

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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Changes in v1.2

1. Changed the word 'ticket' to a correct defined term where unclear
2. Updated the CBIF selection criteria to include BIF explicitly tagged Peaks and moved the content to Appendix E as a set of work instructions
3. Added references to using the BIFApproved and BIFRejected Collections
4. Applied emphasis that defect Peaks can only be closed when the fix is released to live
5. Updated Appendix A to add steps to challenge "Re-target" and force to PTF
6. Inserted Appendix B to add anomaly checks for TfSNow
7. Renumbered Appendix B to Appendix C and updated it to use Live Defect and correct some grammar errors
8. Response Category value "30 -- Pending -- TL confirmed" will cease to be used
9. Target Release – the values of "Requested For" and "Released at" will cease to be used
10. Removed references to Simon Wilson as the team work for Steve Evans
11. Watermark changed to "POA INTERNAL"
12. Consolidated Peak document update list action into Live Defect Section (moved Root Cause list to this action)
13. Improved wording to clarify that a Live Defect is one that is present on the LIVE system and something likely to need a fix (it can also be present on a test system but if it is not present on the live system then it is not a Live Defect)
14. Added definition for KBA
15. Updated screenshots to be more specific on the screen item they applied to
16. Updated the descriptive text for the ##LiveAffectingDefect Collection in Peak
17. Removed Root Cause values as reasons to treat as No Fault Found as too inconsistent at this time
18. Adding cloning instruction screenshots
19. Added new Response Category "120 -- Final -- Cloned to create Defect Peak" to be used when cloning an investigation Peak to create a defect Peak
20. Clarified technique for Peaks declared as on "monitor"
21. Added reference to Release Peaks and Peaks that have been Baselined
22. Clarified that only one HDR-* CI or Collection should be set and if both could apply then use HDR-Fin
23. Clarified that when Release Management set the Planned Out Live date they use the date the first time the fix was deployed to the live environment (irrespective of rollout schedules that may decide on the rollout to the whole live environment)
24. Added recommendation that Peaks that are resolved but not ready to be closed as the resolution action is to be 'monitored' can remain in a non-closed state but must have a Forecast Date added to the Response so that this warns the support specialist and team leader that the review date has arrived and the Peak should be reviewed for closure
25. Added statement that Release Management processes will apply to 3rd party deployments that are within the Fujitsu scope of responsibilities. For example, Ingenico fixes will be deployed under releases and Peaks will be Targeted At, Proposed for, and Reported In release numbers identified for Ingenico fixes – currently 90.xx
26. Corrected the incorrect references to RAM/RAB
27. Added new step that on a release, SSC will ensure relevant KBA updates are checked and completed
28. Added new approach for progressing fixes through the release process faster – with consideration for a hot-fix
29. Added a screenshot for the Release Management "Reset Dates" feature
30. Added screenshots to explain the difference between an internal Fujitsu Progress update and a replicated Response update

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31. Enhanced the description of the HDR report generation process and moved to Appendix D as a work instruction
32. Revised the description stating deferred Peak as always Live Defects – some are not if they relate to test environments
33. Added process for Live Defects where no fix action is proposed
34. Numerous updates to Appendices to make them actionable Work Instructions
35. Updated Actions, removing ones completed

Changes in v1.1

1. Split Streams 5-7 to a new document
2. Added What's New to provide a pseudo Executive Summary for new readers before they delve into the detail
3. Added screenshots and diagrams to aid understanding
4. Removed requirement for Development (ManDays) to be entered on any Peak and also removed Development (ManDays) as a criteria for submission to CBIF
5. Refined criteria to be reviewed at BIF to guide what is taken to CBIF
6. Added additional references for Response Category and Root Cause field values
7. Added additional clarification that deferred Peaks that still require investigation are assigned Call Type "L" not "#"
8. Added guidelines for use of the "Additional comments (Customer visible)" field in TfSNow
9. Added criteria currently being used to derive content for CBIF and HDR
10. Added Appendix A to show some data validation checks that certain teams are advised to build in to and expand upon within their own local processes
11. Added Appendix B to show draft criteria for not acting on defects – the potential policy we will write to remove any subjectivity from decisions to close defect Peaks or not open Peaks from Jiras
12. Updated Actions

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Introduction

This document describes a number of improvements to the Post Office Account ways of working to enhance the end-to-end process of Live Defect Management. It describes how the systems should be used and how various teams will need to interact to ensure an effective end-to-end process is followed and can be tracked and reported on.

A PPT has been created for a quick overview.

Our interactions need to be system and process driven, not people and experience – and that will create a clear audit trail too.

We need to limit the dependency on meeting-specific reports or embedded tables in minutes to show progress on important matters.

Transparency is key – to the fullest sensible extent, POL need to see everything – and they need to be able to see it in their systems or from consistent reports from our systems. That way, POL are informed and able to make decisions for us or with us.

Terms and Terminology

New terms

Throughout this document, there are new terms and phrases that will need to be understood so we increasingly use a common language. A diagram is provided below this list. The main ones are:

- **Live Defect** – is a logged Incident that is present on the Live system that is within Fujitsu's scope of obligations and is, or appears to be, inconsistent with the agreed design or service specification. It is, therefore, a fault that is likely to need fixing
- **HDR Defect** – Live Defects that affect, or have the potential to affect, branch operations (financial, experience, or end customer)
- **Horizon Defect Review (HDR)** – a weekly meeting with POL to review HDR Defects. POL need to know the HDR Defects and their status. They share this with postmasters. This is a very important meeting that sees Fujitsu and POL aligned on the HDR Defects
- **Investigation Peak** – is an Incident that is being investigated where the cause and required action are not yet confirmed. A linked TfSNow Incident may well exist – and MUST exist if POL need to be aware. The Peak Call Type should be "L" if this is a Live Defect
- **Defect Peak** – is a Peak that is not linked to a TfSNow Incident and that describes the confirmed Live Defect that will be progressed through the SDLC (BIF, PTF, Dev, Test, Release) to live deployment
- **Investigation Incident (TfSNow)** – is an Incident that is being investigated where the cause and required action are not yet confirmed. The Incident MUST be bonded if POL need to be aware
- **Defect Incident (TfSNow)** – is a TfSNow Incident that describes the confirmed Live Defect that will be progressed by a Resolver Group that does not use Peak (e.g. Networks, Security, Unix)
- **Potential Live Defect (Peak)** – is a Live Defect that we are still looking into. There will likely be an investigation Peak open and probably a TfSNow Investigation Incident too. The Peak Call Type should be "L"
- **Confirmed Live Defect (Peak)** – is a Live Defect where the cause and required action to fix are known. The investigation has concluded. A defect Peak will exist with Call Type "#"

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- **Potential Live Defect (TfSNow)** – is a Live Defect that we are still looking into that is logged as a TfSNow Investigation Incident. The State will be “Acknowledged, Work in Progress, or Researching”
- **Confirmed Live Defect (TfSNow)** – is a Live Defect where the cause and required action to fix are known. The investigation has concluded. A TfSNow Defect Incident will exist with the State field set to “Fix in Progress”
- **KBA** – Knowledge Base Article. The term KEL is no longer to be used

Terminology – Overview

We need to be clearer and consistent about what we mean by, and how we use, various tools and processes within POA. The following entries are intended as an initial simple summary. They will be expanded on as the workstreams progress and sub elements will also be reviewed too. They cover Incidents, Problems, Peak, Release, Live Defects, Live Defect Management, BIF, CBIF, HDR and the KB.

Incidents

- All Incidents which POL should be aware of must be created and managed in TfSNow and be bonded so that they replicate to POL ServiceNow. Although actions and progress may happen in other tools, systems and processes, the primary source of all relevant content MUST be TfSNow.

Problems

- All Problems must be raised in TfSNow and be reviewed on an agreed schedule with POL. As Problems cannot be bonded, additional work will be needed to manually share updates and hold mutual reference numbers.

Peaks

- Peaks can be used for many purposes. Where Peaks relate to Incidents initiated from TfSNow, the relevant Investigation Peak updates MUST be synchronised with TfSNow. Peaks raised outside of an Incident MUST also be raised as TfSNow Incidents if they require the awareness or involvement of POL.
- Peak is the only system used to record and manage Live Defects.
- Peaks do not need to be shared with POL. If the awareness or involvement of POL is applicable then there will be a TfSNow bonded Incident and this will contain all relevant parts of any Peak so that the Incident that POL see is a suitable complete reference. Progress updates for POL on HDR Defects will take latest extracts from the Peak system and provide the update in a report.

Release

- Release Notes must state all Peaks that are being closed when the Release goes live. This must be included in the related Change ticket
- There must be a report showing the Peaks and any associated POL HDR Defect references so that POL are able to keep their tracking in sync
- Release dates must be held in Peak so that Peaks can be tracked to deployment

Live Defects

- A Live Defect is defined as an issue that:
 - Is present on a LIVE system
 - Is within Fujitsu's scope of obligations
 - Is, or appears to be, inconsistent with the agreed design or service specification
 - Is, therefore, a fault that is likely to need fixing

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- The Horizon Defects Review (HDR) scope will be those Live Defects that also have at least 1 of the following attributes (HDR Defects):
 - Affects, or has the potential to affect, branch financial outcomes (add the “HDR-Fin” Collection)
 - Affects, or has the potential to affect, the way a postmaster is required to use the system (User Interface, Report, Function) (add the “HDR-Exp” Collection)
 - Affects, or has the potential to affect, the experience of a Post Office customer or client (add the “HDR-Exp” Collection)

Note: Only one HDR- Collection needs to be set and if both could apply then HDR-Fin should be chosen*

- There may be a workaround, but the underlying issue still meets the criteria above
- The HDR Defect may be under investigation and is not confirmed to meet the criteria above but has attributes that meet the criteria above (a potential HDR Defect)
- When the HDR Defect is being investigated there will be a TfsNow Incident open and bonded. POL may track status using their ServiceNow Incident reference or may create a ServiceNow Problem record and manage it with that reference. All progress during investigation is to be added to the TfsNow Incident so that it is visible to POL in their corresponding Incident. It is POL's responsibility to keep their Problem record up to date if they have opened one.
 - Note: If the Incident has been escalated to a Problem in TfsNow then updates on the investigation work will be provided within the weekly status update report which shows confirmed Live Defect
- When a HDR Defect is confirmed then a specific defect Peak reference will be added to the closing comments in the TfsNow Incident. Fujitsu will then manage the HDR Defect in Peak and will provide status update reports – from Peak – to POL at their weekly HDR Forum.
- Non-HDR Defects will be managed internally by Fujitsu using Peak. Reports will be available for POL to show overall progress but it is not intended that every non-HDR Defect will be discussed.

Live Defect Management

- All Live Defects must be rigorously managed until resolved.
- The status of all Live Defects must be known at all times and they must be shared with POL: the more branch impacting ones at POL's Horizon Defects Review Forum; and the rest by a separate report. Fujitsu must assure POL that Live Defects are well managed and must keep POL aware of progress.

BIF

- All confirmed Live Defects must go through the Business Impact Forum (BIF) and must have all the required meta data and tags added/checked.
- The dates of BIF meetings, the outcome, and the reasons for CBIF submission must be recorded in the Peak.

CBIF

- CBIF submissions will be based on criteria held in Peak.

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- The criteria are shown later in this document and that criteria will be agreed with POL.
- CBIF will become part of the POL HDR weekly meeting.

HDR

- The Horizon Defects Review (HDR) Forum is the new name for what was the Known Error Review Forum (KERF).
- This is a critical meeting which sees POL and Fujitsu having mutual awareness of the main Live Defects and the progress being made on them.
- It is a joint weekly forum to manage HDR Defects that meet the stated definition.
- POL will maintain a list of all HDR Defects and their progress. Fujitsu will provide updates to the HDR Defects being tracked.
- There must be a POL Problem reference and a corresponding Fujitsu Incident, Peak or Problem reference.
- The updates to the Fujitsu tracked Incidents, Peaks and Problems will be shared at the HDR Forum.

KB

- The Fujitsu KB is an information repository used for support purposes.
- Any observed defects will be recorded as a Knowledge Base Article (KBA) but the progress to investigate and address them will be done via Peak(s) and/or Incident(s).
- KBAs do not need to be shared with POL as the tracking needs to be on the Peak and/or Incident.
- If the awareness or involvement of POL is applicable then there will be a TfSNow bonded Incident and this will contain all relevant parts of any KBA so that the Incident that POL see is a suitable complete reference.

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Systems and Teams

Managing Incidents

- An Incident is defined in the HNG-X contract as “any perceived abnormal or undesirable occurrence relating to the Services”
- Incidents for the Live environment that POL need to be notified of and be aware of must be logged in the Fujitsu service management toolsets, TfSNow, and bonded so it is visible in the POL service management toolset, ServiceNow
- Fujitsu must ensure TfSNow Incidents are raised and bonded where POL notification is required (e.g. when relevant KBAs are created, or faults are identified whilst doing other work such as testing or problem determination)
- Service Operations should only use TfSNow for communicating Incidents between Fujitsu and POL
- Incidents cannot be raised by email by POL or Fujitsu. Incidents must be raised in TfSNow by Fujitsu or in ServiceNow by POL
- The Summary field should be understandable by most readers as this feeds Peak and also shows on reports
 - For system monitoring this is set by SMC, bonded Incidents it comes from POL, otherwise it's Fujitsu staff (MAC & Security) that choose its content
- The Incident should be a complete and comprehensive self-contained reference to the status of an Incident
- Incident progress MUST be shown on the Incident in TfSNow and cannot be managed via separate emails. Emails must be added to the Incident in TfSNow if relevant to demonstrating progress or status
- The Incident should appear to be integral – the fact that 3rd and 4th line use a different toolset should not be apparent
- There should be no references visible to POL (going forward) to toolsets used by Fujitsu that are not accessible to POL such as Peak or KBA for status information (as these are Fujitsu internal) – a Peak reference is acceptable for a reference to a defect Peak that is being progressed. References for Fujitsu use only must be maintained
- Incidents must be updated to contain relevant updates from systems such as Peak (but not private updates) and relevant parts of KBAs (not the internal instructions)
- Incidents raised as Fujitsu internal that do not need to be notified to POL may contain internal system references
- Incident updates should contain meaningful and appropriately detailed technical content
- Incident updates, and in particular updates summarising the current status, should be written in plain English to be understandable to most readers
- A clear statement of the latest status and the next action should be obvious within the Incident. This needs to be the last, or very recent, update
 - The “Additional comments (Customer visible)” field must provide a latest status view – at least periodically and for POL bonded Incidents mainly – so it can be easily understood by any reader. Peak uses a dedicated field for this and uses the following format:
 - Business impact: [description of the business impact, succinct]
 - Status update: [description of current status – succinct]
 - Next action: [next action to be taken and expected date for next update]
- For bonded Incidents we need to use the agreed set of categories, sub-categories and CIs so that the replication interface retains the settings. The original setting will stand throughout the

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life of the Incident. You cannot change the Category/Sub-Category or it breaks the replication link. You can change the CI but it will be retained Fujitsu side but will not replicate

- We need to use the designated open and close categories to better monitor Incident categories
 - Open category – TfSNOW has Configuration Items that should be used
 - Closure code – TfSNOW has these and they should be used
- The Peak closure codes must map to TfSNOW Incident closure codes. As at the date of this document the mappings are as follows:

Peak Closure Code	Fujitsu
Advice after Investigation	POA-Advice & Guidance
Avoidance Action Supplied	POA-Fujitsu Operational
Administrative Response	POA-Administration
Advice and guidance given	POA-Advice & Guidance
No fault in product	POA-No Fault Found/No Action Taken
Duplicate Call	Cancelled
Solicited Known Error	POA-Advice & Guidance
Insufficient evidence	Unidentified Root Cause
Fix Released to Call Logger	POA-Peak Fault Found
User error	POA-User Error
Unspecified Insufficient evidence	Unidentified Root Cause
Call withdrawn by user	Cancelled
Fixed at Future Release	POA-Peak Fault Found
Enhancement Request	POA-POL domain
Suspected hardware fault	Unidentified Root Cause

- Incidents outside of the Fujitsu domain that are identified by Fujitsu are passed to POL ITDSD. If there are no consequential implications for Fujitsu then the TfSNOW Incident will be set to Suspended to await feedback to help us advance our KB (perhaps for the agreed Suspend period and then we close). If there are implications then we leave the Incident open as we need to know the outcome
- Only the originating organisation can close an Incident
 - Incidents we have marked as requiring a fix should be closed in TfSNOW with the defect Peak reference added as that is what will be tracked and managed to conclusion
 - For Incidents closed that relate to process or user issues then we should propose system improvements – and this should be done in conjunction with an equivalent process for Peaks closed with the same reasons
- Fujitsu will set an Incident to Suspended in TfSNOW until POL close their original Incident
 - *Note: Resolved in TfSNOW only means that the last assigned Resolver Group has completed their action – but it may require other actions by other Resolver Groups. Therefore, Resolved*

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is not replicated to ServiceNow or POL will wrongly assume it is Resolved and will likely close their Incident. When all possible actions are complete and MAC believe it is truly Resolved then they will request POL to close it.

