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**Horizon Service Desk Joint Working Document**
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| **Document Title:** | Horizon Service Desk Joint Working Document |
| **Document Type:** | Horizon Service Desk Joint Working Document |
| **Release:** | *Release Independent* |
| **Abstract:** | Joint Working Document to support the Service Desk Service provided to Post Office by Fujitsu Services |
| **Document Status:** | APPROVED |
| | This document contains sections that have been identified to POL as comprising evidence to support the assessment of named Acceptance Criteria by Document Review. These sections must not be changed without authority from the FS Acceptance Manager. |
| **Author & Dept:** | Sandie Bothick: Fujitsu Services |
| **Internal Distribution:** | As reviewers list |
| **External Distribution:** | David H Wright <br> Rebecca Barker <br> Kendra Dickinson |
| **Security Risk Assessment Confirmed** | YES, security risks have been assessed, see section 0.10 for details. |

UNCONTROLLED IF PRINTED

## Approval Authorities:

| Name | Role | Signature | Date |
|---|---|---|---|
| Leighton Machin | Fujitsu Services: EUS Lead Service Delivery Manager | | |
| Mandy Jones | HSD Operations Manager | | |

*Note: See Post Office Account HNG-X Reviewers/Approvers Role Matrix (PGM/DCM/ION/0001) for guidance.*

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# 0 Document Control

## 0.1 Table of Contents

## 0.2  Document History

| Version No. | Date | Summary of Changes and Reason for Issue | Associated Change - CP/PEAK/PPRR Reference |
|---|---|---|---|
| 0.1 | 15/2/07 | Draft | |
| 1.0 | 21-AUG-2007 | Approval version | |
| 2.0 | 04-Sep-2008 | Changes for Acceptance by Document Review: insertion of new Section 0.4 containing the table of cross references for Acceptance by Document Review. No other content change. | |
| 2.1 | 16-Sep-2010 | Updates to personnel, removal of Post Shop references, other minor corrections. | |
| 2.2 | 2nd-April-2012 | TfS update changes from 1.7 to 2.06 | |
| 2.4 | 14-Nov-2012 | TfS changes from 2.06 to 2.7 | |
| 2.5 | 02-Dec-2013 | Yearly Updates and amendment of terminology | |
| 2.7 | 25-Feb-2014 | Revised following review comments | |
| 3.0 | 26-Feb-2014 | Approval version | |

## 0.3  Review Details

| Review Comments by : | |
|---|---|
| Review Comments to : | Sandie Bothick & Post Office Account Document Management |

| Mandatory Review | |
|---|---|
| Role | Name |
| HSD Operations Manager | Mandy Jones |
| HSD Duty Manager | Sarah Hill and Mark Richardson |
| Major Incident Service Delivery Managers | Steve Bansal, Steve Gardiner and Tony Wicks |
| IT Service Advisor, Service Management | David H Wright |
| Service Manager | Rebecca Barker |
| NBSC Relationship Manager | Kendra Dickinson |

| Optional Review | |
|---|---|
| Role | Name |
| IMT Team Manager | Sarah Hill |
| EUS  HSD Service Delivery Manager | Sandie Bothick |
| EUS Senior Service Delivery Manager | Leighton Machin |
| | |

| Issued for Information – Please restrict this distribution list to a minimum | |
|---|---|
| Position/Role | Name |
| | |
| | |

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( * ) = Reviewers that returned comments

## 0.4  Acceptance by Document Review

The sections in this document that have been identified to POL as comprising evidence to support Acceptance by Document review (DR) are listed below for the relevant Requirements:

| POL NFR DR Acceptance Ref | Internal FS POL NFR Reference | Document Section Number | Document Section Heading |
| --- | --- | --- | --- |
| SER-2206 | SER-2181 | 5 | VIP/HOT Sites Escalation |

## 0.5  Associated Documents (Internal & External)

| Reference | Version | Date | Title | Source |
| --- | --- | --- | --- | --- |
| PGM/DCM/TEM/0001 (DO NOT REMOVE) |  |  | Fujitsu Services Post Office Account HNG-X Document Template | Dimensions |
|  |  |  |  |  |
| SVM/SDM/SD/0001 |  |  | Service Desk Service Description | DIM9 |
| SVM/SDM/PRO/0018 |  |  | POA Incident Management Process | DIM9 |
| SVM/SDM/PRO/0003 |  |  | Customer Services End-to-End Complaints Management Process | DIM9 |
| SVM/SDM/SD/0016 |  |  | Management Information Service: Service Description | DIM9 |
| SVM/SDM/PRO/0020 |  |  | Enforced Closure Process | DIM9 |
| SVM/SDM/SD/0023 |  |  | POA Call Enquiry Matrix and Incident Prioritisation | DIM9 |

