



IP Handover

Post Office Account – Service Delivery

Problem & Major Incident Manager

This document covers all basic instructions for standard weekly and monthly work taken out in the year 2015/16 that is transferable for the next IP in year 2016/17. Not all aspects may be of use as roles change throughout the year.

Note Jan 2018: Document updated to reflect changes on POA Account.

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1. Problem & Major Incident Management

1.1 Weekly Tasks

1.1.1 Virtual Whiteboard Clean-up

At the beginning of each week, it is beneficial to perform a simple tidy up of the Incident Whiteboard found on SharePoint:

Irrelevant

This consists of aligning closed incidents on TfS in the Virtual Whiteboard (VWB).

1. Open the VWB
2. Month by month check for open incidents by filtering out those that are not labelled as closed (Closed – 'Y')
3. Open TfS. Copy the incident number into TfS and check if incident is closed (this is in the top right corner – 'Active' if 'No', then the incident has been closed, if 'Yes', then the incident is still open)

The screenshot shows the TRIOLE Service Desk interface. At the top, there's a search bar with 'Incident' and a 'Go' button. Below the navigation menu, the incident details for 'A12360790 Event Detail' are displayed. The 'Active?' status is circled in red, indicating it is 'YES'. The interface includes sections for 'Detail' and 'Summary Information'.

Affected End User		Reported By	Preferred Language	Active?
POA-SMC1		Akash	English	YES

Detail				
Classification	Status	Incident Type	Recorded Method	
O-Operational/OP02 Central Systems Software failure	Open	Regular	EM Event	
Logged By:	Assignee	Group	2nd ary Assignment Group	
Sharma, Akash		POA-SMC1		
No. of Users	Impact	Urgency	Priority	
Less than 10% of user base	3	3	5	
Change	Problem	Call Back Date/Time	Configuration Item	
Caused by Change Order	External System Ticket	Outage Start Time	Outage End Time	

Summary Information	
Summary	Total Activity Time
<TMSNX_CAPO_A_B> Error Message: Handshake retries exceeded on PI 03 Socket 01	00:13:06
Description	
Observed below critical alerts.	
LPRPNAC001 <TMSNX_CAPO_A_B> Error Message: Handshake retries exceeded on PI 03 Socket 01 16/05/2016 10:13:08 1 LPRPNAC004 <TMSNX_CAPO_B_B> Error Message: Handshake retries exceeded on PI 00 Socket 00 16/05/2016 10:11:34 1 LPRPNAC004 <TMSNX_CAPO_B_B> Error Message: Handshake retries exceeded on PI 03 Socket 01 16/05/2016 10:11:25 1	

4. Change the 'Closed' status in the VWB to 'Y'.
5. Update the 'End Time' to reflect when the incident was resolved. To do this you need to read through the logged comments in the incident to find the most relevant update showing when the incident was resolved.
6. Update the 'Root Cause' to reflect what the cause of the incident was. Similarly, to do this you need to read through the logged comments in the incident to find the most relevant update for the cause of the incident.
7. Repeat this for all open incidents in the VWB, this may take a while so spread it over the week as a **background task** if need be.

1.1.2 ATOS Problem Spreadsheet

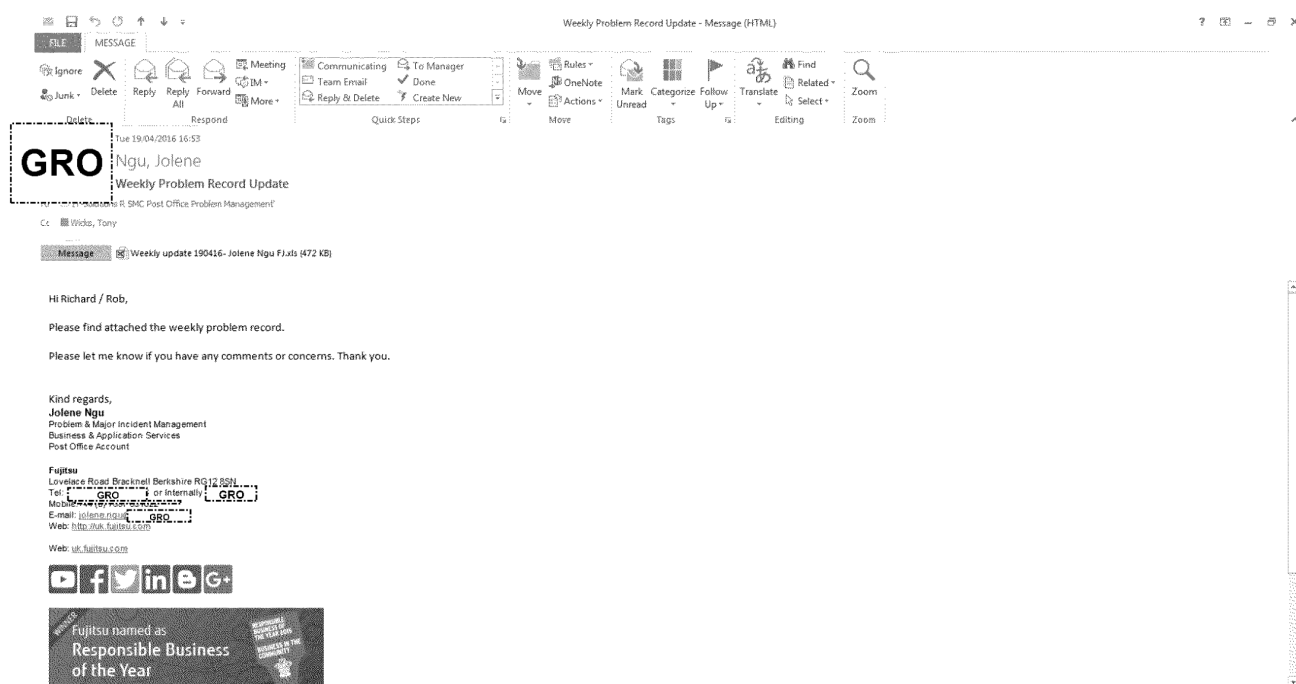
Every Tuesday afternoon you will be responsible for distributing the Problem Spreadsheet to ATOS Problem Management (*Richard Benton & Robert Shaw*) with Fujitsu updates which are discussed on the weekly Problem Management call every Friday.

1. Open the last spreadsheet sent from ATOS Problem Management.
2. For each problem record, insert the date, your name, and then the update for the week
3. For problem records currently sitting with ATOS, update with 'Awaiting ATOS update'
4. For problem records sitting with Fujitsu, each update can be based on any work you or Tony have undertaken in the past week in relation to that problem. If you are stuck for an update, discuss with Tony and he'll point you in the right direction for who is responsible for the work in that Problem Record.
5. When completed, save file with the date you have updated the spreadsheet and save to your documents.

6. Distribute this spreadsheet on the Tuesday afternoon – To: PostOfficeProblemManagement.it-solutions

CC: Tony.Wicks

GRO



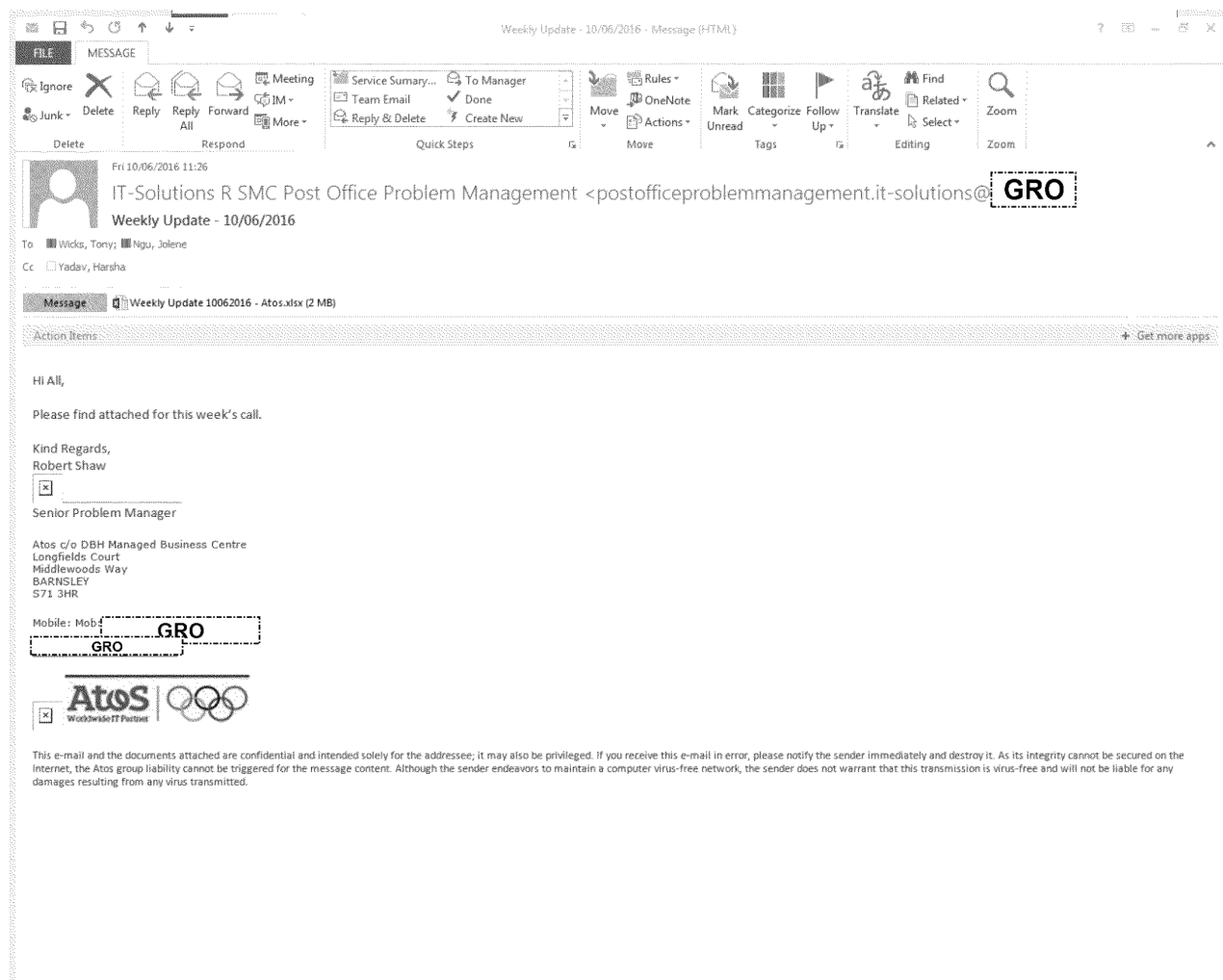
7. At the end of each month, upload the latest updated spreadsheet for that month, including the latest copy sent through from ATOS on the Friday, into the Problem Management SharePoint area in 'Weekly problem Reports':

http://emeia.fujitsu.local/03/sites/T17/00672/Service_Management/Service%20Support/Forms/AllItems.aspx?RootFolder=%2F03%2Fsites%2FT17%2F00672%2FService_Management%2FService%20Support%2FPROBLEM%20MANAGEMENT%2FPROBLEM%20RECORDS%2FWeekly%20Problem%20Reports%202017&FolderCTID=0x012000F5F6C7BF5271FF48BBBD895BD2F87A2B&View=%7B28ABB9A1-0DD6-41FE-957D-1E43327616FC%7D

1.1.3 Problem Management Call with ATOS

Every Friday morning, you and Tony Wicks hold a Problem review call with ATOS Problem Management to discuss the ongoing problem records within the spreadsheet. ATOS will send a spreadsheet with their updates on the Friday morning before the meeting which will be discussed. Before each meeting it is best to discuss these with Tony Wicks and make sure you are set for discussion with the customer before entering the room unprepared. The call consists of going down each Problem Record and giving a view of its latest status, followed by an AOB opportunity.

Before every meeting, Atos Problem Management will send through an email with the updated spreadsheet attached. This will be the spreadsheet that is used in the discussion on the call. The example of the email received is as below. Attached is also the example of the spreadsheet.



Weekly Update
10062016 - Atos.xlsx

1.1.4 Action Spreadsheet

As a result of Major and Post Incident Reports, there are a number of actions which can easily become difficult to manage with a high number of reports open at once (see sections 1.2 & 1.3), so we have a central spreadsheet where we keep record of all the actions from both Major and Post Incident Reports. This can be found at:

http://emeia.fujitsu.local/03/sites/T17/00672/Service_Management/Service%20Support/Forms/AllItems.aspx?RootFolder=%2F03%2Fsites%2FT17%2F00672%2FService_Management%2FService%20Support%2FPost%20Incident%20Report%20-%20Action%20Spreadsheet&FolderCTID=0x012000F5F6C7BF5271FF48BBBD895BD2F87A2B&View=%7B28ABB9A1-0DD6-41FE-957D-1E43327616FC%7D

Your role is to maintain this spreadsheet:

1. Whenever a new MIR/PIR is generated, add this to the spreadsheet with all of the actions associated.
2. When an action is closed, move this to the closed tab and give a summary of closure.
3. At the beginning of each week, send the spreadsheet out to all action owners via email and copy in Steve Bansal – as a reminder of the urgency to complete their actions to aid in lessons learnt to avoid repeat occurrences.
4. If you get no response, send individual chasers and even phone / set up meetings to discuss progress with action owners.
5. If you get an update, place this into the spreadsheet and continue tracking.

1.1.5 OBC19 Spreadsheet

Every Wednesday the Release Management hold an OBC19 Review Meeting to discuss issues relating to file transfers via the Post Office Data Gateway (PODG): new PODG routes deployment, routes deletion, progress of PODG incidents etc. You will be asked to update the last 2 tabs of OBC19 Spreadsheet – PODG Issues and PODG Decommissioning tab.

PODG issues tab is updated by adding new incidents that might be raised for file transfer issues. Include the client name, PODG route name, Tfs and ATOS reference and a brief description of the issue. Newly added incidents and updates need to be marked in green.

IRIS	HRSAP_IRIS IRIS_HRSAP	A16495624/I10486260	We (FJ) have been unable to connect to the 3rd Party Server (IRIS) since 07:20 on 2nd August 17 and hence we have a back log of files awaiting transfer. It would appear that ATOS might be having problems identifying who they should be contacting; the incident was raised with UK.3rdP.CSC.STERIA.SAPHR. A company called Lumesse (Lee Pearce) were involved in the testing phase back in 2012. Paula Hillsdén provided contact details for Lumesse representative. We (FJ) are awaiting ATOS IM to liaise with the third party representative. The third party (Lumesse) performed an IP address change at their end on the 2nd Aug 17. The change was unannounced to both ATOS and FJ, however there had been some communication between POL and Lumesse. An OBC request (OBC105 – Route Change with Network Changes) now needs to be submitted into FJ from ATOS. There are currently 28 files awaiting transfer into IRIS. <u>06/09/17</u> There are currently 42 files back logged for the PODG route HRSAP_IRIS.
COOP Bank	APS_TXN_COOP	A16631311/I10525781	The PODG Client (COOP Bank) requested a file resend (COA00077.CIF) via the ATOS Service Desk. The FJ support team confirmed that the file had been successfully supplied into the 3rd Party at 22:15:38 (28/08). The ATOS Service Desk were advised that an OBC111 request and PO number would be required to allow for the file resend to take place. We are currently awaiting further feedback from the ATOS Service Desk. We did chase for an update on the 4th Sept 17.
BRANDS	MONEYCORP_BRANDS	A16642264/I10532683	Initial file transfer failure observed on 1st September at 18:15. FJ UNIX determined this to be a reoccurrence of an issue seen in A16542995/I10503277 whereby the third party deleted the /IPTMP directory.

Every day SMC Team send an update on the PODG incidents (*PODG calls logged between...*), so check these in the first instance. Still, if you are unsure what incidents to add, request Steve Gardiner for assistance. He normally attends the meeting as well and has access to PODG Reporter to check file activity on a given route (if Steve is unavailable, FJ SMC and FJ Unix may assist in checking).

