Document Title: PinICL Incident Management Process

Document Type: Process

Abstract: The scope of this process is to cover the processing of incidents on the Pathway products. These may have been raised by the customer or within Pathway or its partners. It is mandated (a) once a product has been handed over from one team to another (b) when a team finds an error in its own products which have been handed over to Configuration Management. It does not cover incidents raised as operational hardware problems.

Status: Definitive

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Pathway Online Standards

Author: John Newitt

Comments to: Author

0 Document control

0.1 Document history

The following were issued under reference PM/PRD/0003

10/10/96	(0.4)	First draft for general circulation
08/11/96	(0.5)	Minor classifications
17/10/96	(1.1)	Reworks to conform with online HELP.

The following were issued under reference PA/PRO/0014

14/01/97	(0.1)	Reformatting and new reference
11/07/97	(2.0)	Issued Online HELP plus amendments
21/01/98	(2.1)	Incorporates internal review of process
30/01/98	(3.0)	Issued updated Word version

0.2 Approval authorities

Name	Position	Signature	Date
S Lee	Configuration Manager		

0.3 Associated documents

Reference	Vers	Date	Title	Source
			GENESIS User Guide	

0.4 Abbreviations

CM	Configuration Management
PCMS	Process Configuration Management System (the CM tool used in Pathway)
PinICL	Pathway Incident Management System (tool used in Pathway)
PIT	Product Integration Testing
SPTS	Service Provision Technical Support (a team in T&I)
SSC	System Support Centre
T&I	Test and Integration

0.5 Changes in this version

This is a major revamp to fit into the style of Pathway on-line processes format following internal review. However, parts of the processes for external incidents remain "to be added".

0.6 Table of content

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1. PinICL Overview

The scope of this process is to cover the processing of incidents on the Pathway products. These may have been raised by the customer or within Pathway or its partners. It is mandated :

- Once a product has been handed over from one team to another
- When a team finds an error in its own products which have been handed over to Configuration Management.

It does not cover incidents raised as operational hardware problems.

Live customer incidents are raised on the PowerHelp system with a link to PinICL.

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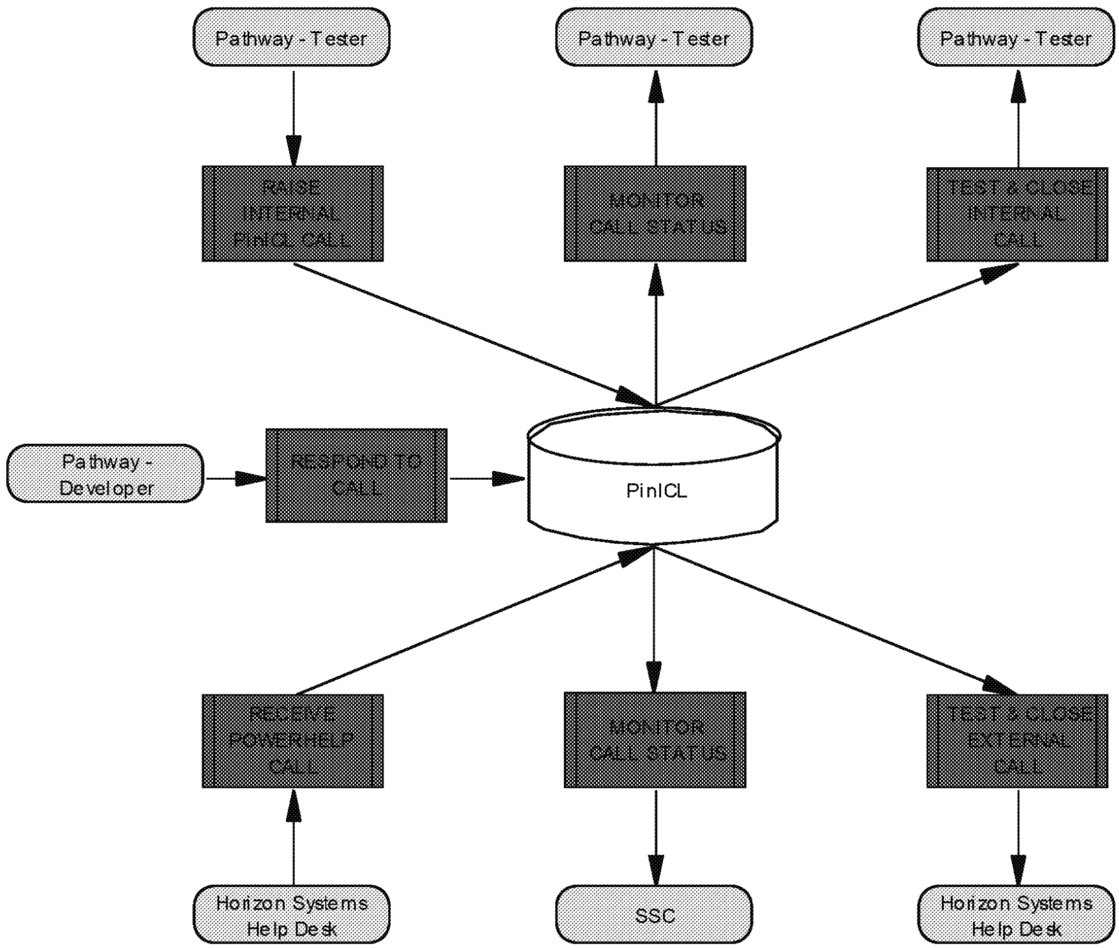