- When POL close an Incident it notifies MAC and MAC can then close the TfsNow Incident
- Incidents in a Suspended state are reviewed weekly between the MAC and POL teams and it is included in the monthly SMR pack
 - Where the Incident is Suspended as no further action by Fujitsu is possible then after 10 days the Incident will be closed. When the Incident is set to Suspended the following text will be added as the final update "Please be aware that the incident will automatically be closed after 10 days if no response is received from you."
- Fujitsu must tag Incidents that POL are tracking (mostly for HDR) so it is aware of Incidents where POL have an interest so that it can review content and status frequently. Adding any relevant POL references, such as the POL Problem reference, should be considered
- A Live Defect is defined as an issue that:
 - Is present on a LIVE system
 - Is within Fujitsu's scope of obligations
 - Is, or appears to be, inconsistent with the agreed design or service specification
 - Is, therefore, a fault that is likely to need fixing
 - Incidents that meet the definition of a Live Defect must have the "LiveAffectingDefect" CI added in TfsNow
 - The State field values must be used

State

Work in Progress



- Acknowledged – Fujitsu is aware of the Incident but is not yet working on it
- Work In Progress/Researching – Fujitsu is investigating the issue described in the Incident
- Fix In Progress – Fujitsu has confirmed that the Incident requires an action to fix it – most likely linked to a Change ticket
- Suspend – action is complete by Fujitsu or is required from another entity
- An Incident that has the LiveAffectingDefect CI and State of Acknowledged/Work In Progress/Researching is a potential Live Defect. Suspend will also be classed as a potential Live Defect too for simplicity
- An Incident that has the LiveAffectingDefect CI and State of Fix In Progress is a confirmed Live Defect
- The POL Horizon Defects Review scope will be those Live Defects that also have at least 1 of the following attributes (HDR Defects):

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Configuration Items Search Name Search

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All > Name >= HDR

Name	Asset tag	Serial number	Company	Managed by
HDR - EXP			POA	(empty)
HDR - FIN			POA	(empty)

- Affects, or has the potential to affect, branch financial outcomes (add the “HDR-Fin” CI)
- Affects, or has the potential to affect, the way a postmaster is required to use the system (User Interface, Report, Function) (add the “HDR-Exp” CI)
- Affects, or has the potential to affect, the experience of a Post Office customer or client (add the “HDR-Exp” CI)

Note: Only one HDR- CI needs to be set and if both could apply then HDR-Fin should be chosen*

- When the HDR* CI is applied to an Incident, Fujitsu MAC will also email the Fujitsu Duty Manager email alias and a POL designated alias to provide an email early warning that a new HDR Incident has been raised
- Incidents carrying a HDR* CI will have the POL Problem references added to the Incident to enable cross-checking
- Incidents carrying a HDR* CI will still be classified as potential or confirmed Live Defects using the classifications mentioned above
- Peaks that are cloned that have a ServiceNow reference cannot be closed by EDSC until the cloned Peak that was created is also closed or has its Call Type changed to “#”. The original Peak must be kept open until the cloned Peak is closed and updates must be applied to the original Peak so that the related TfSNow and ServiceNow Incidents continue to receive updates. For Peaks cloned for GDC for GDPR obfuscation reasons this will only apply up to April 2020 as from that date the original Peak was obfuscated and a clone was not created
- Peaks that are closed that have a ServiceNow reference with the reason being that a cloned Peak is now to be tracked will be sent back to Peak by MAC to reopen the Peak as this must be maintained to ensure the continued automatic flow of updates to the originator
- Recurring Incidents and Incidents with follow up actions require a Problem record to be created. The Incidents are linked to the Problem
- To ensure we avoid updates being overtly associated with an individual, meetings, updates, and reports relating to Incidents must be system driven from the relevant toolset – not separate emails or meeting comments
- We need management reports for Incidents to see trends. This needs to be part of the monthly SMR and/or internal Service Operations meetings:
 - Open, Active and Closed Incidents
 - Live Defect Incidents – potential and confirmed
 - HDR Defects – potential and confirmed
 - For each, show views based on:
 - Open category & Close codes
 - CI associations
 - Internal response times by type/priority

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- Branch Code - an Incident may relate to one FAD (Branch Code will be set to the nnnnnn FAD by either Fujitsu or POL) but it may relate to many FADs (Branch Code set to POA SMC by Fujitsu or MAC by POL)
- Service requests should not be accepted as Incidents, but whilst they are very few (those that relate to investigations are now re-directed through other channels) this will be accepted and reviewed periodically

Managing Problems

- Problems must be logged in the Fujitsu service management toolset, TfSNow
- Problems cannot be bonded, like Incidents, to cause mutual replication between the Fujitsu and POL service management toolsets so each organisation needs to maintain its own records independently
- POL need to provide their Problem reference for Fujitsu to record and link to its own Problem & POL also may need to provide status updates back to Fujitsu – we need to escalate POL inefficiencies at SMR as well as at the inter-company Problem Review Meeting
- Fujitsu internal Problems are managed entirely in TfSNow
- If a Problem is tracking a Live Defect then the Problem needs to hold the Peak reference as that is where progress will be actively updated and reported
- Peaks related to Fujitsu Problems will need to have the Fujitsu Problem reference added so the association is clear when checked from either system
- *Note: Fujitsu use Problem tasks and manage the updates to those*
- Major Incidents will lead to Problems being raised to close out on all findings
- Fujitsu MAC will notify Problem of underlying issues identified from Incidents –these tend to relate to Unix, NT etc (TfSNow Resolver Groups) and no Peaks (Peak has its own processes)
- Problems also use the State field – Acknowledged, Work In Progress, Researching, Fix In Progress, Suspend – to record and track status
- The Problem should have the applicable Configuration Item assigned (HDR Defects):

The screenshot shows the 'Configuration Items' section of the Fujitsu TfSNow tool. At the top, there is a search bar with 'Name' selected and a 'Search' button. Below this, a filter 'All > Name >= HDR' is applied. The main table has columns for Name, Asset tag, Serial number, Company, and Managed by. There are search filters for each column. The table lists two items: 'HDR - EXP' and 'HDR - FIN', both with 'POA' as the Company and '(empty)' as the Managed by field.

Name	Asset tag	Serial number	Company	Managed by
HDR - EXP			POA	(empty)
HDR - FIN			POA	(empty)

- Affects, or has the potential to affect, branch financial outcomes (add the “HDR-Fin” CI)
- Affects, or has the potential to affect, the way a postmaster is required to use the system (User Interface, Report, Function) (add the “HDR-Exp” CI)
- Affects, or has the potential to affect, the experience of a Post Office customer or client (add the “HDR-Exp” CI)

Note: Only one HDR- CI needs to be set and if both could apply then HDR-Fin should be chosen*

- Problem reporting should have HDR tagged Problems
- Incidents where the resolution is a fix to address a Live Defect may be both a Peak and a Problem (the former for management, the latter for joint process validation)

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Actions

System Changes

- Added CIs for HDR-Exp, HDR-Fin, LiveAffectingDefect

New Ways of Working

1. **Sandie** – We need to regularly check
 - that any Incident that POL need to be notified of or be aware of has been logged in TfSNow and bonded
 - that we do not reference KBAs, Peaks or include internal content in TfSNow bonded Incidents and that the TfSNow Incident contain all relevant content and be a comprehensive self-contained reference to the status of an Incident. The only Peak reference that should be added is for defect Peaks (if applicable)
 - Incidents are being updated and that we are not using separate emails to share progress that is not embedded into the Incident updates
 - Incident updates are well worded and use language that is understandable to most readers – challenging and coaching where needed
 - the current status and the next action on an Incident is clearly stated so any reader is in no doubt that the Incident is under full control – challenging and coaching where needed
 - the Summary field is well worded and understandable by most readers
 - the relevant open and close categories are being used when handling Incidents – applying additional caution with bonded Incidents to use the mutually agreed settings
 - the LiveAffectingDefect CI is being set for Live Defects
 - the HDR* CIs are being set by Fujitsu management where applicable (and that the POL Problem Reference is also added to the Incident)
 - when an Incident is placed into Suspend as no further Fujitsu action is applicable then the text of “Please be aware that the incident will automatically be closed after 10 days if no response is received from you.” has added. After 10 days, these Incidents should be closed
2. **Sandie/Steve Ba** – create a process/report to share Incidents and Peaks closed due to process or user issues with POL monthly to encourage POL to consider system enhancements that could avoid the occurrence of the issue

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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Managing Peaks

- The use of Peak and the updates to Peaks must be consistent and documented. That takes the onus off the people and it enables anomaly reporting and management oversight
- If the awareness or involvement of POL is applicable then there will be a TfSNow bonded Incident and this will contain all relevant parts of any Peak so that the Incident that POL see is a suitable complete reference
- If any 3LS, 4LS or Architect creates a Peak in the course of their normal duties that matches the definition of Live Defect:
 - Is present on a LIVE system
 - Is within Fujitsu's scope of obligations
 - Is, or appears to be, inconsistent with the agreed design or service specification
 - Is, therefore, a fault that is likely to need fixing

...then it must be given the ##LiveAffectingDefect Collection and an Incident must be raised in TfSNow if one is not already open.

- If a Peak has had the ##LiveAffectingDefect Collection added, and it also has at least 1 of the following attributes (Horizon Defect Review):
 - Affects, or has the potential to affect, branch financial outcomes (add the "HDR-Fin" Collection)
 - Affects, or has the potential to affect, the way a postmaster is required to use the system (User Interface, Report, Function) (add the "HDR-Exp" Collection)
 - Affects, or has the potential to affect, the experience of a Post Office customer or client (add the "HDR-Exp" Collection)

Note: Only one HDR- Collection needs to be set and if both could apply then HDR-Fin should be chosen*

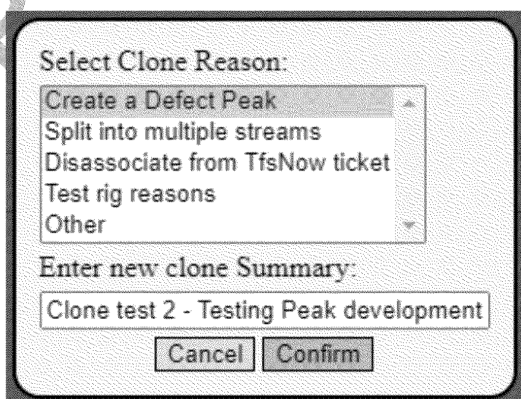
- If a Peak raised independent of TfSNow is subsequently qualified as being an Incident that POL should be aware of, then Fujitsu MAC need to be contacted. Fujitsu MAC will create a new TfSNow Incident which will be bonded and then assigned to 3LS. This will create a new Peak. The content of the original Peak must be copied to the new Peak so that updates can automatically flow back to TfSNow. The original Peak should be closed citing that it has been superseded by a Peak linked to TfSNow
- When the investigation into an issue defined in a Peak originating from TfSNow is concluded, the 'investigation' Peak can be closed
 - If the investigation Peak is an existing clone then the Peak can have its Call Type changed to "#" (for GDC obfuscated Peaks this will apply to any cloned Peaks created prior to April 2020)
 - The investigation Peak has not been cloned then it needs to be cloned to create a defect Peak (for GDC obfuscated Peaks this will apply to any Peaks obfuscated since April 2020)

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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- The defect Peak reference should be added to the investigation Peak as part of its closure activity. The defect Peak reference will then be mentioned in the TfSNow Incident so that it replicates to POL ServiceNow
- The interface between TfSNow and Peak (OTI) must protect the internal system references to Peaks or KBAs and updates should appear to all be generated in TfSNow – except for a reference to a defect Peak that is shared for future tracking purposes
- The Summary field needs to be written so as to be understandable to most readers as it will be used in internal management and external POL reports
- New fields are being introduced to help Live Defect Management tracking and reporting and these will need to be completed by various parties as the Peak progresses
 - See section Live Defect Management – Key Fields in Peak
- Cloning processes and rules need to be applied consistently:
 - Cloning carries forward all Collections, References and Key Fields and it must show cloned from and cloned to support chain of events tracking
 - Cloning should be for specific purposes and the reason will appear as a prompt when cloning is initiated:
 - Assignment to GDC (so we can redact/obfuscate)
 - *Note: Since April 2020 UK Bridge do not clone Peaks but instead they obfuscate the original so it can be widely shared and updated whilst maintaining any links to TfSNow Incidents. Peaks cloned prior to this date that remain open will have broken the auto links to any TfSNow Incidents*
 - Splitting into multiple threads linked to a single origin (e.g. Data Centre & Counter, phased fix – urgent perhaps by script/refdata and follow-on for code)
 - Disassociating from the TfSNow incident (e.g. documentation, follow-on to an initial response to an Incident)
 - Creating the defect Peak to progress the Live Defect to resolution
 - Creating Test Only Peaks where the test in a particular environment can't mirror the entirety of the issue described e.g. 3rd party connections are not available. This is rare. Testing is then done on the clone in that environment. The master defect Peak is still open as it may be used for the full testing in LST. The Test Only Peak will be closed once testing is completed successfully
 - *Note: if a Peak has been assigned to a Baseline then cloning should be done with caution and include consultation with the Baseline owner in advance*
- When the [Clone] button is clicked, the following menu is displayed:



Select Clone Reason:

- Create a Defect Peak
- Split into multiple streams
- Disassociate from TfSNow ticket
- Test rig reasons
- Other

Enter new clone Summary:

Clone test 2 - Testing Peak development

Cancel Confirm

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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- The user selects from the list ("Create a Defect Peak" is the default option), amends the Summary to give the clone a different and helpful title, and clicks confirm. The reason is captured in the clone Peak:

```

Date:11-Aug-2021 09:00:38 User:John Simpkins
CALL PC0250898 opened
Details entered are:-
Summary:test mb problem
Call Type:#
Call Priority:D
Target Release:HNG-X 12.11
Routed to:EDSC - John Simpkins
Date:11-Aug-2021 09:00:38 User:John Simpkins
Clone Reason: Create a Defect Peak
Date:14-Dec-2015 15:52:55 User:_Customer Call_
CALL PC0244669 opened
Details entered are:-
Summary:test mb problem

```

- If the Defect reason is selected, the clone will be created with Call Type '#'.
 - Peaks raised in Test or Dev that also relate to the Live environment will not have Call Type "L".
 - Test will raise a new Peak within the release being tested for unexpected Live Defects and then assign it to the Developers. It has a Call Type "P" by default
 - The Developers & Architects decide if it relates to Live and must set the relevant Live Defect meta data as described above
 - Peaks that are cloned that have a ServiceNow reference cannot be closed by EDSC until the cloned Peak that was created is also closed or has its Call Type changed to "#". The original Peak must be kept open until the cloned Peak is closed and updates must be applied to the original Peak by EDSC so that the related TfSNow and ServiceNow Incidents continue to receive updates. For Peaks cloned for GDC for GDPR obfuscation reasons this will only apply up to April 2020 as from that date the original Peak was obfuscated and a clone was not created
 - Peaks that have been held by EDSC due to having been cloned and having a ServiceNow reference must be periodically reviewed to ensure updates from the cloned Peak are applied
 - Peaks that are closed that have a ServiceNow reference with the reason being that a cloned Peak is now to be tracked will be sent back to Peak by MAC to reopen the Peak as this must be maintained to ensure the continued automatic flow of updates to the originator
 - Rules on use of Call Type need restating so we ensure greater consistency
 - All Peaks must be owned by a team whose manager will check that progress is being made
 - We need regular management quality checks – use of fields, age of Peaks, progress being made – and this needs to be summarised and reported upwards to ensure executive visibility and confidence
 - The report created by Fujitsu MAC is useful but does not appear to cause action to be taken
 - The origin of a Peak – SPM, POL, SMC, Fujitsu – is identifiable by scraping the Contact Name: field – but this cannot be done using standard Peak reporting and requires a custom script to be run. This has been created to help the POA Defect Manager report on this content
 - 'Private' Peak updates can be added to the Progress field. They stay in Peak and are not replicated across the OTI

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15:01

Just for info based upon this meeting. When adding progress to a 'bonded' Peak the default response option is '-- Progress Only' this does NOT flow back to Peak.

Edited

[PAPAL205 OIR 40063 : [20540] : [131943-1-00-1909-5] - [attempt to use invalid Journal Sequence number 350 6475173, whilst the current

Progress Text		Progress Templates
		None
		Note: This is an OTI Provider Incident
		• Progress Only updates will not be sent to the Consumer
		• Pending Responses will be sent to the Consumer
		• Final Responses will pass the incident back to the Consumer (closing the Peak)
Response Category	Effort (hours)	
-- Progress Only	0	
Forecast Date	Development (ManDays)	No Forecast Date
25/09/2021 10:00	0	
back to detail		save

Edited

Note the Text on the right-hand side of the progress entry box for further guidance.

If you select a response category then the text above the Progress changes to reflect this:

[PAPAL205 OIR 40063 : [20540] : [131943-1-00-1909-5] - [attempt to use invalid Journal Sequence number 350 6475173, whilst the current

Response Text - your update will be sent to the OTI Consumer		Progress Templates
		None
		Note: This is an OTI Provider Incident
		• Progress Only updates will not be sent to the Consumer
		• Pending Responses will be sent to the Consumer
		• Final Responses will pass the incident back to the Consumer (closing the Peak)
Response Category	Effort (hours)	
10 - Pending - Fix Failed	0	
Forecast Date	Development (ManDays)	No Forecast Date
25/09/2021 10:00	0	
back to detail		save

No references will be sent across to TFSNow (or beyond) so all Documents, Baselines, KBs, Peak etc can be added as references

-
- Updates added the Response field are replicated across the OTI
- The References field is manually maintained so can miss Incident or KBA references. SMC may add KBA into reference text instead of into the References field which limits query-ability
- Peaks closures:
 - Incident related Peaks are closed when the investigation phase has concluded and no further action is needed, when further info required (as it passes back to TfsNow), or when the next action needs to be assigned to another TfsNow Resolver Group (the Peak is no longer needed)
 - Incident related Peaks are closed when the investigation phase has concluded and we have a confirmed Live Defect. This would see a cloned Peak raised as Call Type "#". If the Peak is not linked to a TfsNow Incident bonded to POL then the Peak can just be reassigned to Call Type "#"
 - Defect Peaks are closed **when the Release they are targeted at is deployed** – ideally by automating the process – this will probably be Peaks at Status "F"
 - All other Peaks are closed based on team/process specific rules – as per current processes
- Peaks closed as user/process error should be considered along with TfsNow Incidents closed for the same reasons to provide a monthly report to POL to recommend enhancements that

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could avoid the occurrence of the issue. A likely source of these could be Peaks closed with the following Root Cause values:

- “39 General – User Knowledge” – caused by lack of knowledge with the user
- “40 General – User” – caused by an action performed by the user which was outside expected use
- “41 General – in Procedure” – caused by not following defined procedure
- Peaks/Incidents closed as “66 – Final – Enhancement Request” should also be reported on monthly to POL to recommend enhancements are submitted to Fujitsu. KBAs also needs to be updated to show the outcome was that POL need to raise an enhancement request
- Peaks that are resolved but not ready to be closed as the resolution action is to be ‘monitored’ can remain in a non-closed state but must have a Forecast Date added to the Response so that this warns the support specialist and team leader that the review date has arrived and the Peak should be reviewed for closure
- The Peak closure codes must map to TfSNow Incident closure codes. As at the date of this document the mappings are as follows:

Peak Closure Code	Fujitsu
Advice after Investigation	POA-Advice & Guidance
Avoidance Action Supplied	POA-Fujitsu Operational
Administrative Response	POA-Administration
Advice and guidance given	POA-Advice & Guidance
No fault in product	POA-No Fault Found/No Action Taken
Duplicate Call	Cancelled
Solicited Known Error	POA-Advice & Guidance
Insufficient evidence	Unidentified Root Cause
Fix Released to Call Logger	POA-Peak Fault Found
User error	POA-User Error
Unspecified Insufficient evidence	Unidentified Root Cause
Call withdrawn by user	Cancelled
Fixed at Future Release	POA-Peak Fault Found
Enhancement Request	POA-POL domain
Suspected hardware fault	Unidentified Root Cause

- An Incident may relate to one FAD but it may relate to many FADs – this is recorded in the Business Impact text showing the number of branches affected
- To ensure we avoid updates being overtly associated with an individual the updates should be system driven – not separate emails or meeting comments
- For the occasions where Fujitsu is required to share actual Peaks, it will need to define a Peak extract process that will brand, classify and version control content. The process must also redact/obfuscate to remove PII and remove internal only Progress updates. This extract process is not under consideration as at the date of this report

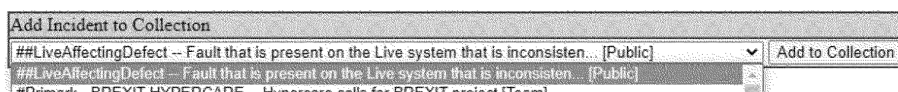
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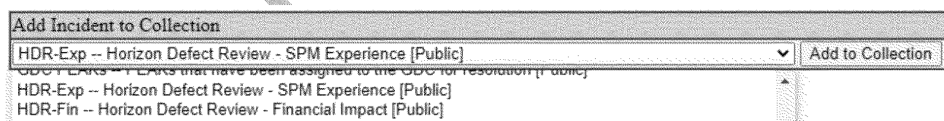
Release Management

- Deferred Peaks should be recognisable against the release they were deferred from and the release to which they are subsequently targeted
- Only Peaks can be deferred – POA Jira's or other things stored outside of Peak CANNOT be deferred
- Deferred Peaks (that do not relate to test environment findings) become Live Defects. When a Peak is deferred, the Fujitsu party obtaining the agreement must ensure:
 - the ##LiveAffectingDefect Collection is set where applicable



- the “Deferral Agreed” Collection set
- The Call Type set to “#” if the Live Defect is confirmed and a fix can be progressed, or the Call Type set to “L” if the Live Defect still needs further investigation
- Target Release Type changed to “Proposed for” for subsequent update via BIF/PTF
- If the deferred Peak has at least 1 of the following attributes (Horizon Defect Review):
 - Affects, or has the potential to affect, branch financial outcomes (add the “HDR-Fin” Collection)
 - Affects, or has the potential to affect, the way a postmaster is required to use the system (User Interface, Report, Function) (add the “HDR-Exp” Collection)
 - Affects, or has the potential to affect, the experience of a Post Office customer or client (add the “HDR-Exp” Collection)

Note: Only one HDR- Collection needs to be set and if both could apply then HDR-Fin should be chosen*



- Release Notes must list all Peaks that are fixed and being deployed. The extract/report must also show the POLPRB- reference for HDR Defects and the Fujitsu Problem references if they have been tagged to be tracked by the Problem manager(s). This is achieved by clicking the button to the right of the listed Peaks in the Release Note which creates an Excel spreadsheet that can attached to the TfSNow Change ticket (format similar to below):

Call Reference	Summary	POL Problem Ref	Fujitsu Problem Ref
PC0295314	LST20.94: Proper messages has to display instead of Agent events in DCM LREC.DCM_CREATE LREC_C4D jo		
PC0295403	LST: 20.94: Too many D records in LREC file		
PC0295711	PBS Pilot: INC8349716 : Amex trans not settled as expected when reconciling DRS2 reports		
PC0295725	PBS: INC8354763 (TfSNow) : INC0388718 Lloyds £300 withdrawal [MCSUK-16376]		

Close

- Release Notes will not list:
 - the Peaks that are being deferred (as they are not fixed yet)
 - any clone Peaks raised by Test for Test Only actions (as these are not additional Live Defects but are just a tracking mechanism for the Test team)

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- The action of deploying the Release should cause the relevant Peaks on the Release Note to be closed. As a minimum it should ensure all are set to Status “F” and alert the originator that the fix is deployed and they are asked to close the Peak
- The action of deploying the Release should notify SSC so that any related KBAs can be correctly actioned
- “Release Peaks” are administrative reference Peaks for Release Management. They do not act as master Peaks so the defect Peaks must be kept updated independent of the Release Peak settings and dates
- If a Peak has been assigned to a Baseline then cloning should be done with caution and include consultation with the Baseline owner in advance
- Release Management processes will apply to 3rd party deployments that are within the Fujitsu scope of responsibilities. For example, Ingenico fixes will be deployed under releases and Peaks will be Targeted At, Proposed for, and Reported In release numbers identified for Ingenico fixes – currently 90.xx
- Hotfixes are a mini release and will use the new 3-node release numbering xx.yy.zz where the primary 2 nodes are the release that they relate to and the third node is the hotfix number.
- If a release has gone Live, then any Peaks which require a hotfix should NOT be Targeted At the master release, but at a hotfix release. For example:
 - PBS - the master releases was 20.94. Any hot fixes have their own release 20.94.01, 20.94.02 ... 20.94.11 and so on
 - 71.10 – the master release was 71.10, already released from FJ to CC for packaging. Any hot fixes for this would be 71.10.01, followed by 71.10.02 and so on
- If a hotfix is needed, Release Management will create the hotfix release in Peak with its own set of dates, so that it can be properly tracked
- Any peaks that are not urgent, and therefore not a hotfix, should go to BIF/PTF for release via the Maintenance Release process
- Release Management will maintain the Target Release date table:
 - All past Releases must state the actual release date for deployment (if phased, this should be the Pilot release date when at least 1 live branch saw new code installed)
 - All future Releases must show the latest anticipated release date for deployment – irrespective of who will be leading the deployment
 - The Release date should be the first time that the deployment was made to any live environment (Model Office or agreed pilot rollout sites). The date will therefore show the first time the fix was deployed to a live counter/branch eventhough a phased rollout may mean other counters/branches did not receive the fix until a later agreed date
 - The Target Release screen should be used to make universal changes to Peaks when release information changes – especially the Planned Dates for the whole Release. The dates can be changed and then the “Reset Date” button is used to apply the new date to all Peaks Targeted At the updated release (see below):

The screenshot displays the 'Peak Incident Management System' interface. At the top, there's a 'Select Release' dropdown menu showing 'HNG-X 90 01' and a 'Show invisible' checkbox. Below this, the 'Release Number' is 2213, 'Release Id' is 'HNG-X 90 01', and 'Invisible' is unchecked. The 'Description' is 'Ingenico PinPad Update' and 'Collection' is 'No Collection'. There are buttons for 'Plan Our Dev', 'Plan Our Integration', 'Plan Into Test', and 'Plan Our Test'. The 'Plan Our Live' date is '25/10/2021'. A 'Reset Date' button is present, with a tooltip that reads 'Reset Date on all release planning records for this release'. At the bottom, there are buttons for 'Save Changes', 'Restore', 'Delete Release', and 'List Releases'.