The second tab is PODG Decommissioning issues. These are incidents raised for PODG routes that are no longer operational but have not been yet deactivated. There are normally no updates on this tab so just change the dates. Once every 2-3 months you might approach Steve Bansal to find whether he got any update via the monthly Service Review. The update then might look as follows:

WINCOR	PG_TXN_WINCOR	A14191147/I9836115	25/01/17 The last Wincor kiosk was decommissioned on 24th March 2015, with their contract ending on 31st March 2015 for Post Office so there is no longer any contact with Wincor. For an extended period we have been receiving empty files (84 K) in size. This now appears to have come to an end. No WINCOR Post and Go file has been received since the 27th Nov 16 and hence PODG is reporting Warn Expected Time Exceeded and Info Stop Time Expired. Decommissioning therefore required. <u>10/01/18</u> -Brenda Shields (POL) to pick this up with Paula; action no 079 being tracked by Atos/POL
First Rate	APS_TXN_FIRSTRATE_02 APS_TXN_FIRSTRATE_01	A16244673/I10400047	The PODG route APS_TXN_FIRSTRATE_02 was briefly discussed during the OBC19 review meeting (01/02). Email was also received from Paula Hillsdén (ATOS) post the meeting. Checks were performed whereby no file activity seen. File activity checks for the PODG route APS_TXN_FIRSTRATE_01 were also performed. Files 120 bytes in size are being generated (empty files). This has been occurring since at least the 01/11/16. This is as far as PODG reporter goes back to. On 15th Feb 2017 Paula Hillsdén confirmed she had taken up decommissioning of the route with the Project. Checks were performed again and no file activity has been seen this year on APS_TXN_FIRSTRATE_02 and empty (120kB size) files being generated on the APS_TXN_FIRSTRATE_01 route <u>10/01/18</u> - Brenda Shields (POL) to pick this up with Paula; action no 079 being tracked by Atos/POL
UK Border Agency SODEXO	APS_TXN_SODEXO	A16193923/I10399800	<u>21/06/17</u> The overnight APS schedule is now generating empty files of 120 bytes in size for SODEXO (UKBA). This is due to the SODEXO (UKBA) contract being terminated on the 31st May 2017. The related PODG route APS_TXN_SODEXO requires decommissioning <u>10/01/18</u> - Brenda Shields (POL) to pick this up with Paula; action no 079 being tracked by Atos/POL



PODG calls logged
between 28th Decem

1.1.6 KEL Review Forum

The KEL is the master knowledge base for all incidents being progressed through the support chain. It was developed by the SSC who also maintain the servers it runs on.

The KEL Review Forum is a meeting held weekly to update this master knowledge database, accessed via SSC website: <https://ssc.fs.fujitsu.com/SSC3/homepage.jsp>

1. Compile Agenda: The SMC Team are to send through a list of KELs for discussion each Tuesday. It normally contains 10 KELs. These need to be included in the KEL Agenda, along with Criteria for Review. Example below:

Meeting Agenda

1. KELs highlighted for review:

KEL Ref:	Version	Criteria for review	Comments
For discussion at Forum			
RKing1425P	4	SMDB-related KEL. JA comment: Any KEL relating specifically to the SMDB can be demised.	
acha346S	2	SMC comment: Need to discuss about SMC action and priority	
schlatterk5341L	3	SMC comment: We do not deal with EMC anymore, need to discuss if the KEL is still valid.	
acha2117P	1	SMC comment: SMC action & priority not specified	
acha710R	7	SMC comment: SMC action & priority not specified	
acha1518M	5	SMC comment: Need to discuss about priority of	

Other parties may also bring KELs to the forum, but SMC are the primary source.

2. Send out Agenda: You need to distribute the Agenda once all KELs are received (Wednesday afternoon at the latest) to all mandatory participants and the FC.IN.DL SMC MANAGEMENT **GRO** dist. list. You may invite other parties if they want to participate.

Title: Fujitsu – POA KEL Review Forum

Invitees/Attendees

Business Unit	Lead Representative	Optional / Mandatory	In Attendance
POA BAS Incident Manager	Nick Crow (Chair)	Mandatory	
POA BAS Problem & Incident Manager	Tony Wicks (Vice-Chair)	Optional	
SSC/EDSC	Sunil Nellikkentavita (or nominee)	Mandatory	
	John Simpkins	Optional	
SMC India	Rajaram Kuppuramaseshan	Mandatory	
SMC India	Ravula Rajaramana	Optional	
SMC Manager (UK)	Jerry Acton	Mandatory	
GDC Poland (scribe)	Aleksandra Zawislak	Mandatory	
Optional Invitees	To be invited only if advised by NC/TW - relative to the KEL's to be discussed		
SSC/EDSC	Steve Parker	Optional	
Software Development Manager	Nick Lawman or nominee	Optional	
POA BAS Lead SDM & Risk Manager	Yannis Symvoulidis	Optional	
Additional Attendees:			
SSC / EDSC:			

The SSC person then returns comments for the Agenda, and you incorporate those in the file. Agenda then needs to be sent out again in an updated version.

Hold Skype KRF Session: The KRF Meeting takes place **Thursdays** at 14:00. During the meeting you will need to share your screen with participants, presenting the KELs that are being discussed. You also read out the criteria for review & comments (2 screens come in handy...).

Right under the list of KELs for discussion, there's also a table with actions. You are required to request participants about any update and make a note if provided. At the end of the Meeting you do a quick round the table, and if anyone raises an AOB (Any Other Business) item, make a note in a table along an appropriate action no.

5. Any Other Business / for discussion:

No.	Raised by	Query	Assigned to
047040117	RR	KEL: AChambers4350S is related to an old issue which NCR Fixed. The KEL can be ignored it just relates to a previous time we had the same issue and NCR made a change at their end. Consider deactivating. KRF 4/01: Recommend keep the KEL	KRF

Draft KRF Minutes: The notes you make during the KRF later serve you to compile Minutes.

FUJITSU

Meeting Minutes

1. KELs highlighted for review:

KEL Ref.	Version	Criteria for review	Comments
For discussion at Forum			
RKing1425P	4	SMDB-related KEL. JA comment: Any KEL relating specifically to the SMDB can be demised.	SSC comment: Deactivate. KRF 4/01: SMC to deactivate.
acha346S	2	SMC comment: Need to discuss about SMC action and priority	SSC comment: If it is a single service then raise call with 3 rd party(Main service BKAC managed by Postcode anywhere. If multiple service effected then check with Unix and network. If BKAC service involved then P3 call recommending. KRF 4/01: SMC to amend accordingly
schlatterk5341L	3	SMC comment: We do not deal with EMC anymore, need to discuss if the KEL is still valid.	SSC comment: Better to check with Unix. KRF 4/01: SMC to follow up with FJ UNIX.
acha2117P	1	SMC comment: SMC action & priority not specified	SSC comment: Deactivate. PC0229355 resolved this issue and new Cron jobs created for housekeeping. KRF 4/01: SMC to deactivate.
acha710R	7	SMC comment: SMC action & priority not specified	SSC comment: Deactivate. PC0217158 resolved and new baseline released under this peak. KRF 4/01: SMC to deactivate.

Post Meeting Minutes: Save the Agenda as a new file, changing the header, completing the participants list, etc. The Minutes file has to be uploaded on SharePoint as **POA KRF Minutes DD MM YYYY**:

http://emeia.fujitsu.local/03/sites/T17/00672/Service_Management/Service%20Support/Forms/AllItems.aspx?RootFolder=%2F03%2Fsites%2FT17%2F00672%2FService_Management%2FService%20Support%2FKEL%20Review%20Forum&FolderCTID=0x012000F5F6C7BF5271FF48BBBD895BD2F87A2B&View=%7B28ABB9A1-0DD6-41FE-957D-1E43327616FC%7D

The actions following the KRF need to be shared with the assignees (normally SMC get all the actions).

The SMC Management confirms back the actions are completed prior to the next Forum.

If there are KELs with no clear action agreed (i.e. SMC/SSC are unsure how to proceed and need to consult other FJ SDUs), the KELs needs to be published in the next Agenda, until update on KEL is agreed.

FW KELs for
discussion in KRF .msg

RE KELs for

KRF Actions 4th
January 2018.msg

1.1.7 Account Call-Out Rota

Each Friday you need to ensure that the call-out rota for the account has been updated for the following week so each team has sight of cover for both in and out of hours support for the week.

1. Open the account call-out rota SharePoint page

http://emeia.fujitsu.local/03/sites/T17/00672/Service_Management/BCP/Forms/AllItems.aspx?RootFolder=%2F03%2Fsites%2FT17%2F00672%2FService_Management%2FBCP%2FAccount%20Call%20Out%20Rota&FolderCTID=0x01200050C1935F4019924AA797C34E1BB6DC0D&View=%7B0E6CCDCE-03BC-41A0-8080-06CD353E37C1%7D

2. Ensure there is a spreadsheet for the following weeks date and open the sheet

3. Look down the spreadsheet and if there are any gaps, you need to email members from the teams and ask them to provide updates before the end of the day.

4. Ensure the spreadsheet has been updated for our Duty Manager team. If not, discuss with Tony Wicks/Steve Gardiner and ask who is Primary / Secondary Duty Manager for the week and update the sheet accordingly. This also applies for the Out of Hours Duty Manager – this information can be found on the POA OHH Duty Manager Rota provided by Jean Woolley, ask Tony for sight of this if you haven't already been given one.

5. You are also responsible to update the GDC details on the call out rota. The GDC team has a separate rota that you would need to copy the details from and into the Account Call-Out Rota. Their rota can be found at:

http://emeia.fujitsu.local/03/sites/T17/00672/Project_Delivery/Development/GDC/Shared%20Documents/Forms/AllItems.aspx

6. A few days before the end of every month, send a reminder to the GDC team to update their call out rota. You can send the email to [Chethan.Gurumurthy](mailto:Chethan.Gurumurthy@fujitsu.com) **GRO** or [Venu.Anamalla](mailto:Venu.Anamalla@fujitsu.com) **GRO** as they normally manage the schedule.

1.1.8 Weekly Reports

1.1.8.1 Incident Report

Each Friday, you are required to generate the weekly reports for the account from Problem & Major Incident Management. This is handed over to Steve Gardiner on the Friday afternoon who then provides updates on Monday/Tuesday the following week reflecting incidents that occurred over the weekend.

1. Open the VWB
2. Review each incident from the Monday to the Friday that week
3. Only incidents that either have an ATOS incident reference or need to be shared with the customer need to be added. Those labelled 'Internal FJ' are not to be added to the weekly report.
4. For each incident in the weekly report, the summary consists of the incident date, high level summary of the incident, high level root cause & resolution of the incident and Fujitsu/ATOS incident references. If ATOS have not provided an incident reference at the time of producing the weekly report, then leave as 'No ATOS incident provided'.
5. Update the date of the report showing the week ending date, then send to Steve Gardiner in a 'DM Friday-Monday Handover' email, ready for when Steve comes back into the office on Monday.

To see an example report ask Tony Wicks / Steve Gardiner.

Weekly Report 220416 [Compatibility Mode] - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ADD-INS

Clipboard Font Paragraph Styles Editing

Post Office Account
Weekly Report
W/E 24/04/16

Service Management Weekly Report

Service	RAG	Commentary
Incident Management		
Steve Gardiner		18/04 Monitoring reported that 7 external PODG routes associated with POADMIN experienced file upload failures. This was a result of possible firewall issue within the external domain. APOP files are now delivered via Quatrix as a workaround. No issues identified within FJ domain. A23270701 and I8900295 refer.
Jolene Nau		18/04 Monitoring reported critical alerts on CAPO CDG. This is a known problem with the send where very occasionally the send seems to fail but the file has been transferred. The file was received by HP at 20:37 (18/04)
GRO		19/04 Fujitsu Reconciliation Team had requested to ascertain whether there were any issues which may have caused multiple kiosk transactions C4 to be delivered a day late. This resulted in multiple kiosk transactions to appear on our reports moving from state 11 to state 39. The file submitter for the SKs (YesPay) did not provide the settlement file for transactions processed on the 13th which meant there was a day's delay in processing these transactions. No issues identified within FJ domain. A12176428 and I8906811 refer.
		19/04 Monitoring reported external PODG route BRANDS had failed. FJ were unable to deliver file AIS054PrePaidCard_20160419.txt to BRANDS. This was a result of an IP address change within the external domain. No issues identified within FJ domain. Incident A12178907 refer. No Atos reference provided.
		20/04 Monitoring reported critical alerts for low disk space on 'G.' drive on LMIPMIA002. No issues identified within the FJ domain. Incident A12183229, A12196029, I8913627 and I8915208 refer.
		21/04 Monitoring reported alerts for Banking LINK Service. Checks were performed by NT and Networks and no issues were identified within FJ domain. BT will send engineers to sites to further investigate. Incident A12193422 and I8915220 refer.

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1.1.8.2 PEAK Reporting

Each Thursday, you are required to generate a PEAK Report for Steve Bansal in preparation for the Leadership Team Meeting on Friday. The instructions to produce the PEAK report are detailed in the document 'PEAK Reporting' below. To produce this report, you would need to have access to PEAK and FSR (using your TfS user).

As PEAK Reporting is used to keep track of the trend of PEAKs, when there is a sudden increase or decrease of PEAKs, do a little drill down to enable better understanding of why it has happened. Run a query on PEAK for what area you would like to drill down.

There are 3 main spreadsheets to help produce this report. The spreadsheet titled 'PEAK Weekly Totals' contains historical data to help with trend analysis. The spreadsheet titled '16-06-2016' is a spreadsheet created weekly that contains data extracted for the PEAK report of that week. The spreadsheet titled 'TfS Totals' is a template to help produce the report for the TfS section of the PEAK Report.



PEAK
Reporting.docx



TfS Totals.xls



PEAK weekly
totals.xlsx



16-06-2016.xlsx

1.1.9 Out of Hours Duty Manager Handover

The detail for completing this has been extracted from the Problem & Major Incident Work Instructions SVM/SDM/WKI/2399, I have included this in this handover as this is a short daily task you may be required to do at the end of the working day.

Prior to End of Day the day time POA Duty Manager will send an e-mail to the Out Of Hours POA Duty Manager.

1. Log onto Managed Service Change (MSC) system at Irrelevant
 2. On accessing the MSC system select **SEARCH** from the tool bar at the top of the screen
 3. Select ADVANCED SEARCH under the Search Pages.... Tab
 4. In the Top Left 'Text Field' select **Client** Ensure the **Contains** button is selected and **Post Office** is inserted in the text box.
 5. On the first Date Filed row select **Implementation Start** Ensure the **Between** button is selected and type today's date **dd/mm/yy** in the first field and tomorrows date **dd/mm/yy** in the second field for the MSCs which will start implementation overnight.
- To check for over weekend changes, i.e., on a Friday, use the same process but put Monday's date in the second text field.
6. Press the **Search** button
- A table of changes will be displayed.
7. Select the 'Click button to export to Excel' button
 8. When Excel opens, save the spreadsheet with an appropriate name e.g., MSCs POA 29-30 06 15 into an appropriate folder in your work area.
- Use the Duty Manager Call-out Rota instructions above to ascertain the POA OOH Duty Manager for that day.
9. From your Outlook Account create a new e-mail. This is normally sent around 17:15 Monday to Thursday and 16:45 on a Friday.
 10. Title the e-mail along the lines of 'DM Handover'.
 11. The detail normally consists of two focused areas:

From a search on the MSC Database the attached were listed as starting implementation overnight (or over the weekend – as applicable), between **Day & Month** and **Day & Month** (as per the dates above.)

Detail any High Priority Incidents or significant issues, or provide a statement similar to - I'm unaware of any significant issues to handover.
 12. Ensure the e-mail is addressed to the OOH POA Duty Manager as detailed in the rota and copy it to the POA DutyManager mailbox.
 13. Don't forget to attach the list of MSCs created above and then send the e-mail.

1.1.10 7 Day Service slide

By EOB Friday you need to send out a set of slides with a snapshot view of service during the last week. These include figures on incidents raised/closed, completed MSCs, updates to KELs, planned changes etc. (FSC-Forward Schedule of Change).

1. Tfs calls raised and Tfs calls closed. This is retrieved from FSR¹

Irrelevant

Click on Report (top), navigate to Incident (left handside), choose FSR003 *Incidents Work In Progress*. The Tenant is POA, Primary Group – Day, then Report Period – *Use dates* (last Saturday – Friday).

REPORT: FSR003 – INCIDENT WORK IN PROGRESS

FUJITSU

Reports > Incident > FSR003 – Incident Work In Progress

The report then returns all Open and Closed figures.