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

## 0.6  Abbreviations

| Abbreviation | Definition |
| --- | --- |
| CMT | Communication Management Team |
| HSD | Horizon Service Desk |
| IMT | Incident Management Team |
| MI | Management Information |
| MIS | Management Information Service |
| NBSC | Network Business Support Centre |
| OLT | Operational Level Target |
| POL | Post Office Ltd |

| POA | Post Office Account: Fujitsu Services |
|---|---|
| SDU | Service Delivery Unit |
| SLT | Service Level Target |
| SRB | Service Review Book |
| TSMF | TRIOLE for Service Management Function |

## 0.7 Glossary

| Term | Definition |
|---|---|
|  |  |
|  |  |
|  |  |
|  |  |

## 0.8 Changes Expected

| Changes |
|---|
| Changes due to the introduction of TSMF |

## 0.9 Accuracy

Fujitsu Services endeavours to ensure that the information contained in this document is correct but, whilst every effort is made to ensure the accuracy of such information, it accepts no liability for any loss (however caused) sustained as a result of any error or omission in the same.

## 0.10 Security Risk Assessment

Security risks have been assessed and it is considered that there are no security risks relating specifically to this document.

# 1 Introduction

## 1.1 Purpose of Document

The purpose of the document is to detail the working procedures and practises as agreed between Fujitsu Services and Post Office Ltd to support the Service Desk Service as detailed in the Service Desk, Service Description.

## 1.2 Document Owner

This document is owned by the POA Service Desk Manager, HSD Operations Manager and Post Office Service Desk – Duty Manager & IT Service Advisor, as detailed below:

| CONTACT | CONTACT DETAILS | COMPANY |
|---|---|---|
| Leighton Machin (EUS Service Delivery Team Manager) | GRO | Fujitsu Services |
| Sandie Bothick (HSD Service Delivery Manager) | | Fujitsu Services |
| Mandy Jones (HSD Operations Manager) | | Fujitsu Services |
| Rebecca Barker (Service Manager) | | Post Office Ltd |
| David H Wright (IT Service Advisor)) | | Post Office Ltd |

## 1.3 Change control

Changes to this document can be made by either Fujitsu Services or Post Office Ltd, and must be agreed by either party. The revised document must be submitted to POA Document Management and entered in the Fujitsu Services Document Management systems – Dimensions.

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# 2      Service Summary

2.1      The Service Desk Service provides a first level support, including end to end Incident management, to Branches and other designated groups, as defined in this Working Document through the provision of a Service Desk function. Branches or other designated groups within Post Office or Fujitsu Services experiencing difficulties with any part of the Counter Equipment, Software or Operational and Call Off Services will call the Service Desk and log an Incident reporting the circumstances of such Incident.

2.2      The Service Desk Service also interfaces with the Change Management, Asset Management and Configuration Management systems required to support the Branch Infrastructure and HNG-X Central Infrastructure.

2.3      The Service Desk Service also acts as an initiator within the Problem Management process due to its ability to monitor Incident trends against the severity received.

2.4      Fujitsu Services may provide a non dedicated service desk function sharing the resource with other Fujitsu Services customers as described within this Service Desk, Service Description.

2.5      The Service Desk Service will act as a central point for information on the working state of the Services and be responsible for informing Post Office of any service affecting Incidents.

2.6      Post Office will be notified of any scheduled interruptions to the Operational or Call Off Services where those interruptions are service affecting and will inform Post Office when the affected services will be restored as documented within the Working Document entitled; *"POA Incident Management Process" (SVM/SDM/PRO/0018)*

2.7      The Service Desk Service will resolve all Incidents relating to Incidents as detailed within this Working Document..

2.8       The Service Desk Service shall provide the facility to receive re-directed calls from other Post Office helpdesks and help lines as required.

2.9      The Service Desk Service shall manage the resolution of any Incident using procedures that are defined within the Working Document entitled: *"POA Incident Management Process" (SVM/SDM/PRO/0018)*.