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- These date changes then propagate to the Release Mgt tab for each Peak and update the dates shown below enabling the progress of each Peak to be tracked:

	Planned Dates (DD/MM/YYYY)		Actual Dates (DD/MM/YYYY)	
Out Development				
Out Integration				
Into LST				
Out LST				
Into Production				

- Hotfix releases must also be included in the date table
- Targeted Releases with no stated deployment date must be reported on and validated to ensure progress – or the intentional lack of it – is defined by process and cannot go unnoticed
- We all know that the goal is to progress from logging a perceived fault to fixing it (unless it isn't really a fault) as quickly as we can. The added objective here is to ensure POA management and POL management are aware of the packages of work we have and are fully engaged in determining priorities and dates. The only thing stopping us making an immediate fix should be a POL supported decision to not take immediate action. We should never determine what we fix or don't by ourselves (unless Fujitsu is the only beneficiary of the fix). So, here are some actions I feel move us closer to that goal:

Actions

System Changes

- Create a button alongside the listed Peaks on the Release Note that gather the content for into an Excel sheet for easy upload into the TfSNow Change ticket, updated the cloning process to ask for a reason and then record it in the new cloned Peak, updated the cloning process to take more fields across to the clone
- To create menu list for reason for creating a clone and also to enable the Summary field to be changed to a more appropriate text string

New Ways of Working

- Managers will need to conduct spot checks on Peak data entry quality and encourage new habits – fields filled in, fields read well, clones created for correct situations – See Appendix A
- Adam/Steve Ba/Sandie** – Peaks closed as user/process error should be considered along with TfSNow Incidents closed for the same reasons to send a monthly report to POL to recommend enhancements that could avoid the occurrence of the issue
- Adam/Steve Ba/Sandie** – Peaks/Incidents closed as “66 – Final – Enhancement Request” should also be reported on monthly to POL to recommend enhancements are submitted to Fujitsu. KBAs also needs to be updated to show the outcome was that POL need to raise an enhancement request

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4. **Matt S** – Targeted Releases with no stated deployment date must be reported on and validated to ensure progress – or the intentional lack of it – is defined by process and cannot go unnoticed
5. **PMs/QFP** - Deferred Peaks will need to be updated. The party obtaining agreement to defer will need to ensure:
 - the ##LiveAffectingDefect Collection is set (if applicable)
 - the “Deferral Agreed” Collection set
 - The Call Type set to “#” if the Live Defect is confirmed and a fix can be progressed, or the Call Type set to “L” if the Live Defect still needs further investigation
 - Target Release Type changed to “Proposed for” for subsequent update via BIF/PTF
 - If the deferred Peak has at least 1 of the following attributes (Horizon Defect Review):
 - Affects, or has the potential to affect, branch financial outcomes (add the “HDR-Fin” Collection)
 - Affects, or has the potential to affect, the way a postmaster is required to use the system (User Interface, Report, Function) (add the “HDR-Exp” Collection)
 - Affects, or has the potential to affect, the experience of a Post Office customer or client (add the “HDR-Exp” Collection)

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Live Defect Management – Live Defect Definition

- All Live Defects are managed in Peak only
- Some classifications of Live Defects are managed in a joint weekly Horizon Defect Review Forum chaired by POL. These are known as HDR Defects
- A Live Defect is defined as an issue that:
 - Is present on a LIVE system
 - Is within Fujitsu's scope of obligations
 - Is, or appears to be, inconsistent with the agreed design or service specification
 - Is, therefore, a fault that is likely to need fixing
 - The Horizon Defects Review (HDR) scope will be those Live Defects that also have at least 1 of the following attributes (HDR Defects):
 - Affects, or has the potential to affect, branch financial outcomes (add the "HDR-Fin" Collection)
 - Affects, or has the potential to affect, the way a postmaster is required to use the system (User Interface, Report, Function) (add the "HDR-Exp" Collection)
 - Affects, or has the potential to affect, the experience of a Post Office customer or client (add the "HDR-Exp" Collection)

- There may be a workaround, but the underlying issue still meets the criteria above
- An Incident may be under investigation that is not confirmed to meet the criteria above but has attributes that meet the criteria above (a potential Live Defect/HDR Defect)
- *Note 1: Only one HDR-* Collection needs to be set and if both could apply then HDR-Fin should be chosen*
- *Note 2: Defects identified and managed throughout the Development and Test stages are not under this Live Defect Management process as they do not relate to the Live system. Hence there are 3 types of defect:*
 - *Live HDR Defects*
 - *Live (Non-HDR) Defects*
 - *Non-Live Defects (test/dev etc) – not tracked by Live Defect Management*
- *Note 3: KBAs can be raised to describe Live Defects but the management of the Live Defect is done by the Peak and this Live Defect Management process*

Live Defect Management – Goals

A banner will appear on the Peak login screen to remind support staff of the changes that are described below. This will most likely be removed when new habits are successfully formed and the reminder is no longer needed:

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Defect Management Changes

There have been some changes to the Defect Management process to enable more accurate reporting. Please consider the following when reviewing a potential defect Peak:

- Is this a Live Defect? If so, add the **##LiveAffectingDefect** Collection.
- Is the Call Type correct? Change to **L -- Live Incident** or **-- Defect Identified** as applicable.
- Does could this affect branch operations? If so, add either the **HDR-Fin** (Financial) or **HDR-Exp** (Experience) Collection.
- Is there a Workaround? If so, add the **Workaround Reference** field and set it to **Yes**.
- Have you added a **Impact** update? There is a new template to guide adding an impact.
- Is the Priority correct? The default priority from TFSNow is often too low.
- Are the Product & Product Group fields correct? Multiple products can be added if required.
- Is the Status (Response Category) correct? Does it reflect the current activity in the defect process.
- Where possible ensure your progress updates are understandable to non-technical users.

Main Menu

Peak Incident Management System - RMG Account

incident mgmt	call list	find call	build query	query list
		preferences	multiprint	file share
	help	logout	collections	alerts

- Live Defect Management must have a designated owner on POA to manage and evolve the processes and systems used
- Staff will need training and guidance on how POA wants Live Defects to be managed and how the systems need to be kept up to date
- Live Defects must be recorded as Peaks and managed using the Peak system
 - Fujitsu may have Problems open for Live Defects but the Problem record needs to hold the relevant Peak reference as this will be where progress updates will be derived
- We must know how many Live Defects there are at any point in time – and importantly, we must know which ones are part of the HDR Defect tracking led by POL and we must store the POL tracking reference on our defect Peak
- We need to be able to differentiate between Live Defects that are still being investigated and are not confirmed, and Live Defects that have been confirmed and require action to resolve
- We need to know the status of all Live Defects and whether there are any issues needing attention
- We need to be able to review trends and attributes of Live Defects to identify patterns – for example, we need new reports to show trends, volumes, efficient areas, inefficient areas, process stalled, aging entries, mix by priority, targeted at, time by stage, defects by system area
- Live Defects must be clearly titled so that they can be understood by the majority of readers
- Live Defect status must be clearly stated and be current and not require the reader to read content and come to a summarised view themselves
- All Live Defects must have a clear next action stated that can be tracked
- All Live Defects must be owned by a team at all times whose manager will ensure the right actions are being taken (this can be a different team throughout the lifetime of the Live Defect)
- Managers must ensure that Live Defects within their areas are reviewed regularly and action taken to ensure processes are being followed – this may require manual reviews
- When a HDR Defect is being investigated there will be a TfsNow Incident open and bonded. POL will track status by referring to their ServiceNow Incident. All progress on the investigation is to be added to the TfsNow Incident so that it is visible to POL in their corresponding ServiceNow Incident
 - It is POL's responsibility to keep their Problem record up to date if they have opened one
- If Fujitsu completes its investigation and confirms there is no HDR Defect then the investigation Peak and Incident will be closed with no further actions required. The Peak will be closed with Response Category "95 -- Final – Advice after Investigation" [or "66 – Final –

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Enhancement Request”] which will see it excluded from Live Defect counts in the future. The HDR-* Collection should remain so we know it was considered within the HDR Forum

- When a HDR Defect is confirmed as a Fujitsu owned Live Defect, then a new defect Peak will be created that summarises the fault and the required fix and carries all the required meta data tags. The defect Peak reference will be added to the investigation Peak which will then replicate to the TfSNow Incident. The investigation Peak will be closed along with the TfSNow Incident. Fujitsu will then manage the Live Defect in Peak and will provide status update reports from Peak that will be shared with POL for POL to use as part of the weekly HDR Forum
- Live Defects that are not classified as HDR Defects are managed internally by Fujitsu using Peak. Reports will be available for POL to show overall progress but it is not intended that every non-HDR Defect will be discussed
- There are a number of new and updated fields that comprise the key meta data used to manage defect Peaks. These fields must be kept up to date by Fujitsu staff and checked and amended by team managers regularly
- Deferred Peaks (that do not relate to test environment findings) become Live Defects. When a Peak is deferred, the Fujitsu party obtaining the agreement must ensure:
 - the ##LiveAffectingDefect Collection is set where applicable

Add Incident to Collection	
##LiveAffectingDefect -- Fault that is present on the Live system that is inconsisten... [Public]	Add to Collection
##LiveAffectingDefect -- Fault that is present on the Live system that is inconsisten... [Public]	
#Primark PREVIT LIVERCAFE Discontinue calls for PREVIT product (Team)	

- the “Deferral Agreed” Collection is set
- The Call Type is set to “#” if the Live Defect is confirmed and a fix can be progressed, or the Call Type set to “L” if the Live Defect still needs further investigation

Details		File	Call	Options	Admin	Help
Peak Incident						
DETAILS	REFERENCES	PRODUCTS	EVIDENCE	IMPACT	C	
Call Reference	PC0294913					
Release	Targeted At -- HNG-X 21.52					
Call Type	L -- Live Incidents					
Contact	# -- Defect Identified					
Impact	A -- Administrative use					
Summary	C -- Cloned call					
Date: 01-Jun-2021 22	E -- Enhancement Request					
CALL PC0294913 oper	F -- Document Review/Design Walkthrough					
Details entered are	G -- GDC Testing Incidents/Defects					
Summary: INC8092244	I -- Internal Development Incidents/Defects					
Call Type: L	K -- Primark					
Call Priority: D	L -- Live Incidents					
Target Release: HNG-	M -- Problem Management					
Routed to: EDSC - _U	O -- Operational (SSC)					
Date: 01-Jun-2021 22	P -- Product Incidents/Defects					
=====	R -- Release Notice Forum					
INCIDENT MANAGEMENT	S -- System Testing Incidents/Defects					
Date/Time Raised: J	T -- Technical query					
Priority: D	U -- Security Testing Incidents/Defects					
Contact Name: POA S	V -- Vulnerability					
Contact Phone:	W -- Reference Data Service					
Originator: XXXXXX@	X -- System Management Testing Incidents/Defects					
Originator's reference: INC8092244	Y -- Live (Non-RefData) Data Updates					
Product Serial No:						
Product Site:						
=====						
Service: NA Platform: NA Server: NA						

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

FUJITSU CONFIDENTIAL – INTERNAL USE ONLY (POA ONLY)

- Target Release Type changed to “Proposed for” for subsequent update via BIF/PTF
- If the deferred Peak has at least 1 of the following attributes (Horizon Defect Review):
 - Affects, or has the potential to affect, branch financial outcomes (add the “HDR-Fin” Collection)
 - Affects, or has the potential to affect, the way a postmaster is required to use the system (User Interface, Report, Function) (add the “HDR-Exp” Collection)
 - Affects, or has the potential to affect, the experience of a Post Office customer or client (add the “HDR-Exp” Collection)

Note: Only one HDR- Collection needs to be set and if both could apply then HDR-Fin should be chosen*

- We need a documented process that reviews any Fujitsu internal Jiras and ensures they are monitored and raised as Peaks when needed so they follow the processes. Jiras meeting the criteria stated in Appendix C require no action as Appendix C is a POA policy
- We need to hold dates when Releases went live and when future Releases are proposed for so we have an outcome for any defect Peak
- We need to provide a full list of ALL Live Defects closed in a Release with their associated POL Problem references so that POL are also able to manage their HDR process
- Reports are needed for management to show the overall status, trends, and patterns related to all current Live Defects and historical Live Defects
- CBIF rejections will get a POL reference that we will add to the Peak References field and also to the KBA so we know this was a POL decision not to take further action. The Peak will be closed with Response “63 -- Final -- Programme approved - No fix required”
- CBIF submissions will be documented in a file that will be attached to Peak. The file will use the File Type “CBIF Proposal” so it can be readily identified. This will be sent to HDR so that the meeting has the information in advance
- The outcome of BIF/CBIF/PTF meetings will be held in concise notes in the relevant text boxes on the Release Mgt tab. No need for separate minutes
- Peaks that have been tested successfully and are still to be deployed must not be closed and must be routed to RM-x and assigned to “Release to Live” so it is clear that the Live Defect is still present in the system but that its fix has been tested and is awaiting release
- “Release Peaks” are administrative reference Peaks for Release Management. They do not act as master Peaks so the defect Peaks must be kept updated independent of the Release Peak settings and dates
- We need a method to track when a fix was ready and then the delay was related to waiting for a slot to deploy as it is the date the fix could have been applied that is key – not the date it was applied
 - BIFApproved is a date when we knew what to do. Although this does not include an estimate of the time to fix it, it is a point where we could have started the work and hence a fix could have been deployed nearer to that time that the release date eventually used
 - We need to message this correctly to POL and POA management

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

FUJITSU CONFIDENTIAL – INTERNAL USE ONLY (POA ONLY)

- We need to challenge ourselves on our processes and the batching of items for a release – why do we not do more releases, why do we not put more in a release
 - We need to ensure that POL and POA management are involved in the defect backlog decision making so we agree periodically that waiting is ok rather than action
 - Demand Planning may need to include an explicit defect fix work item so it can be prioritised along with the other project work – or not – but by explicit decision making
- The following Response Category field values are considered No Fault Found:

Response Category – 62 -- Final – No fault in product
Response Category – 63 -- Final -- Programme Approved – No Fix Required
Response Category – 66 -- Final -- Enhancement Request
Response Category – 68 -- Final -- Administrative Response
Response Category – 72 -- Final -- Duplicate Call
Response Category – 94 -- Final -- Advice and guidance given
Response Category – 95 -- Final -- Advice after Investigation
Response Category – 96 -- Final -- Insufficient evidence
Response Category – 97 -- Final -- Unspecified insufficient evidence
Response Category – 98 -- Final -- User error
Response Category – 100 -- Final -- Route call to Tfs
Response Category – 120 -- Final -- Cloned to create Defect Peak
Response Category – 200 -- Final -- Call withdrawn by user

- We should ensure that any Live Defect is promptly investigated until we confirm no fault is found or that a fix is needed and change the status to Defect Identified. Anyone owning a stack with Peaks classed as ##LiveAffectingDefect that is open and still being investigated should ensure progress is made optimally
- If we have a Live Defect that is Defect Identified and it has either of the HDR-* Collections, or is Priority A or B we should:
 - a. Explore every option we can to find a workaround – and implement it
 - b. Get it Targeted At a release as fast as possible (immediate BIF and PTF)
 - c. Get a strong proposed date for these Releases (so we have a go live date in mind) – this may require more input from POL
 - d. Propose a hot-fix is considered and invite POA management and POL management to decide if they want to or not (forget the constraints – this is a management call)
 - e. Stack owners and Release Management must ensure this is done
- If we have a Live Defect that is Defect Identified and is Priority C/D/Z we should:
 - a. Get it Targeted At a maintenance release as fast as possible
 - b. Normal BIF and PTF scheduled meetings can continue
 - c. Demand more maintenance releases with confirmed dates
 - d. Stack owners and Release Management must ensure this is done
 - e. We should expect to put Live Defects that are Defect Identified into the next month's maintenance release 'at the latest'
- If we determine that progressing a Live Defect is not the best option (for example the feature is being migrated and any fix would serve little purpose) then we should act as follows:

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

FUJITSU CONFIDENTIAL – INTERNAL USE ONLY (POA ONLY)