2. Live PEAKs opened and Live PEAKs closed- this is taken from Peak report produced weekly by the Problem and Major Incident IP. Contact Fatima Ahmed to get the current volumes.
3. Incidents escalated to the day time duty manager -this is gathered from the virtual whiteboard (VWB) and the scan of the DM mailbox.
4. Incidents escalated to the OOH duty manager- refer to the OOH handover emails that are sent through.
5. KELs updated/created - this information is gathered from John Simpkins (weekly mail with KEL updates - attached).
6. MSC completed- this is retrieved from the MSC system. Choose *Client - Post Office, Implementation start - between* and fill out dates (from Saturday till Saturday); example for Friday 12th January 2018 would be:

Client	☐ Contains ☒ Exactly ☐ Doesn't contain	Post Office	
	☐ Contains ☒ Exactly ☐ Doesn't contain		
#Implementation Start	☐ On ☐ Between ☐ Before ☐ After	06/01/18	(and 13/01/18)

The closed/cancelled box needs to be unticked.

7. Incidents caused by change - gathered from the VWB and it will be any rows highlighted yellow.
8. Problem records opened or closed in the last week. For this information talk to the problem controller or a member of the problem team.

¹ If you have no access, contact Sandie Botick. Username & password are the same as in Tfs.

9. Incidents where resilience has worked per design – contained in the VWB. For resilience from year to date filter all the incidents from the beginning of the financial year.
10. Escalation topics – for this talk to Steve Gardiner/ Tony Wicks / Steve Bansal and discuss any ongoing issues from the week. Alternatively, this can be found in POA DM mailbox.
11. 3rd party issues – for this information look through the VWB and the duty manager mailbox looking for incidents that were caused by an issue in external domain.
12. FSC (Forward Schedule of Change) – this is an excel file with a brief list of changes. You access the file via this link:

Irrelevant

Irrelevant

Forward schedule needs to run from the following Monday to Sunday. Copy the bit of the table that is needed (*Activity – Service Impact* columns) and paste into the slide:

Activity	Priority	Title	Start Date Time	End Date Time	Service Impact ?
R16.58	Compliance	R16.58 Renewal of SYSMAN3 TPM SSL certificates	2018-01-08 09:00	2018-01-08 17:00	
IOS Upgrade	Compliance	Citrix IOS upgrade - pi11n1b201[202]-access-live-vrf011	2018-01-08 18:00	2018-01-08 20:00	
IOS Upgrade	Compliance	Citrix IOS upgrade - pi19n1b201[202]-access-live-vrf011	2018-01-08 18:00	2018-01-08 20:00	
IRE11 Trident House DC Planned Maintenance	Compliance	Clean Floor Voids in Tech Halls & Comms Rooms (Non-Intrusive)	2018-01-08 18:00	2018-03-04 08:00	
HDCR R16.20	HDCR/Programme	R16.20 HDCR RHB Migration	2018-01-09 16:00	2018-01-09 20:00	
IRE11 Trident House DC Planned Maintenance	Compliance	Quarterly Air Con Maintenance (Q1) (Non-Intrusive)	2018-01-10 08:00	2018-01-17 08:00	
IOS Upgrade	Compliance	Citrix IOS Upgrade - pi11n1b201[202]-access LST/SV&I	2018-01-11 18:00	2018-01-11 20:00	
HDCR R16.20 Branch Access HBS Migration	HDCR/Programme	HDCR R16.20 Branch Access HBS Migration	2018-01-12 23:00	2018-01-13 03:00	
IOS Upgrade	Compliance	Update failover connections on firewall pairs in IRE19 Firewalls	2018-01-13 14:00	2018-01-13 19:00	
Security Patching	Compliance	OL6 Database Patching	2018-01-13 20:00	2018-01-13 23:55	
Sun 14th Jan		Week Marker	2018-01-14 00:00		
Security Patching	Compliance	OL6 Database Patching	2018-01-14 04:30	2018-01-14 10:30	
Business Continuity test	Compliance	BCT Business Continuity test (Contingency slot)	2018-01-14 10:00	2018-01-14 17:00	
IOS Upgrade	Compliance	Citrix IOS upgrade - pi19n1b201[202]-access LST/SV&I	2018-01-14 18:00	2018-01-14 20:00	

If you cannot access the link, email Lorraine.Elliott@GRO and ask for the FSC for the coming week to be sent.



7 day service
slide.msg



FW 7 day of
service.msg

1.2 Major Incident Reports

As a Major Incident manager, your highest priority role is to manage live service, even more so when there is a high priority incident that can have a potential service impact. In the event of a Major Incident, you alongside the rest of the team will be expected to drop whatever you are doing to manage the issue in the most effective way.

There are a variety of ways and reasons for Major Incidents which you may be involved in, but an important role for the IP is to assist with the documentation that follows. In the event of a Major Incident, we have 24 hours to produce a first draft report to ATOS who provide the detail to Post Office Ltd., detailing the Major Incident, from a specific timeline of events to the root cause and resolution actions taken. The Major Incident Procedure document is useful to flick through and gain an understanding SVD/SDM/PRO/0001.

When producing the Major Incident Report, you will be assisted by the Duty Manager who was running with the incident, who will provide you with a detailed timeline of events, including calls that were made and resolution steps taken by the individual teams. With this information you will do the typing of the first draft using the account template SVM/SDM/INR/2693.

Once you have completed the report, you will review with the relevant parties, e.g. Duty Manager involved and Steve Bansal, before sending the report to Steve Bansal. From this point Steve will make final edits and send to the customer. Your main job is to type up the report and make sure all detail is recorded, Steve will make the decision to remove any unnecessary detail.

1.3 Post Incident Reviews

Following a Major Incident, we will normally hold a Post Incident Review (PIR) internally. This is so all parties involved can discuss the incident, run through the timeline and make sure everyone agrees on the events. In doing so, the aim is to build a view of lessons to be learnt and generate actions to fulfil this in an attempt to avoid any repeat occurrence of the incident.

Your role:

1. Set up the PIR, sending invites to all people involved in the incident (ask the Duty Manager if you're unsure who needs to be involved)
2. Take the minutes throughout the PIR. The minutes will consist of a walkthrough of the incident, including a number of observations. An observation is a point where there could be improvement, or a question is asked as to why it was handled in that way etc.
3. Your opportunity to ask any questions or suggest ways of improving a process to minimise the likelihood of a repeated mistake.
4. Observations made will be tied to actions. Either no further action is required, i.e. the answer is given in the PIR and there is nothing more that can be done OR an action will be generated in accordance to the observation made.
5. Run through the observations and actions at the end of the PIR to ensure all parties are content.
6. After the PIR, you will need to spend some time tidying up the minutes taken, removing points that aren't needed and generating actions etc.
7. Once you are happy with the document and have reviewed with Tony and the Duty Manager then you need to upload the first draft to Dimensions and distribute to all involved for review. You can do this by emailing the document to [PostOfficeAccountDocumentManagement@postoffice.co.uk](#) **GRO**

1.4 Major Incident Report Tracker

As a result of Major Incidents and Post Incident Reviews, the Business & Application Services Team have a tracker to view number of actions created and are with Fujitsu. You will be responsible for maintaining and updating this tracker. This spreadsheet is part of BAS Communication Cell which is for our team meeting on Monday's. To access [this spreadsheet go to](#).

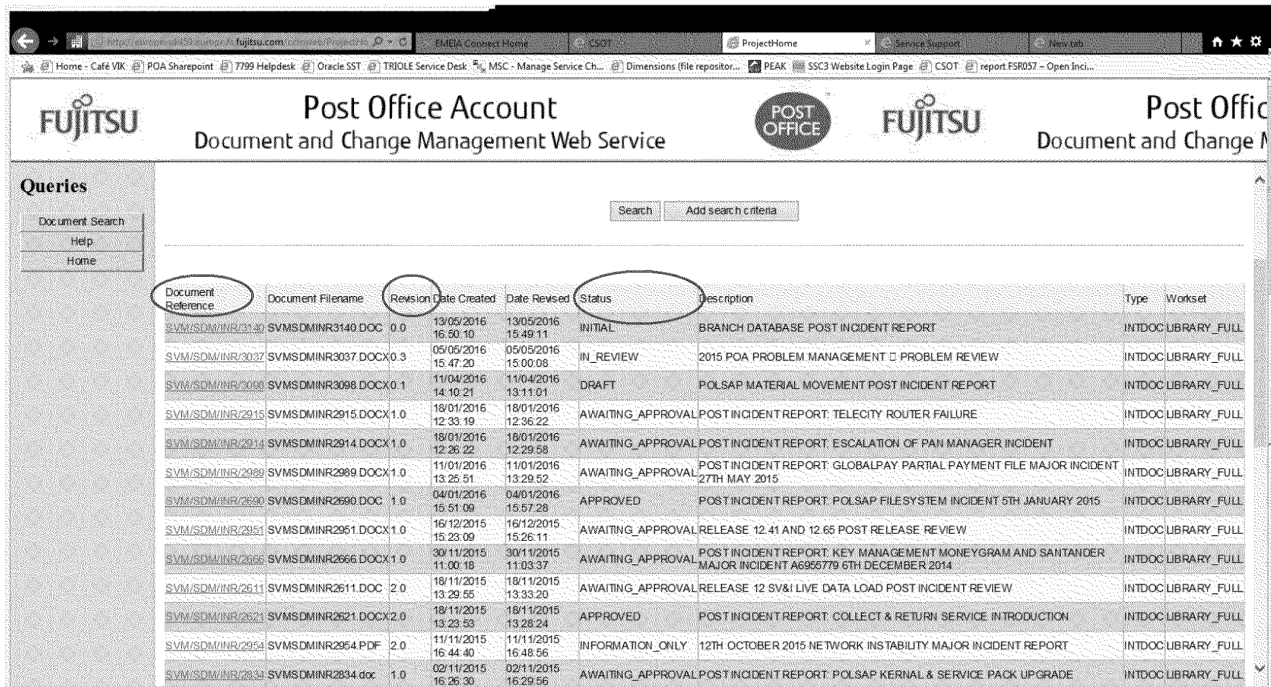
Irrelevant

and select 'MIR Tracker with Macro'. Check out the document and add the MIR/PIR as necessary.

Major Incident Summary	Date of Incident	MIR Document Reference	MIR Version on Dimensions	PIR Document Reference	PIR Version on Dimensions	First Draft sent to Atos	Problem Record sent to Atos	Second Draft sent to Atos	No. of MIR Actions	No. of Open FI MIR Actions	Final Version sent to Atos
Branch Database	09/05/2016			SVM/SDM/INR/3140	0		N/A		4		
BDS Server Memory Leak (MIR)	13/02/2016	SVM/SDM/REP/3099		SVM/SDM/REP/3108		16/01/2016	A11630945		11	2	
POLSAP Material Movement (MIR)	25/01/2016	SVM/SDM/REP/3097	V3 (Information Only)	SVM/SDM/INR/3098	V0.1 (Draft)	29/01/2016	A11500531		19	0	
Network Instability (MIR)	12/10/2015	SVM/SDM/INR/2954	V2 (Information Only)	N/A	N/A	13/10/2015	A10530531	23/10/2015	2	0	
Track and Trace (PIR)	10/08/2015	N/A	N/A	SVM/SDM/INR/2949	V0.1 (In Review)	N/A	N/A	N/A	N/A	N/A	N/A
PAN Manager Issue (PIR)	04/09/2015	N/A	N/A	SVM/SDM/INR/2914	V1 (Awaiting Approval)	N/A	N/A	N/A	N/A	N/A	N/A
Delay in distributing Bereau Margin & Spot Rate Files to those branches on the Oracle 10G Database (MIR)	16/06/2015	SVM/SDM/INR/2800	V2 (Information Only)	N/A	N/A	Yes	A8969361	Yes	6	0	Yes
POLSAP Kernel & Service Pack	14/06/2015	SVM/SDM/INR/2802	V2 (Information Only)	SVM/SDM/INR/2834	V1 (Awaiting Approval)	Yes	A9157767	Yes	3	0	Yes
Cash Declaration (MIR)	05/06/2015	SVM/SDM/INR/2801	V1 (Information Only)	N/A	N/A	Yes	A9157908	Yes	6	0	Yes
GlobalPay Partial Payment File	27/05/2015	SVM/SDM/INR/2787	V2 (Information Only)	SVM/SDM/INR/2889	V1 (Awaiting Approval)	Yes	A8954715	Yes	4	0	Yes
Telecity (PIR)	19/05/2015	N/A	N/A	SVM/SDM/INR/2915	V1 (Awaiting Approval)	N/A	N/A	N/A	N/A	N/A	N/A
Weston Super Mare FAD 445511 (PIR)	10/05/2015	N/A	N/A	SVM/SDM/INR/2794	V1 (Approved)	N/A	N/A	N/A	N/A	N/A	N/A
HR SAP Files (PIR)	07/04/2015	N/A	N/A	SVM/SDM/INR/2748	V1 (Approved)	N/A	N/A	N/A	N/A	N/A	N/A
Disruption to Network Banking Services	15/03/2015	SVM/SDM/INR/2780	V3 (Information Only)	SVM/SDM/INR/2739	V1 (Approved)	Yes	A7941790	Yes	7	0	Yes
POLSAP Filesystem	05/01/2015	SVM/SDM/INR/2734	V2 (Information Only)	SVM/SDM/INR/2690	V1 (Awaiting Approval)	06/01/2015	A7224474	Yes	4	0	Yes

In this spreadsheet, you would need to fill in the details according to the Major Incident Report or Post Incident Review Report. By looking at the MIR/PIR, you will be able to fill in the columns H and J to N. For Columns G and I, speak to Tony Wicks to obtain the dates when these documents were sent out. As a PIR is an internal report, this does not get sent to Atos/POL.

For columns C to F, you would need to access Dimensions. On Dimensions click POA on the left hand side of the screen > Log In > Queries/Search > Document Search > In Document Reference, type 'SDM/SDM/INR'. All MIR and PIR Documents are kept under this document reference. Select 'Latest revisions only' to avoid duplication of documents shown.

