



InfoCapture SLAs

The SLA system makes use of 'Traffic Lights'. Consider traffic lights to be similar to the 'status' of a form, but one which is only ever controlled automatically.

An SLA is used for counting passing time and assisting in automatic changes based on those times.

For example, a newly submitted ticket could have a traffic light status of 'Within SLA' but after 5 hours, it's needed for the traffic light to change to 'Out of SLA'.

How SLAs are seen

SLAs will always show at the top of each ticket submission:

A screenshot of the InfoCapture interface. At the top, it says 'InfoCapture / T-Shirt Order / View Order: TSO0021'. Below this, there are buttons for 'Download ticket in PDF format', 'Submit Order', and 'Switch to T-Shirt Order'. The main content area shows ticket details: ID TSO0021, Submitted by Claromentis Administrator, Status Requested, Last modified 08-06-2023 12:25, Date of report 08-06-2023 12:20, and Ticket last modified 0 days ago. A red box highlights the SLA status: 'SLA [Within SLA] - Will change in 4 minutes 4 seconds (at 12:30)'. Below this, there are tabs for 'View Order', 'FlowChart', 'Notes', 'History', 'History diagram', and 'All'. The bottom section is titled 'T-Shirt Order Form' and contains fields for Name (Claromentis Administrator), Gender, Size (3XL), and T-Shirt Colour.

The corresponding colour of each SLA will highlight the far left of each ticket row to denote what it's currently in:

A screenshot of a ticket list. At the top, it says '1-20/23'. Below this, there is a table with three rows. The first row has a green background and the ID 'TSO0023'. The second row has a red background and the ID 'TSO0022'. The third row has a red background and the ID 'TSO0021'. There is a dropdown arrow next to the ID 'TSO0023' and a speech bubble icon.

Optionally a traffic light column can be added to appear in the ticket list area, where the associated label will appear:

Admin / InfoCapture / T-Shirt Order / Tickets list columns

Project options
Project Summary
Edit project properties
Project permissions
Statuses
Conditions
Field condition sets
Triggers
Behaviour
Field visibility
SLA
Automatic changes

Tickets list columns

Choose which column headings should be displayed when viewing the list of submitted tickets.

Name

Add

Field name	Symbolic name	Type	Hide
ID, Comments, Files	-	-	fixed
TRAFFIC LIGHT	.traffic.light.		
SUBMITTER	.reporter.		
T-Shirt Colour	tshirt_colour	Select	
T-Shirt Code	tshirt_code	Short string	
Customise	customise	Select	
STATUS	.status.		
DATE CREATED	.created.		

InfoCapture / T-Shirt Order

Ticket / Jump / Search / Switch to T-Shirt Order

+ Submit Order

List Of Orders

Statistics

Using this form, staff are able to request a company T-Shirt, selecting their size, choosing the colour and even adding customisations.

If a member of staff requests a T-Shirt without customisations, the marketing team are able to place the order straight away. If a member of staff requests a T-Shirt with customisations, management will need to approve the customisations prior the marketing team placing the order. If customisations are rejected by management, the requester will be notified.

For more information on this process, please see [here](#).

Enter your search words...

Search

Ticket types

All 23

Submitted by me 5

Open 17

Monitored by me 0

Options

+ Submit Order

List Of Orders

Statistics

1-20/23

ID	Traffic light	Submitted	T-Shirt Colour	T-Shirt Code	Customise	Status	Created
TSO0023	Within SLA	Claromendis Administrator		-2-	None	Requested	08-06-2023 12:31
TSO0022	Outside SLA	Claromendis Administrator		-8-	None	Requested	08-06-2023 12:24
TSO0021	Outside SLA	Claromendis Administrator		-7-	None	Requested	08-06-2023 12:20

1. Creating Traffic Lights

Your Intranet management team can brainstorm what traffic lights would be required to best fit the stages of your form, as well as how long a ticket should remain in each traffic light before it moves to the next.

Field condition sets will need to have been created ahead of time to define what changes can be tied to traffic lights and prompt them to change too.

Once ready to create them head to Admin > InfoCapture > (your project) > SLA

Under the traffic lights tab, click the 'Add' button and choose a label and a colour.

A simple example is to create one for within, and one out of, SLA:

Admin / InfoCapture / T-Shirt Order / SLA

Project options
Project Summary
Edit project properties
Project permissions
Statuses
Conditions
Field condition sets
Triggers
Behaviour
Field visibility
SLA

SLA

A Service Level Agreement (SLA) is a traffic light system to ensure tickets are dealt with agreed timescales.

This is dependent on Field Condition Sets having first been added and Statuses being enabled. Once these are configured, the next action must be to setup traffic lights, such as 'Within SLA' and 'SLA breached'. SLAs are a means of automatically changing a traffic light when a predefined amount of time has passed. For example, you may have a Field Condition Set that a ticket's status is 'Newly submitted'. The SLA rule could change the traffic light to 'Within SLA' and begin running a timer. After 10 hours, the traffic light is automatically changed to 'SLA breached'.

