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0.0 Document Control

0.1 Document History

Version No.	Date	Reason for Issue	Associated CP/PinICL No.
0.1	15/02/00	First Draft for review	N/A
0.2	08/06/00	Second draft for review	N/A
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1.1	21/01/02	Annual review	N/A
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2.0	18/02/02	Approved version following email review of 1.2	N/A

0.2 Approval Authorities

Name	Position	Signature	Date
Graham Chatten	Programme Office Manager		

0.3 Associated Documents

Reference	Version	Date	Title	Source
DE/PRO/015			ICL Pathway Development Directorate Incident/Defect Management	PVCS
CM/MAN/009			PinICL Training Manual	PVCS

Unless a specific version is referred to above, reference should be made to the current approved versions of the documents.

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0.4 Abbreviations/Definitions

Abbreviation	Definition
BTC	Business & Technical Conformance; now known as PTU (Pathway Testing Unit)
CP	Change Proposal
EDSC	PinICL name for team now known as SSC.
HSH	Horizon System Helpdesk
KEL	Known Error Log
PTU	Pathway Testing Unit
QFP	Quality Filtering Process (a group containing representation from the Delivery Units, PTU and Customer Services)
RMF	Release Management Forum
SMC	Systems Maintenance Centre (First line unit support for Live Calls)
SSC	System Support Centre (Second line support unit for Live Calls) Known as EDSC within the PinICL system

0.5 Changes in this Version

Version	Changes
2.0	Minor changes from review of version 1.2

0.6 Changes Expected

Changes
This document may be changed to reflect feed back or changes in working practice.

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0.7 Table of Contents

1.0 Introduction

This document will assist the usage of the PinICL system by explaining what the key fields are and how they should be used.

PinICL is the incident logging system for ICL Pathway Ltd. It is available for access by Pathway members of staff and must be used accurately and professionally. PinICL is a tool to enable incidents to be raised, progress to be monitored and resolutions to be documented; it is NOT to be used as a forum to air disagreements, to have discussions or to promote viewpoints. PinICL content is available to all PinICL users including Senior Management, and once sent the contents of a Call update cannot be erased from the audit record.

As a PinICL user, it is important that you are aware of the status of the Calls raised either by yourself or within your team, and that you monitor their progress at least daily. If you feel a Call is not receiving the attention it warrants then escalate the issue, either by telephoning or emailing the department concerned whom you feel should be doing something about it, or speaking to your Team Leader for them to raise awareness. Be aware of those Calls that have a fix available, as you may be able to take the fix onto the rig and re-test.

Statistics are drawn from the PinICL system from which a quality status is inferred. It is important that this is not misleading in any way.

Additional information is available in CM/MAN/009 (PinICL Training Manual)

2.0 Scope

This document sets out to describe the following:

Target Releases

Product Groups

Reference Values

Priority

Call Types

Response Categories

Action

(Contact) Details

Call Effort

Root Cause Analysis

Clone PinICLs

Summary line

Known Error Logs

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3.0 Target Releases

For the current available set of Target Release values, scroll through the Target Release Drop Down field in any Call Details window.

For Live Calls, the Target Release field is provisionally set by a member of the SSC to the release on which the incident occurred. For all other Call types it is set to the system default of "Unknown". The field may only be changed by people with Local Administrative capability (or greater). It is normally set to a value agreed between the members of the QFP or RMF as appropriate.

As the project moves forward, old Target Release values are removed and new values are introduced.

4.0 Product Groups

When you open a new PinICL Call, the system will make you select a Product Group Value. For preference, you should also select a product.

For the current available set of Product Group values, click the Product button on any Call details window then scroll through the Product Group Drop Down field in the Product Information window.

For the current available set of Product values, click the Product button on any Call details window then scroll through the Product Drop Down field in the Product Information window.

Each product is unique and is a member of one product group only. If you select a product group, the product drop down list will be reduced to those products that are members of the selected product group.

If you cannot find the product you believe to be in error in the product dropdown list, use the most appropriate product containing the word "unknown", and ask the PinICL database administrator to consider including the product name you searched for and failed to find. He will either include it or explain why it will not be included.

Many products may be associated with a Call. Only one (the subject product) can be viewed from the Call Details screen. You can set the subject product from the list of associated products.

If the problem described in the Call causes Delivery Unit staff to fix an error in one of their products, then Delivery Unit staff member must add this product (if it is not in the list) and set it as the subject product.

Within the same window as Product Groups, there are other non-mandatory fields:

Operating System – The operating system for which this Call relates.

Platform – Hardware on which products run.