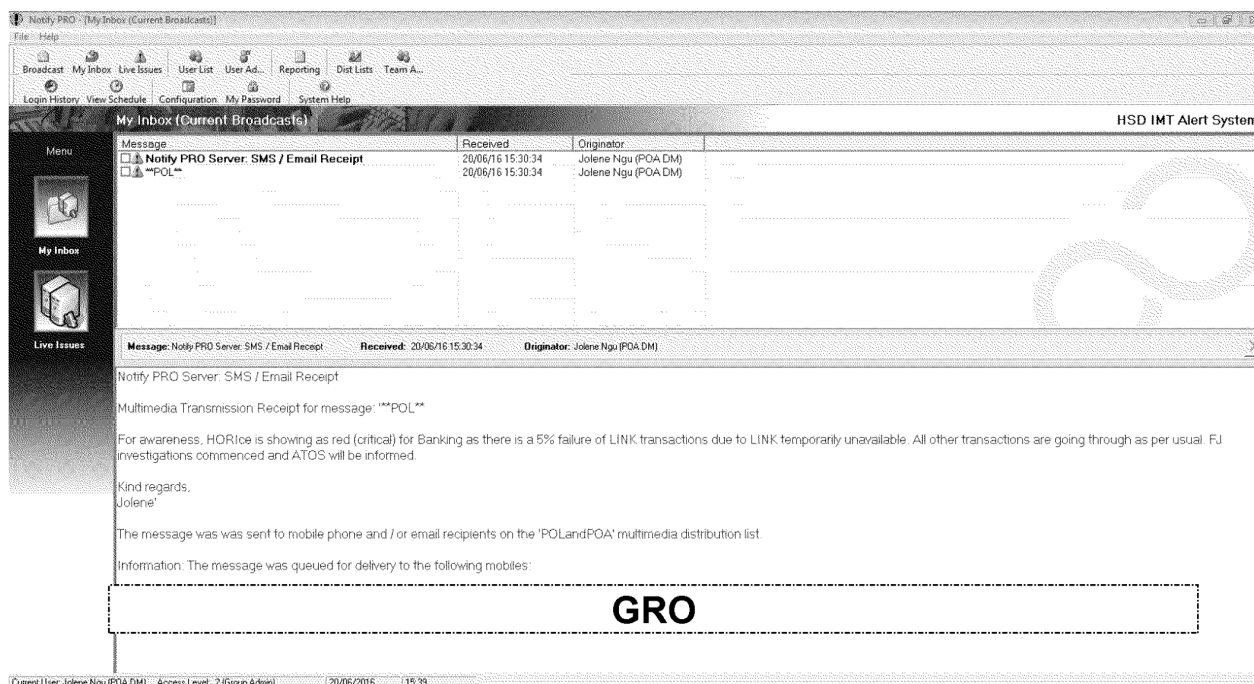


Document Reference	Document Filename	Revision	Date Created	Date Revised	Status	Description	Type	Worksheet
SVM/SDM/INR/3140	SVMSDMINR3140.DOC	0.0	13/05/2016 16:50:10	13/05/2016 15:49:11	INITIAL	BRANCH DATABASE POST INCIDENT REPORT	INTDOC LIBRARY_FULL	
SVM/SDM/INR/3037	SVMSDMINR3037.DOCX	0.3	05/05/2016 15:47:20	05/05/2016 15:00:06	IN REVIEW	2015 POA PROBLEM MANAGEMENT C PROBLEM REVIEW	INTDOC LIBRARY_FULL	
SVM/SDM/INR/3098	SVMSDMINR3098.DOCX	0.1	11/04/2016 14:10:21	11/04/2016 13:11:01	DRAFT	POLSAP MATERIAL MOVEMENT POST INCIDENT REPORT	INTDOC LIBRARY_FULL	
SVM/SDM/INR/2915	SVMSDMINR2915.DOCX	1.0	18/01/2016 12:33:19	18/01/2016 12:36:22	AWAITING_APPROVAL	POST INCIDENT REPORT: TELECOMY ROUTER FAILURE	INTDOC LIBRARY_FULL	
SVM/SDM/INR/2914	SVMSDMINR2914.DOCX	1.0	18/01/2016 12:26:22	18/01/2016 12:29:58	AWAITING_APPROVAL	POST INCIDENT REPORT: ESCALATION OF PAN MANAGER INCIDENT	INTDOC LIBRARY_FULL	
SVM/SDM/INR/2989	SVMSDMINR2989.DOCX	1.0	11/01/2016 13:25:51	11/01/2016 13:29:52	AWAITING_APPROVAL	POST INCIDENT REPORT: GLOBALPAY PARTIAL PAYMENT FILE MAJOR INCIDENT 27TH MAY 2015	INTDOC LIBRARY_FULL	
SVM/SDM/INR/2690	SVMSDMINR2690.DOC	1.0	04/01/2016 15:51:09	04/01/2016 15:57:28	APPROVED	POST INCIDENT REPORT: POLSAP FILE SYSTEM INCIDENT 5TH JANUARY 2015	INTDOC LIBRARY_FULL	
SVM/SDM/INR/2651	SVMSDMINR2651.DOCX	1.0	16/12/2015 15:23:09	16/12/2015 15:26:11	AWAITING_APPROVAL	RELEASE 12 41 AND 12 65 POST RELEASE REVIEW	INTDOC LIBRARY_FULL	
SVM/SDM/INR/2666	SVMSDMINR2666.DOCX	1.0	30/11/2015 11:00:18	30/11/2015 11:03:37	AWAITING_APPROVAL	POST INCIDENT REPORT: KEY MANAGEMENT MONEYGRAM AND SANTANDER MAJOR INCIDENT A6956779 6TH DECEMBER 2014	INTDOC LIBRARY_FULL	
SVM/SDM/INR/2611	SVMSDMINR2611.DOC	2.0	18/11/2015 13:29:55	18/11/2015 13:33:20	AWAITING_APPROVAL	RELEASE 12 SV&I LIVE DATA LOAD POST INCIDENT REVIEW	INTDOC LIBRARY_FULL	
SVM/SDM/INR/2621	SVMSDMINR2621.DOCX	2.0	18/11/2015 13:23:53	18/11/2015 13:28:24	APPROVED	POST INCIDENT REPORT: COLLECT & RETURN SERVICE INTRODUCTION	INTDOC LIBRARY_FULL	
SVM/SDM/INR/2054	SVMSDMINR2054.PDF	2.0	11/11/2015 16:44:40	11/11/2015 16:48:56	INFORMATION_ONLY	12TH OCTOBER 2015 NETWORK INSTABILITY MAJOR INCIDENT REPORT	INTDOC LIBRARY_FULL	
SVM/SDM/INR/2834	SVMSDMINR2834.doc	1.0	02/11/2015 16:26:30	02/11/2015 16:29:56	AWAITING_APPROVAL	POST INCIDENT REPORT: POLSAP KERNAL & SERVICE PACK UPGRADE	INTDOC LIBRARY_FULL	

The screen above will appear and the information you are looking for is in the columns circled in red. Once you have found the PIR/MIR document you are looking for, copy the 'Document Reference', 'Revision' and 'Status' of the document available on Dimensions.

1.5 Notify PRO

This is an ad hoc task as to when an incident occurs (ie: if HORIce is showing red for one of the service). You may be required to send out a message to Post Office Limited or to Tower Leads.



An example of a text message is as above. You should already have an email from the MAC team detailing your log in details to allow you to access Notify PRO.

Check with Tony Wicks before sending out the message. The two groups we normally send out to is ****POL**** which includes external individuals and ****TOWER**** which is internal only.

1.6 CP CT Tracker

As part of the Communication Cell for the BAS Weekly Team Meeting, you will also be responsible for updating the CP CT Tracker. This is a spreadsheet that is used to keep track of the number of days allocated/impacted by the BAS team for a certain Change Proposal (CP). You will not be providing any impacts as this is done by other individuals across the team. To access this spreadsheet, go to **Irrelevant** and select CP CT Tracker.

CP Ref	PWS	CT	CP Title	CT Owner	CT Approval	Expected Completion	Problem and Incident Management	HNG-x Online Services	Governance
1	CP1813	6370	Credence & MDM production data backup request	Jim Young	Out For Impact				
3	CP1809	6356	Variation to HPCR associated with extension of POLSAP Services and Credence Hosting and Support beyond 31st March 2016	Dave Ibbett	Out For Impact				
4	CP1801	6358	Change to Horizon to Credence Interface	Jim Young	Out For Impact				
5	CP1787	6344	Running HNG-X counters on a Verizon supplied Branch Network	Cameron Houston	Withdrawn				
6	CP1784	6341	POLSAP and OpenText (IXOS) Application Migration - Future Transition Backup Data Transfer (Tape)	Jim Young	Out For Impact			NO IMPACT	NO IMPACT
7	CP1777	6334	Barcoding All Parcels Phase 2a - SSK - Completion	David Hinde	Out For Impact			NO IMPACT	NO IMPACT
8	CP1776	6333	Variation to HPCR associated with extension of POLSAP Services and Credence Hosting and Support beyond 31st March 2016	James Stanton	Withdrawn			NO IMPACT	NO IMPACT
9	CP1775	6332	Logical decommissioning of Credence/MDM refreshed infrastructure	Jim Young	Out For Impact			NO IMPACT	NO IMPACT
10	CP1758	6315	GlobalPay Integrity Charges Fee Removal	Colin Webber	Out For Impact			NO IMPACT	NO IMPACT
11	CP1757	6314	Update to Agent Mapping Connect from MoneyGram Service to CDP (Common Digital Platform) and Fujitsu HBS	David Hinde	Out For Impact			NO IMPACT	NO IMPACT
12	CP1756	6313	Extended SSK Automation	David Hinde	Out For Impact			NO IMPACT	NO IMPACT
13	CP1755	6312	Decommissioning of Credence/MDM refreshed infrastructure	Jim Young	Out For Impact			NO IMPACT	NO IMPACT
14	CP1753	6310	Back Office (POLSAP) Integration Review	Jim Young	Out For Impact			NO IMPACT	NO IMPACT
15	CP1752	6309	Change to Bank Holiday Delivery Schedule (Bank Of Ireland)	David Hinde	Out For Impact			NO IMPACT	NO IMPACT
16	CP1740	6297	Decommissioning of Credence/MDM VS	Jim Young	Out For Impact			NO IMPACT	NO IMPACT
17	CP1725	6282	Platform Cloning	Daniel Wicks	Out For Impact			NO IMPACT	NO IMPACT
18	CP1716	6273	Further engagement on Back Office Tower	Pete Newsome	Approved	Jan-16		5 (Preimpacted)	5
19	CP1715	6272	Engagement on BTT Programme	Muhunda Satchithananda	Approved	Mar-16	5 (Preimpacted)	N/A	N/A
20	CP1714	6271	Revised Reference Data Service Changing Application Migration - Backup and	Colin Webber	Out For Impact			2	2

Check out the document and add the impacts and CPs accordingly. As this task is correlated to the CP Impacting Meeting on Tuesdays, you can update the spreadsheet after every meeting to ensure the CP's and impacts are up to date. Details for columns A to E are found in the CP itself. To obtain the CP, go to the BAS SDM Mailbox and open up the email with the CP you are looking for. These CP's are usually sent by PostOfficeAccountCustomerService **GRO**.

Only CP's titled 'Urgent' are added to your spreadsheet. This task is related to the CP Impacting (See 6. CP Impacting Meeting of this document) and Customer Service (See 8. Customer Service of this document).

1.7 HORIce

HORIce is the screen on the right, showing a number of our live services and their running status. Here is a summary of the status colours the screen may show:

Green – Service is running ok

Red – Critical alert, failures within Fujitsu domain

Amber – Failure alerts in the external domain - less of an issue for Fujitsu, but needs monitoring and managing in the appropriate way with ATOS Service Desk to liaise with 3rd party who are seeing high failure counts

Purple – Service is reporting behind schedule - this is a simple call up to the SSC if it prolongs to ensure it is running ok

Blue – Service is harvesting data - this usually only lasts around 30 to 60 seconds and is just updating the latest status, again, if this prolongs, simple call up to the SSC

Grey – Not Running - HORIce is not running data for the service, if this prolongs for longer than a minute or so then call SSC and ask to investigate.

For when a service is showing as RED, this is the most critical alert for us as it indicates there are failures that can potentially be service impacting as a result of errors within our domain.

When any service shows critical, first this to do is voice MAC team and ask them to raise an incident and pass call to relevant teams. Speak to Tony Wicks / Steve Gardiner to see where the calls should be routed to. Number for MAC team is **GRO**

1.8 Tech Bridge

When there is a major incident or an incident of high priority, you may be required to join a Technical Bridge. This is an internal call between Fujitsu Post Office Account service lines in order to discuss an incident and move to resolution as promptly as possible. This is an urgent call, so if you are required to join, then this becomes your greatest priority.

Your main role within a Tech Bridge is to take the minutes and record everything discussed as it may be of use in a following report e.g. Major Incident Report. This call can become very technical so while it is important to try and understand what is going on, it is vital that you capture all details and in particular the times at which updates are given. This level of detail is crucial if a report is needed for the customer.

Details of joining the Tech Bridge will be provided as and when necessary as they may be subject to change, however the general joining details for the Tech Bridge are:

Dial **GRO** Participant ID is 38461819#. If you are needed to chair the Tech Bridge, the Chairperson ID is 92796518#.

There is also a **Service Bridge**, which is for external use, so third party clients can join the bridge if it is a cross domain issue and needs urgent resolution.

Again, details for joining the Service Bridge may be subject to change, however the general joining details are:

Dial **GRO** Participant ID is 36081855# the Chairperson ID is 57863059#.

1.9 Virtual Whiteboard Incident Input

Part of the teams working way is to include all incidents of necessary priority into our team Virtual Whiteboard. This is a yearly Excel spreadsheet with a monthly breakdown of each incident of note.

Incidents that we input into the Whiteboard are mainly Major Incidents/P1s (Priority 1 in TfS), those that have been shared with ATOS Service Desk, incidents caused by change and in general those that have taken a fair amount of effort to resolve.

When placing an incident into the Whiteboard, the main information that is required from the call is the date and time of the incident, incident summary, Fujitsu and ATOS (if available) call references, impact and root cause.

You can find the Virtual Whiteboard at the bottom of this page:

Irrelevant

If you are unsure whether or not to place an incident into the Whiteboard then discuss with one of the team.

1.10 Yearly Problem Review

Once a year, Problem Management produce a Problem Review for the previous years' problem records. Detailed instruction on how to complete this can be found in SVM/SDM/PRO/0025 the POA Problem Management Procedure.

The review is made up of two phases. First, you need to undergo analysis of each problem record opened and/or closed in that year. These are broken down into three categories:

Type 1 – Problems in Fujitsu domain or further analysis is required.

Type 2 – Administration Closures, e.g., the problem record was raised in error against the incorrect resolver group.

Type 3 – Underlying issue was found to have originated in a third party domain.

See below the 2015 Problem Review as a reference for how to complete the following years review.



2015 - Problem
Records Review - 0.2

The second phase consists of organising a meeting with the relevant people involved in the 'Fujitsu domain' problem records, to discuss if anything further can be done or if anything can be learnt.

All of the above is covered in more detail in document SVM/SDM/WKI/2399 Problem & Major Incident Management Team Work Instructions. This handover document is for use as a basic guide.

2. Finance

2.1 BAS Monthly SST Breakdown

Once a month, you are required to produce a Breakdown of the figures in BAS Profit and Loss Statement. At the beginning of the month, Martin Cornell will send you an Excel Spreadsheet detailing the P&L for the financial year.

	Nov	Dec	Jan	Feb	Mar		
	2016	2016	2016	2016	2016	2016	2017
P&L Detail by Month (£'000s)	Actual	Actual	Actual	Actual	Actual	Actual	q1budget 16
Revenue	916	815	843	872	991	10,262	10,038
Cost of sales	366	316	329	328	293	4,244	4,816
Gross Margin	550	499	514	544	698	6,018	5,222
Gross Costs Excl. Internal Chgs/Rec	86	113	90	85	97	1,005	1,291
Total Networks Trading	2	0	0	0	0	4	2
Total BAS Trading	203	146	178	185	142	2,460	3,000
TPG Trading Total	0	1	0	0	0	2	2
Total MIS EU Trading	42	32	49	50	42	491	482
Total MIS Hosting Trading	1	2	0	0.22	1	12	18
DEF Trading Total	4	1	1	0.35	0	9	0
Trading Other	26	16	6	4	7	226	0
Total Internal Trading Charges / Recoveries	277	198	234	240	193	3,204	3,504
Total Other Charges and Recoveries from HQ	2	5	4	3	3	35	21
Transfers to CoS	(366)	(316)	(329)	(328)	(293)	(4,244)	(4,816)
Opex	0	0	(0)	0	(0)	(0)	0
OPPL before Opex Allocation	550	499	514	544	698	6,018	5,222
Total Headcount	5	5	5	4	4	4	5

Open Excel file: BAS Service Delivery 2016 > Copy the new month column in Martin's spreadsheet > Paste the detail in tab 'P&L' > Create a new tab and name it 'SST Detail MM YY' > Copy the format from the Spreadsheet in the month before in SST Detail MM(-1) YY > Paste data in tab created.

Now that we have the template in place, we can start applying the figures in.

Open Excel file from Martin > Click tab P&L > Copy figure for 'Total BAS Trading SST only' of that Month. To locate this figure, expand 'Total BAS Trading' and it will show as below

41	Total BAS Trading	241	203	146	178.439	185	142	2,460
42	Total BAS Trading SST only	241	203	146	178.439	185	142	2,460
43	Total BAS Trading - Not SST	0	0	0	0.000	0	0	0
44	Total BAS Trading - B2B	0	0	0	0.000	0	0	0

> Paste in 'Total BAS Trading SST ONLY' in tab created earlier.

2				£
3				
4		BAS SST- Application Services		141,813
5		Unreconciled Difference		0
6		Total BAS Trading SST ONLY		141,813
7				
20		Total MIS EUS Trading - SST ONLY		42,468
21				
23		DEF Trading Total		310
24				
42		Trading Other		7,441
43				
44		TPG Trading Total		37
45				
46		Total MIS Hosting Trading		528
47				
48		Total Internal Trading Charges / Recoveries		192,598

For Total MIS EUS Trading – SST Only, DEF Trading Total, Trading Other, TPG Trading Total and Total MIS Hosting Trading, copy the figures like we have done for the BAS Trading SST Only.