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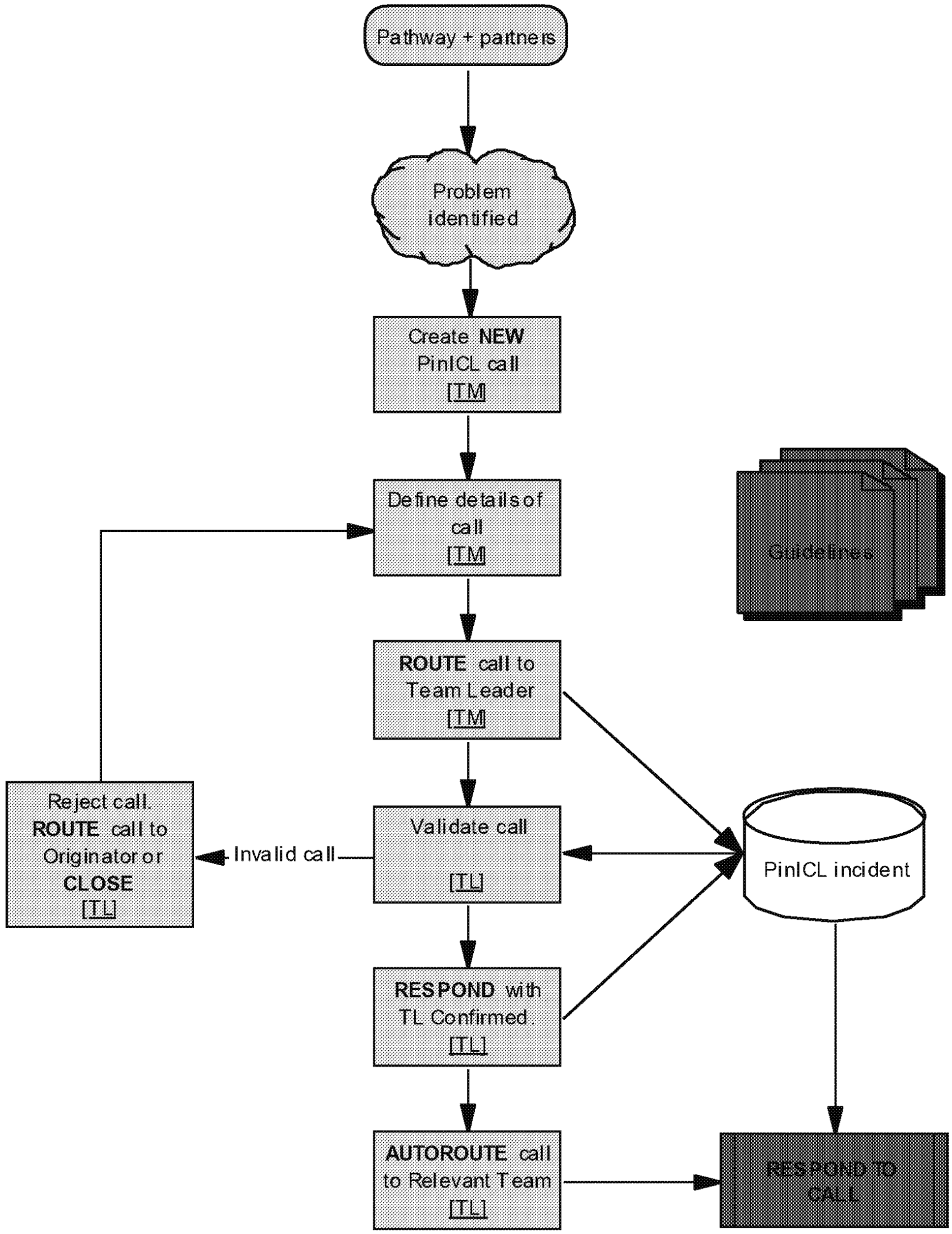
2. Process Flow - Raise Internal PinICL Call



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Process Owner	:	PinICL Problem Manager
Process Objective(s)	:	The scope of this process is to cover the logging of internal incidents (calls) on the Pathway products. These may have been raised within Pathway or by its partners.
Process Rationale	:	The process details are built round the facilities of PinICL and the flowchart uses PinICL terminology. In particular, PinICL commands are shown in **BOLD**. Calls are logged by the originator on PinICL. The originator routes them to the Team Leader. The Team Leader reviews the call, signifies approval (or rejection) and routes the call to the relevant team (defined by the Products (see section 3.5) associated with the call).
Entry/Input(s)	:	A suspected error or technical query from one of Pathway's suppliers or a Pathway unit.
Resources	:	Originating team (may be partner, T&I or development team) TL - Team Leader TM - Team Member
Sub Processes	:	None
Guidelines	:	Logging Internal Calls Guidelines (see section 3)
Exit/Output(s)	:	Call logged on PinICL

3. Logging Internal Calls Guidelines

It is important to remember that the person you are sending the PinICL call to is not a mind-reader and requires as much information as possible to start solving the problem. The call may be routed through intermediate teams before reaching the relevant development team. You must not assume the same level of intimacy with the products - the call must be understood without any prior knowledge of the testing being conducted. It is also **essential** that any Year 2000 Compliance or Usability issues are identified.

All newly raised calls must be reviewed by a Team Leader to confirm all necessary information is correctly logged and that the call is valid (see section on routing). The Team Leader will either confirm the call and route it, return it to the logger for further action, or close the call if not valid. The Team Leader will also assess the urgency of the required fix and decide whether the call requires Fast Tracking, or can follow the standard call life cycle flow.

For each new call:

1. From PinICL, select **Call/New** from the menu.

2. Leave **Contact** unaltered unless you are raising the call on behalf of someone else.

3. Select **Target Release** from the pull down menu - likely to be 'Release 2.0'

4. Select **Call Type** to be:

   P - Product error (error in product under test or in test data)
   T - Technical query (don't know if error/usability etc.)
   (Note **L (Live)** should only be used by SSC when the call is raised on operational software on behalf of a user).

5. Select a Priority (see section 3.6)

6. **Summary** should be a concise one line, indicating the general nature of the fault (e.g. PMSC204 errors with 1234 under Maestro). Include important keywords that could be used in later searches (e.g. HelpDesk, CMSC101, BES, error codes, Oracle table names)

7. Select Products for routing (see section 3.5). At least one product is mandatory.

8. Use the Reference button (see section 3.3) to specify references such as Test Reference, Baseline reference, Year 2000 compliance issue or Usability (HCI) issue.

9. In **Description**, provide an explanation of the problem giving details not already entered in the Product, Platform, and Reference fields. - e.g. Rig configuration, second linked platform, what test script was being executed, steps involved up to the point of failure, what other processes were running, details of files loaded, contents of tables, screen prints, test phase, test case number, test cell ref., test rig number, personal contact number (see Example section 3.2).

10. Attach **Evidence** through the Evidence button (see section 3.4). It can take the form of
    - NT Event viewer logs saved as text
    - Telnet logs of Oracle table extracts or journals
    - Screens captured into Paintbrush format via 'Print Screen' and paste

- Message Store extracts – as a zip file if large

11. Do **not** click on **Respond to Call Logger**; the call will be returned to the Contact and we can change this if necessary when the logger moves between teams.

12. All calls raised by testers require Team Leader confirmation. Use **Route** button and **Route to Person in current team** to assign the call to your Team Leader (or nominee).

13. Finally, **Send** the call to write it to the PinICL database.

14. The Team Leader (or nominee) validates the call (see section 3.1), checking details and priority level.

    - If the call is valid, click on **Respond** and select the **TL Confirmed** response category. (This changes the call status from **Open** to **Pending**.)

    - If Fast Track fix is required, obtain **full** agreement and authorisation from the three relevant managers from PIT, Testing and Product Development. (Out of hours, contact the duty manager.) Specify the names of the three managers in the **Response text**.

    - If the call is a usability issue and has a HCI reference, the call needs to be manually routed to the Design team (using **Route to Team** below).

    - **Route** using either **Automatic routing required** (the normal method which uses routing provided by the **Product**) or **Route to Team** (to specify a specific team e.g. for usability issues).

    - If the call details are inadequate, the team leader may either **Route** the call back to the originator or, in extreme cases, **Close** the call.

Note
All narrative must be of a concise and professional nature; avoid using PinICL to hold question and answer sessions; it is NOT an Email service. Technical queries are best handled by personal communication, via the telephone or Email if necessary. REMEMBER our customer has access and can view PinICL details. KEEP IT PROFESSIONAL

3.1 Team Leader (or nominee) validates the call

The Team Leader (or nominee) validates the call as follows:

- check the details are complete and correct
- check the priority is suitable - if not, change the priority
- assess the call for Fast Tracking; if required, it must have Priority A
- check that usability issue has HCI reference
- check the call is valid (e.g. fault in product requiring fixing, enhancement request)
  - if not, **Route** the call to the originator for correction or closure
- check the narrative is of a concise and professional nature
  - if not, **Route** the call to the originator for correction
  - or, in extreme cases (e.g. where the wording of the call is not professional), **Close** the call and advise/educate the originator to raise a new call correctly

3.2 Example of Description Content

Test Phase: PAT / HelpDesk for Release 1c
Test Case No: HD 1.8.3
Test Cell Ref.: PAT Seq10 HelpDesk/PO 123456
Test Rig No: ST01
Contact No: GRO
Description: Within 'Enquire and Encash Payments', Payments for a customer are not visible
Script:
1) Entered 'Identify Benefit Office' screen from Main menu
2) Called up Benefit Office
3) Entered 'Enquire and Encash Payments' via Main menu
4) Entered valid NINO XY123499
5) System responded with name details but no encashment details
6) Checked Oracle tables - encashed_payments_1 & encashments_1
See evidence supplied.