- If there is a Live Defect then we have an obligation to fix it
 - We either fix it, or we get permission not to
 - Permission can be from POL (ideally) or from POA DE/VP (second choice) – but they have to be empowered to say “do nothing”
 - We then write a KBA to describe the approved fault so future calls know that no action is required
 - We associate the KBA with the Defect Peak we will not be actioning
 - We set the Response Category on the Defect Peak to “Programme approved – no fix required” (so it is treated as a no action Peak)
 - We close the Peak
 - We leave the KBA open
- Take ALL numbered and dated Releases to Demand Planning so they can be prioritised alongside other work by POA and by POL and POL know the implication of not allowing us to progress them

Live Defect Management – Key Fields in Peak

The following are the key fields needed for Live Defect Management:

- **Call Type** – must be set to “#” Defect Identified when a Live Defect is confirmed. Prior to this Live Defects ought to be Call Type “L” Live Incident but can have other Call Types provided they carry the ##LiveAffectingDefect Collection. The Collection descriptive text is “Fault that is present on the Live system that is inconsistent with the agreed design and/or service specification”

DETAILS	REFERENCES	PRODUCTS	EVIDENCE	IMPACT
Call Reference	PC0295241			
Release	Reported In -- HNG-X Rel. Ind.			
Call Type	O -- Operational (SSC)			
Contact	# -- Defect Identified			
Impact	A -- Administrative use			
Summary	C -- Cloned call			
Date: 16-Jun-2021 10:10	E -- Enhancement Request			
CALL PC0295241 open	F -- Document Review/Design Walkthrough			
Details entered are	G -- GDC Testing Incidents/Defects			
Summary: testing	I -- Internal Development Incidents/Defects			
Call Type: L	K -- Primark			
Call Priority: D	L -- Live Incidents			
Target Release: HNG-	M -- Problem Management			
Routed to: EDSC - U	O -- Operational (SSC)			
Date: 16-Jun-2021 10:10	P -- Product Incidents/Defects			
[Start of Response]	R -- Release Notice Forum			
testing dev MD	S -- System Testing Incidents/Defects			
[End of Response]	T -- Technical query			
Response code to call	U -- Security Testing Incidents/Defects			
Date: 16-Jun-2021 10:10	V -- Vulnerability			
The Call record has	W -- Reference Data Service			
Date: 16-Jun-2021 10:10	X -- System Management Testing Incidents/Defects			
Development Cost updated: new cost is 2 (Man Days)	Y -- Live (Non-RefData) Data Updates			
[Start of Response]				
test 1				
[End of Response]				
Response code to call type L as Category 40 -- Pending -- Incident Under Investigation				
Date: 16-Jun-2021 10:51:08 User: John Simokins				

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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- **Summary** – must be written so as to be understandable by most readers. This will need more thought when Peaks are raised. Management should amend this during weekly clean-ups (careful to preserve links where raised in another system)
- **Impact** – tab and free form field to articulate impact, status and next steps so it is easy to understand for anyone. This will be maintained for HDR Peaks weekly. For other Peaks it can be as needed
 - Business impact: [as used currently, mention how many branches are affected if helpful]
 - Status update: [description of current status – succinct]
 - Next action: [next action to be taken and expected date for next update]
- **Collection ##LiveAffectingDefect** (formerly ##LiveAffectingSoftwareFault). This Collection must be set when the Peak meets the criteria for a Live Defect at the earliest possible opportunity. It is likely that Call Type “L” will frequently carry this ##tag but it will not always be the case so needs selectively applying. The Collection descriptive text is “Fault that is present on the Live system that is inconsistent with the agreed design and/or service specification”

- **Collections of “HDR-Fin” or “HDR-Exp” for HDR Defects**

Note: Only one HDR- Collection needs to be set and if both could apply then HDR-Fin should be chosen*

- **Collections** – when a Collection is added or removed the history is held on the Release Mgt tab in the RMF area as shown below:

- **Priority** – which must be validated at all times so it is accurately shown as this will affect reporting and decision making
- **POL Problem reference** – using the prefix “POLPRB-” so it is obvious and also searchable
 - POL Problem Reference is a Reference field and the following screenshots shows how to add the field:

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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Peak Incident Management System - PC0295241

Reference Type	Current Value	Top Ref	Delete	Top Ref
Call reference	PC0295059	☒	Delete	Top Ref
Call reference	PC0295059		Delete	Top Ref
Call reference	PC0295059		Delete	Top Ref
Workaround	Yes		Delete	Top Ref

Add Reference Type

Reference Value(s)

Expected Format(s): FJPRB-Problem reference

Add Reference(s)

- **Fujitsu Problem reference** – using the prefix “FJPRB-“ so it is obvious and also searchable
 - Fujitsu Problem Reference is a Reference field and the following screenshots shows how to add the field:

Peak Incident Management System - PC0295241

Reference Type	Current Value	Top Ref	Delete	Top Ref
Call reference	PC0295059	☒	Delete	Top Ref
Call reference	PC0295059		Delete	Top Ref
Call reference	PC0295059		Delete	Top Ref
Workaround	Yes		Delete	Top Ref

Add Reference Type

Reference Value(s)

Expected Format(s): FJPRB-Problem reference

Add Reference(s)

- **Workaround** – to state “Yes/No” state if a workaround has been implemented. If the field is blank or contains “No” then no workaround has been identified. If it is “Yes” then an accepted workaround is in place
 - Workaround is a Reference field and the following 2 screenshots show how to add the field and set its value:

Peak Incident Management System - PC0295241

Reference Type	Current Value	Top Ref	Delete	Top Ref
Call reference	PC0295059	☒	Delete	Top Ref
Call reference	PC0295059		Delete	Top Ref
Call reference	PC0295059		Delete	Top Ref
Workaround	Yes		Delete	Top Ref

Add Reference Type

Reference Value(s)

Expected Format(s): Yes

Add Reference(s)

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

FUJITSU CONFIDENTIAL – INTERNAL USE ONLY (POA ONLY)

Peak Incident Management System - PC02

DETAILS	REFERENCES	PRODUCTS	EVIDENCE	IMPACT	COLLECTIONS	TARGET RELEASE	RELEASE MGT
Reference Type					Current Value		
Call reference					PC0290059		
Call reference					PC0290000		
Call reference					PC0290800		
Add Reference Type					Reference Value(s)		
Workaround					Yes		
Expected Format(s)					Yes		
If adding multiple references these must be comma separated and be of the same					No		

- **Release Mgt tab – Initial and Completed dates and text box** - We need to know the stage we are at in the fixing process, the date it initially entered the stage and when the stage was completed and the notes from the meetings at which it was discussed
- **Assigned Team** – must show which team is currently responsible for taking the next action or ensuring action is taken
- **Product Group and Product** - We need to know the part of the system that the Live Defect relates to for reporting and quality purposes
- **Root Cause** – we need to know what type of fix was needed, which when matched to the part of the system affected, gives us further quality data
- **Response Category** – specific values have been identified to enable clarity and to spot exclusions:
 - “63 -- Final -- Programme approved - No fix required” – for Peaks rejected at CBIF
 - “66 -- Final -- Enhancement Request” – for Peaks tagged with the HDR Collection that were subsequently qualified as not being HDR Defects but enhancement requests
 - “95 -- Final – Advice after Investigation” – for Peaks tagged with the HDR Collection that were subsequently qualified as not being HDR Defects
 - The value “30 -- Pending -- TL confirmed” will cease to be used
- **Target Release** – the values of “Requested For” and “Released at” will cease to be used
- Management governance and checking is needed to ensure this is how the system is being used – correcting at least weekly
- A reminder will pop up on certain changes of Peak status to remind support staff to consider the key fields:
 - Events triggering presentation of the pop-up:
 - The Peak Routing is changed
 - The Call Type is changed
 - The Response Category is changed
 - The ##LiveAffectingDefect Collection is added
 - The HDR-Fin or HDR-Exp Collections are added
 - Pop-up wording:
 - Is this a **Live Defect**? – if so, add the ##LiveAffectingDefect Collection
 - Is the **Call Type** correct (Live Incident or Defect Identified if applicable)?
 - Does/could this **affect branch operations**? – if so, add the HDR-Fin or HDR-Exp Collection
 - Is there a **Workaround**? – if so, add the Workaround References field and set it to Yes
 - Does your **last update read well** to users not involved in the Peak progress?
 - Have you added a helpful **Impact update**?
 - Is the **Priority** correct?
 - Are the **Product & Product Group** fields correct?
 - Is the **Status (Response Category)** correct?

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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Live Defect Management – Reporting

- From 2 queries/datasets it should be possible to create views of potential Live Defects, confirmed Live Defects, deferred Live Defects, and Peaks needing customer input
- The 2 reports are:
 1. Report to extract all ##LiveAffectingDefect tagged Peaks and show the columns as below
 2. Report to extract all Open Peaks and show the columns as below
- The output fields for both queries are to be (at least):

Call Reference, Summary, Date Opened, Product, Product Group, Call Type, Priority, Assigned Team, Status, Root Cause, Collections, References, TfsNow Incident, POL SNOW Incident, Contact Name, Workaround, Business Impact, Target Release, Target Release Type, Response Category, BIF Initial Date, BIF Completed Date, BIF Text, CBIF Initial Date, CBIF Completed Date, CBIF Text, CBIF Proposal (exists or doesn't for now), PTF Initial Date, PTF Completed Date, PTF Text, Development (Man Days), Cloned from, Cloned to, Date Time Last Updated, Planned Out Live, Call Logger, Actioned Team, Date Last Closed, Call Loggers Team, BIF_Ticked_Questions, HDR_User, HDR_Date, BIF_User, BIF_Date, TFSBanded (1/0), Assignee, Time to Target (Days)

Actions

System Changes

- Rename ##LiveAffectingSoftwareFault to ##LiveAffectingDefect and apply to all currently tagged Peaks
- Rename Call Type "L" to remove "/Defects" from label
- New Workaround field with optional text values Yes/No
- New Call Type value of "#" for Defect Identified
- New HDR Collections of "HDR-Fin" and "HDR-Exp"
- Updated Release Mgt tab to add BIF, CBIF and PTF fields above current list (to hold dates of meetings and outcome summaries)
- Amended default guidance text for the Impact text box
- New Reference type of POL Problem Reference and enforce POLPRB- prefix
- New File Type of "CBIF Proposal"
- Removed "30 – Pending –TL confirmed" Response Category
- Amended the descriptive text for ##LiveAffectingDefect to "Fault that is present on the Live system that is inconsistent with the agreed design and/or service specification"
- Added new Response Category "Cloned to create Defect Peak"
- Added text box to ask user why they are cloning, writing the response into the start of the clone
- Added capability to setup email alerts if specific Collections are added or removed
- Added temporary reminder pop-up until the new fields and values become more embedded
- Remove the values of "Requested For" and "Released at" from list of Target Release field values

One-Time Actions

1. **Adam/Tariq** – what documents need updating to formalise all this?
 - **Application Support Strategy** **SVM/SDM/PRO/0875**
 - i. Root Cause values need explaining and adding to the Application Support Strategy document

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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- 1 Architecture
 - 6 Design - Platform Design
 - 7 Design - High Level Design
 - 8 Design - System Outline
 - 13 Development - Build Scripts
 - 14 Development - Code
 - 15 Development - Low Level Design
 - 16 Development - Reference Data
 - 21 Requirements
 - 24 Cfg Mgt - Config Data Error
 - 26 Integration - Build
 - 31 Test - Test interpretation
 - 32 Test - Script
 - 33 Test - Data
 - 34 Test - Environment
 - 37 General - Network Change
 - 38 General - Hardware Fault
 - 39 General - User Knowledge
 - 40 General - User
 - 41 General - in Procedure
 - 42 Gen - Outside Program Control
 - 43 General - Operational Change
 - 96 Gen - Investigation On-Going
 - 97 General - 3rd Party issue
 - 99 General - Unknown
- SSC WIs Will be linked to the ASS changes
 - Peak User Guide CS/MAN/011
 - Developer Wiki pages TBC
2. **Tariq** – review all current Jiras and provide a report on those that are still present in the Live system – no matter how trivial – for review
 3. **Steve Br/Steve Ba/Tariq/Adam/Graham** – when the final list of Live Defects is visible, identify policy statements and decision criteria that can be defined that sees defect Peaks either closed or actioned where currently they seem to have stagnated
 4. **Steve Br** – Draft a Live Defect Management document for Dimensions [SVM/SDM/PRO/4313]
 5. **Steve Br** - Agree a process for CBIF Proposal creation
 6. **Steve Br** – confirm a method to track when a fix was ready and then the delay was related to waiting for a slot to deploy as it is the date the fix could have been applied that is key – not the date it was applied
 7. **Steve Br** – Investigate implications of Post Office Cloud on ways of working. Check how Live Defects are being recorded in AWS JIRA and be sure it is aligned to this Live Defect Management process or that an agreed alternative way of working is defined and agreed at DE/VP level

New Ways of Working

The identified fields necessary for Live Defect Management must be kept up to date.