On the left side of these tables, you see + and – signs. These will expand each column and you will be able to provide the breakdown in this area.

Now that you have the end figures in place, you would need to download the General Ledger and the SST report to perform a breakdown of these figures. To do this, go to EMEIA Connect Homepage > On drop down menu 'For Employees', select 'Full Employee Services list' > Select 'informationDirect' > Select 'My Reports' > Select 'GL' > Select 90206, Actuals > Select 'Export All GL Transactions (GL110 Report)' for the month you would require > A new tab will open up and then you should save this in your work area.

Go back to the informationDirect page and select 'Export All SST Transactions' for the month you would require. A new tab will open and then you should save this in your work area.

Now that we have the data required, open the GL you have just downloaded and copy all data. Go to BAS Service Delivery Excel Spreadsheet, under tab 'GL', paste data in here. In the SST Transactions downloaded, in tab 'GL SST Debit (Prj) Details' copy details to BAS Service Delivery tab, 'Debit'. Do the same for tab 'Credit'.

These details are extracted from Debit SST details. MIS EUS Trading is usually not found in Credit SST details. Go to the Pivot table on tab 'Debit Pivot'. For filter 'Recoverable', select Recoverable. For filter 'GL Debiting CC', select All. For 'OL3 Name' select all MIS codes only excluding MIS HT and 'GL Debiting Nominal' select 7438, 7443, 7413.

Recoverable	Recoverable	Y
GL Debiting CC	(All)	Y
OL3 Name	(Multiple Items)	Y
GL Debiting Nominal	(Multiple Items)	Y

Copy the 2 columns that are produced onto the tab 'SST
Detail MM YY' and paste it under the drop down of Total
MIS EUS Trading.

Row Labels	Sum of Full Amount	
Blandford, Christopher (C.)	6720	
Bower, David (D.A)	8090.08	
Elliott, Derek (D.A)	1010.5	
Guy, James (J.R)	3487.5	
Jennings, Graham (G.S)	2202.75	6720
Jones, Mary Anne (M.)	2980	8090.08
Kotwal, Snel (S.)	67.52	1010.5
Leahy, Trevor (T.J)	2666	3487.5
Pavis, Andy (J.A)	4226.9	2202.75
Welch, Michael (M.J)	4187.7	2980
Wodhams, Ray (R.)	6829.25	67.52
Grand Total	42468.2	2666
		4226.9
		4187.7
		6829.25
Total MIS EUS Trading - SST ONLY		42,468

DEF Trading Total.

To extract these details, do the same as you have done for 'Total MIS EUS Trading SST Only'. This time, go to the Pivot table on tab 'Debit Pivot'. For filter 'Recoverable', select Recoverable. For filter 'GL Debiting CC', select All. For 'OL3 Name' select all DNS codes only and 'GL Debiting Nominal' select code 7522. Copy these 2 columns into the drop down menu on your 'SST Details MM YY' Tab.

Trading Other

To extract these details, go to the GL Pivot tab. Under 'Nominal' select all Code 7000's. Under 'Row Labels', select Labour Recoveries, Trading: Travel and Trading: Overtime. Copy these 2 columns into the drop down menu on your 'SST Details MM YY' Tab.

Nominal	(Multiple Items)
Row Labels	Sum of Value
LABOUR RECOVERIES	3862.87
N/A consolidated to project / task	3978
Auto Capping108233	-26.72
Auto Capping108381	-21.73
Auto Capping108238	-57.14
Auto Capping108296	-9.54
Trading: Travel	1632.06
Mr Andrew Beardmore:UK519582:Accom_BSI:	191.33
Mr Andrew Beardmore:UK519582:Accom_Evening_Meal:	36.75
Mr Andrew Beardmore:UK519582:Mileage:	99.82
Mr Andrew Thomas:UK549186:Taxi:Taxi	6.4
Mr Andrew Thomas:UK549186:Train:	166.2
Mr Christopher Blandford:UK094824:Mileage:	147.73
Mr John Pavis:UK532285:Mileage:	22.13
Mr Christopher Bailey:UK059586:Station_Parking:	3
Mr Christopher Bailey:UK059586:Train:	121.6
Mr Christopher Bailey:UK059586:Mileage:	132.4
Mr Iain Macleod Janssens:UK059620:Visa_Costs:KWIKPICTUREFRAMING	4.99
Mr Torstein Godeseth:UK012158:Parking:South West Trains	45
Mr Andrew Beardmore:UK519582:Tolls:M6 Toll Midland Express Limitd	4.58
Mr Andrew Beardmore:UK519582:Tolls:M6 Toll Midland Express Limited	4.58
Mr Andrew Beardmore:UK519582:Tolls:M6 Toll Midland Express Ltd	9.16
Mr Andrew Thomas:UK549186:Parking:NCP	10
Mr Philip Moss:UK089962:Parking:British Rail	10.2
Mr Andrew Beardmore:UK519582:Evening_Meal:Blues SmokeHouse Bracknell	22.54
Mr Philip Moss:UK089962:Train:	22.6
Mr Torstein Godeseth:UK012158:Train:	174
Mr Garry Hewitson:UK094883:Train:	89.1
Mr Garry Hewitson:UK094883:Mileage:	77.68
Mr Torstein Godeseth:UK012158:Mileage:	54.59
Mr Iain Macleod Janssens:UK059620:Visa_Costs:High Commission of India	175.68
Grand Total	5494.93

TPG Trading Total

For this section, you would not need to provide the breakdown as the figure is quite small. To obtain the figure, go to the GL Pivot tab. Under 'Nominal' select all Code 7000's. Under 'Row Labels', select TPG. Copy the figure and paste it in your 'SST Details MM YY' Tab.

Total MIS Hosting Trading

For this section, you would not need to provide the breakdown as the figure is quite small. Go to 'Debit Pivot' tab. For filter 'Recoverable', select Recoverable. For filter 'GL Debiting CC', select All. For 'OL3 Name' select all codes that begin with MISHT* only and 'GL Debiting Nominal' select code 7432.

Copy the figure and paste it in your 'SST Details MM YY' Tab.

If MISHT is not found in the Debit Pivot tab, Go to the GL tab and put a filter on 'Nominal Description' and select all MIS Hosting SSTs. Under the column 'Value', highlight to show the sum and copy this figure into the report.

Total Networks Trading

To extract these details, go to the tab GL tab and put a filter on 'Nominal Description' and select all 'Networks' and 'NT Trading Adhoc'. Under the column 'Value', highlight to show the sum and copy this figure into the report.

BAS Trading SST Only

As this is the main focus of the breakdown, it will be presented in a separate area on the spreadsheet.

50	BAS SST- Application Services Detail		
51			
52		Debits	Credits
53			
54			
55	Anamalla, Venu (V.)	-	-
56	Anderson, Magnus (M.W)	164	-
57	Arain, Tariq (T.)	4,691	-
58	Aujla, Amarvir (A.)	2,531	-
59	Bailey, Chris (C.R)	4,964	-
60	Bansal, Steve (S.)	6,984	7,688
61	Barclay, Adrian (A.P)	4,617	-
62	Barnes, Gerald (G.J)	494	-
63	Beardmore, Andy (A.)	3,924	-
64	Betteley, Julia (J.R)	995	-
65	Bhandari, Akeel (A.)	5,030	-
66	Bhogireddy, Shanmukha Vijaya Kum (S.)	-	-
67	Blandford, Christopher (C.)	-	-
68	Bower, David (D.A)	-	-
69	Boardman, Phil (P.K)	4,609	-
70	Brindley, Susan (S.)	1,024	-
71	Budworth, John (J.H)	5,051	-
72	Carter, Rick (R.P)	1,980	-
73	Capon, Barry (B.)	-	-
74	Canniffe, Tim (T.)	224	-
75	Crayson, Paul (P.G)	-	-
76	Challa, Praveen (P.)	1,033	1,291
77	Cochrane, Eddie (D.)	1,742	-
78	Cooper, Jill (J.E)	38	-
79	Crow, Nick (N.)	6,512	6,512
80	Dhage, Vinod (v.)	1,891	1,891
81	Dolton, Tony (A.B)	364	-
82	Dugdale, Simon (S.J)	754	-
83	Elliott, Derek (D.A)	-	-
84	Evans, Steve (S.A)	5,273	-
85	Gardiner, Stephen (S.)	3,412	3,802
86	Gibson, Andrew (A.R)	-	-
87	Goddard, Steve (S.D)	1,557	-
88	Godeseth, Torstein (T.O)	10,380	-
89	Gurumurthy, Chethan (C.K.)	-	-
90	Gurung, Jubita (J.)	1,404	-
91	Guy, James (J.R)	-	-
92	Harley, Ken (K.J)	195	-
93	Hickman, John (J.E)	156	-
94	Holmes, Alan (A.A)	4,673	-

These details are extracted from both Debit and Credit SST details. To do this, go to the Pivot table on tab 'Debit Pivot'. For filter 'Recoverable', select Recoverable. For filter 'GL Debiting CC', select All. For 'OL3 Name' select all BAS codes only and 'GL Debiting Nominal' select 7446. Copy the 2 columns that are produced onto the tab 'SST Detail MM YY'.

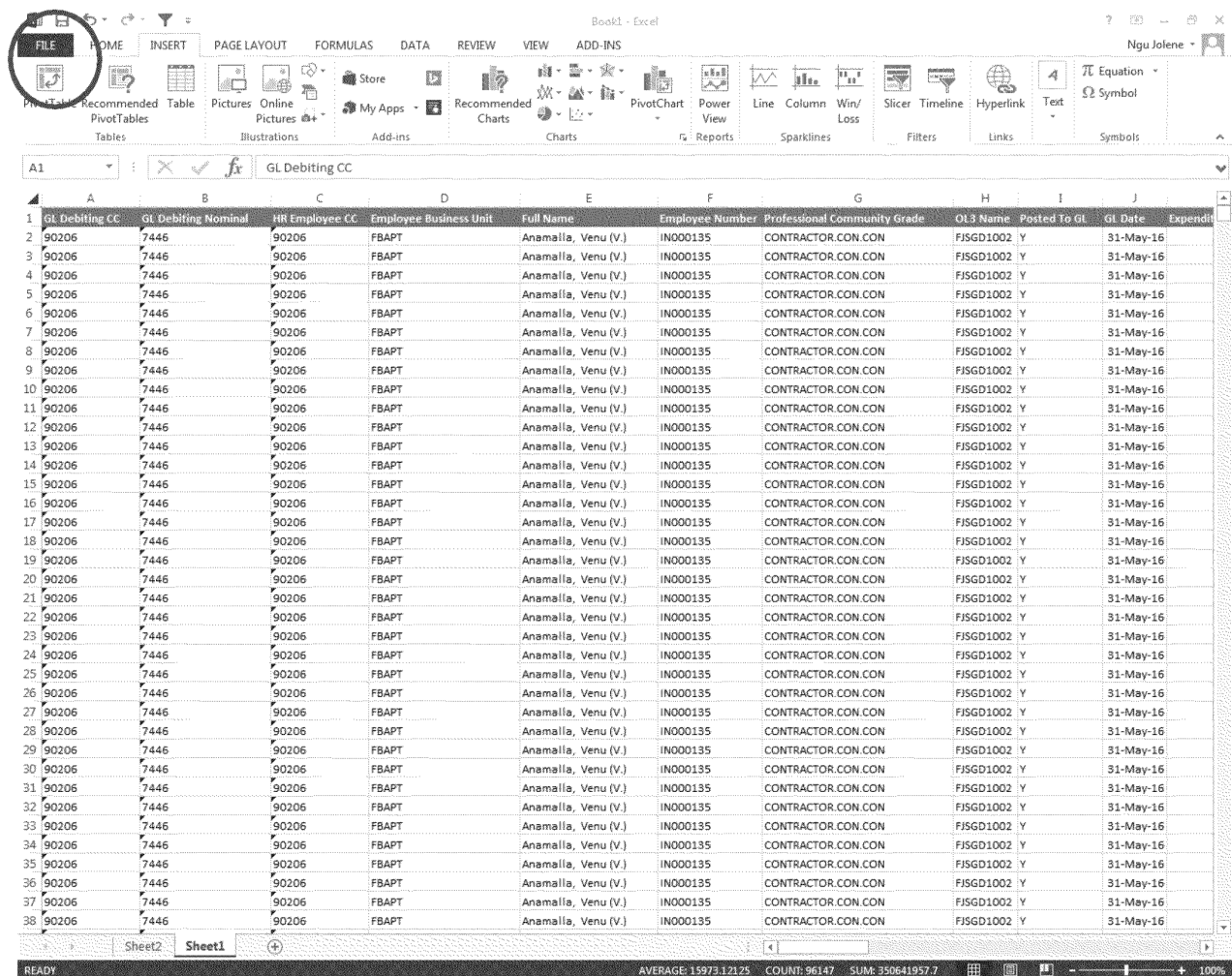
Do the same for Credit. Ensure that the total for both Debit and Credit in 'SST Detail MM YY' are the same with the figures in both Pivot tables.

When you've completed the task, ensure your Pivot tables are left to show the BAS details only as this is extracted by a formula into the 'SST Details MM YY' Tab.

2.2 BAS SST Cost Centre 90206

When requested by Steve Bansal, you would be required to produce a breakdown of the amount (£) charged towards an SST code for the week. To get an accurate reflection of the SST, perform this task every Tuesday as the figures from the previous week is normally uploaded on Monday. To do this task, go to EMEIA Connect Homepage > On drop down menu 'For Employees', select 'Full Employee Services list' > Select 'informationDirect' > Select 'My Reports' > Select 'GL' > Select 90206, Actuals > Select 'Export All SST Transactions' for the month you would require > A new tab will open up and then you should save this in your work area.

Open the spreadsheet you've just saved > select all data > copy to a new Excel Workbook > Insert Pivot Table



	A	B	C	D	E	F	G	H	I	J
	GL Debiting CC	GL Debiting Nominal	HR Employee CC	Employee Business Unit	Full Name	Employee Number	Professional Community Grade	OL3 Name	Posted To GL	GL Date
1	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
2	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
3	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
4	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
5	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
6	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
7	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
8	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
9	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
10	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
11	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
12	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
13	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
14	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
15	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
16	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
17	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
18	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
19	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
20	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
21	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
22	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
23	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
24	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
25	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
26	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
27	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
28	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
29	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
30	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
31	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
32	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
33	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
34	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
35	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
36	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
37	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16
38	90206	7446	90206	FBAPT	Anamallia, Venu (V.)	IN000135	CONTRACTOR.CON.CON	FISGD1002	Y	31-May-16

To create the pivot table, on the right side, you will see an area PivotTable Fields. Drag and drop 'Full Name' into 'Rows', 'Timesheet Weekending' into 'Columns' and 'ADJ Amount (0 for non-recov)' into 'Values'.

The screenshot shows an Excel spreadsheet with a PivotTable. The PivotTable is titled 'Count of ADJ Amount (0 for non-recov)' and is located in the range A3:I38. The PivotTable Fields task pane is open on the right side of the screen. The task pane shows the following fields:

- Choose fields to add to report:**
 - ☐ Recoverable
 - ☐ Task
 - ☐ Task Name
 - ☐ Expenditure Type
 - ☐ Hours
 - ☐ Calculated Hourly Rate
 - ☐ Full Amount
 - ☒ ADJ Amount (0 for non-recov)
 - ☐ Timesheet Reference
 - ☐ Expenditure Comment
 - ☐ Transaction Source
 - ☐ Expenditure Status Code
 - ☐ Orig Transaction Reference
 - ☐ Expenditure Item Id
 - ☐ Line Num
 - ☐ Line Num Reversed
- Drag fields between areas below:**
 - FILTERS:** (Empty)
 - COLUMNS:** Timesheet Week Ending...
 - ROWS:** Full Name
 - VALUES:** Count of ADJ Amount (...)