3.3 More on References

Reference fields are used for any key information that can be used for searching at a later date.

Using the **Reference** button, select an appropriate **Reference Type** and **Reference Value**. For example:

	Reference Type	**Reference Value**
Test reference (to indicate test stage)	Test reference	ST, DIT, E2E, BIT or MO
Another call	Call reference	PCnnnnnnn
Baseline reference	Baseline *	Baseline identifier
PCMS Work Package number	Work package *	PWY_WP_nnnn
Year 2000 compliance issue	Y2K *	Y2K followed by optional string
Usability/HCI (Human Computer Interface) issue	Usability/HCI *	HCI followed by optional string

* - At the time of writing, it is planned to introduce these references types. If they are not available, use “Other”.

For each Reference Type, an expected format will be shown where applicable for the **Reference Value** but any format can be used. Click on **Add**.

More than one reference can be added. Ensure that the one you want to be shown on the call summary screen is selected as **Top reference**. Click on **OK**.

3.4 More on Evidence

If there is external evidence (e.g. a PC file) this can be attached to the call.

Click on **Evidence**.

Upload the evidence file by clicking on **PC file on local machine** (or other appropriate field) and **Upload to PinICL** buttons and then specifying the **Filename on PC** field (e.g. c:\msoffice\filename).

Insert a **Description**.

Click on **Add**.

More than one evidence file may be added. Finally, click on **OK**.

3.5 More on Products

At least one product MUST be defined.

Click on **Products**

Select a **Product Group** from the pull down menu (You can enter the first letter of the Product Group to be offered a more selective choice - e.g. enter 'o' to be offered a choice of 'OBCS' and 'Oracle').
Then select a **Product** from the pull down menu and, if appropriate, a **Version**.

Select a **Platform** from the pull down menu.

Click on **Add** for each product/platform. Note that the product and platform entries are logically independent in spite of being set up together. (If you define more than one product, ensure that the one you want to use for routing is marked as the **Subject** product.)

Click on **OK**.

3.6 More on Priorities

Each call type has a set of priorities each with a target response time; this is the number of working days within which a response is expected.

Currently, the priorities are the same for each call type (except R which has a special purpose):

A	Business stopped	1 day
B	Progress stopped	3 days
C	Progress restricted	5 days
D	Non-urgent	10 days

The descriptions (but not the target response times) are displayed in the pull down menu.

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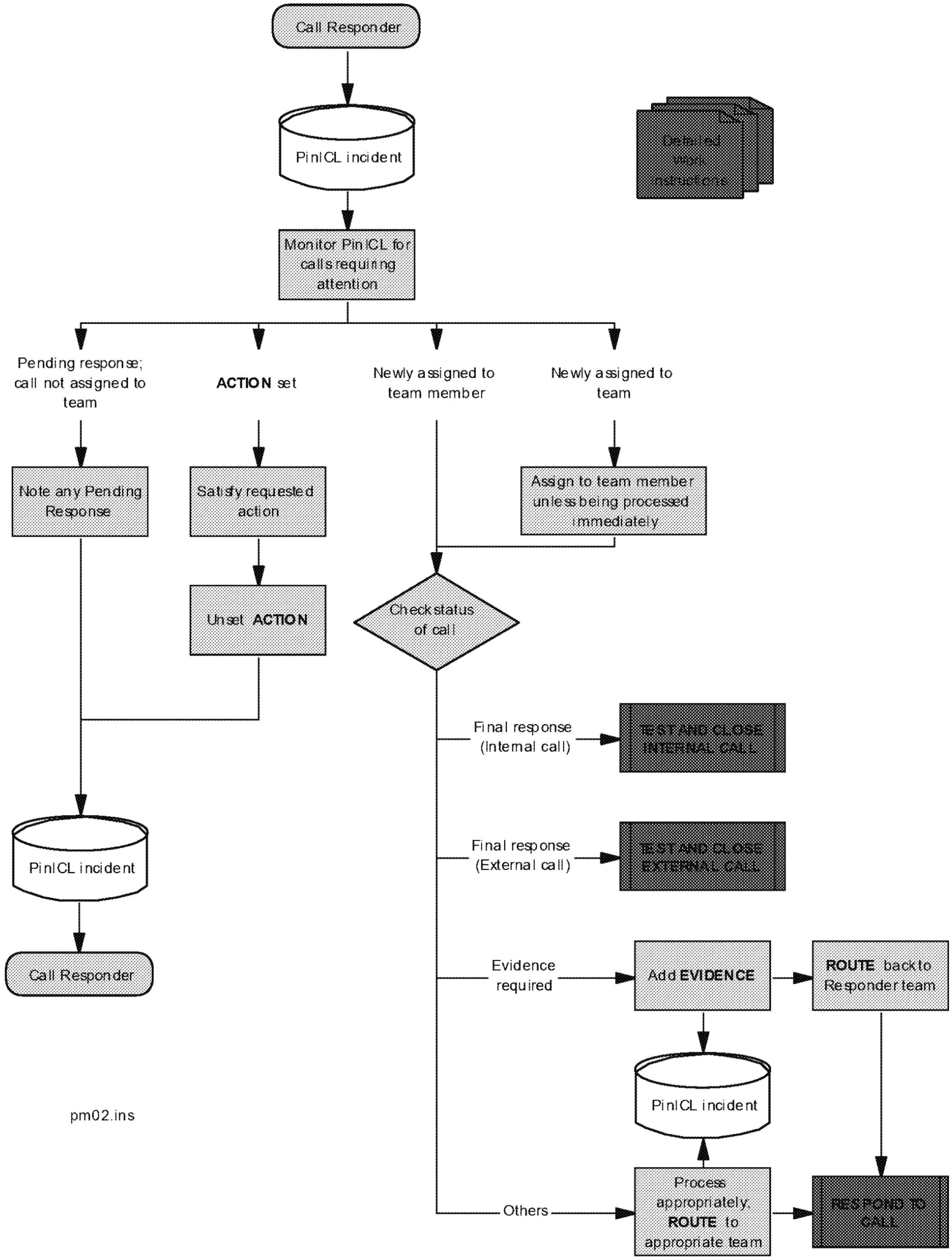
4. Process Flow - Monitor Call Status by Call Logger