Traffic lights

SLA rules

Statuses

Work time

+ Add new traffic light

Label	Colour
<input type="checkbox"/> Within SLA	green
<input type="checkbox"/> Outside SLA	red

0 tickets selected

2. Creating SLA Rules

Next head to the 'SLA rules' tab.

Here you will use your chosen field condition sets to determine when a traffic light change should occur.

In the simplest example shown below once a ticket is submitted and enters 'Requested' status, it is labelled 'Within SLA'.

Admin / Infocapture / T-Shirt Order / SLA

Project options

Project Summary

Edit project properties

Project permissions

Statuses

Conditions

Field condition sets

Triggers

Behaviour

Field visibility

SLA

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Traffic lights

SLA rules

Statuses

Work time

+ Add new rule

Field condition set	Type of time count	Traffic light	Time interval
<input type="checkbox"/> Status = Requested	From latest status change	Within SLA	0
<input type="checkbox"/>		Outside SLA	Hours: 8

Delete selected

You'll also notice the 'type of time count' column has two options: From latest status change, or 'by stopwatch timer'.

The time interval is set to 0 as the traffic light change is desired as soon as that condition is met.

Until 8 hours pass at which point it will change to 'Outside SLA'.

The 8 hours is custom curated, so really this time period can be whatever you need it to be for your forms.

3. Add a timer action per status

A timer will run in the background for the benefit of SLAs.

The way the system is told how to run the timer is in the 'Statuses' tab:

Project options

Project Summary

Edit project properties

Project permissions

Statuses

Conditions

Field condition sets

Triggers

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Field visibility

SLA

Automatic changes

Workflow

Notification

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Traffic lights

SLA rules

Statuses

Work time

Status	Stopwatch timer action
Requested	Start / Reset timer
Requested, Requires Manager Approval	Continue timer
Approved	Continue timer
Rejected	Suspend timer
Ordered	Suspend timer
Delivered	Stop timer

Save

In each status, the timer can be started, paused, and stopped.

Generally, you would want a timer to begin when a form is submitted and for it to stop once the form has reached a closed status.

As you can see from the 'rejected' or 'ordered' line above, sometimes it can be useful to pause the timer, however, this totally depends on the requirements of your form's use case.

4. Define working hours

In the 'worktime' tab define which hours of the day the timer should run, which can again be custom configured to fit the specifications of a form:

Admin / Infocapture / T-Shirt Order / SLA

Project options

- Project Summary
- Edit project properties
- Project permissions
- Statuses
- Conditions
- Field condition sets
- Triggers
- Behaviour
- Field visibility
- SLA**
- Automatic changes
- Workflow
- Notification
- Notifications
- Default notification fields
- List options
- General list options

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Traffic lights SLA rules Statuses **Work time**

Weekday		Work time
Monday	<input checked="" type="checkbox"/>	09:00 - 18:00
Tuesday	<input checked="" type="checkbox"/>	09:00 - 18:00
Wednesday	<input checked="" type="checkbox"/>	09:00 - 18:00
Thursday	<input checked="" type="checkbox"/>	09:00 - 18:00
Friday	<input checked="" type="checkbox"/>	09:00 - 18:00
Saturday	<input type="checkbox"/>	-
Sunday	<input type="checkbox"/>	-

Holiday zone: - No group selected -
Use common holidays from this Holiday Planner Zone

Save

Tick the days you want to be active and then use the dropdown to set a start and end time.

These are the only periods that the timer will be active and contribute to the changes in SLA.

This is really beneficial to ensure timers aren't running when it's the weekend or non-working hours!

5. Test

Submit tickets in your form that meet certain conditions used in your SLAs.

To speed up the testing process, enter smaller time periods e.g. 5, 10 minutes for each change, rather than your intended figure if this is e.g. 350 hours.

Watch over the tickets and check that they move through each traffic light when appropriate and that the label updates as expected.

As SLAs rely on the background task running, there could be delays in the label updating or being applied at all.

So, when testing SLAs make sure to give a few minutes for the system to apply the rules.

Its also important to note, if an SLA is changed once saved in an established form with tickets already in it e.g. the number of hours in the time interval, new tickets submitted will follow the updated rule and change after the new time but past tickets in the form will need some kind of interaction to rectify (where applicable) e.g. editing and saving it, status change etc to update the SLA.

Outside this past tickets submitted before the changes should update when the background task runs (which is every day at 5 AM)

Therefore if you make changes to SLA timeframes it is best to wait at least 24 hours to check past tickets update as expected and if they do not after this period, let us know in a support ticket.