2.10    The Service Desk Service will accept calls from Branches, Post Office internal departments, Post Office Clients, NBSC and the POL Live Service Desk.

2.11    The Service Desk Service will accept calls from internal Fujitsu Services capability and support units as referred to in section 2.1.1.3 of the Service Desk, Service Description.

2.12    Branches wishing to contact the Service Desk will do so by telephoning a Single Point of Contact (SPOC) telephone number. Post Office undertakes the management and control of this SPOC telephone number. An Interactive Voice Response (IVR) system will enable the caller to select an appropriate option to connect to the Service Desk for circumstances where there is an issue relating to the call types referred to in this Working Document.

2.13    Calls destined for the NBSC which have been answered by the Service Desk will be transferred to the NBSC in accordance with the processes identified within this document.

2.14    Calls destined for the Service Desk which have been answered by the NBSC will be transferred to the Service Desk in accordance with the processes identified within this document.

2.15    All Service Desk staff will have suitable and appropriate skills and training and act in a professional manner whenever dealing with callers, complying with agreed Service Desk behavioural standards. Fujitsu Services shall ensure sufficient skilled resources are available to cover for holidays, sickness and natural attrition  within Fujitsu Services.

2.16 Fujitsu Services shall provide on line access to the Incident Management System call-handling tool to Post Office. Post Office Live Service Desk shall inform Fujitsu Services as necessary of all Post Office staff who are authorised to access the tool.

2.17 Fujitsu will monitor the quality of the Service Desk Service to ensure that it meets the Post Office specifications as documented within this Working Document. This may include the recording of calls, where this is reasonably possible, for the purposes of monitoring call control, customer satisfaction, knowledge and system use. Post Office will agree the method and timescale with Fujitsu Services and reserve the right of audit of any internal quality scoring.

2.18 Where Post Office chooses to carry out user satisfaction surveys, in the event that any such survey results are pertinent to Fujitsu Services' provision of the Service Desk Service, the relevant survey results shall be shared with Fujitsu Services at the next meeting of the Service Management Relationship.

2.19 Fujitsu Services will provide information to support the response to Branch complaints to Post Office.

2.20 Fujitsu Services will escalate to Post Office any Incident that occurs in high profile Branches, in accordance with this Working Document.

2.21 The Service Desk Service will accept and pass on Banking Transaction Record Queries to the Security Management Service in accordance with paragraph 2.4.1.8 of the *Security Management Service, Service Description (SVM/SDM/SD/0017)*.

# 3    Service Availability

The Service Desk Service is available via telephone to Branches from 07:00hrs to 23:00hrs Monday to Friday and 08:00hrs to 23:00hrs on Saturday and 08:00hrs to 17:00hrs on Sunday excluding Christmas Day. Bank Holidays will cover Sunday Hours. During this period, the Service Desk front line Agent will be available to take calls from Branches that are received via the SPOC telephone number.

Arrangements for Bank Holidays shall only vary from a normal Service Desk Day where agreed with Post Office, having regard to their applicability throughout the United Kingdom.

## 3.1    Contacting the HSD

There are several groups of people who are entitled to service from the HSD as detailed below in Table One, and two types of calls can be raised:

Tenant POA – Horizon: Call is subject to SLT

Tenant POA – Fujitsu: Call not subject to SLT & is generally raised internally

Type of call raised will be determined by the Caller Group, Matrix as described in *SVM/SD,/SD/0023*, and details information in the Knowledge articles followed.

**Table One**

| Caller Group | Contact Number (see Table Two) | Specific Information required | Type of Call raised |
|---|---|---|---|
| Branches | Desk | Branch Code / nature of fault | Tenant: POA Horizon |
| Post Office Ltd | IMT / Desk | As relevant | Tenant: POA Horizon or POA Fujitsu |
| NBSC | Desk / IMT | As relevant | Tenant: POA Horizon or POA Fujitsu |
| Fujitsu / Romec Engineering | Engineering number | Branch Code / nature of fault | Tenant: POA Fujitsu or POA Horizon |
| SDU | Desk / IMT | As relevant | Tenant POA Fujitsu |
| Post Office Account | IMT / CMT / Team Leaders | As relevant | Tenant: POA Horizon or POA Fujitsu |

**Table Two: Desk Contact numbers**

| Name | Number |
|---|---|
| Engineering Number | 0870 4239632 |
| Desk Number | 0845 6011022 |
| IMT | 0845 6003681 |
| CMT | 0870 4239633 |

## 3.2   Voice mail

In the event that the caller calls outside the working hours of the HSD, an option is provided to leave a voicemail. Voicemail is checked at 08:00 and voicemails left are responded to within 60 minutes. All details about voicemails are recorded on a call logging form which are stored electronically, and then added to the Incident Management System.