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Process Owner	:	PinICL Problem Manager
Process Objective(s)	:	The scope of this process is for Call Loggers to monitor their PinICL call stacks and to take appropriate actions. It covers responding to actions placed by other teams, noting pending responses, adding evidence and dealing with calls that have been routed back to them.
Process Rationale	:	The process details are built round the facilities of PinICL and the flowchart uses PinICL terminology. In particular, PinICL commands are shown in **BOLD**. Actions may be placed on any team to either request information from or to pass information to that team. Teams need to monitor such actions; when one is placed, they need to respond to it and to unset the action marker. Only one action can be set at a time. When a call responder has made progress on resolving an incident, he/she may provide a pending response. The call logger should read this response and take any appropriate action or make suitable plans. One particular value of pending response is the request for further Evidence (see section 3.4); the Respond to Call process states that the call should have been routed to the team. When a call is transferred with Final status, the appropriate process for testing or accepting the response and closing the call needs to be followed.
Entry/Input(s)	:	Monitoring of PinICL stacks should be done regularly (at least twice each day).
Resources	:	Call logging team (may be partner, T&I or development team) or any other team accessing PinICL.
Sub Processes	:	None
Work Instructions	:	Monitor Call Status By Call Logger (see section 5)
Exit/Output(s)	:	Updated PinICL call

5. Work Instructions for Monitor Call Status by Call Logger

This section deals with the monitoring of calls for actions placed on you or pending responses which require additional evidence or are reporting progress. See also Work instructions for Test and Close Internal Calls.

Monitor your calls twice each day; the **Refresh** button updates the display.

You can identify calls newly assigned to you by the Chgd flag (see section 14).

Actions may also be placed on you and these will be signified by an entry in the **Actioned** columns on the display screen.
If a call is actioned on you even though you are not the call logger or in the assigned team, the call will still appear on your display screen.

1. Monitor your calls twice a day looking for any which have Chgd (see section 14) or have an **Action** placed on you. If the call has recently been assigned to your team, reassign to a team member (via **Route**) unless you are going to deal with the call straightaway.

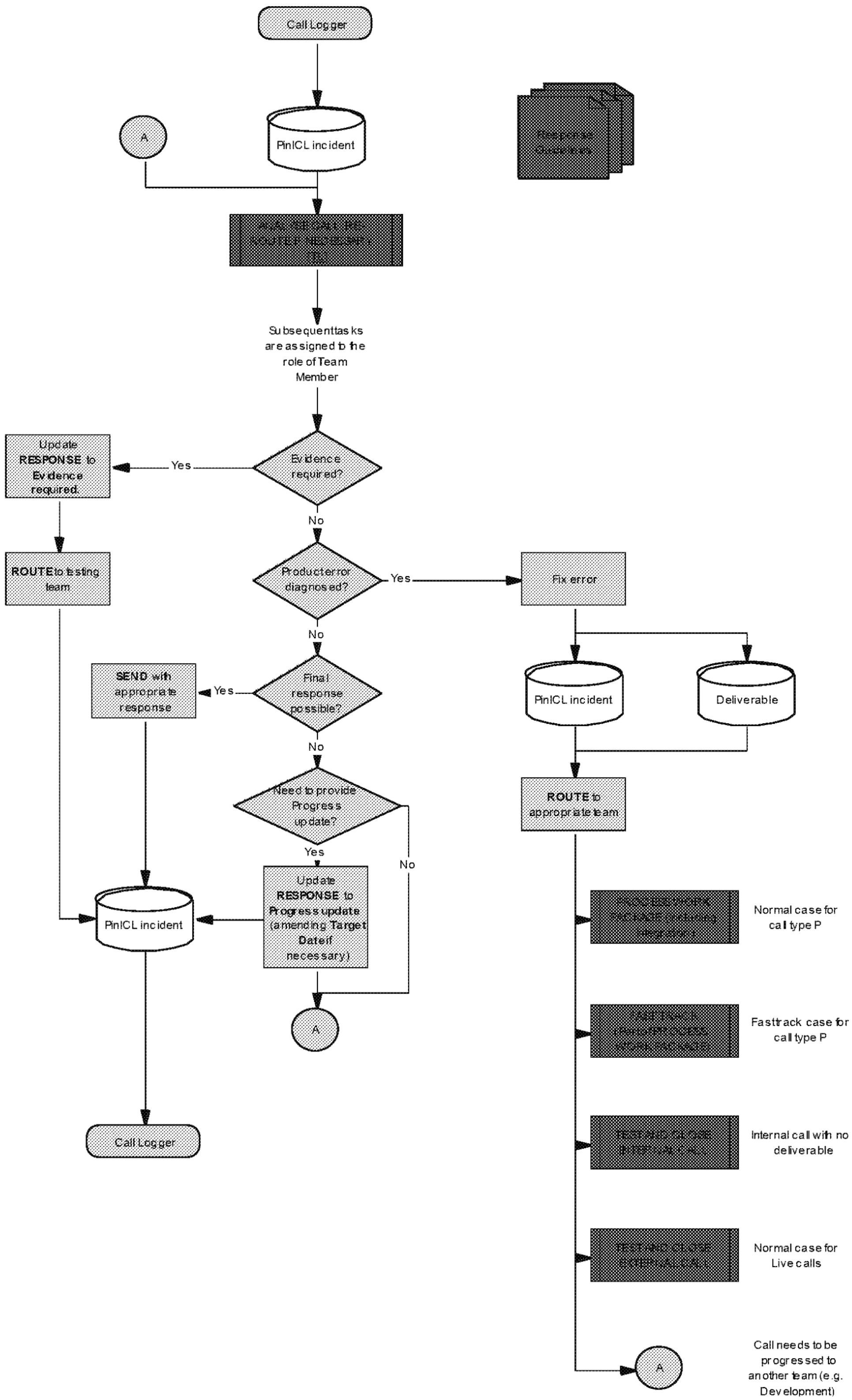
2. If an **Action** has been placed, the details of the action should be in the Progress Narrative. You need to do whatever is necessary to satisfy the action, adding **New Progress Text** if appropriate. Unset the action: Click on **Action** and click on **No outstanding action** button; click on **OK**.

3. The call responder may request additional evidence by using a special pending response. You should attach it as Evidence (see section 3.4). If the call is assigned to your team, **Route** the call back to the team which requested the evidence.

4. If any other pending response has been provided, note the information and make appropriate plans if necessary.

5. If a call is transferred with Final status, the appropriate process for testing or accepting the response and closing the call needs to be followed.

6. Process Flow - Respond to Call



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Process Owner : PinICL Problem Manager

Process Objective(s) : The scope of this process is to cover the processing of incidents by the call responder, typically a member of a development or support team.

Process Rationale : The process details are built round the facilities of PinICL and the flowchart uses PinICL terminology. In particular, PinICL commands are shown in **BOLD** and the diagram refers to specific **RESPONSES**.

The following significant tasks need to be accomplished:

i. Analyse call; reroute to another team if necessary
ii. Route the call to a team member
iii. Request additional evidence
Iv. If a new error is diagnosed, inform call logger, fix error and handover to appropriate team
v. If the diagnosis is that this is one of
- a known error,
- an enhancement request,
- there is no error in the product,
- a workaround is available
- a duplicate call

then a response is sent to the call logger.

[There is also a category of “administrative closure” which is used for situations such as the withdrawal of the call by the user.]

If more time is required to diagnose the call, the target date may be amended.

Entry/Input(s) : A call has been logged on PinICL and passed to a call responder team.