1. **Adam** - Mandate weekly refreshes of Impact field for all HDR- tagged Peaks (and ideally all ##LiveAffectingDefect tagged Peaks)

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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2. **Steve Br/Adam** - Implement a management process to check the new fields and ensure they are correctly used for the next few weeks until habits form – see Appendix A for checks

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POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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BIF

- BIF is a Fujitsu internal meeting
- When a Developer is ready for BIF to consider their proposal then they must
 - Set BIF Action flag on the relevant Peak
 - If the Peak:
 - Is present on a LIVE system
 - Is within Fujitsu's scope of obligations
 - Is, or appears to be, inconsistent with the agreed design or service specification
 - Is, therefore, a fault that is likely to need fixing
 - Then
 - Add the ##LiveAffectingDefect Collection

- If the cause and required action to remedy are:
 - Still being investigated – then set the Call Type to "L"
 - Are confirmed – set the Call Type to "#" and also update:
 - Root Cause field is up to date

- Ensure Workaround field is up to date
- Ensure Product Group field is up to date
- Ensure Product field is up to date
- Ensure Priority field is up to date
- Ensure Impact field is up to date
- All Peaks with the BIF Action flag set will be reviewed at BIF
 - This will include all defects Peaks with the ##LiveAffectingDefect tag
 - It will also include other Peaks that may relate to other topics such as environments or Peaks that the Developers wish to discuss at the forum

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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- If a Peak had previously been rejected - as more information was required - then it will have the BIF Action flag set again when the Developer is ready to re-present their proposal
- BIF must consider the proposal (as it does currently) and also validate the following data values for defect Peaks:
 - If the Peak:
 - Is present on a LIVE system
 - Is within Fujitsu's scope of obligations
 - Is, or appears to be, inconsistent with the agreed design or service specification
 - Is, therefore, a fault that is likely to need fixing
 - Then
 - Ensure the ##LiveAffectingDefect Collection is set

Add Incident to Collection	
##LiveAffectingDefect -- Fault that is present on the Live system that is inconsisten... [Public]	Add to Collection
##LiveAffectingDefect -- Fault that is present on the Live system that is inconsisten... [Public]	
##Demand -- PREVIT LIVEDOCCARE -- User reports calls for PREVIT Incident Team	

- If the cause and required action to remedy are:
 - Still being investigated – then set the Call Type to "L"
 - Are confirmed – set the Call Type to "#" and also update:
 - Root Cause field is up to date

Peak In	
DETAILS	REFERENCES
Call Reference	PC0295241
Release	Reported In -- HNG-X Rel. Ind.
Call Type	O -- Operational (SSC)
Contact	# -- Defect Identified
Impact	A -- Administrative use
Summary	C -- Cloned call
	E -- Enhancement Request
	F -- Document Review/Design Walkthrough
	G -- GDC Testing Incidents/Defects
	I -- Internal Development Incidents/Defects
	K -- Primark
	L -- Live Incidents
	M -- Problem Management
	O -- Operational (SSC)
	P -- Product Incidents/Defects
	R -- Release Notice Forum
	S -- System Testing Incidents/Defects
	T -- Technical query
	U -- Security Testing Incidents/Defects
	V -- Vulnerability
	W -- Reference Data Service
	X -- System Management Testing Incidents/Defects
	Y -- Live (Non-RefData) Data Updates
Date:16-Jun-2021 10:51:08	
CALL PC0295241 opened	
Details entered are	
Summary:testing	
Call Type:L	
Call Priority:D	
Target Release:HNG-X	
Routed to:EDSC - U	
Date:16-Jun-2021 10:51:08	
[Start of Response]	
testing dev MD	
[End of Response]	
Response code to ca	
Date:16-Jun-2021 10:51:08	
The Call record has	
Date:16-Jun-2021 10:51:08	
Development Cost updated: new cost is 2 (Man Days)	
[Start of Response]	
test 1	
[End of Response]	
Response code to call type L as Category 40 -- Pending -- Incident Under Investigation	
Date:16-Jun-2021 10:51:08 User:John Simokins	

- Ensure Workaround field is up to date
- Ensure Product Group field is up to date
- Ensure Product field is up to date
- Ensure Priority field is up to date
- Ensure Impact field is up to date

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- Check if the new HDR Collections of “HDR-Fin” or “HDR-Exp” should apply. If it needs applying then the chair must alert Steve Bansal, Adam Woodley and Sandie Bothick. If the issue in the Peak:
 - Affects, or has the potential to affect, branch financial outcomes, add the HDR-Fin Collection
 - Affects, or has the potential to affect, the way a postmaster is required to use the system (User Interface, Report, Function), add the HDR-Exp Collection
 - Affects, or has the potential to affect, the experience of a Post Office customer or client, add the HDR-Exp Collection

Note: Only one HDR- Collection needs to be set and if both could apply then HDR-Fin should be chosen*

Add Incident to Collection	
HDR-Exp -- Horizon Defect Review - SPM Experience [Public]	Add to Collection
HDR-Exp -- Horizon Defect Review - SPM Experience [Public]	
HDR-Exp -- Horizon Defect Review - SPM Experience [Public]	
HDR-Fin -- Horizon Defect Review - Financial Impact [Public]	

- Check if there are conditions that would mean the Peak needs POL input and hence must go to CBIF. The questions are on the Release Mgt tab under the BIF section

BIF Questions:
☐ The fix can be done in more than one way and POL would need to guide Fujitsu on choosing the preferred option.
☐ The fix may change the functionality of the system and consequently POL will be required to provide appropriate communication, and potentially training, to the subpostmasters.
☐ The fix may need to be done in conjunction with changes performed by some of POL's other suppliers and POL will need to manage and synchronise that activity.
☐ The fix may need to be done concurrently with a separate future planned change, due to the two fixes being logically related, and POL would need to confirm their willingness to accept any potential delays in deploying the fix.
☐ The fix may relate to active discussions between Fujitsu and POL on a specific and separate topic and hence should be discussed within that context (Fujitsu management discretion).
☐ Fujitsu does not believe a fix is a sensible option and seeks POL's agreement to record the circumstances in a KBA only.

- * The fix can be done in more than one way and POL would need to guide Fujitsu on choosing the preferred option.
 - * The fix may change the functionality of the system and consequently POL will be required to provide appropriate communication, and potentially training, to the subpostmasters.
 - * The fix may need to be done in conjunction with changes performed by some of POL's other suppliers and POL will need to manage and synchronise that activity.
 - * The fix may need to be done concurrently with a separate future planned change, due to the two fixes being logically related, and POL would need to confirm their willingness to accept any potential delays in deploying the fix.
 - * The fix may relate to active discussions between Fujitsu and POL on a specific and separate topic and hence should be discussed within that context (Fujitsu management discretion).
 - * Fujitsu does not believe a fix is a sensible option and seeks POL's agreement to record the circumstances in a KBA only.
- Note: The forecast Development (ManDays) will no longer be a deciding factor for submission to CBIF
 - The BIF chair must record, in Peak on the Release Mgt tab, what decisions are made:

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- The new BIF date fields (Initial and Completed) will need to be completed during, or after, the BIF meeting (not before or it will affect status reporting)
 - Initial date - will hold the date of the first BIF the Peak was first presented at – this value should not change
 - Completed date - will hold the last BIF meeting the Peak was discussed at – this value will change if the Peak is iteratively presented for review and it will allow reporting on what was reviewed at the last BIF meeting
- The outcome of BIF discussions should be added to the BIF text box on the Release Mgt tab. A concise note is all that is needed. No need for separate BIF minutes
- If the Peak is approved at BIF then the BIFApproved Collection must be added (also for BIFRejected)

- If the Peak is to go to CBIF this will be determined by the field values and the BIF chair should not set the PTF Action flag
 - If the Peak does not need to go to CBIF then the PTF Action flag will be set
- o The definition of BIF in the contract ASM schedule needs to be updated

CBIF

- CBIF is a joint meeting with POL
- CBIF will continue to exist and it will be merged with the HDR Forum
- CBIF will evolve to being more system driven (more explanation below)
- Items to be discussed at CBIF must have a "CBIF Proposal" that has been created in advance using the agreed template (see right) and approval process so it is clear that this is what the decision needs to be made on (not additional dialogue during a meeting)
- Peaks to be discussed at CBIF are determined by Peak data items so it is system driven. See CBIF Submission Extract Criteria below for the system value that will determine CBIF applicability

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Improved Ways of Working & Actions Required

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- Peaks required to go to CBIF will be identifiable via system query and report and will be shared in advance with POL so that the meeting can focus on the decision not the familiarisation
 - If we need to invite an SME to elaborate (only for exceptional submissions) then the SME will be invited. If the submission text is well worded then SME attendance should not be required – as is currently the case when CWOs are approved
- The CBIF representative must record, in Peak on the Release Mgt tab (but not in the presence of POL), what decisions are made:

The screenshot displays a web-based interface for managing business impact forums. It features several sections: 'Business Impact Forum (BIF)', 'Customer Business Impact Forum (CBIF)', 'Peak Impact Forum (PIF)', and 'Release Management Forum (RMF)'. Each section contains a table for tracking progress and status. The BIF section includes a 'BIF Questions' area with instructions. The CBIF section includes a 'CBIF Status' table. The PIF section includes a 'PIF Status' table. The RMF section includes a 'RMF Status' table. The interface also shows a 'Next BIF' and 'Next CBIF' section with a 'Next PTF' section.

- The new CBIF date fields (Initial and Completed) will need to be completed during, or after, the BIF meeting (not before or it will affect status reporting)
 - Initial date - will hold the date of the first CBIF the Peak was first presented at – this value should not change
 - Completed date - will hold the last CBIF meeting the Peak was discussed at – this value will change if the Peak is iteratively presented for review and it will allow reporting on what was reviewed at the last CBIF meeting
- The outcome of CBIF discussions should be added to the CBIF text box on the Release Mgt tab. A concise note is all that is needed. No need for separate in CBIF minutes
- If the Peak needs to go back to the Developer then it should be assigned to the Developer team
- If the Peak can proceed as discussed then the PTF Action flag will be set
- If the Peak is to be discussed next time (as POL wish to seek wider feedback within their own organisation) then the PTF Action flag will not be set and this will cause the Peak to reappear on the weekly report
- CBIF rejections must get a POL reference which we add to the Peak and also to the KBA so we know this was a POL decision. The Peak is then closed with Response Category “63 -- Final -- Programme approved - No fix required”
- There will need to be a weekly report seen by management of what is to be presented at CBIF, and what the status is of open CBIF items and POL decisions
- There is no definition of CBIF in the contract – it says BIF – this needs to be addressed

Refer to Appendix E for instructions on how to determine if there are any CBIF candidates to report to POL.

PTF

- PTF is a Fujitsu internal meeting

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- All Peaks with the PTF Action flag set will be reviewed at BIF
 - This will include all defect Peaks with the `##LiveAffectingDefect` tag
 - It will also include other Peaks that may relate to other topics such as environments or Peaks that the Developers wish to discuss at the forum
- If a Peak needs to be re-presented at PTF then it will have the PTF Action flag set again
- PTF must consider the proposal (as it does currently) and additionally be mindful that any that carry a HDR Collection or that have been presented at CBIF must get additional scrutiny – and potentially prioritisation – as progress will be reported to POL weekly
- The PTF chair must record, in Peak on the Release Mgt tab, what decisions are made:

S:\01 - 2017 - 2018		PROJECTS		COLLECTIONS		DOCUMENTS		SCHEDULES	
Notes - 4/2/2017		Last Edited: John Simpson		Date: 2/16/2017 14:35:15					
Business Impact Fulfillment (BIF) Test BIF progress						Enter the current BIF status. Include items such as: 1. Date - Date of the last review 2. Status - BIF status following the last action 3. Action - Person Department with any actions to progress or Defected. 4. Paper Reason - Reasons of removal.			
BIF Questions: The fix can be done in more than one way and PCL would need to guide Fulfiller on choosing the preferred option. The fix may change the functionality of the system and consequently PCL will be required to provide appropriate communication, and potentially training, to the sub-administrators. The fix may be done in conjunction with changes performed by some of PCL's other suppliers and PCL will need to manage and synchronize that activity. The fix may need to be done concurrently with a separate future planned change, due to the two fixes using legacy system, and PCL would need to confirm that volunteers to accept any potential delays in deploying the fix. The fix may relate to some discussion between Fulfiller and PCL, on a specific area where the topic and history should be discussed within the fix context (PCL management discussion). Fulfiller need not believe a fix is a reasonable option, and needs PCL's agreement to assess the circumstances in a fix only.									
Customer Business Impact Process (CBIP) Test CBIP progress						Enter the current CBIP status. Include items such as: 1. Date - Date of the last review 2. Status - CBIP status following the last action 3. Action - Person Department with any actions to progress or Defected. 4. Paper Reason - Reasons of customer rejection.			
Proc Targeting of PTF (PTF) Test PTF progress						Enter the current PTF status. Include items such as: 1. Date - Date of the last review 2. Status - Targeted Release - 3. Action - Person Department with any actions to progress or Defected.			
Release Management Process (RMP) Test RMP progress						Enter the system status from the Release Management Process. Include items such as: 1. Date - Date of the last review 2. Action - Person Department with any actions to progress or Defected of Defected. 3. Review - Date to return actions			
Initial Date (DD/MM/YYYY):						Completed Date (DD/MM/YYYY):			
To BIF									
To Customer BIF									
To PTF									

- The new PTF date fields (Initial and Completed) will need to be completed during, or after, the PTF meeting (not before or it will affect status reporting)
 - Initial date - will hold the date of the first PTF the Peak was first presented at – this value should not change
 - Completed date - will hold the last PTF meeting the Peak was discussed at – this value will change if the Peak is iteratively presented for review and it will allow reporting on what was reviewed at the last PTF meeting
- The outcome of PTF discussions should be added to the PTF text box on the Release Mgt tab. A concise note is all that is needed. No need for separate in PTF minutes

HDR

- There is an updated Terms of Reference (currently v2.2) but it has yet to be presented for sign off. CBIF will need adding at some stage once Fujitsu are ready with the internal CBIF processes
- Overview of the process:
 - Fujitsu takes new items as Incidents to HDR not KBAs or Peaks
 - Fujitsu must ask POL for their Problem reference so it can be added to the Fujitsu Incident (and any related Peaks) so we have the POL reference
 - Fujitsu embeds any relevant KBA or Peak content into the Incident it shares
 - Fujitsu tags its Incidents and Peaks with the applicable HDR-* CI or Collection tags
 - Fujitsu does not reference its KBAs (and does not share them with POL in their native form)
 - The only Peak reference is the defect Peak reference Fujitsu raises when the cause is known and a fix is to be taken through the fixing process. Fujitsu will close the

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- investigation Peak and the linked Incident as the confirmed defect Peak reference will be the one that will be managed from this point
 - If a KBA, or internal Peak, is created that identifies a condition that meets the definition of HDR Defect then Fujitsu raises an Incident by contacting Fujitsu MAC with the relevant KBA content in it and Fujitsu MAC bonds the Incident and alerts POL
 - Updates on potential Live Defects is provided via bonded Incident updates
 - Updates on confirmed Live Defects is provided by defect Peak weekly reports
 - The above ensure POL has visibility at all times either from their ServiceNow Incident or by maintaining their ServiceNow Problem record (POL will need to transpose data from the weekly Fujitsu reports into its Problem records)
 - As this is an early warning forum too, we will also issue an email alert to the Fujitsu Duty Manager distribution list and a POL distribution list to alert interested parties
- Summary
 - Potential HDR Defects will be reported automatically to POL via the service management toolset replication driven by Fujitsu updates to the TfSNow Incident
 - Actual HDR Defects (including any deferred) will be shared with POL weekly by an extract report from Peak that will be sent to POL in advance of the meeting showing the latest update
 - New CBIF content will be shared with POL on a weekly report from Peak that will include the proposal and will be sent to POL in advance of the meeting
 - Updates to CBIF content will be shared with POL weekly by a extract report from Peak that will be sent to POL in advance of the meeting showing the latest update
- The Incident will be worked by Fujitsu if it is within the Fujitsu scope of obligations – otherwise it will be passed to POL ITDSD to assign to the relevant POL third party
- POL will probably convert the ServiceNow Incident to a ServiceNow Problem – but that is their choice
- If Fujitsu completes its investigation and confirms there is no HDR Defect then the investigation Peak and Incident will be closed with no further actions required. The defect Peak will be closed with Response Category “95 -- Final – Advice after Investigation” to say the HDR Defect was not confirmed
- For the purposes of Live Defect Management, Fujitsu will use Peak references not TfSNow Problem references
- Fujitsu will provide its view of status – from its systems – and manage any difference of opinion with POL
- Fujitsu will provide weekly updates prior to the meeting
 - Potential HDR Defects – no action required as the updates will already be in POL ServiceNow
 - Confirmed and deferred HDR Defects – by sharing the latest update on the defect Peak we are managing our side in the form of a report.
 - CBIF new Live Defects – for decision by sharing the pro-forma proposal in a report and inviting a decision
 - *Note: Any reports will be checked and sent in advance of the HDR Forum so POL can add it to their Problem record and ensure they are ready to provide a decision to the CBIF new Live Defects*
- The HDR Forum needs to evolve away from a “talking shop” to one of quick facts that demonstrate systematic control and confidence. Fujitsu should reduce the number of attendees

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- If POL need more information, the Fujitsu Incident, Peak or Problem owner is tasked to get it and add it to our system – or we get the CBIF proposal updated for resubmission. The new information must be added to the system
- POL need to hold the Fujitsu Incident or defect Peak reference in their Problem record so they know what to ask us for an update on – and what to apply our report updates to in their system
- The HDR minutes need an overhaul for Fujitsu. This is the Fujitsu specific meeting and yet it lists numerous Live Defects that are not related to Fujitsu and the minutes are sprawling and hard to follow. POL will be advised that:
 - They need to make it clear which HDR Defects are within Fujitsu's scope of obligations
 - They need to show the Fujitsu Live Defect reference (ServiceNow/TfSNow Incident or defect Peak)
 - They need to show Fujitsu's latest update
 - A summary view at the top is needed - New, Open, Closed, by Severity, by area affected, and trend
- Any ad-hoc calls should only be required when the next scheduled meeting is too far away. Updates from Fujitsu must come from the Incident update or defect Peak report with any additional comments made during the meeting being added to the Incident or defect Peak
- There is no definition of HDR in the contract – this needs to be addressed

Refer to Appendix D for instructions on how to create the weekly HDR Report for POL.

