Microsoft Dynamics CRM product, please contact support@incrementalgroup.co.uk.