Resources : Call responder team member (default resource)
Call responder team leader

Sub Processes : Analyse call, Re**ROUTE** if necessary (see section 8)

Guidelines : Response Guidelines (see section 7)

Exit/Output(s) : Updated call logged on PinICL
Deliverable (e.g. Code)

7. Response Guidelines

PinICL calls raised on the Live Environment are screened by SSC before passing to the relevant response team (e.g. Requirements, Design or Development). All newly opened Internal calls are reviewed by a Team Leader to confirm that the call is valid, correctly logged and contains all necessary information. Once the call has been confirmed it will be routed by Product to the relevant Response Team.

Response Team Leaders must view their PinICL call stacks regularly and all calls must be responded to within the Pathway target response time as defined by the priority rating given to the call. The progress of 'A' Priority and Fast Track Calls must be monitored hourly by the Team Leader and progress narrative added within the required guidelines.

The Response Team Leader will also be required to carry out the following tasks.

Analyse calls, check the validity and progress as follows:

- Suspected error in the product requiring code fix - Assign to Team Member
- Believed to be an enhancement which, if required, would have to be progressed as a CP (e.g. a tester may have identified a major shortcoming of the system) - Add enhancement request response code and qualifying narrative; the call will auto-route back to the logger for further progress.
- Known not to be a requirement of the system - Add qualifying narrative and "no fault in product" response code; call will auto route back to Logger
- Incorrect detail or routing - Update call with correct information (e.g. Product Type, References etc) add qualifying narrative, and re-route to correct team if necessary.

The assigned Team Member will be required to carry out the following tasks.

If the call needs to be processed by an external (to PinICL) third party, see section on External Teams (see section 7.1). Otherwise, carry out diagnosis. Use the **Respond** button; the pull down menu indicates the Response Categories available (see section 15). Progress the call as follows:

- Diagnose Error - Confirm product error against Design requirement. Add "Product error diagnosed" response code and details of plan for fixing the problem.
- Year 2000 Compliance or Usability (HCI) Issues - It is essential to separate Year 2000 compliance or Usability issues from general acceptance issues at New Release 2. If during diagnosis it is considered that there is a Year 2000 compliance issue or a usability issue, add a Reference (see section 3.3) (Reference Value "Y2K" or "HCI" with qualifying narrative). In either case, use response code "Progress update" and route to Design.
- Fix Error - Add narrative with detailed information of fix, including which modules (or documents, etc.) have been amended and data on recreation of the problem fixed. Where appropriate, create a knowledge entry.
  The subsequent processing depends on the type of call and the team dealing with it. Except where otherwise stated, the response code is "Product error fixed".

Response Team	Type of call	Action

Development, Design etc.	Live. Fix is specifically for the live environment.	Add response code; route to CM and voice prompt.
Development	Call is a Fast Track .	Add work package number as Top Reference (PWY_WP_nnnn). Add response code; route to PIT; voice prompt PIT Manager and own Team Leader
Development	Call is not a Fast Track, has a deliverable (the normal case)	Add work package number as Top Reference (PWY_WP_nnnn). Add response code and route call to relevant Development Integration Release Team*
Development	Call has no deliverable (e.g. call type T)	Add response code and route call to Originator
Requirements, Design etc.	Call fixed	Add response code "Fix released"; this auto routes call to originator
Requirements, Design etc.	Call needs to be progressed to another team (e.g. Development)	Add response code and route call to relevant Team

** Whilst a call is in Development Integration Release Team, the Design team may monitor calls to ensure that there are no "knock on" effects to the overall Product design*

- More evidence required - Add "Evidence required" response code and detailed narrative of requirement; route to call logger.

- Enhancement required - Confirm with Team Leader, then add "Enhancement request" response code and detailed narrative of requirement; the system auto-routes the call back to the logger. [*The logger (via the team leader) decides whether to submit the call to Requirements or Design.*]

- No error diagnosed - Add "No fault in product" response code and qualifying narrative (e.g. this is not a requirement of the system). Call will auto route to the logger.

- Known error - If a knowledge entry exists, create a link. Use References to include any linked call numbers, CP number, KPR entry etc. Add "Published Known Error" response code and detailed narrative. Call will auto route to the logger.

- Workaround available - Add "Avoidance action supplied" response code and narrative detailing a proposed plan for a permanent fix. Call will auto route to the logger. The logger can accept the workaround and submit the call to Requirements for entry on the KPR and closure, or resubmit for a permanent fix._

- Duplicate call - This applies if the call is a duplicate of another call but the error has not been published (e.g. via a knowledge entry, CP or a KPR entry). Use References to include linked call numbers. Add "Duplicate call" response code and detailed narrative. Call will auto route to the logger.

- Progress update - All calls are given a Pathway priority rating A, B, C, or D and the Call Responder must progress calls accordingly. Calls must also have regular progress updates at least every:

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A = Half Day B = Day C = 2 Days D = 5 Days

Response code "Progress update" should be used when adding progress updates.

- Target Update - If the call will not be resolved within the Priority time frames then the Call Responder must update the target date and time with a realistic expected delivery time, and progress the call with detailed reason narrative. Call target response times are:

  A priority 1 day B priority 3 days C priority 5 days D priority 10 days

*The above response guidelines are based on the typical **first** response to a newly raised call where the first response team would **normally** be a Development team.*
If the call has been routed on for further responses, e.g. to Design or Requirement, then not all of the Team Leader or Team Member tasks may be relevant and can be omitted accordingly.