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## 3.3  Appropriate Calls

The designated groups of people detailed in 3.1 who have the right of service from the HSD/SDU can log the following incidents:

- Counter Hardware
- Branch & Central network faults
- Software
- Central Infrastructure
- Changes
- Reference Data
- BIM Visits
- Security
- Operational Business Change – Branch & Reference Data.

## 3.4  Mis-Routed Calls

Mis-Routed calls are defined as below; all mis-routed calls are logged on the Incident Management System. If the incident has been investigated by an Agent and the call is deemed to be an mis-routed call, the desk Agent will give the Post Master an Incident number and warm transfer the Post Master to the NBSC or advise the relevant 3rd party contact.

- Calls that are Post Office business issues.
- Calls that require training/advice.
- Any issue that is not related to a fault on the Horizon system – eg operational / procedural issue.
- Caller requests advice on cash account/discrepancy issues

Below are examples of the issues the NBSC are responsible for advising on:

- If a caller requires a telephone number
- If a caller wants to order consumables
- If a caller is having issue with another unit for example scales, safe alarms etc
- If a caller has any issue that is NOT related to a fault on the Horizon system
- If a caller wants to issue a Vault card
- If a caller reports a SWAP icon
- If a caller reports NO entry signs on log out
- If a caller advises they are in training mode
- If a caller requires AP recovery advice
- If a caller reports they cannot log in or out
- If a caller reports problem with their username or password
- If a caller requests advice on cash account/balancing/discrepancy issues[1]
- If a caller requires advice on navigation round the system or transaction advice

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- If a caller requires advice on stock units/adding users etc [1]

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[1] In the event that NBSC have confirmed that there is no procedural issue and that there is a technical fault, the call will be returned to HSD for progression.

# 4    End to End Incident Management

All incidents reported to the HSD are managed in accordance with the "POA Incident Management Process" (SVM/SDM/PRO/0018).  Calls are logged in the incident management system

## 4.1   Incident Logging

### 4.1.1    Receiving & Diagnosing a Call

HSD Agents will always ensure that they are always ready and able to take a service call, unless they are doing call related work, when they must set their telephone to Desk Work or away from their desk on a break, when they must set their telephone to Desk Work. The Agent should also ensure that their headset is on their head ready for use BEFORE the call is answered to ensure there is no delay or background noise before greeting the caller & that the call management system is up and running.

This will minimise the delay to a caller when the Agent is retrieving/recording the caller's details and thus allow more time for the Agent to speak to the caller regarding the problem.

The moment an Agent receives an incoming telephone call, they will greet the customer with the example shown below.  All spoken words are marked in Italics and in "quotes".

> "Good Morning/Afternoon/Evening, Horizon Service desk, [AGENT NAME] speaking".

> "May I take your Branch code please?"

**Branch Code Validation Failure**

If a Branch code cannot be given, the caller immediately fails validation. If the reason why the Branch code cannot be provided is because the PO employee cannot remember, or does not know the Branch code, the incident will be logged under '999999' as *Other Queries, QU04 Caller fails initial verification, Cause: Resolution Administration*, taking all the details of the caller. The Agent must then politely decline the call directing the caller to the NBSC for example:

> "Unfortunately without a branch code we are unable to assist further.  Please call back once you know your branch code"

If the caller is not entitled to service from the HSD but was given the HSD number to use in terms of PO-related business i.e., "my pension book has not arrived at the Post Office and the PM said to call you to ask you for further information about it", the Agent must take down the details of the caller, name and number and details about who provided them with the HSD telephone number. Service to the caller must then be politely declined for example:

> "Unfortunately I cannot recall any information on our system regarding your details which means I am unable to help you further"

**Branch Code Validated**

(a)    For each call where the Branch code is provided, the Agent must verify the caller with the information retrieved from the Triole for Service system.  The Agent should confirm the following with the caller:

- Site name (e.g. Post Office name)

- Telephone number

- Caller's full name (recording it in the logged call)

- Position of the caller

*NB: If the telephone number is different from the number listed in Triole for Service, the Agent MUST ask the caller to confirm that the number is the MAIN telephone number for the Post Office.*

(b)   If any of the above details given differ from that displayed in Triole for Service, ask the caller to confirm the:

- Post code

- Postal address

Details of any changes should be escalated to IMT and the PM should be advised to inform the NBSC of the change.

c)   If the caller cannot be verified from this information then the AGENT should log the call as *Other Queries, QU04 Caller fails initial verification, Cause:* resolution Administration on the Problem Management System.