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5.0 Reference Value

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 each Reference Type, an expected format will be shown where applicable for the reference value.

More than one reference can be added. Ensure that the one most relevant to the Call's current position in its lifecycle is marked as the Top Reference (and is therefore the reference shown in the Call Details window).

6.0 Priority

Priority	Description	Days to Fix
A	Programme Stopped	1
B	Progress Stopped	3
C	Progress Restricted	5
D	Non-urgent	10

The Priority of the Call indicates its importance to the Programme.

These are generally interpreted as:

A – Critical error which is stopping any progress on that particular rig, it cannot be worked around and will cause the test windows not to be met. It is only possible for there to be one priority 'A' Call on a rig at any time.

B – Highly significant error that is stopping any further progress either on the rig or with the script being executed on the rig, e.g. the overnight schedule cannot run due to data errors.

C – An error which affects how one aspect is working. This can be either a data problem where invalid data is being written to the database or a code error where the user is unable to use a particular client.

D – Insignificant and usually cosmetic error, either a documentation error or spelling error on the system, which always has a work around.

The priority to be chosen is very dependent upon the IMPACT being caused by the problem to the current test cycle and testing window. If in doubt about the priority then speak to the team leader, but don't delay raising the Call and expediting it if it is of a critical nature.

During particular cycles, e.g. Integration Testing, Calls will tend to be raised with the highest priority they can warrant, as their quick resolution is critical. A Call priority may also be

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lowered if an acceptable circumvention has been supplied. It would not be closed however, until the full fix has been re-tested.

Selection of priority tends to be subjective. Over use of the higher priorities negates the value of the priority system. Testing Team Leaders must therefore ensure a realistic Priority is allocated to the Call before it is progressed further.

7.0 Call Types

For the current available set of Call Type values, scroll through the Call Type Drop Down field in any Call Details window.

When opening a new Call, you are responsible for ensuring that the Call Type is correct. When you were set up as a PinICL user, you were given a default Call Type appropriate to the team(s) you were a member of. As long as you remain with that team, the default will probably be correct. If you need to change the default, select Options from the main menu, then "Call Details Defaults".

Select an appropriate Call Type from the pull-down list if your default is not appropriate. The Call Type is used to determine the phase of the product lifecycle in which the incident was found. E.g. Call Type 'L' is for Live Calls, and may only be used by SSC.

Currently, the main types that we use creating a new call are:

Call type	Team
B	BTC Bus. Int.
C	Cloned calls – not used when logging new calls
G	BTC Rel Mig
L	EDSC (SSC)
P	Any other team not covered by this list
R	RelMngmntForum
S	Any System Test team
V	BTC IntgrtyVol
Y	SecurityPolicy
Z	Problem Mgt

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8.0 Response Categories

Response categories available for use vary depending on the Call Type currently set for a given Call. For the Response Categories available for a particular Call Type, open a Call of that type, click on the Add Text/Response button and scroll through the Response Category Drop Down field in the Add Text/Response window.

The Response Category is a mandatory field which denotes the Call status within the lifecycle, split between four stages Open (new Call), Pending (work in progress), Final and Closed; it identifies the type of response given to the contact for a Call.

The essential difference between a Pending response and a Final response is that a Final Response is routed back to the originator by the system; a Pending Response leaves the Call with the currently Assigned Team/Assignee.

9.0 Action

Use of the Action functionality in PinICL is not required or defined by the Incident/Defect Management process [ref. DE/PRO/015]. It is nevertheless available for use within the system and occasionally used.

The most frequent reason for using the Action facility is to make a Call visible to another team while keeping it assigned to your own team. If you are a member of the Actioned Team and can see no further value in its being visible to your team, remove the action.

10.0 (Contact) Details

Contact details are maintained centrally for every registered user of the PinICL system. The contact details of the person raising a new Call are linked to the Call when it is created. Subsequently, the contact details may be changed either to make a different user the first point of contact for the Call or to amend the details (e.g. telephone number) of the current user. Note that amending the details for the Contact from within a Call details screen does not change the centrally held details.

When a final response is logged, the system automatically routes the Call to the currently named contact in the Call details screen.

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11.0 Call Effort

You are asked to input the Call Effort field when you route a call to another user or team, or when you close a call.

You need to input a specific value only if you are the team/individual involved in resolving the fault detailed in the Call; generally this will be either Development or Design. The effort is required in hours (to one decimal place), e.g. if one and a half hours was the time taken to fix, then 1.5 should be entered.

When you are asked for the Call Effort at other stages of the call life cycle, it is sufficient to enter 0 (zero); in particular, this applies for Release Management Forum and Problem Management calls (call types R and Z).