Note

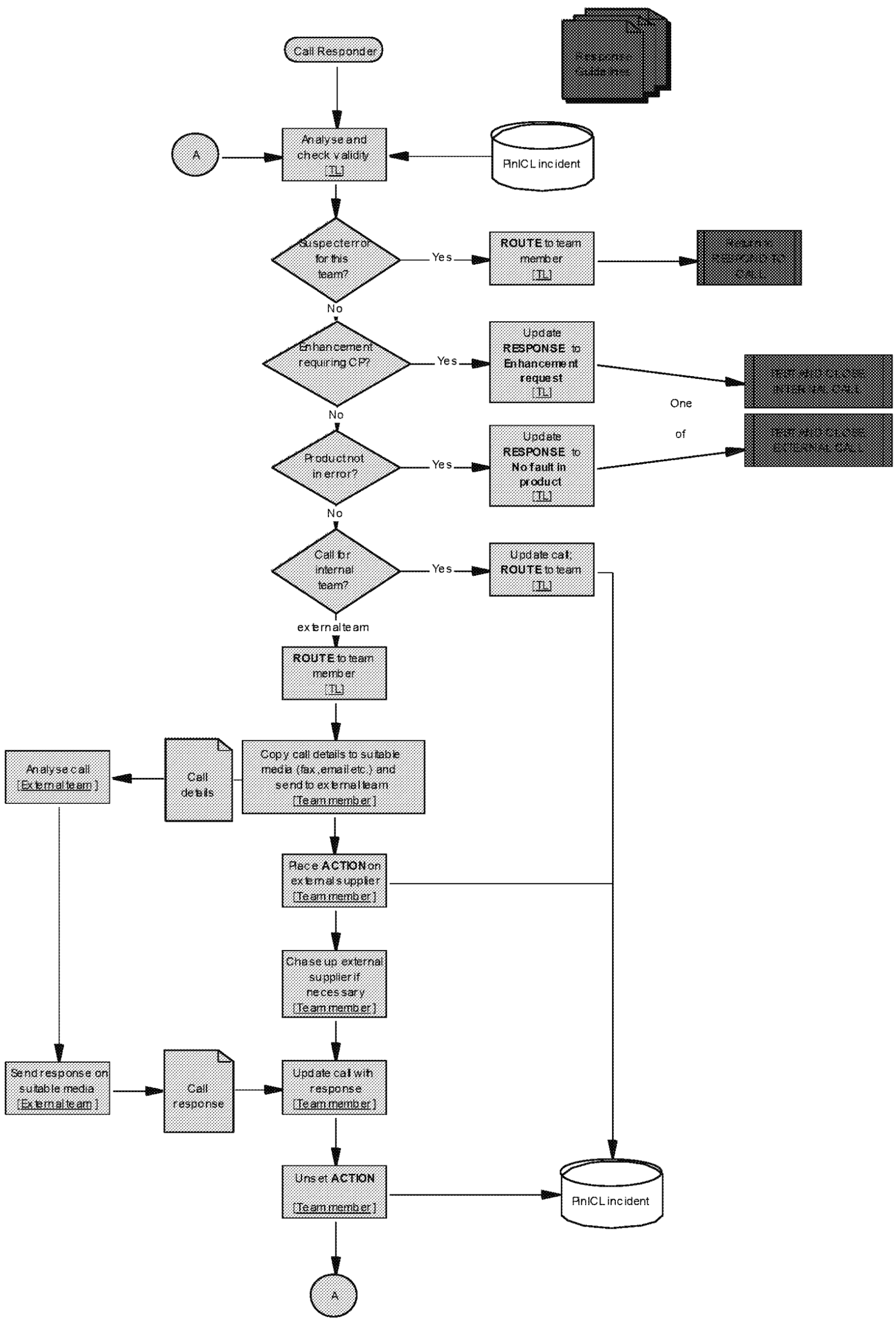
All narrative must be of a concise and professional nature; avoid using PinICL to hold question and answer sessions - it is NOT an Email service. Technical queries are best handled by personal communication, via the telephone or Email if necessary.

REMEMBER our customer has access and can view PinICL call details. KEEP IT PROFESSIONAL

7.1 External Teams

Information may be required from an external team which does not use PinICL. Click on **Action** and **Action on External Party**. It is your responsibility to send details on suitable media (fax, email etc.), to chase them if necessary for a response, to input their response into PinICL; and **Unset** the **Action**. Depending on the response, the Team Leader or Team Member needs to decide on the next appropriate step.

8. Process Flow - Analyse Call; ReROUTE if Necessary



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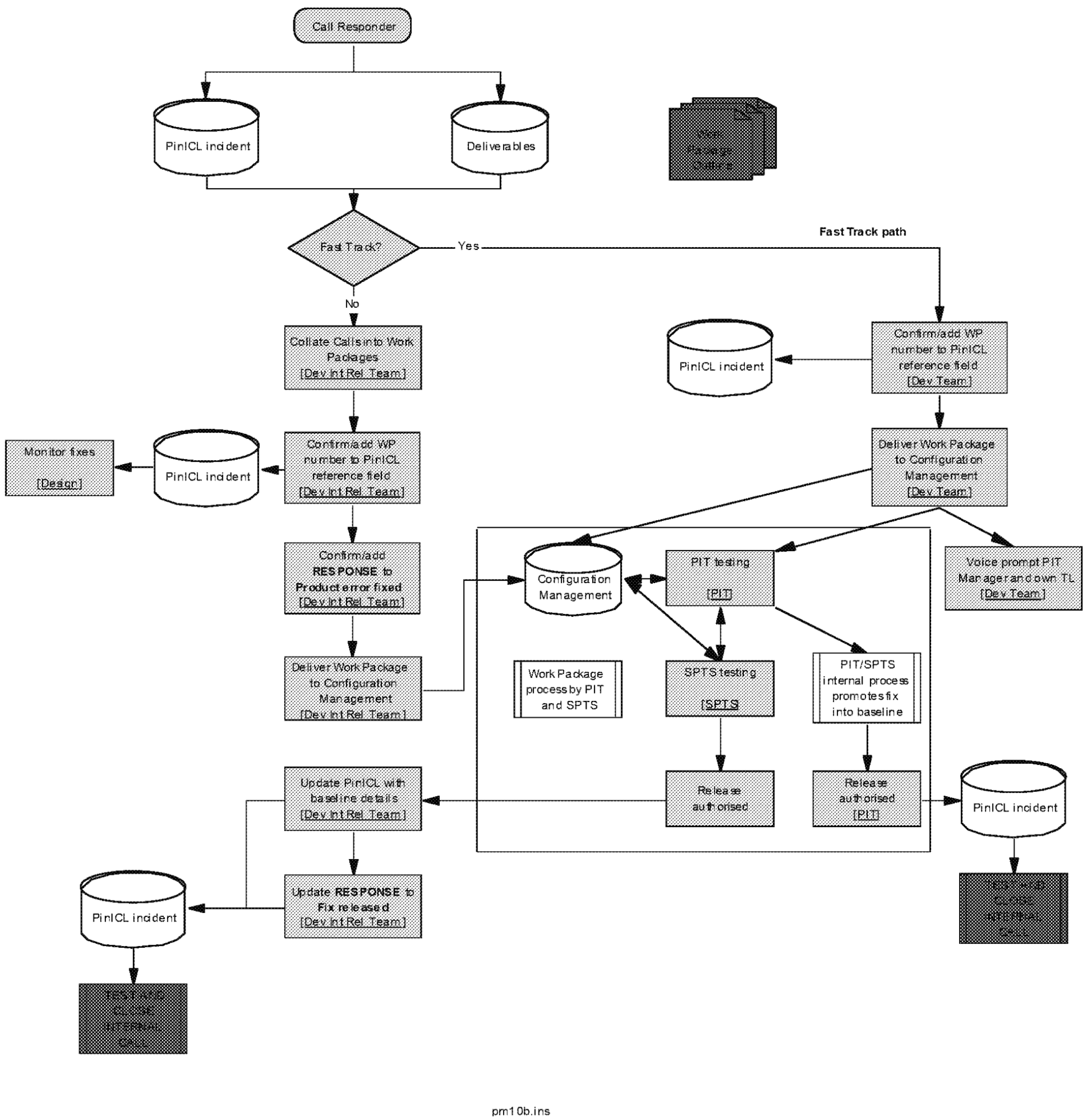
Process Owner	:	PinICL Problem Manager
Process Objective(s)	:	The scope of this process is the detailed procedures involved in validating the call and rerouting it, possibly to external parties.
Process Rationale	:	This is a sub process of Respond to Call Process. When a call is received by a Call Responder Team, the team leader must analyse it, and route to a team member, another team or back to the originator. If the call needs a response from an external (to PinICL) party, information must be recorded on PinICL whilst ownership remains within the team.
Entry/Input(s)	:	A call has been received by the Call Responder Team for analysis (and rerouting if necessary).
Resources	:	Call Responder Team TL Team Leader TM Team Member External team Note, the TL may allocate work to him/herself as a TM.
Sub Processes	:	None
Guidelines	:	These are part of Response Guidelines(see section 7)
Exit/Output(s)	:	Updated PinICL call.