The AGENT will then end the call politely, an example of which is shown below.

*"Unfortunately I cannot recall any information on our system regarding your details so I am unable to help you further. You may wish to contact the NBSC for assistance by dialling 0845 6011022*

## Taking Information about the Issue

The Agent must establish the reason for the call from the customer; an example of how to obtain this information might be to ask:

*"Which part of the Horizon equipment may I help you with?"*

Whilst noting the issue , the Agent must check the incident history in the profile browser  window  to make sure that there isn't an incident already open for the caller's current problem. If there is already an open incident, the Agent must open this call to add an update.

A minimum evidence requirement is required for incidents that require further investigation by another SDU ie SSC

### *General counter application issues*

1. FAD code
2. Node id
3. User Id
4. Exact date / time of error
5. Key strokes
6. Message number, Message title and Full message text as seen by the PM
7. Where the error occurred (screen ID)
8. Current TP / BP / Stock unit

### *Counter transaction issues*

1. FAD code
2. Node id
3. User id
4. Date / Time of transaction
5. Session ID
6. Transaction number(s)
7. Amounts
8. First 6 and last 4 digits of card number (if applicable)
9. Current TP / BP / Stock unit

10. Key strokes
11. For counter transactions that completely fail the transaction number of the previous successful transaction.
12. Barcode references for any issues concerning transactions that make use of barcodes

### Balancing issues

As a business issue these should be initially sent to the NBSC. Only if the NBSC declares that they suspect a Horizon application issue should the following information be gathered before sending the error to Fujitsu:

1. FAD code
2. A summary of what the NBSC have already checked with the PM
3. Where is the discrepancy (Cash / Stock etc)
4. Which report shows the balancing issue
5. Date / time report generated

Current TP / BP / Stock unit

If the Incident(s) in the incident history are not related, the Agent must record details regarding the issue and enter it on the Call Management system by raising a new incident..

## Alerts & Trends

The Agent must look out for key words that may identify a trend whilst noting the issue.. Key words might be 'usual problem' or 'it has happened again'. If Agent believes that there might be a recurring issue they must check the site history by looking through the incidents in the incident history and note any associated closed call reference numbers in the incident log. The Agent will also assign the Triole for Service incident record appropriate codes and a priority as defined in "*POA Call Enquiry Matrix and Incident Prioritisation*" *SVM/SDM/SD/0023*

## Ending the Call

Whether the incident is going to be closed or progressed, the Agent must always give the caller a unique incident record number, taken from the Triole for Service system,when ending the voice call, as follows:

> "*Your incident reference number is xxxxxxxx. Please always use this as a future reference of this incident and if you require further information regarding this issue.*"

## Receiving & Diagnosing a Call

| Process | Activity | |
|---|---|---|
| Receiving a Call | Validating a call | 1. Desk Agent will ask branch for the Branch Code & input into the Call box and log Incident |
| | | 2. If the Branch Code is invalid number will be rechecked with customer and re input. |
| | | 3. If Branch Code number is still invalid caller is advised to contact NBSC to be validated with the correct Branch Code. |
| | Confirm call details | 1. Desk Agent will confirm with the caller that the site details are correct, namely site address, post code, contact name and telephone number. |
| | | 2. If contact name and site telephone number are different to that displayed, these will be overtyped. |
| | | 3. If address is incorrect, HSD will escalate call to NBSC to have these details amended on database. |
| | | 4. Agent will highlight any important site information for example VIP status and also identify trends. |
| | Identify Product and problem | 1. Caller will be asked for product which appears to have the problem and details of the fault. |
| | Diagnose Call | 1. Agent will diagnose problem using own Knowledge Articles or web based tools – there may be a series of diagnostic questions which the Agents will have to ask the caller.. |
| | | 2. If the Agent is unable to diagnose the fault, the Incident will be routed to appropriate SDU – see section 4.1.2. The Caller will be provided with a unique reference number & provided with expected resolution time, in accordance with SLA. |
| | | 3. If the Agent is able to diagnose fault, this should be resolved using the Knowledge Articles or web based tools.. |