The PivotTable data is as follows:

Row Labels	20/03/2016	27/03/2016	03/04/2016	10/04/2016	17/04/2016	24/04/2016	01/05/2016	08/05/2016
Anamalla, Venu (V.)	9			9	10	10	10	10
Anderson, Magnus (M.W)								
Araín, Tariq (T.)								
Aujla, Amarvir (A.)								
Bailey, Chris (C.R)								
Bansal, Steve (S.)								
Barclay, Adrian (A.P)								
Barnes, Gerald (G.J)								
Beardmore, Andy (A.)								
Bhandari, Akeel (A.)								
Blandford, Christopher (C.)								
Boardman, Phil (P.K)			5					
Bower, David (D.A)								
Braisher, Paul (P.)								
Brindley, Susan (S.)								
Brown, Alister (A.)								
Budworth, John (J.H)								
Capon, Barry (B.)							1	
Challa, Praveen (P.)						10	10	
Cooper, Jill (J.E)								
Crow, Nick (N.)								
Dhage, Vinod (v.)				2	10	10	4	
Dolton, Tony (A.B)								
Dugdale, Simon (S.J)								
Elliott, Derek (D.A)								
Evans, Steve (S.A)							2	
Gardiner, Stephen (S.)								
Gibson, Andrew (A.R)							2	
Goddard, Steve (S.D)								
Godeseth, Torstein (T.O)								
Gurumurthy, Chethan (C.K.)					10	10	10	10
Gurung, Jubita (J.)								
Harley, Ken (K.J)								
Harris, Ian (I.V)								

The default setting is for 'ADJ Amount' to show as a Count. You would need to change this by clicking the arrow next to it and selecting 'Value Field Settings'. Change this to Sum.

The screenshot shows an Excel spreadsheet with a PivotTable. The PivotTable is titled 'Count of ADJ Amount (0 for non-recov)' and is located in the range A3:G38. The PivotTable has 'Full Name' as the Row Labels and 'Timesheet Week Ending...' as the Column Labels. The PivotTable data is as follows:

Full Name	20/03/2016	27/03/2016	03/04/2016	10/04/2016
Anamalla, Venu (V.)				
Anderson, Magnus (M.W)				
Arairi, Tariq (T.)				
Aujla, Amarvir (A.)				
Bailey, Chris (C.R)				
Bansal, Steve (S.)				
Barclay, Adrian (A.P)				
Barnes, Gerald (G.J)				
Beardmore, Andy (A.)				
Bhandari, Akeel (A.)				
Blandford, Christopher (C.)				
Boardman, Phil (P.K)				
Bower, David (D.A)				
Braisher, Paul (P.)				
Brindley, Susan (S.)				
Brown, Alister (A.)				
Budworth, John (J.H)				
Capon, Barry (B.)				
Challa, Praveen (P.)				
Cooper, Jill (J.E)				
Crow, Nick (N.)				
Dhage, Vinod (V.)				
Dolton, Tony (A.B)				
Dugdale, Simon (S.J)				
Elliott, Derek (D.A)				
Evans, Steve (S.A)				
Gardiner, Stephen (S.)				
Gibson, Andrew (A.R)				
Goddard, Steve (S.D)				
Godeseth, Torstein (T.O)				
Gurumurthy, Chethan (C.K.)				
Gurung, Jubita (J.)				
Harley, Ken (K.J)				
Harris, Ian (I.V)				

The 'Value Field Settings' dialog box is open, showing the 'Sum of ADJ Amount (0 for non-recov)' as the Custom Name. The 'Summarize value field by' dropdown is set to 'Sum'. The 'Number Format' button is visible. The 'PivotTable Fields' task pane on the right shows the 'Full Name' field in the ROWS area and the 'Count of ADJ Amount (0 for non-recov)' field in the VALUES area. The 'Timesheet Week Ending...' field is in the COLUMNS area. The 'Defer Layout Update' checkbox is checked.

Once this is completed, select 'Column Labels' as circled and select the weeks required for the report.

3. Horizon Production Service Dashboard

This dashboard is produced for Pete Thompson, showing a number of Key Performance Indicators (KPIs). This is mainly made up by asking the relevant teams to produce graphs for you to include in the dashboard, all of which they are aware of. This is produced as and when Pete asks for it, usually once a month. See example below:



Horizon Production
Service Performance

3.1 External Dashboard Slides

Slide 0

- Branch and Counter Availability SLT graph – Data is updated in Excel file ‘Availability 3 month summary graph.’ – Contact Mark Jones for Availability SLT LDT Model. Update the graph in the file and make it a 6 months view.
- Major Incidents – Data is updated in file ‘Graphs’ under tab ‘Major Incidents’ – Speak to Tony Wicks to check if any major incidents have been raised. Make it a 6 months view.
- SLA Performance – Data is updated in file ‘Graphs’ – Contact Mark Jones for the SLA’s of that month. Include the new figures into the data and make the graph a 12 month view.
- Problem Management – Update the data on the slide itself – Look at the last Weekly Report for the month and make sure it coincides with what is on the graph. Again, check with Tony Wicks that the data reported is accurate.

Slide 1

- Patch Management – Data is updated in Excel file ‘Patching KPI 16’ – Request Patch Management data from Jason Muir. Once he has send you the spreadsheet, look at the left column for (MM YY). Copy this data into the spreadsheet and update the graph accordingly. Adjust the graph to show a 12 month view.
- Total no of ARQs queried – Data is updated in Excel file ‘ARQ KPI 15’ – Request from Jason Muir the spreadsheet for ARQ queried. Once he has sent you the spreadsheet, look at the left column for (MM YY). Copy this data into the spreadsheet mentioned above and update the graph accordingly. Adjust the graph to show a 12 month view.
- Security Patches – Request this table from Jason Muir. Adjust the table to fit the slide.

Slide 2

- PCI Risks. Contact Darren Gaile for an update of this slide.

Slide 3

- OBC Count of Errors (21’s) – Data is updated in Excel file ‘OBC Count of Errors’ – Sandie Bothick will provide the data (look at ‘Number of OBC 21’s’ on the table). Show as 6 months view.
- Cost on OBC Service – Data is updated in Excel file ‘Cost of OBC Services’ – As per the previous graph, Sandie Bothick will provide the data. In the file she sends through, look at the tab ‘Cost’ and copy this month’s data into your spreadsheet ‘Cost on OBC Services’. Show as data in a 6 months view.
- OBC Changes v OBC 21’s – Data is provided in Sandie Bothick’s graph. Just copy over the graph she has provided.
- MSC Analysis – Data is found in V Drive > 003 MSC> MSC Reports > 2016 > MSC RAG 2016 > Graph – The graph will show the data for the entire year. Edit the graph to show only until the month you are reporting as the other months are still blank. Copy the graph into the PowerPoint Slide.

Slide 4

- Branches with No Online Services. Contact Sandie Bothick and she will provide you with the latest version.

Slide 5

- Ref Data Statistics – data is updated in Excel file 'Ref Data Stats' – To obtain this data, go to HORice > live query > Ref Data Services > Change year to 2016. Look at the column of the month you want and copy the figure on the last row. Adjust the graph to show a 12 month view.
- Ref Data Variable Cost – Data is updated in Excel file 'Ref Data Stats' under tab 'Cost' – Every month a CP for these charges are produced. Speak to Ken Westfield to obtain the CP for that month. Copy the figures from the CP into your spreadsheet and adjust data to show 12 months view.
- BC Test Schedule – copy the data for the month from SharePoint and adjust size to fit the space. – POA SharePoint > Operations > On the left panel, under Libraries, click BCP > Business Continuity – Test Management > Business Continuity Test Planner 2016.
- Open Service Review Action Against Target – data is updated in Excel file 'Open SMR Actions & AP-ADC Script Incidents' – To update this, data is found in SMR Minutes (from the SMR Pack) or ask Gary Blackburn (Atos) for it. Alternatively, you can ask Steve Bansal as he may have them. – Open the SMR minutes and copy the SMR open actions into an excel spreadsheet. Apply filter according to the owner* and target of completion. If there are more than 1 action owner, include them in both counts (ie: Gary Blackburn/Sandie Bothick would count 1 for Atos and 1 for Fujitsu)

*To identify if owners are Fujitsu, Atos or POL representatives, look at the beginning of the minutes of the meeting.

Slide 6

- CSAT Scores – data is updated in Excel file 'CSAT Scores' – Ask Pete Thompson for the data. Update the graph accordingly to show 4 quarters of data
- Average Customer feedback per Category - data is updated in Excel file 'CSAT scores' – Ask Pete Thompson for the data. Update the graph accordingly to show 4 quarters of data.

Slide 7

- Forward Schedule of Change – This slide is provided by Julia Betteley. If she is not available, you can go to POA SharePoint > Operations > Release Management > Customer Facing Forward Schedule of Change. In the spreadsheet, look for the month of that you're reporting on.

Slide 8

- Branch Transaction Volumes – Contact John Simpkins or Mark Wright regarding this slide.

Slide 9

- Average Trading Branches – Contact John Simpkins or Mark Wright regarding this slide.

Slide 10 to 11

- Continuous Service Improvements – Check with Steve Bansal if there are updates for this.

Slide 12 to 14

- Risks – Contact Yannis Symvoulidis for this slide.

Slide 15

- Programme Key – Contact Ewan Hill for this slide.

Slide 16

- HDCR Release 14 and 15 Live Dates – Contact Alan Flack for this slide.

3.2 Internal Dashboard Slides

Slide 0

- Total PEAKs – This is extracted from the PEAK Report you generate. See 1.1.6.2 PEAK Reporting of this document.
- Live PEAKs – This is extracted from the PEAK Report you generate. See 1.1.6.2 PEAK Reporting of this document.
- Total Open TfS calls – This is extracted from the PEAK Report you generate. See 1.1.6.2 PEAK Reporting of this document.
- Ref Data Statistics – This graph is the same graph in the External Dashboard on slide 5.

Slide 1

- CSAT Scores – This graph is the same graph as from External Dashboard on slide 6.
- Problem Management – This table is the same table on External Dashboard on slide 0.
- Branch and Counter Availability SLT – This graph is the same graph as from External Dashboard on slide 0.
- Service Focus Areas – The data is updated on the slide itself – Request from Pete what the new figures are.
- SLA Performance – This graph is the same graph as from External Dashboard on slide 0.

Slide 2

- Transaction Volumes Against Contracted Volume – This graph is updated in file: Transaction Volume 2. To obtain this data go to Drive (U:) > Capacity Management Report > Capacity Report MM YY of the month you're reporting for.
- Patch Management – This graph is the same graph as from External Dashboard on slide 1.
- Total no. of ARQs queried – This graph is the same graph as from External Dashboard on slide 1.
- MSC Analysis – This is the same graph as from External Dashboard on slide 5.

Slide 3

- Risk Register – Request from Yannis Symvoulidis for data of this.
- Top RISKS-Probability, Impact & Value - Request data from Yannis Symvoulidis.
- Service – Request from Mark Jones.

Slide 4

- CT1818 Fujitsu Service Support Call off – data is updated in file: CTs. tab: .CT1818 – Request from Steve Bansal the latest information. Update the data in the excel file, keep in mind the formulas in place. When a new row is inserted, make sure to check that the formula for 'Total Value' is accurate.
- CT1839A - Fujitsu Service POLSAP Incident Routing – data is update in file:CT's tab:CT1839A. – Request from Steve Bansal the latest information. Update the data in the excel file, keep in mind the formulas in place. When a new row is inserted, make sure to check that the formula for 'Total Value' is accurate.



KPI HNGx Dashboard.zip

4. Service Level Targets (SLTs)

4.1 Data Centre SLTs

Every month, you and Yannis Symvoulidis are responsible to enter SLTs into a spreadsheet as this will feed into MJ's monthly report. To perform this task, you would need to have access to HORlce. Any issues regarding HORlce, send an email to POAHORICE@GRO or speak to John Simpkins in SSC up on the 6th Floor. Attached below is a set of work instructions on how to perform the task. Contact Yannis Symvoulidis for any queries.

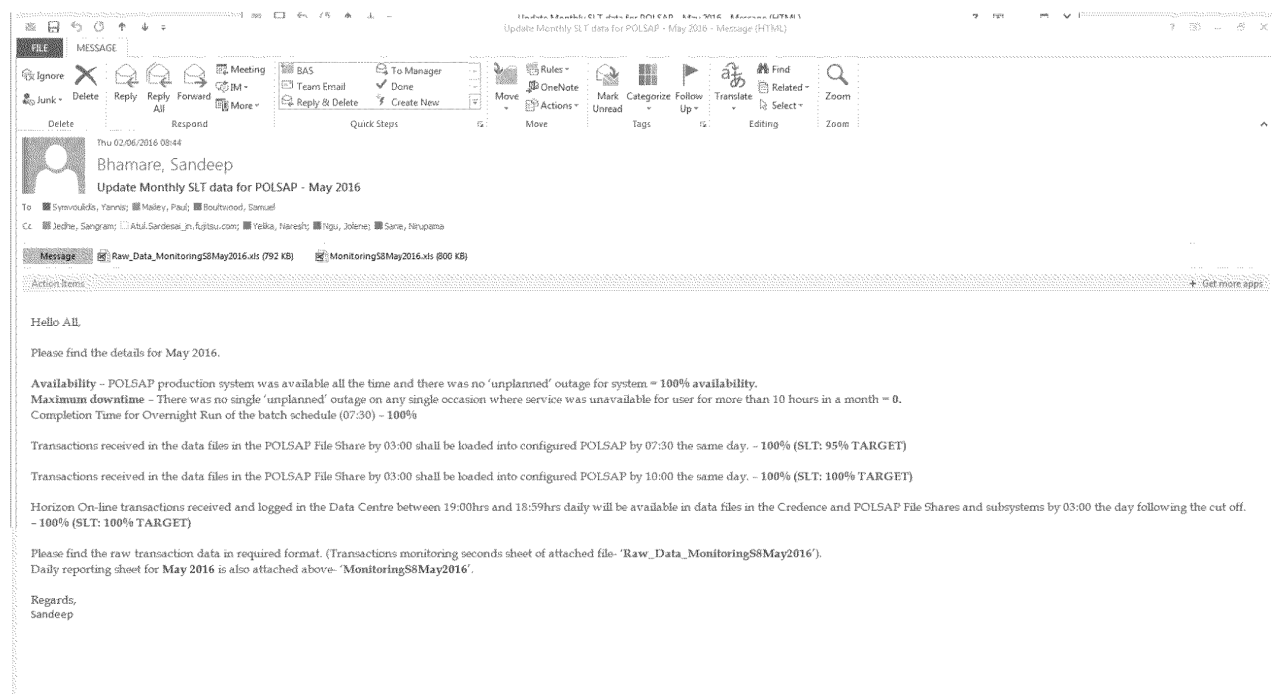


DC Ops Work
Instructions.docx

The SLTs are recorded in an excel spreadsheet that can be found on RMG_BU_Business_Support (U:) Drive > Service Review Book > SLT charts > Data Centre Operations Service.

4.2 POLSAP SLTs

Every month, you and Yannis will also be responsible for the SLT input for POLSAP. As POLSAP currently do not have a requirement for SLTs, these are still recorded in a specific area for audit purposes. At the beginning of each month, you will receive an email from Sandeep Bhamare which will contain 2 spreadsheets. The example of the email is as below:



Once you've received this email, you can start recording the SLTs in the correct area. Some of the SLT's feed into the Data Centre SLTs. Go to RMG_BU_Business_Support (U:) Drive > Service Review Book > SLT charts > Data Centre Operations Service. The details in this email will fill in SLTs 5 to SLT 8 on this spreadsheet.

		May15	Jun15	Jul15	Aug15	Sep15	Oct15	Nov15	Dec15	Jan16	Feb16	Mar16	Apr16	May16
3	Data Delivery: Outbound HR SAP HR SAP file should be delivered to PQSAP by 05:00 on the day following the day defined by Post Office. Failure data for the generation of this report	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
4	Data Delivery: Outbound to Credence & POLSAP Transaction records to Credence & POLSAP should be delivered by 03:00 the day following the cut off	0	0	0	0	0	0	0	0	0	0	0	0	0
5	HR SAP transactions received and logged in the Data Centre between 19:00hrs and 18:59hrs daily will be available in data files in the Credence and POLSAP File Shares and will be loaded into configured POLSAP by 03:00 the day following the cut off	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
6	Data Delivery: Outbound TFS to POLSAP Transaction records loaded to configured POLSAP system - Failure per SLT Calendar Year	0	1	0	0	0	0	0	0	0	0	0	0	0
7	Transactions received in the data files in the POLSAP File Share by 03:00 shall be loaded into configured POLSAP by 07:30 the same day	100.0%	75.7%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
8	Transactions received in the data files in the POLSAP File Share by 03:00 shall be loaded into configured POLSAP by 10:00 the same day	100.0%	75.7%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

HORICE SMP Panel / TPS Monthly Data / HRSAP_CFPO & HRSAP_SP50

see notes on worksheet HRSAP; RepCat 1330

HORICE SMP Panel / TPS Monthly Data / CRD & PSP (to supplement existing reporting from POLSAP team) daily email from BASIS team (Mick to send example), and we would know if CGI-LOGICA raised a call with SMC or UNIX team could check what time the data was sent; RepCat 1338

alerting already in place, but please check with Gaby about ownership & monthly report 64 daily BLE files, all or nothing, so calculate % as not-failed day divided by days in month interpretation of RepCat 1119 by SMEs at POLSAP team

The following 3 targets are currently reported by Gaby & POLSAP team

For spoken to Paul and the SLT is referring to the Transaction Processing System that creates the BLE files.