9. Process Flow - Process Work Package



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Process Owner : PinICL Problem Manager

Process Objective(s) : The scope of this process is the building of PinICL calls that have fixes into Work Packages and the progress of the Work Package into and out of Integration Testing. It deals with both Fast Track and normal calls. It does not deal with the Integration processes themselves.

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Process Rationale	:	This is a sub process of Respond to Call Process. Deliverables (e.g. code) are built into Work Packages. Progress of deliverables is recorded on PCMS rather than PinICL and so is outside the scope of this process. Each Fast Track call fix forms a separate Work Package. The PinICL call follows the Work Package into PIT. Ordinary call fixes are merged into meaningful units for baselining and testing (i.e. a Work Package). Whilst the Work Package is progressed through the various stages of Integration testing, the associated PinICL calls are retained by Development under a special team "Development Integration Release Team". Once the release has been approved, this team moves the calls back to the Originator (typically a Testing team).
Entry/Input(s)	:	A call has been fixed by a member of a Development Team and is ready for Integration testing.
Resources	:	Dev Team — relevant Development Team Dev Int Rel Team — Development Integration Release Team SPTS PIT
Sub Processes	:	None
Guidelines	:	Work Package Guidelines (see section 10)
Exit/Output(s)	:	Updated PinICL call.

10. Work Package Guidelines

When a Development Team has produced a fix for a call (other than a Live call) which requires to be baselined, it is built into a Work Package and follows one of two routes:

Development Team fixes error (not a Fast-track call)

1. Development Team routes call to Development Integration Release Team
2. Development Integration Release Team:

- collate PinICL calls into Work Packages
- confirm / add WP number in top reference (PWY_WP_nnnn)
- confirm /add response category "Product error fixed"
- hold PinICL calls
- deliver Work Packages into Configuration Management (PCMS)

3. Work Packages are processed through PIT and SPTS who record progress on PCMS
4. PIT/SPTS create the Baseline and authorise the release
5. Development Integration Release Team update PinICL calls with Baseline details
6. Development Integration Release Team route calls direct to the Originator (normally Testing) by responding with response category "Fix released"
7. The Originator (Testing) conducts a test, closes the call (or routes it back to Development Team if the original problem has not been resolved).
8. In parallel with other work, Design can monitor the fixes as required and discuss with the appropriate teams any potential issues.

Development Team fixes error in Fast-track call

A Fast-track call requires joint authorisation from Product, PIT, and Testing Managers.
Each call forms a separate Work Package.

1. Development Team:

- adds WP number in top reference (PWY_WP_nnnn)
- deliver Work Package into Configuration Management (PCMS)
- routes the PinICL call to PIT
- voice prompts the PIT Manager and their own Team Leader

2. Work Packages are processed through PIT and SPTS who record progress on PCMS
3. PIT / SPTS internal process promotes fix into Baseline
4. PIT update PinICL call with Baseline details
5. PIT routes PinICL call direct to the Originator (normally Testing) by responding with response category "Fix released"
6. The Originator (Testing) conducts a test, closes the call (or routes it back to Development Team if the original problem has not been resolved).
7. In parallel with other work, Design can monitor the fixes as required and discuss with the appropriate teams any potential issues.

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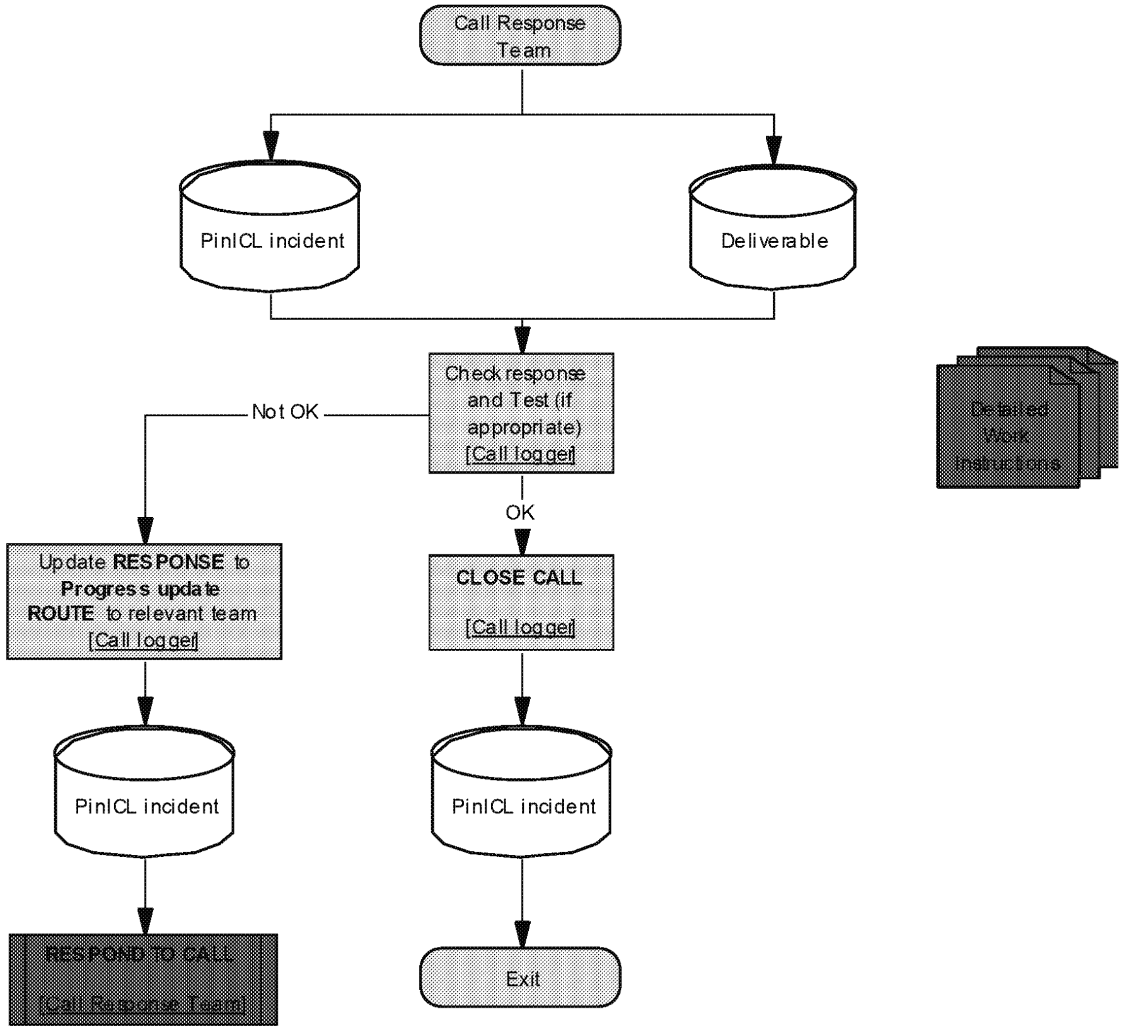
11. Process Flow - Test and Close Internal Call



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Process Owner : PinICL Problem Manager

Process Objective(s) : The scope of this process is to cover the acceptance and/or testing and closure of internally raised incidents.

Process Rationale : The process details are built round the facilities of PinICL and the flowchart uses PinICL terminology. In particular, PinICL commands are shown in **BOLD** and the diagram refers to specific **RESPONSES**.