## 4.1.2    Routing Call To Other Service Delivery Units

If following diagnosis the HSD cannot resolve the call, the call will be routed to the appropriate SDU.

| Process | Activity | |
|---|---|---|
| | Advice and Guidance Call | Caller has phoned in with a query or that is not a Hardware/Software or network related issue. The caller requires advice & guidance. |

| | | |
|---|---|---|
| | Mis-Routed Helpdesk | 1. Agent will log the call as in section 4.1.1. |
| | | 2. Caller will be advised they have come through to the wrong Helpdesk and advised to call the NBSC or other 3$^{rd}$ Party |
| | | 3. The HSD call will be closed. |
| | Software/Network Call | This may be a call where the caller is unable to use the system due to a software or network issue, in this incidence: |
| | | 1. Agent will log the call as in section 4.1.1. (input appropriate call type ie network or software) |
| | | 2. Call log will be updated with diagnostics |
| | | 3. Call reassigned to the appropriate SDU (EDSC for Software Issues/CMT Network) |
| | Hardware Call | 1. Agent will log the call as in section 4.1.1. |
| | | 2. Call log will be updated with diagnostics |
| | | 3. Agent will confirm site Access hours |
| | | 4. Call reassigned to default Engineer action group D1 |
| | PO Closure | 1. Call logged as PO closure Call |
| | | 2. Enforced Closure Process (SVM/SDM/PRO/0020) followed |

## 4.1.3    Updating Existing Incident  – Repeat Call

| Process | Activity | |
|---|---|---|
| | Identify Call | 1. Call Identified as an existing Incident. |
| | | 2. Agent will obtain the customers Branch Code and if possible the Incident number. |
| | | 3. If a Incident number is not available, the Agent will look through the open calls against that Branch Code and select the one the customer is calling about. |
| | | 4. Agent will identify reason for phone call for example customer providing update, additional information etc. |
| | Update call | 1. Agent will update Incident log stating that there had been an enquiry on the call by the customer. |
| | | 2. If caller is phoning to give an update on the incident, the activities log will be updated with relevant information. |

| | | |
|---|---|---|
| | | 3. If further action is required then the incident will be actioned accordingly. <br><br> 4. . |
| | Third party update | 1. If an engineer or third party is calling on the support line, the Agent will update the call log with an 'Log comment' action box. <br> 2. The information of the engineer's support request will be noted and actioned. |

## 4.1.4　Closing Incident Record

| Process | Activity | |
|---|---|---|
| Incident Closure | Identify Call | Agent will identify whether call is a closure. <br><br> (Closure being incident is completed no  further action is required and it has been agreed with the customer to close the call) |
| | Call Closure | 1. Agent will close the Incident within Triole for Service entering the relevant call information (cause if available, ,resolution codes etc), including details of what actions and SDU resolved the reported issue. |

## 4.1.5　Managing Customer Expectation

The HSD are responsible for updating the PM on Engineer SLA Expiry time  and progression of long running Incidents.  When a Hardware incident is logged, the ETA for the engineer arrival time will only  be given as when the SLA expires – where possible the desk should take into consideration the opening hours of the branch.

For long running incidents – hardware incidents for which the SLA has expired or Comms Incidents, the branch should be contacted when a) there is a significant update  OR b) every couple of days.  Branches should be called even if there is no update in order to reassure the branch that work is still continuing on the fault.

## 4.2 Parent Incident

In the event that an incident is identified which could generate multiple calls to the HSD, a Parent Incident is raised and all child incidents will be logged against this Parent Incident. This Parent will then be used to capture the progress of the incident.

This can occur as a result of:

- High Call Volumes: If HSD notice high call-volumes (benchmark of 15 calls waiting) the IMT will investigate if there is a trend in calls and Incidence, using the Incident Management System. In the event that a trend is identified, a working Parent Incident will be raised and sent to the relevant SDU for investigation.

- SMC / SDU Identify Incident: SMC/SDUs will notify IMT in the event of an incident, who will raise a master Incident and assign to the relevant SDU for investigation. HSD will be provided with the Incident reference number.