Here are a few other guidelines:

- We recognise that there may be other Calls or CPs involved; sensible and practical management judgement should be applied in apportioning the time.
- If you are working on a call assigned to another user, you need to provide your effort to the person who moves the call on; similarly, if you are routing a call on to another team, try to find out the effort used by other team members.
- If you are working on a call assigned to another team (which may be sensible to avoid "pingponging" calls backwards and forwards), then you should report your effort to the assigned team as above.
- We expect users to apply reasonable endeavours; we recognise there will be some difficulties and that users will be working under pressure.
- If you are routing a call to a team member without doing work, entering 0 hours may be reasonable.
- If you make a major error, e.g. enter 100 hours rather than 10 hours, please notify Pathway PinICL Helpdesk with details of the call number, date and time, and the wrong and corrected effort; the extracted data will be adjusted.

12.0 Root Cause Analysis

The main concept of Root Cause Analysis is to ensure the same errors do not occur twice.

The Route Cause is specified on the same popup as Call Effort. When the Call logger first routes the Call to another person or team, the system will insist on being supplied with a value. At this point, the most frequently used value will be "99 General – Unknown". As the call is analysed, the value should be refined; often the most appropriate person to do this is the one who finds the reason for the Call. When the Call is closed, the system will not accept "99 General – Unknown" as a valid value. (Note that currently, this check is not applied when live calls are closed via PowerHelp.)

13.0 Clone Calls

A Clone Call is a copy of an original Call, used to manage the delivery of equivalent fixes into multiple baselines or for workaround solutions.

To create a Clone Call, open the Call you want to clone, then from the menu options select: **Call**, **Clone.** This prompts you to confirm that you want the original Call to be cloned and tells you what the new number will be. The clone Call is then displayed on screen. The Clone Call is a precise copy of the original in all respects except that:

- The summary line contains "Copy PCnnnnnnn" preceding as much of the original text as can be fitted into the text box.
- The Target Release is set to Unknown
- An additional reference exists identifying the original Call.

You can modify the clone Call as necessary to reflect its purpose for example:

- Set Target Release to that required
- Change Priority based on urgency with which a fix needs to be made
- Add any additional required References
- Add progress text/response.

14.0 Summary Line

The summary line is there to provide a succinct textual identifier for a Call.

Some teams use short conventional prefixes to any descriptive free format text, to maximise information provided and/or aid searching for and grouping of Calls. For example testing teams might use MP1, MP2 etc. to denote and/or differentiate between calls raised in Main Pass 1, Main Pass 2 etc.

These conventions cannot be systematically enforced, but users are asked to respect them when they see them by not changing them.

15.0 Known Error Log

The KEL - Known Error Log, is not part of the PinICL system, but is closely allied to it. It is a database (owned by SSC) containing descriptions of problems (and solutions where known) which have arisen in the past, thereby giving access to readily available fixes at any time.

<u>Why Raise a KEL entry</u>

The KEL is searched on every Call raised to the SSC - it is part of the HSH/SMC procedures that the KEL MUST be checked prior to passing a Call from Powerhelp into PinICL. The

SMC have filtration targets placed on them which includes negative points for Calls passed to the SSC which are subsequently closed as Known Error.

How to Access SSC Web Site

Log onto the ICL Intranet.

Access web site:

IRRELEVANT

Enter your allocated username and password (obtainable via SSC).

How to search KEL Database

From the main menu list-box, highlight 'Searches'.

Select 'KEL Database Search'.

Using specific keywords, enter a brief description of the problem.

Tailor the list-boxes to narrow the search. (For detailed information on how to search for KEL entries, select the instructions option at the top of the screen.)

Press Execute Query button.

You will be given a list of previous KEL entries related to your query.

Select the blue text (a KEL) to view in more detail.

How to create KEL

From the main menu list-box highlight 'Searches'. From the submenu select 'Create KEL Online'.

Then it is simply a case of completing the boxes. (For more information on how to create KEL entries and the type of data required in the fields, select the help option at the top of the screen.)

When completed, select the Create KEL button.

Update Existing KEL

Find the KEL you want to update (this is done by following the 'How to Search KEL Database' instructions above).

With the KEL in full view, go to the bottom of the screen and select the KEL Reference.

This will bring you to the Update KEL screen, where you can type over the contents of the original KEL. (For more information on type of data required in the fields, select the help option at the top of the screen.)

When all updates are complete, press Update KEL.

Process of approval for KEL entries by SSC

A member of the SSC vets KEL entries created or updated by members of staff who are not members of the SSC before they are made visible to the whole audience.