So the SLT is actually to measure the BLE files are loaded on to POLSAP. It could be interpreted that as long as the BLE files are loaded each day then the SLT has been met. However it means loaded by 09:00, then we have not failed this SLT yet as we have had our 1 allowed failure this calendar year, but will fail if we have another (unplanned) failure.

BLE files shown on HORICE/SMP Panel/TPS/PSP with SLT_Status

ETL file is the last job in the batch, so reported against this RepCat 1119

ETL file is the last job in the batch, so reported against this (later threshold) RepCat 1119

For SLT 5, refer to the part of the email detailing :- *Horizon On-line transactions received and logged in the Data Centre between 19:00hrs and 18:59hrs daily will be available in data files in the Credence and POLSAP File Shares and subsystems by 03:00 the day following the cut off.*

For SLT 7, refer to the part of the email detailing :- *Transactions received in the data files in the POLSAP File Share by 03:00 shall be loaded into configured POLSAP by 07:30 the same day.*

For SLT 8, refer to the part of the email detailing :- *Transactions received in the data files in the POLSAP File Share by 03:00 shall be loaded into configured POLSAP by 10:00 the same day*

For SLT 6, if SLT 7 and 8 are 100%, this would automatically be 0 however, if it is less than 100% contact POLSAP Management (Paul Mailey) to determine the failures per SLT Calendar Year.

Downloaded from <http://ajph.org/> on November 10, 2014

For SLT 1, refer to the part of the email detailing :- *Availability – POLSAP production system was available all the time and there was no ‘unplanned’ outage for system*

For SLT 3, refer to the part of the email detailing :- *Completion Time for Overnight Run of the batch schedule (07:30)*

[illegible]

5. Service Management Review (SMR) Pack

On the 3rd Thursday of the month, an SMR meeting would take place. Prior to the meeting, you would need to pull together data from different individuals. In preparation of the SMR, there will be 2 sets of pack that would need to be sent out.

TIMETABLE OF EVENTS

Key Dates:-

DAY X (+2) = Publication of the minutes from the previous Service Management Review

DAY X = Day of Service Management Review

DAY X (-3) = Publication of the Service Management Pack

DAY X (-5) = Send a note to FUJTISU action owners of open actions from minutes

DAY X (-10) = Ask for Hot Topics to add to the agenda (PT, AK, SB (Fujitsu) IT, IH (Atos)

3rd Working Day of Month = Publication of 'POL Changes' – Ken Westfield

7th Working Day of Month = Publication of Availability Report – Jan Ambrose

10th Working Day of Month = Publication of Service Review Book (SRB) – Mark Jones

12th Working Day of Month = Publication of Service Dashboard – Mark Jones

Other Items:-

Quarterly – Publication of CSAT Scorecard and Weighted Scores – Handed Over (Pete Thompson)

Service Improvement Schedule – As requested – Dan Wicks

Building pack 1 (MM)

Attachment 1 – Agenda

Attachment 2 – Scorecard (Defunct)

Attachment 3 – Service Review Book (MJ)

Attachment 4 – Service Dashboard (MJ)

Attachment 5 – Minutes from last meeting (Gary Blackburn, Atos)

Attachment 6 – SIP Summary (Defunct)

Attachment 7 – POL Changes (Ken Westfield)

Attachment 8 – Availability Report (MJ)

Attachment 9 – Quarterly Scorecard

Attachment 10 – Top 5 Risks (Yannis Symvoulidis)

Building pack 2 (MM YY – Fujitsu POA Service Review Pack)

All the attachments in Pack 1 is to be included in pack 2.

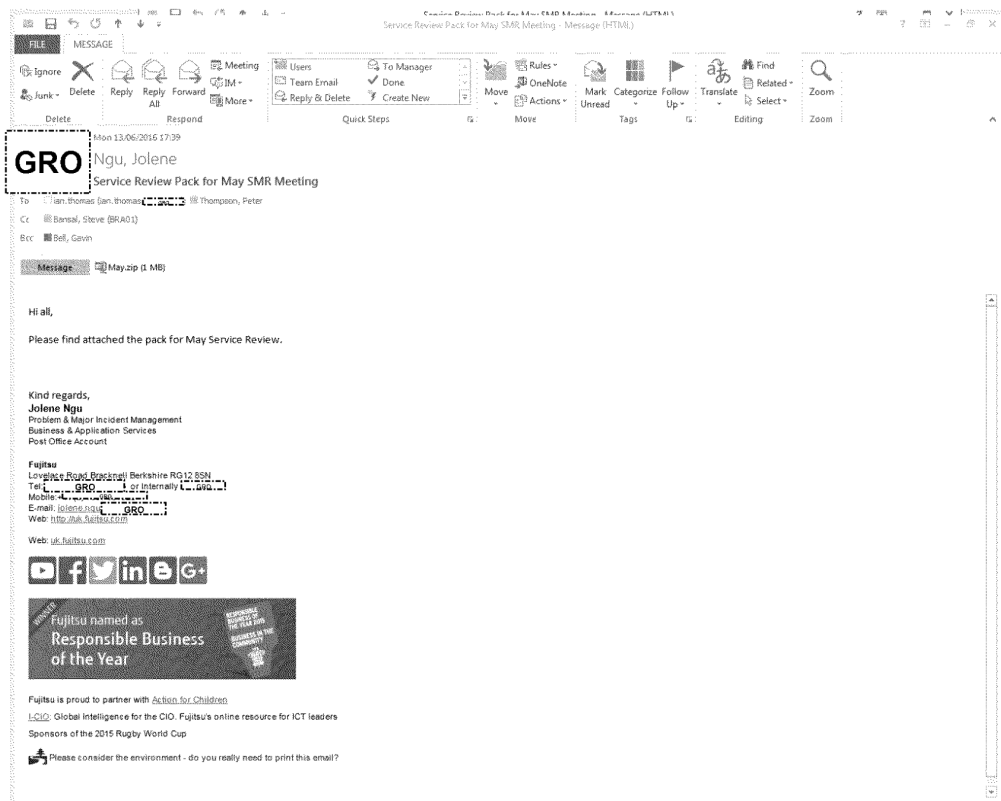
1. POLSAP (*Paul Mailey*).
2. Online Services (*Tony Wicks*)
3. BNS/CNS (*Roger Stearn*)
4. Business Continuity (*Almizan Khan*)
5. MAC (*Sandie Bothick*)
6. OBC (*Chris Harrison*)
7. Release Review (*Nina Brickell*)
8. Changes Report (*Nina Brickell*)

Distribution of pack 1

Ian Thomas [REDACTED] Pete Thompson. CC in Steve Bansal and Bcc Gavin Bell.



Click on the icon on the right to see an example SMR pack which is sent as a .zip file

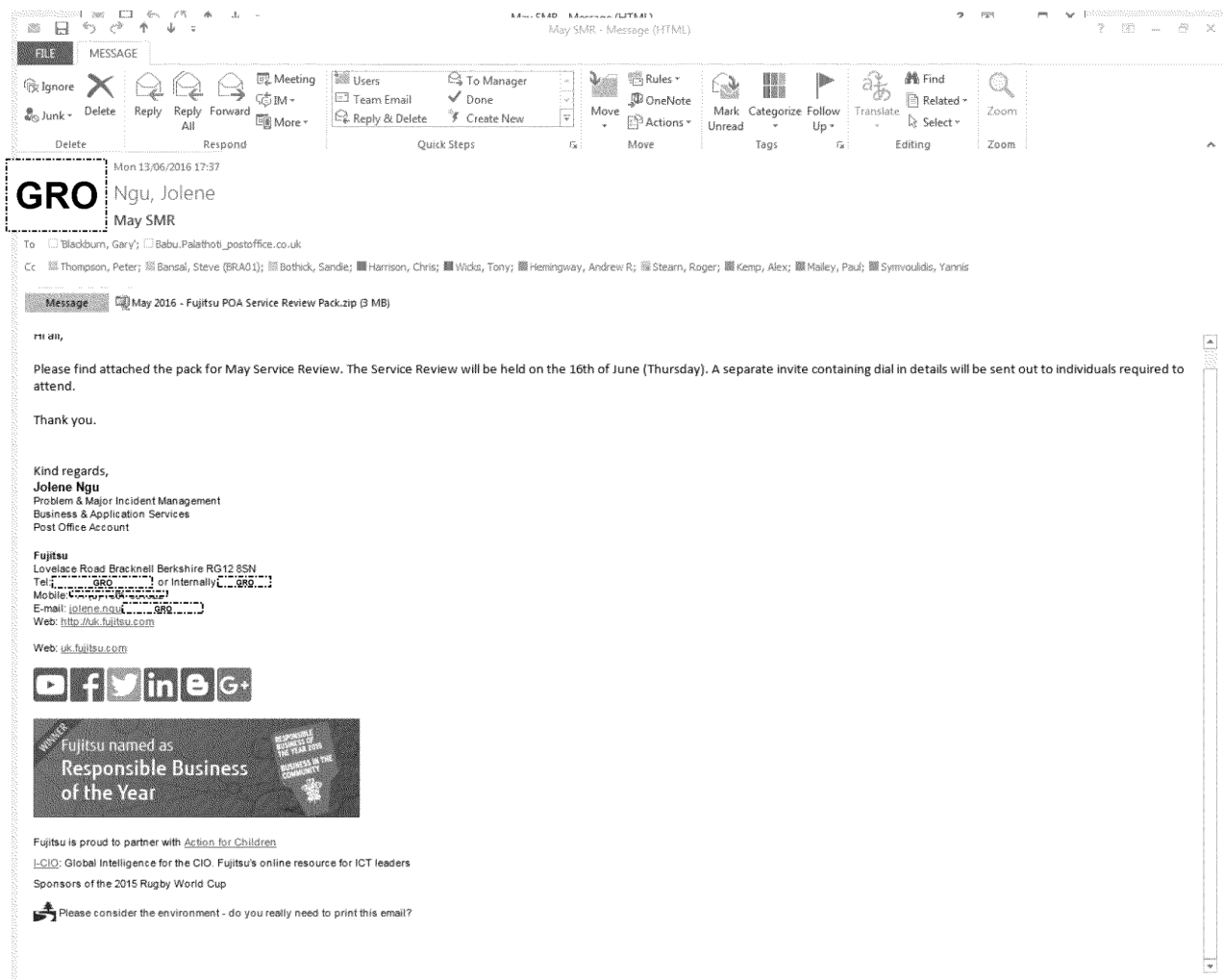


Above is an example of the email sent and the distribution list.

Distribution of pack 2.

Gary Blackburn (Gary.Blackburn@GRO), Babu Palathoti (Babu.Palathoti@GRO).

Cc: Pete Thompson, Steve Bansal and individuals who contributed to details in pack.



May 2016 - Fujitsu
POA Service Review

5.1 Scorecard Weighting Factor

Each quarter you will be required to apply a weighting factor to the scoring received by the customer, below is a guide to completing this:

1. Open the weighting factor table



CSAT Weighted
score.xlsx

2. You will only be updating the 'Applied Weight' and 'Score' column, leave the other columns as they are, the calculations will be applied automatically.

3. Update the 'Score' column with the CSAT scores received from the customer (these will usually be sent to you by Pete Thompson)

4. For the services that have not received a score, change the 'Applied Weight' column to 0 and leave the 'Score' field blank.

Do not put a 0 in the 'Score' field as this will give a poor average calculation.

5. If a service has received a score, then the 'Applied Weight' field for that service should reflect the number in the 'Weight' column. *E.g. If Online – POLSAP received a score, the 'Applied Weight' should be 2. If it did not received a score, the applied weight should be changed to 0.*

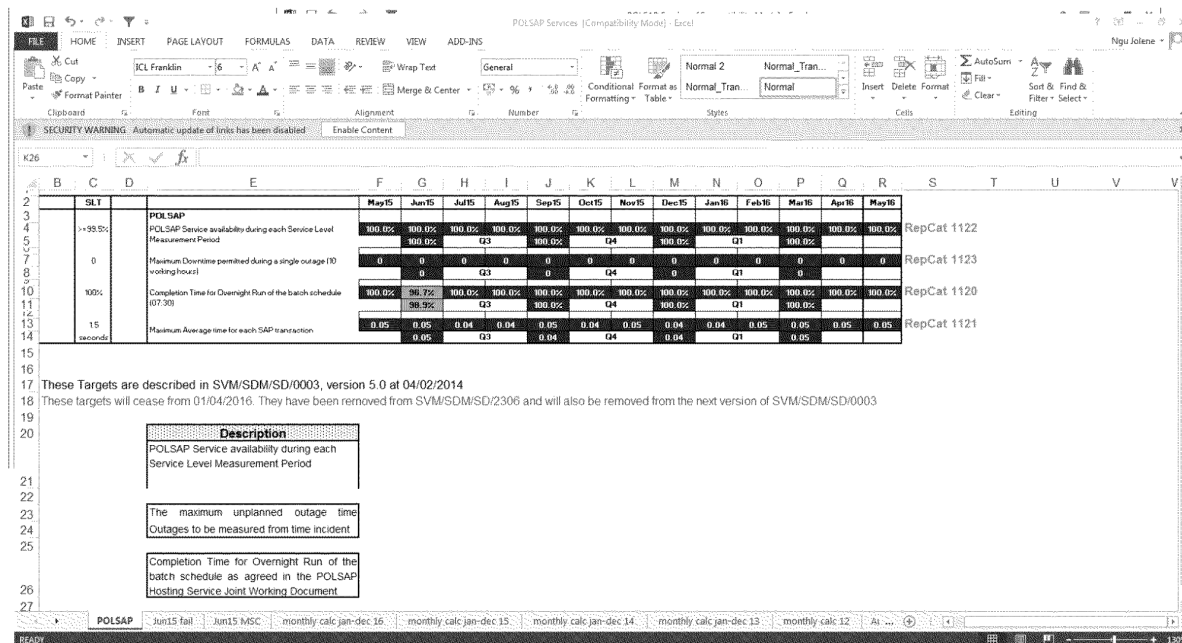
6. The CMT, Engineering and HSD service scores will usually be found in the Comments field of the CSAT scorecard for End User Services. (The average of the three scores makes up the End User Services score)

7. The 'Score' total give you the **Overall Operational Service** score, and the 'Weighting Score' total give you the **Weighted Measure**. Update the scorecard to reflect these figures.

I have left some figures in the table as a completed example and highlighted the two columns that need editing.

5.2 POLSAP Slides for the SMR Pack

This task is correlated to the SLT input you enter monthly. (See section 4.2 POLSAP SLTs of this document) One of the slides included in the SMR Pack is the POLSAP Slides which is mainly prepared by Paul Mailey. After you've received the slides, there is 1 slide on the deck that you would need to provide for. This will be the slide titled POLSAP SLT. To obtain this data, go to U Drive > Service Review Book > SLT Charts > Archived > POLSAP Services. This will provide you with part of the data required.