In Respond to Call, a response has been made on PinICL; this response has to be accepted (by testing or otherwise) and the call closed on PinICL. If the response is rejected, then the process returns to Respond to Call.

Entry/Input(s) : Call with response on PinICL

		Deliverables (where a fix is provided)
Resources	:	Original logging team
Sub Processes	:	None
Work instructions	:	Test and Close Internal Call (see section 12)
Exit/Output(s)	:	Updated PinICL call which may be closed.

12. Work Instructions for Test and Close Internal Calls

1. If the call has resulted in a software fix, you need to test the new code.

2. If the call has resulted in a final response without a software fix, you need to approve the response

3. If you are satisfied, enter a summary in the **New Progress Text**

   For example, "This fix has been tested successfully." together with further details if useful.

   The call should reach you in **Final** status. Click on **Close Call** and then **Send**.

4. If for some reason the call status is not **Final**, you need to investigate why the call has not followed the normal life cycle. If possible, get the team which sent the call to you to change the call to **Final**. As a last resort, click on **Close Call** and then **Send**. This will respond with a Call Response screen; select Response Category **8 - Administrative Response** and add suitable **Response Text**
   Click on **OK.**

5. If you are not satisfied with the response, and want to return the call, click **Respond**, update the **Response Category** to **2 - Progress update** and **Route** the call to the relevant team for further attention. (It is good practice to discuss this with the relevant team to avoid calls bouncing backwards and forwards.)

6. If you are not satisfied with the **Response Category**, but are happy to close the call, click **Respond**, update the Response Category to an appropriate value (see section 15), click **OK** and then **Send**. You then have to open the call again and click on **Close Call**.

FUJ00098253

13. Work Instructions for General Facilities

Set Up Options

The PinICL Administrator normally sets default values for new users. You may need to change these, especially if you move teams.

Call logging defaults are defined in the menu **Options/Call Details Defaults.** The recommended values are:

User as Contact
Show audit details with progress text
Default Call Type as "**P - Product error**"
If you are a member of more than one team, check that your **Team used for Call Logging** is set appropriately.

Most users will use one of call types **P** and **T**. Do not use the others unless you are given specific instructions. The list of possible call types is

Call type	Description
A	Administrative use
L	Live use error
M	Model Office raised by SIS
N	Model Office raised by PDA
P	Product error
R	Release Notice Forum
T	Technical query

Call summary defaults

All users have a stack of open calls that can be displayed. The defaults are defined in the menu **Options/Call Summary Defaults**. The recommended values are:

Set **Display on System Entry** in top left box and select both **Where User is Assignee** and **Where User is Call Logger.** Team leaders should use the **User's Team** option; other team members may choose the **User only** option unless they need to monitor calls for other team members. If you use **User's Team** option, select the teams required.

[NOTE - at the time of writing, there is a known error such that calls may be omitted from this display summary. See Knowledge Entry PK0000209 for latest status.
It occurs if you are a member of more than one team and you have your Options/Call Summary Defaults set as:
Where "User is Assignee" is selected AND teams = All user's teams AND where "User is Call Logger" selected (regardless of whether you select a single team or All user's teams)
It appears to provide correct results if you select a single team for "Where User is Assignee" or do not select the "Where User is Assignee" option.

It is RECOMMENDED that you unset the "Where User is Call Logger" option and you obtain this information via a stored Search.]

Define Search

To do this, select **Generate special query** from **Call/Search** and click on **OK**. On **Call Search** screen, specify a **Search Title**

Use pull down menus to construct selection tests. Click on **Add Phrase**. Additional tests can be added. A maximum of 5 tests are allowed (although with "long" clauses, the maximum may be 4). If a mixture of **ANDs** and **ORs** are used, you should insert brackets in the generated syntax.

If you want to change the default sequence, unset the button in the **Contents and sequence to be as on default summary display**; select field from **display fields** pull down menu in the bottom right corner and click on **Add**. If you want to delete a field from the sort sequence highlight it and click on **Delete**.

Click on **OK**. When the search is displayed, you may change the layout by:

You can extend or contract the width of a column by pointing and holding down the mouse on a column divider in the column heading area and moving it to the left or right.

You can move a column to another position by pointing and holding down the mouse on a column heading (which highlights the column heading) and then dragging and dropping it into the required position.

You can sort the summary list on a particular column by pointing to a column header and clicking on the right mouse button.

To complete the setting up of this as a standard search, click on **Save Layout** at the bottom of the call summary screen.

Create a subset of a summary display

If your list of calls is long you may wish to limit your display to a subset of the full list. You should:

With arrow, move to first call and press Return
With arrow, move to last call in group and press Shift+Return

Additional calls can be selected by use of Control+Return (but it is not possible to select additional groups other than by selecting each individual call). Another technique is to select a "super group" as above and then unset individual calls by Control+Return.

You can use a subset of calls for printing; alternatively, press "Subset" to restrict the calls in your summary list.

You can also use the cursor to select calls by moving the cursor to the left-hand side of the list; the cursor changes to a tick. However, the keyboard method above is often easier than use of the mouse.

FUJ00098253

14. Description of Chgd flag

The following is extracted from the user manual:
The default summary displays includes a Chgd column. This is used to flag changes to specific users, although the flags will be shown for all users so that you can see if the person for whom the flag is intended has in fact viewed the call.

The following values, in the first column of **Chgd**, flag information for the assignee or assigned team:

N This is set when a call is routed, manually or automatically, and newly arrives on a team stack. It applies to all members of the team who have opted to display all calls assigned to their team. It will be displayed until the call is viewed by team member or is in some other way updated by one of the team members. It is also set for an individual user when a call is newly assigned to that user; it will be cleared once he has viewed the call details.

C This is set when a user other than the assignee updates a call. It is cleared when the assignee has viewed the call details.

The following value, in the second column of **Chgd**, flags information for the call logger:

P This is set when a plan response has been sent. It is cleared when the call logger has viewed the call.

Note these **Chgd** flags will only show when the summary screen is refreshed and if you have the call displayed on your current list (depending on whether or not you have a subset selected).

15. Response Categories

Response Categories have a **Status** of **Pending** or **Final**. When you supply a **Pending** response, the call remains with you unless you **Route** the call elsewhere. When you supply a **Final** response, the call automatically transfers to the originator (call logger).

The response categories vary according to the **call type**.

The current values available for call types **P** (Product error), **L** (Live) and **M/N** (Model Office) are:

Pending	**Final**
1 - Evidence required 2 - Progress update 3 - Product error diagnosed 4 - Product error fixed 17 - TL Confirmed (call types N/P)	5 - Published known error 6 - Enhancement request 7 - No fault in product 8 - Administrative response 9 - Avoidance action supplied 13 - Fix released 16 - Duplicate call

[The following **Final** categories have limited use:
100-299 for call types **L, M, N** should be used only by the SSC.]

The current values available for call types **T** (Technical query) are:

Pending	**Final**
2 - Progress update 17 - TL Confirmed	6 - Enhancement request 9 - Avoidance action supplied 12 - Answered 16 - Duplicate call

The current values available for call types **A** (Administrative use) are:

Pending	**Final**
2 - Progress update 17 - TL Confirmed	6 - Enhancement request 8 - Administrative response