KB – Info only

- The Fujitsu KB is an information repository used for support purposes
- Any observed Live Defects will be recorded as a KBA but the progress to investigate and address them will be done via Peak(s) and Incident(s)
- KBAs do not need to be shared with POL as the tracking needs to be on the Peak and Incident raised to progress them
- If the awareness or involvement of POL is applicable then there will be a TfSNow bonded Incident and this will contain all relevant parts of any KBA so that the Incident that POL see is a suitable complete reference
- If POL accept a Live Defect – namely decide that no action is required – then the KBA will be updated accordingly and will have the POL applicable reference added so it is clear that it was not fixed by POL decision. This is a contract responsibility on POL to record these and issue Fujitsu with a notification

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Release Mgt tab – for BIF, CBIF and PTF

DETAILS	REFERENCES	PRODUCTS	EVIDENCE	IMPACT	COLLECTIONS	TARGET RELEASE	RELEASE MGT
Index 41203 Last Editor John Simpkins DateTime 2021-07-21 16:30:16							
Business Impact Forum (BIF)							
Test BIF progress 1 2 3				Enter the current BIF status. Include items such as: 1. Date - Date of the last review 2. Status - BIF status following the last action 3. Action - Person/Department with any actions to progress if Deferred. 4. Reject Reason - Reasons if rejected.			
BIF Questions:							
☐ The fix can be done in more than one way and POL would need to guide Fujitsu on choosing the preferred option.							
☐ The fix may change the functionality of the system and consequently POL will be required to provide appropriate communication, and potentially training, to the subpostmasters.							
☐ The fix may need to be done in conjunction with changes performed by some of POL's other suppliers and POL will need to manage and synchronise that activity.							
☐ The fix may need to be done concurrently with a separate future planned change, due to the two fixes being logically related, and POL would need to confirm their willingness to accept any potential delays in deploying the fix.							
☐ The fix may relate to active discussions between Fujitsu and POL on a specific and separate topic and hence should be discussed within that context (Fujitsu management discretion).							
☐ Fujitsu does not believe a fix is a sensible option and seeks POL's agreement to record the circumstances in a KB only.							
Customer Business Impact Forum (CBIF)							
Test CBIF progress 1 2 3 4				Enter the current CBIF status. Include items such as: 1. Date - Date of the last review 2. Status - CBIF status following the last action 3. Action - Person/Department with any actions to progress if Deferred. 4. Reject Reason - Reasons if customer rejected.			
Peak Targeting Forum (PTF)							
Test PTF progress 1 2 3 4 5				Enter the current PTF status. Include items such as: 1. Date - Date of the last review 2. Status - Targeted Release 3. Action - Person/Department with any actions to progress if Deferred.			
Release Management Forum (RMF)							
Test RMF update				Enter the current status from the Release Management Forum. Include items such as: 1. Date - Date of the last review 2. Action - Person/Department with any actions to progress the Defect if Deferred. 3. Review - Date to review actions			
		Initial Dates (DD/MM/YYYY)				Completed Dates (DD/MM/YYYY)	
To BIF							
To Customer BIF							
To PTF							

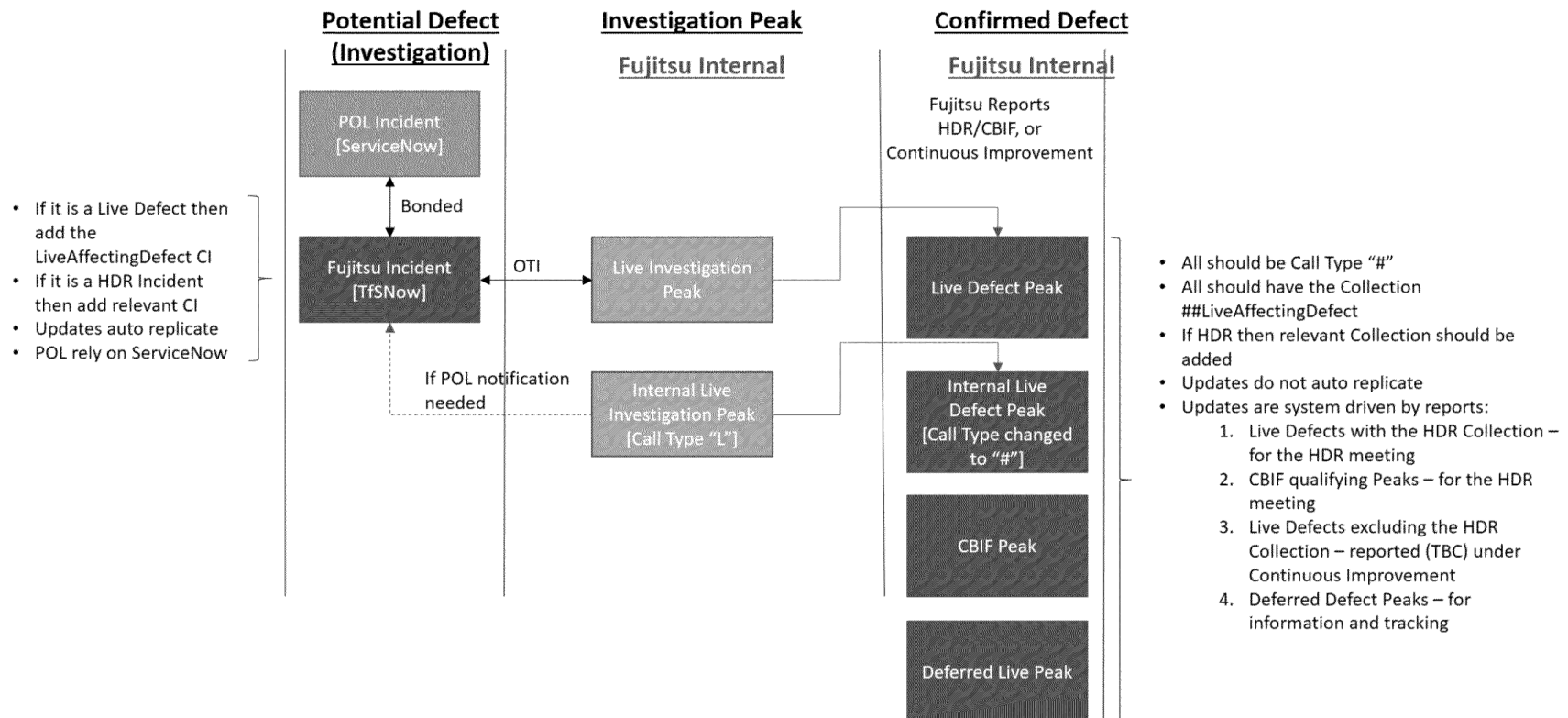
POA Improvements – Streams 1-4

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CBIF / HDR Diagram

Incident – Peak – Defect – HDR – CBIF



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Improved Ways of Working & Actions Required

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Actions

System Changes

- CBIF reason criteria added to the Release Mgt tab

One-Time Actions

- HDR
 1. **Steve Br** – get v2.2 of the ToR agreed and signed off
 2. **Steve Br** – amend ToR to incorporate CBIF and the basis of what qualifies for CBIF submission
 3. **Steve Br** – look at how HDR should be referenced in the contract documents

POA INTERNAL

POA Improvements – Streams 1-4

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Appendix A – Peak data anomaly checks

To ensure the data in Peak remains consistent with the intentions of the changes within this document, period checks will be needed (in addition to the checklist actions owned by stack owners and support staff) to ensure the data remains 'clean' and that the checklists can be updated to gradually capture every potential edit needed. POA Defect Manager will need to enable automated reporting and suitable cross-checking.

The checks relate to Peaks that have the ##LiveAffectingDefect Collection added.

Data Consistency & Accuracy

1. Wrong Call Type – check 1
 - Collection contains ##LiveAffectingDefect
 - Planned Out Live is blank or in the future
 - Peak is not Status C
 - Call Type is not Live Incident or Defect Identified
 - Response Category is not NFF

Result set should be sent to the Assigned Team stack owners to challenge why the Call Type is not "I" or "#"
2. Wrong Call Type – check 2
 - Collection contains ##LiveAffectingDefect
 - Planned Out Live is blank or in the future
 - Peak is not Status C
 - Response Category is "Product Error Diagnosed" or "Documentation Error Diagnosed"
 - Call Type is not Defect Identified

Result set should be sent to the Assigned Team stack owners to challenge why the Call Type is not "#"

 - If TFSBonded is set to 1 and the POL SNOW Reference field has a value then these Peaks should be cloned to Defect Peaks and the Peaks on the result set should be closed
3. Unassigned Peaks
 - Collection contains ##LiveAffectingDefect
 - Planned Out Live is blank or in the future
 - Peak is not Status C
 - Assignee is _Unassigned_

Result set should be sent to the Assigned Team stack owners to challenge why there is no one assigned to own the Peak
4. Status is "F"inal but the fix is deployed
 - Collection contains ##LiveAffectingDefect
 - Planned Out Live is in the past
 - Peak is Status F
 - Assignee is _Unassigned_

Result set should be sent to the Call Logger and Assigned Team stack owners to challenge why the Peak has not been closed
5. Status is Open – appear to be waiting action
 - Collection contains ##LiveAffectingDefect
 - Peak is Status O

Result set should be sent to the Assigned Team stack owners to challenge why the Peak has not progressed
6. Defect Identified – and still bonded to POL ServiceNow
 - Collection contains ##LiveAffectingDefect
 - Call Type is Defect Identified

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- Planned Out Live is blank or in the future
- Peak is not Status C
- TFSBonded is 1
- POL SNOW Reference is not blank

Result set should be sent to the Assigned Team stack owners to have the Peaks cloned and closed

7. HDR – under investigation but not POL bonded
- Collection contains ##LiveAffectingDefect
 - Collection contains HDR
 - Call Type is not Defect Identified
 - Planned Out Live is blank or in the future
 - Peak is not Status C
 - TFSBonded is 0

Result set should be sent to the Assigned Team stack owners to have the Peaks re-created and bonded to POL ServiceNow (unless MAC team confirm they are tracking these by a different TfsNow INC reference in which case the Peak should be updated to show the correct TfsNow Incident and POL SNOW reference field settings)

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Appendix A – Peaks closed that POL should consider following up on

Peaks are closed when the outcome is something that requires a new feature request to be submitted or sometime to explain why the solution works the way it does when that may in fact be causing issues for POL or its postmasters. Peaks that are closed in this way warrant review by POL as it may determine that it would like to add either new features or more user supporting features to reduce Incidents and improve the solution. These should be reported on to POL for them to consider. The frequency of sharing should be monthly with the list growing based on a cumulative view.

The checks relate to Peaks that have the ##LiveAffectingDefect Collection added and hence relate to the Live system.

1. POL Feature Consideration Report

- Collection contains ##LiveAffectingDefect
- Peak is Status C
- Response Category is “Enhancement Request” or “Advice after Investigation”

Result set should be extracted for sharing with POL in the form of a report

- Fields to include will need further work as they should ideally come from the Peak itself and be clearly understandable
- The list should be sorted by Date Closed descending so the newer closed Peaks are at the top

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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Appendix A – Peaks closed with no obvious Release

Peaks can be closed with no obvious reference to when the fix went live. This may be because the fix did not go live under a Release so there are no Planned Out Live dates showing on the system. Until this process is fixed, these Peaks need checking.

The checks relate to Peaks that have the ##LiveAffectingDefect Collection added and hence relate to the Live system.

1. POL Feature Consideration Report

- Collection contains ##LiveAffectingDefect
- Peak is Status C
- Planned Out Live is blank
- Response Category is not on the No Fault Found list

Result set should be extracted for sharing with the Assigned Team stack owners and the Call Logger (who closed the Peak) to confirm that the fix is in fact deployed

POA Improvements – Streams 1-4

Improved Ways of Working & Actions Required

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Appendix A – Release Management checklist

To ensure the data in Peak remains consistent with the intentions of the changes within this document,

1. [Release Management] The key fields on any Peaks presented at BIF, CBIF or PTF must be checked and amended accordingly
2. [Release Management] Peaks with release set to “Re-target” should have the PTF Action automatically set
3. [Release Management] Check that Peaks that have the CBIF flags set do not have the PTF action set until CBIF has been updated (catch the accidental setting of PTF Action after BIF but before CBIF decision provided)
4. [Release Management] All Peaks with Planned Out Live (Date Out Live field on Peak screens) in the past should be Closed. The ‘fix’ has been deployed. If they are Status F then the Call Logger or Call Logger Team manager should ensure these are closed
5. [Release Management] All Peaks where the Planned Out Live (Date Out Live field on Peak screens) is blank or in the future should not be Closed as the ‘fix’ has not yet been deployed
 - These Peaks can be closed if they have a No Fault Found Response Category as this shows they were subsequently determined to require no action by Fujitsu
6. [Release Management] All Peaks with Target Release Type of “Targeted At” are Release Management responsibility to drive to deployment demanding action from other teams as needed to ensure timely progress
7. [Release Management] When a Peak is discussed for the first time at a BIF, CBIF or PTF meeting then the applicable Planned Date and Actual Date should be set to the same date. If the Peak is re-presented at any of these meetings then the Actual Date should change to the date they were reviewed. Suitable comments should be added to the relevant section and updates should be appended to maintain a log
8. [Release Management] If a Peak is approved at BIF then it must have the “BIFApproved” Collection added and the BIF Action removed
9. [Release Management] If a Peak is approved at BIF and does not need to go to CBIF then it must have the PTF Action set and the BIF Action removed
10. [Release Management] If a Peak is rejected at BIF then it is expected that the Peak will be closed with an appropriate update. The Peak must have the “BIFRejected” Collection added and the BIF Action removed
11. [Release Management] If a Peak is not approved at BIF (and not rejected) then the BIF Action should remain so the Peak is picked up at the next BIF meeting
12. [Release Management] If a Peak is targeted at PTF then the PTF Action should be removed
13. [Release Management] If a Peak is not targeted at PTF then the PTF Action should remain so the Peak is picked up at the next PTF meeting
14. [Release Management] The BIF Action should only be removed if BIF approves or rejects a Peak
15. [Release Management] The Root Cause on any Peak should be maintained and it should be checked carefully when being targeted and prepared for release to live
16. [Business Development] Any Peaks with the Collection “Deferral Agreed” should be Call Type “#” unless the defect needs further investigation in which case it is Call Type “L”
 - Deferred Peaks must have the ##LiveAffectingDefect Collection added once the release they relate to is deployed (unless they relate to issues in test environments and NOT the Live system)
 - This can exclude Peaks where the Planned Out Live (Date Out Live field on Peak screens) is in the past and the ‘fix’ has been deployed
17. [ALL Dev Teams] When a Live Defect is confirmed, if the Peak is bonded to TfSNow and POL ServiceNow then it must be cloned. The clone reference is to be added to the original Peak and the original Peak closed with the Response Category “Cloned to create defect Peak”. If the Peak is not bonded to TfSNow and POL ServiceNow then it can just have the Call Type changed to “#”