These Targets are described in SVM/SDM/SD/0003, version 5.0 at 04/02/2014
These targets will cease from 01/04/2016. They have been removed from SVM/SDM/SD/2306 and will also be removed from the next version of SVM/SDM/SD/0003

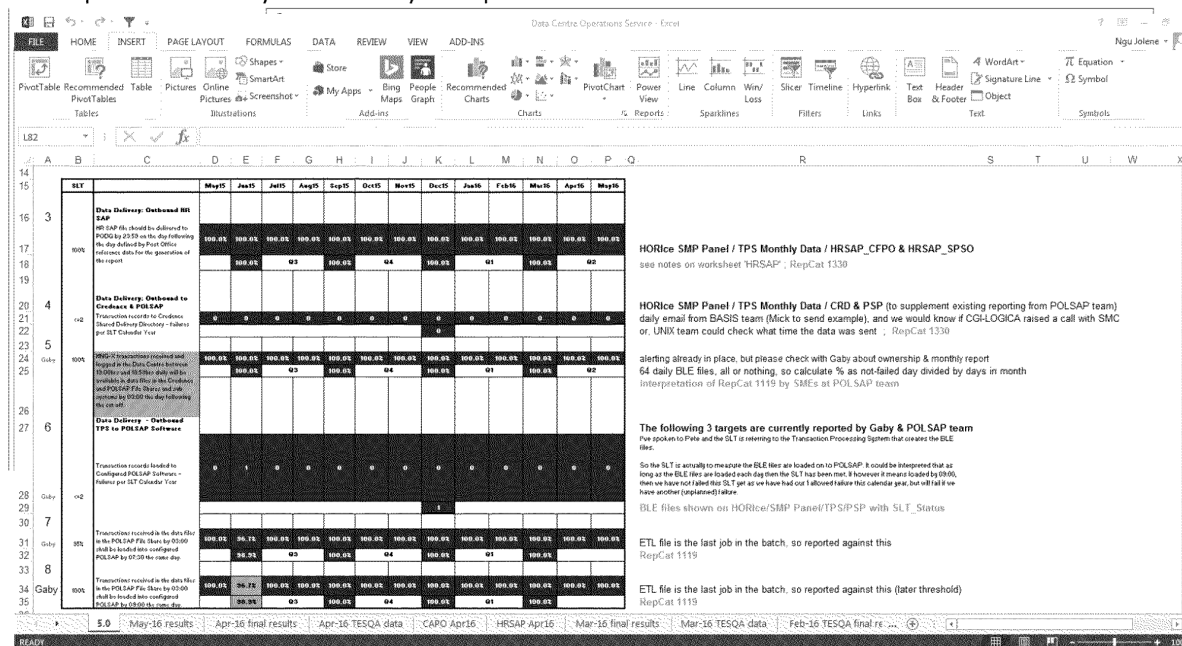
Description
POLSAP Service availability during each Service Level Measurement Period
The maximum unplanned outage time Outages to be measured from time incident
Completion Time for Overnight Run of the batch schedule as agreed in the POLSAP Hosting Service Joint Working Document

Copy all SLTs on this spreadsheet and paste them in a new workbook. Then go to U Drive > Service Review Book > SLT Charts > Data Centre Operations Service. Copy the SLTs from 3 to 8 and paste it in the workbook you created. This would be the complete data you would need for the slide. Click on the icon below for an example of a complete slide



BAS POLSAP SR May
Slide 2016.pptx

deck. Speak to Yannis Symvoulidis if you require assistance on this.



The following 3 targets are currently reported by Gaby & POLSAP team
See spoken to Pete and the SLT is referring to the Transaction Processing System that creates the BLE files.
So the SLT is actually to measure the BLE files are loaded on to POLSAP. It could be interpreted that as long as the BLE files are loaded each day then the SLT has been met. If however it means loaded by 09:00, then we have not passed this SLT yet as we have had our 1st record before this calendar year, but will fail if we have another (unplanned) failure.
BLE files shown on HORICE/SMP Panel/TPS/PPSP with SLT_Status
ETL file is the last job in the batch, so reported against this
RepCat 1119
ETL file is the last job in the batch, so reported against this (later threshold)
RepCat 1119

6. CP Impacting Meeting

Every Tuesday at 2pm, you will be required to hold a CP Impacting meeting. The purpose of this meeting is to allow attendees to determine their impacts towards a particular Change Proposal (CP). Your role in this meeting as the facilitator is to set up the call and ensure that the owners of the CP's presented are available to present the CP. Every Monday, you will receive an email from Ken Westfield that will contain a spreadsheet identifying the CP's that will be going to PCCB that week (Thursday). These will be the CP's that would need to be presented in your CP Impacting Meeting.

Reply
 Reply All
 Forward
 IM

GRO
 Mon 23/05/2016 08:30
 Westfield, Ken
 Potential CP's for Presentation to PCCB Thursday 26th May 2016 (11:00)

To: Ibbett, Dave; Jenkins, Gareth; Young, Jim (P&PM); Jones, Tim

Cc: Post Office Account Customer Service; Membrey, Bill; Janssens, Iain; Tarran, Keith; Newsome, Pete; CSPOA Security; POA Programme Office; **di RMGA ChM CPCommunication**; Capon, Barry; Hogan, Katy; Kemp, Alex; Bansal, Steve (BRA01); Ngu, Jolene

This message was sent with High importance.

Message
 PCCB Potential 26052016.xls (39 KB)

Action Items + Get more apps

Dear Addressees,

Please see the attached list of CPs, which can potentially be presented to PCCB on Thursday 26th May 2016

ADDRESSEES PLEASE RESPOND FOR YOUR CPs

Individuals identified (in Bold Blue on the attached) are requested to provide prompt indication of whether their CP should be presented to PCCB or not (and where not an indication of what is currently happening with it and when it will be ready for presentation).

Those indicated with a red asterisk have changed status or been updated since the last PCCB.

Those with a blue asterisk are new to PCCB.

If you have any queries please contact Change Management who will endeavour to assist.

Your prompt responses would be appreciated to allow early pack production.

Please respond to the POA Change Management mailbox

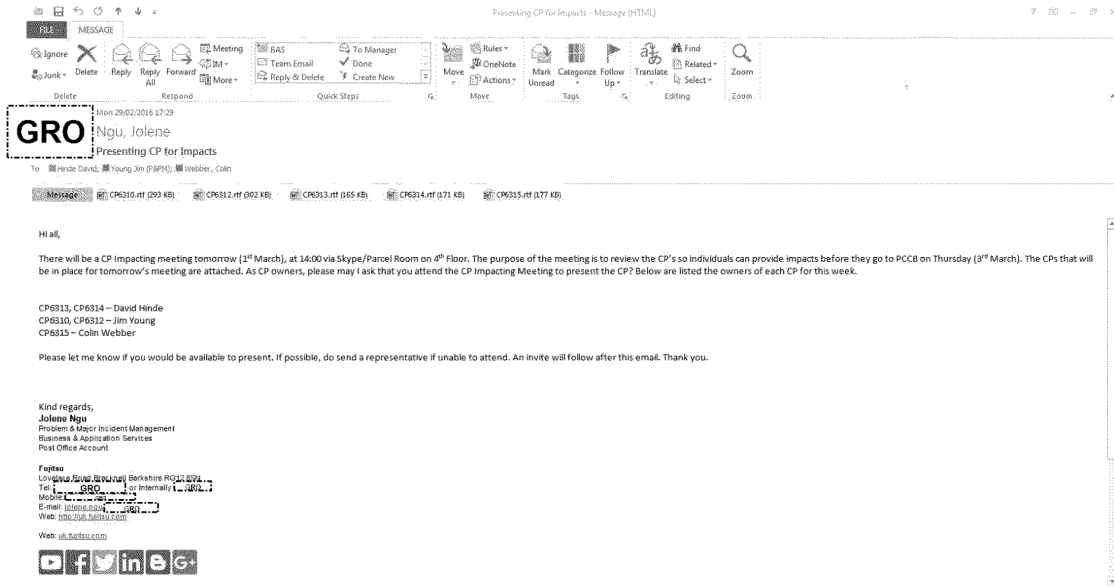
Regards

Ken Westfield MBCS
 Commercial Change Manager
 Business & Application Services

Fujitsu
 Lovelace Road, Bracknell, Berkshire. RG12 8SN
 Tel: **GRO** or Internally **GRO**
 Mobile: **GRO**

After you have determined the CP's that need to be discussed, send an email to the CP owner asking if they will be

able to attend the meeting to present their CP.



After receiving confirmation of who will be able to attend to present the CP(s), send out an invite to the usual Dlist and add the presenters as well. Attach the CPs that will be presented. Don't forget to include a Skype Dial in detail for attendees outside of BRA01. Aim to send out the invite on Monday to allow attendees time to prepare.

The Dlist for this meeting is Yannis Symvoulidis, Steve Parker, Alan Flack, Jerry Acton, Dave Haywood, Stephen Godfrey, Andrew Hemingway, Catherine Obeng, POA BAS SDM, Rajaramana Ravula (SMC), Changdev Pawashe (SMC), Almizan Khan (SMC), Omkar Rangam (SMC), Rajaram Kuppuramaseshan (SMC) + presenters.

7. Credence Report

Once a month, Yannis Symvoulidis would request from you a list of incidents related to Credence in the month before. To produce this report, go to the Virtual WhiteBoard on SharePoint. Select the tab based on the month you would like the data to be extracted from. Do a search for the keyword 'Credence' or 'POLMI'. Filter the table with only these incidents showing and copy them to a new Excel Spreadsheet.

Date	Description	TFS Ref	ATOS INC Ref	Major Incident	Service Impacts	Root Cause	Comments
09/04/2016	Monitoring reported critical alerts showing low disk space for CGI	A12081920	I8858914	N			Also observed below critical alert from the same node. Node Summary Last Occurrence Count ITMDisplayItem LMIPMIA002 SYSMTG_WIN_POLMI_LowDiskSpace_C[(S TRSCAN(Disk_Name, ".") = 1 AND WTLOGCLDSK = 1 AND Disk_Name <> "F." AND %_Used >= 90) ON Primary: LMIPMIA002: NT ON G: (Disk_Name=G: %_Used=90)] 10/04/2016 21:25:22 1 G:
20/04/2016	Monitoring reported critical alerts showing low disk space for CGI	A12183229/ A12196029	I8913627/ I8915208	P1			Observed below critical alert. LMIPMIA002 SYSMTG_WIN_POLMI_LowDiskSpace_C[(S TRSCAN(Disk_Name, ".") = 1 AND WTLOGCLDSK = 1 AND Disk_Name <> "F." AND %_Used >= 90) ON Primary: LMIPMIA002: NT ON G: (Disk_Name=G: %_Used=90)] 20/04/2016 10:19:52 1 G: Received the below minor alert from LMIPMIA002 on 21/04/2016 20:04:52 . Event text: LMIPMIA002 SYSMTG_WIN_POLMI_LowDiskSpace_W[(S TRSCAN(Disk_Name, ".") = 1 AND WTLOGCLDSK = 1 AND Disk_Name <> "F." AND %_Used >= 80) ON Primary: LMIPMIA002: NT ON G: (Disk_Name=G: %_Used=89)] 21/04/2016 20:04:52 1 G:

Ensure the Headings of the columns are copied as well. Once copied to a new Excel spreadsheet, remove columns ; Start Time, End Time and Closed.

Copy this table and paste it in an email to Yannis. Please see below for example of email.



Credence and
POLMI incidents for

8. Customer Service

In case you are ever asked to provide working cover for Jean Woolley, the Operations Service Controller for the account, the below documents should be a good starting point, but discuss the process in detail with Jean before the cover is needed.

8.1 CP Database

The CP database can be found by going to My Computer → Map Network Drive → Drive drop down: 'V' → Folder: \\Europemuk097\RMG_BU_Cust_Serv → Finish

This will open the folder in a new window. Go to 'All Change Proposal FORMS&Documents' → CPDatabase → CP Database (Microsoft Access file)

Ask Jean for access to the Cust_Serv folder.

8.2 Adding Impacts to Dimensions

One of the tasks you'll be required to do is add CP impacts into Dimensions to send to Change Management as and when they come through into the Customer Service mailbox. Ask Jean to grant you access to this mailbox.

8.3 Sending Out a New CP

The other main task you'll need to do is send out a new CP as and when they come into the Customer Service mailbox from Change Management. You then forward these on to the D-Lists provided by Jean. Ask Jean to share these with you.

The document below covers the work instructions on performing tasks 7.2 and 7.3:



CP Impacting
Process V2.docx

9. Software Licensing

This is an ad-hoc task you may be required to carry out for various people on the account.

One of the tasks you will be performing is maintaining license renewals for BAS. The Excel spreadsheet can be found on

Irrelevant

9.1 Purchase Orders

When you receive a request for a license to be renewed, you would need to raise a Purchase Order. The steps to raise a Purchase Order are listed in the instructions below.



Once the renewal has been raised, put the details in the Excel spreadsheet and save the purchase order form you have just created as well as the quote from TPG into a folder on SharePoint.

In the BAS Licenses Tracker Excel Spreadsheet, you will see a few tabs. Go to the tab according to when the license renewed will expire. For example, when a Purchase Order shows an end date of 31st March 2017 it would be placed in tab 'Renewal Reminder 16-17'. These renewal periods are based on the financial year, so it will run from April to March. To fill in the Excel Spreadsheet with details, follow the steps below.

File Name: Insert name of Folder that you have saved it on SharePoint. *make sure this is accurate as the hyperlink will be based on this information.

Req number: Fill this in once you have the confirmation email that is sent to the owner

Renewal Quote Ref: Fill this in once you have the confirmation email that is sent to the owner

Quote ref number: Fill this in once you have the confirmation email that is sent to the owner

Supplier: Fill this in with the PDF file name that you have saved on SharePoint.

Item: Copy details from 'Justification' in Purchase Order form

Description: Copy details from PDF description

CCN/CT: If this Purchase Order is related to a CP, insert the CP details in here.

Project No: As stated on PO

Cost Centre: As stated on PO

Task No: As stated on PO

Start Date: As stated on PO

Stop Date: As stated on PO

Quantity: As stated on PO

Price: As stated on PO

VAT: As stated on PO

Price+VAT: There is a formula in this cell so it will be filled in once you enter details in 'Price' and 'VAT'

Owner: State the name of the individual who requested for the license.

Area: As stated on PO

Comments: Insert any comments here.

Renewal Date: Detail the month and year of when the renewal was done.

Hyperlink: Copy the formula from the previous cell and enter here. Make sure the hyperlink is working. If it is not working, check the File Name and Supplier details you have previously entered and make sure they match the destination on SharePoint.

After entering the details in the spreadsheet, ensure that the previous renewal is highlighted in green.

10. How To

10.1 Create a Group Mailbox

1. Go to the below link for 7799 Self Service:

<http://www.7799.fs.fujitsu.com/7799/links.asp?ref=servicetype&group=csi>

2. Go to 'New Group Mailbox'
3. Fill out the request for and click Submit.

10.2 Add/Remove Members to Group Mailbox

For all management of your Group Mailbox, go to:

<http://www.itzone.fs.fujitsu.com/accounts/>

Here you can add/remove members from mailboxes that you are an owner of.

10.3 Add a Group Mailbox to Outlook

1. Open Outlook
2. Go to File → Info → Account Settings (dropdown) → Account Settings...
3. Highlight your email account, then click 'Change'
4. When the window opens, go to 'More Settings'
5. Go to the 'Advanced' tab
6. From here you can add/remove a mailbox (make sure you have access to the mailbox to view the emails)
7. Once you've added the mailbox click OK, then Apply
8. If you cannot see the mailbox straight away then restart Outlook and it should appear in the left column

10.4 Use Skype

10.4.1 Add Skype Meeting to your Outlook

In Outlook go to: File → Options → Add-Ins → Go → Click on Skype Meeting Add-in for Microsoft Office 2013 → Tick the box → Click OK

10.4.2 Set up Skype Meeting

In Outlook, go to Calendar and select 'New Skype Meeting'. This will automatically give you the conference joining details so all you need to do is send the invites.

If you choose 'New Meeting', then later decide you want to add Lync conferencing, in the meeting appointment, click 'Lync Meeting' and this will add the conference details.

10.4.3 Joining a Skype Meeting

When it's time to join a Skype conference meeting, if you have a calendar reminder pop-up, you can join online by selecting 'Join Online' and you will join via the audio from your laptop, so you'll need your headphones plugged in. Joining via your laptop will allow you to view any screen sharing, or share your own screen.

You can join by phone by using the instruction on the meeting invite, dialling 79577 then typing the conference ID when prompted to do so, followed by #

If you are the leader of this meeting, you will also be required to enter your PIN. This is your UK personnel number. This can be changed by clicking 'Forgot your dial-in PIN' in the meeting invite.