More advanced SLAs

More complexity can be added than just within or outside an SLA.

Take a look at this example, from an InfoCapture project for submitting IT support tickets:

	Field condition set	Type of time count	Traffic light	Time interval
<input type="checkbox"/>	Status = Submitted	By stopwatch timer	Within SLA	0
<input type="checkbox"/>			Resolution Time Breached	Hours: 16
<input type="checkbox"/>	Status = Awaiting Confirmation	From latest status change	Awaiting Confirmation	0
<input type="checkbox"/>	Status = Closed	From latest status change	Closed	0
<input type="checkbox"/>	Critical Problem Submitted	By stopwatch timer	Within SLA	0
<input type="checkbox"/>			Resolution Time Breached	Hours: 1
<input type="checkbox"/>	High Problem Submitted	By stopwatch timer	Within SLA	0
<input type="checkbox"/>			Resolution Time Breached	Hours: 2
<input type="checkbox"/>	Medium Problem Submitted	By stopwatch timer	Within SLA	0
<input type="checkbox"/>			Resolution Time Breached	Hours: 4
<input type="checkbox"/>	Low Problem Submitted	By stopwatch timer	Within SLA	0
<input type="checkbox"/>			Resolution Time Breached	Hours: 8
<input type="checkbox"/>	Critical Problem	By stopwatch timer	Resolution Time Breached	Hours: 4
<input type="checkbox"/>	High Problem	By stopwatch timer	Resolution Time Breached	Hours: 5
<input type="checkbox"/>	Medium Problem	By stopwatch timer	Resolution Time Breached	Hours: 6
<input type="checkbox"/>	Low Problem	By stopwatch timer	Resolution Time Breached	Hours: 7
<input type="checkbox"/>	Ticket Type = Question, Request	By stopwatch timer	No SLA	0
Delete selected				

If the status of a ticket has been changed to 'Submitted', 'Awaiting Confirmation', or 'Closed', the traffic light will be immediately changed to those seen in the 'Traffic light' column.

If no change has taken place after 16 hours, a ticket in 'Submitted' will have its traffic light change to 'Resolution time breached'.

Look further down, to the 'xxx Problem submitted' lines. Here a field condition has been used to capture certain entries in form fields to create a tier of responses:

= Critical Problem Submitted	Ticket Type IN (Problem) Urgency IN (Critical) STATUS IN (Submitted)
= High Problem Submitted	Ticket Type IN (Problem) Urgency IN (High) STATUS IN (Submitted)
= Medium Problem Submitted	Ticket Type IN (Problem) Urgency IN (Medium) STATUS IN (Submitted)
= Low Problem Submitted	Ticket Type IN (Problem) Urgency IN (Low) STATUS IN (Submitted)

This setup means that the different urgencies submitted by users will behave uniquely based on the times entered for them to determine when they move to 'Resolution time breached'.

The other statuses tickets can move through have also been covered by the 'xxx Problem' conditions:

= Critical Problem	Ticket Type IN (Problem) Urgency IN (Critical) STATUS IN (In Progress, Pending Further Info, Further Info Provided)
= High Problem	Ticket Type IN (Problem) Urgency IN (High) STATUS IN (In Progress, Pending Further Info, Further Info Provided)
= Medium Problem	Ticket Type IN (Problem) Urgency IN (Medium) STATUS IN (In Progress, Pending Further Info, Further Info Provided)
= Low Problem	Ticket Type IN (Problem) Urgency IN (Low) STATUS IN (In Progress, Pending Further Info, Further Info Provided)

This ensures once they move out of 'Submitted' a new slightly longer SLA change is implemented.

This project has also defined that any ticket submitted as a 'Question' or 'Request' in a 'Type' form field will not be involved in the SLAs.

It's not appropriate for this company's processes for these types to require an SLA, therefore it's been given its own traffic light to denote this 'No SLA' which it will stay in until moved to 'Awaiting confirmation' or 'Closed' status.

Notifications

You may also wish to send notifications based on your SLA.

This is useful to ensure users who need to interact with tickets ahead of breaches can do so or those who need to be involved in escalation once a ticket has been breached are made aware.

To do so, perform the following steps:

1. Create a field condition that specifies *Traffic light is SLA breached*
2. Create a trigger with the following rules
 - a) Condition WAS NOT: *Traffic light is SLA breached*
 - b) Condition IS NOW: Traffic light is SLA breached
3. Create a notification that uses that trigger.

Key Facts

1. The **background task** processes **traffic lights**, and then **automatic changes**.
The rules trying to be followed are traffic light-> automatic change ->traffic light which would have to be spread out between two runs of the background task.
2. The background task only checks traffic lights for an issue if a timer has expired.
3. A timer is only set if a real user saves an issue or if the current SLA traffic light has another traffic light following it.

Recommended next article:
Workflow