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18. [ALL Dev Teams] When a Live Defect is confirmed and the Call Type is changed to “#” the BIF Action must be set as soon possible so that the Peak moves quickly towards being targeted
19. [SSC] Peaks containing the HDR Collection that:
 - Are not Call Type “#”
 - Do not the Planned Out Live (Date Out Live field on Peak screens) in the past as the ‘fix’ has been deployed
 - Are not closed as they had a No Fault Found Response Category
 - And were not Deferred

must have a TfsNow and a ServiceNow Incident reference as they are under active investigation and affect a POL branch so POL must be aware through the service management toolsets

Process Consistency & Rigour

- [Release Management] Peaks that are Defect Identified that are Priority A or B or have a HDR- * Collection must get an urgent BIF/PTF review to be assigned a Release as well as a Release Date. A hot-fix must also be proposed for POA/POL management decision
- [Release Management] Peaks that are Call Type “# - Defect Identified” but have not yet been to BIF (BIF action not yet set and BIFApproved not in Collection) then action is needed unless they are scheduled for the next BIF meeting
 - This can exclude Peaks where the Planned Out Live (Date Out Live field on Peak screens) is in the past and the ‘fix’ has been deployed
 - This can exclude Peaks that are Targeted At as they may have been handled prior to the new processes
 - These Peaks can be closed if they have a No Fault Found Response Category as this shows they were subsequently determined to require no action by Fujitsu
- [Release Management] Targeted At Peaks should be Call Type “#” as the Defect is identified. This should have been caught at BIF and/or PTF
 - This can exclude Peaks where the Planned Out Live (Date Out Live field on Peak screens) is in the past and the ‘fix’ has been deployed
 - These Peaks can be closed if they have a No Fault Found Response Category as this shows they were subsequently determined to require no action by Fujitsu
- [Release Management] Peaks that are identified as “Re-target” should have the PTF action set to force the continued discussion so a next step is clear
- [Release Management] Targeted At and Proposed For - where Planned Out Live (Date Out Live field on Peak screens) is blank or in the future should be Open (O or P) and not Closed (F or C). Although F is still technically open, the Call Logger may deem it acceptable to close it prematurely – hence Status F should be avoided
- [Release Management] Where release numbers are referenced in Target Releases, a date for the release should be added and reasons why no date can be assigned should be challenged
- [Release Management] We need to highlight where the Target Release is ‘Rel. Ind.’ or ‘Next Counter Release’ – perhaps with POL so they share our enthusiasm to schedule and fix - and in so doing we keep momentum
- [Release Management] If a Peak has been to BIF it needs to have the BIFApproved or BIFRejected collection added. If not then it should have the BIF Action flag set as it is to be re-presented
- [All] Managers/Team Leaders must check for Peaks that have been cloned to ensure the reasons match the conditions agreed. If they do not, then appropriate action must be taken (update the cloning rules, remove the clone, ensure the reason for cloning is captured on the master Peak and that the purpose of the new clone is captured in the cloned Peak)

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Appendix B – TfSNow data anomaly checks

To ensure the data in TfSNow remains consistent with the intentions of the changes within this document, managers will need to conduct manual checks. Those checks should cover at least the following. Expanded checklists should be created within each team. The POA Defect Manager will also need to do this at a cross-function level.

The checks relate to TfSNow Incidents that have had the ##LiveAffectingDefect or any HDR-* Configuration Items added.

Data Consistency & Accuracy

- [Defect Manager] Check TfSNow Incidents ...

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Appendix C – draft criteria for closing Defect Peaks with NO action

There will always be Live Defects that experience and judgement says are simply not worth fixing. To ensure this is a matter of policy and not one of subjective decision making, criteria is needed that staff can use to make decisions.

The following is an initial draft to build upon.

A fix for a Live Defect will NOT be progressed if at least THREE of the following conditions apply:

- * The frequency of occurrence of the Live Defect is rare – less than TWICE per annum
- * The impact of the Live Defect is minor – it does NOT affect branch operations or Fujitsu service delivery
- * The impact of the Live Defect only affects Fujitsu service delivery – and Fujitsu has compensating controls in place and Fujitsu management has agreed to taking no action
- * The impact of the Live Defect is accepted by POL – and a KBA has been created by both Fujitsu and POL clearly stating the decision and the decision maker
- * The Live Defect is in a part of the system that will be decommissioned before any fix could be developed and deployed
- * The Live Defect relates to Fujitsu internal documentation only and the remedy will not affect the understanding or support of the system by Fujitsu

Live Defects recorded in Jira's that meet the above criteria do not need to be raised as Peaks as doing so would simply see the Peaks immediately closed. A Jira that describes a Live Defect that would warrant a KBA must have a KBA written to help future support activities.

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Appendix D - HDR Report Creation Work Instructions

To create the weekly HDR Report which is shared with POL, follow these steps:

- As at the date of this document, the criteria to be used to determine HDR reporting candidates to share with POL will be determined by creating 3 lists using the following logic. The resulting lists will then be merged and the HDR candidates identified.
- A spreadsheet format has been used to date so the previous week's POL HDR Report submission should be used as the basis for the new report – removing all previous week highlighting and deleting rows scored out as POL have been told these are being removed
- Then, open the Peak_Defect_Management spreadsheet and Enable Content and go to the Data tab and click Refresh All on each tab. The password to run the embedded queries needs entering 3 times and is "IRRELEVANT". Save the resulting file with the timestamp to match when the extract was created – so it can be referred back to
- Filter the Peak_Defect_Management spreadsheet **##LiveAffectingDefect** tab on these values first:
 - Must have the **##LiveAffectingDefect** Collection (relates to the Live system and does, or might, need a fix) – auto done for you using the **##LiveAffectingDefect** tab
 - Must have the either the HDR-Fin or HDR-Exp Collection (Collections contains HDR)
 - Must have a Planned Out Live date in the future or blank (it has not been deployed)
 - Must not have the Response Category set to any of these values as these are No Fault Found:

Response Category – 62 -- Final -- No fault in product
Response Category – 63 -- Final -- Programme Approved – No Fix Required
Response Category – 66 -- Final -- Enhancement Request
Response Category – 68 -- Final -- Administrative Response
Response Category – 72 -- Final -- Duplicate Call
Response Category – 94 -- Final -- Advice and guidance given
Response Category – 95 -- Final -- Advice after Investigation
Response Category – 96 -- Final -- Insufficient evidence
Response Category – 97 -- Final -- Unspecified insufficient evidence
Response Category – 98 -- Final -- User error
Response Category – 100 -- Final -- Route call to TfS
Response Category – 120 -- Final -- Cloned to create Defect Peak
Response Category – 200 -- Final -- Call withdrawn by user

- List 1 – Deferred Live Defect Peaks
 - Must also have the Collection "Deferral Agreed" (Collections also contains "Deferral")
 - These are unlikely to be discussed at HDR as they are previously approved and understood but are provided to show the level of Fujitsu control
 - Extract the list showing:

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- Category (HDR-Fin = Impact, HDR-Exp = Experience)
 - Place the entries into the correct Impact or Experience section
- POL Reference (set to N/A)
- Then copy the data fields from the Peak_Defect_Management subset the filters have derived and paste to replace the Deferred Defects list on the POL HDR Report
 - Fujitsu Reference (the Peak Call Reference)
 - Summary
 - Confirmed Defect (Call Type is Defect Identified = Yes, otherwise No)
 - Workaround

Category	POL Reference	Fujitsu Reference	Summary	Confirmed Defect?	Workaround
Impact	N/A	NONE			

- Next Lists – non-Deferred Peaks
 - Must NOT have the Collection “Deferral Agreed” or “Deferral Proposed” (Collections does not contain “Deferral”)
 - List 2 – Project Live Defects
 - If clearly from a Project that is under a controlled rollout where the Fujitsu and POL Project Managers are working together (e.g. PBS – identifiable by the use of “PBS” or “PITPOS” { which is an Ingenico Jira reference}, or other identifiable text)
 - Summary contains “PBS or contains “PITPOS”
 - There may be none
 - These are unlikely to be discussed at HDR as they are part of the ongoing Project Manager regular review calls
 - Extract the list showing:
 - Category (HDR-Fin = Impact, HDR-Exp = Experience)
 - Place the entries into the correct Impact or Experience section
 - POL Reference (set to N/A)
 - Then copy the data fields from the Peak_Defect_Management subset the filters have derived and paste to replace the Deferred Defects list on the POL HDR Report
 - Fujitsu Reference (the Peak Call Reference)
 - Summary
 - Confirmed Defect (Call Type is Defect Identified = Yes, otherwise No)
 - Workaround

Category	POL Reference	Fujitsu Reference	Summary	Confirmed Defect?	Workaround
Impact	N/A	NONE			

- List 3 – non-Project Live Defects (likely originating from an Incident during normal service delivery)
 - These will be those that remain that are NOT on Lists 1 and 2
 - These require more comprehensive information as these will be discussed at the HDR meeting
 - Having reached this point there will be a small number of entries left

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- This needs cross-referencing to the previous week's submission to check if anything is new or if anything has disappeared. This will need manual checking for confidence
- To do this start with the POL HDR Report list and check if they are still on the data subset showing on the Peak_Defect_Management filtered list in view
 - Note any that seems to have gone so you can check why
 - Add any that seem to be new so you can check later
- Some may still be under investigation. They will have a Call Type of "Live Incident" and will have TfSNow/ServiceNow Incident references
- Some may relate to Fujitsu Problems. The Collections should contain "FJPRB-". For these, the Fujitsu Update should be the latest entry in the relevant Fujitsu Problem record in TfSNow
- The remainder should have the Call Type "Defect Identified". For these, the Fujitsu Update should be derived from the Business Impact field which will need to be checked and improved if necessary
- Extract the list showing:
 - Category (HDR-Fin = Impact, HDR-Exp = Experience)
 - Place the entries into the correct Impact or Experience section
 - POL Reference (this should be known unless the entry is new)
 - For new entries, copy the data fields from the Peak_Defect_Management subset the filters have derived and paste into the new line you have created on the POL HDR Report
 - Fujitsu Reference (the Peak Call reference for Call Type #, otherwise the TfSNow/ServiceNow Incident or Problem reference)
 - Summary
 - Confirmed Defect (Call Type is Defect Identified = Yes, otherwise No)
 - Workaround
 - Business Impact (or latest Problem record update if known to be being managed as a Problem)

Category	POL Reference	Fujitsu Reference	Summary	Confirmed Defect?	Workaround	Business Impact
Impact						
Experience						

- Compare the previous HDR report to the new list and amend accordingly so the new HDR report list matches what the system now shows
 - Any that have been closed should be scored out and highlighted in yellow
 - Any that are new should be added to the relevant Impact or Experience section and highlighted in red
 - These then need scrutiny to ensure they look correctly tagged as HDR and that the Impact is accurate. If they are HDR then the required fields for the HDR report need to be checked with SMEs and 4LS chased for updates. These red entries are the ones reviewed by the Fujitsu HDR meeting attendees prior to the HDR report being submitted
 - When the report is ready to submit, the highlighting should be changed to yellow

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- Any existing entries that remain on the list should be checked for updates to the Impact statement and, if progressing from Live Incident to Defect Confirmed, to amend the reference from a TfSNow Incident to the Defect Peak reference
- The far right column “Change from last week” should be used to say what has changed so it is clear where to look and why. It should also be set to yellow highlight if it has changed

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Appendix E - CBIF Submission Extract Work Instructions

To identify if there are any CBIF submission necessary to POL, follow these steps:

- As at the date of this document, the criteria to be used to determine CBIF candidates to share with POL will be determined by creating 3 lists using the following logic. The resulting lists will then be merged and the CBIF candidates identified. A CBIF Proposal will then be needed as this is what will be submitted to POL.
- Filter on these values first:
 - Must have the ##LiveAffectingDefect tag (relates to the Live system and does, or might, need a fix)
 - Must be Call Type "# - Defect Identified" (a fix is needed)
 - Must have a Planned Out Live date in the future or blank (it has not been deployed)
 - Must not be Targeted At (Target Release Type is not Targeted At) as this means it has gone through PTF already
 - Must not have a HDR Collection (or it has been to HDR anyway)
 - Must have a date in the BIF Planned Date (it has to have been to a BIF meeting)
 - Must have the BIF Approved Collection set or have a BIF Completed Date in the past (it has been technically qualified)
 - Must not have the BIF action set meaning it needs further discussion at BIF (Actioned Team is not BIF)
 - Must not have the PTF action set as that means it has gone past CBIF (Actioned Team is not PTF)
 - Must not have PTF dates as that means it has gone past CBIF (PTF Planned Date is blank)
 - Must not have the Response Category set to any of these values as these are No Fault Found:

Response Category – 62 -- Final – No fault in product
Response Category – 63 -- Final -- Programme Approved – No Fix Required
Response Category – 66 -- Final -- Enhancement Request
Response Category – 68 -- Final -- Administrative Response
Response Category – 72 -- Final -- Duplicate Call
Response Category – 94 -- Final -- Advice and guidance given
Response Category – 95 -- Final -- Advice after Investigation
Response Category – 96 -- Final -- Insufficient evidence
Response Category – 97 -- Final -- Unspecified insufficient evidence
Response Category – 98 -- Final -- User error
Response Category – 100 -- Final -- Route call to TfS
Response Category – 120 -- Final -- Cloned to create Defect Peak
Response Category – 200 -- Final -- Call withdrawn by user

- Then, in turn, check these filters to build the 3 lists:
 - List 1 – high priority Live Defects:

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- Must be Priority A or B (highest impact defects)
- List 2 – Live Defects that originated from a POL ServiceNow bonded Incident:
 - Must have a POL SNOW Reference
- List 3 – Live Defects explicitly identified at BIF for taking to CBIF:
 - Must have a CBIF Criteria checked marker – BIF_Ticked_Questions is not blank (BIF selected it for CBIF)

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