- High Priority Incident Or Major Incident If an MI is required, IMT raise an Urgency 1, Priority 1 incident in Triole for Service and reassign it to the HSD IMT action group

__Raising A Parent Incident__

In the event that a Parent Incdent is raised, IMT will gather as much information as possible regarding the incident and log it all in the description field. This will include information on what is down (if known), how many sites are affected, and who has been notified of the incident. Once the area of responsibility is identified, the corresponding Service Delivery Manager will be contacted

The Major Incident Service Delivery Manager will advise on actions to be taken.

__Updating Parent Incident__

The Parent Incident will continue to be checked and updated during the lifecycle of the incident and all calls to the desk will be logged on this incident.

__Closure of Parent Incident__

__Once a resolution has been implemented by the resolver, IMT will gain resolution confirmation from a sample of Child Incidents. When IMT have the confirmation, the Parent Incident can also be resolved and closed.__

## 4.3 Communication of Business Impacting / High Priority or Major Incident

The Major Incident Service Delivery Manager will review the Parent Incident and identify if the incident is or is potentially Business / Service Impacting. If these criteria are met, extended communication will take place as detailed below.

### 4.3.1 Updates to POL Live Service Desk

Following review of the Parent Incident, the Service Delivery Manager will confirm if and when POL Live Service Desks is to be notified, in accordance with the Major Incident Process (SVM/SDM/PRO/0001). IMT are responsible for the communication to POL Live Service Desk and all updates must be checked in advance with the Major Incident Service Delivery Manager.

The frequency of verbal updates must be agreed with POL Live Service Desk and strictly adhered to; i.e. if updates are agreed to be hourly, then a conversation must take place, even if there is no further update.

## 4.3.2 SMS

All communications on MIs and Business Impacting Incidents are communicated via the SMS process using Outlook and each message has a maximum capacity of 160 characters.

- The first and the last SMS must be sent to POA SMS INTERNAL and POA VIP GROUP.

- Interim SMS updates must ONLY be sent to POA SMS INTERNAL.

The SMS to the TECHNICAL BRIDGE is an alert to the Technical experts to attend a conference call to discuss the incident to identify an action plan.

The Major Incident Service Delivery Manager must authorise which D-list is to be utilised and the message is agreed by the Major Incident Service Delivery Manager and sent out by IMT.

# 4.4 IVR

**IVR**

**Personalised IVR**

HSD have the option of implementing a personalised IVR message in the event of a High/Major Incident/Service Impacting issue in order to provide a more specific and efficient message.

**Activation**

IMT will activate a pre-agreed default IVR message following approval with the Service Desk Management team. Any changes to the default message should be agreed with service delivery management

**De-activating IVR**

Once the incident has been resolved, the IVR needs to be removed at the point the issue has been confirmed as resolved by the Incident manager

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# 5 VIP / Hot Sites Escalation

## 5.1 VIP Process

VIP Branches are sites where POL would like increased focus and enhanced communication in the event of an Incident. The list is controlled by POL and is limited to a maximum of 50 branches. The Branches listed may be changed by POL without formal change control via local agreement i.e email to the Branch Network Services Team.

Any branch on the VIP list has a flag marker in the Incident Management System so that the HSD are aware that the branch should follow the process below:

Applicable only if a VIP site logs an Urgency 1/Priority 1 call or Online Services call.

| No | Task | How |
|----|------|-----|
| | Select option 1 or 2 | |
| 1 | Contact the duty manager to advise of VIP site Incident (In hours) | Go to the desk BCP folder and obtain the latest *Call Out Rota*. Alternatively there are copies stored on Share point. Look for the heading Post office AccountDUTY MANAGER and see who is listed to cover Out Of Hours. |
| 2 | Contact the duty manager to advise of VIP site Incident (outside core hours) | Contact the pager service 07699 728314 and advise you would like to send a page to number 07699728314. They will ask you to read out what to put in the page' *VIP site XXX has logged an Urgency 1/Priority 1 Incident for XXX. Incident reference XXXX.* Then add the applicable comment below? *Engineer SLA is XXX* *CMT are investigating* |
| | Continue with escalation | |
| 3 | Send an SMS | Send an SMS text message to distribution list **SMS Internal & SMS FMS Group** *VIP site XXX has logged an Urgency 1/Priority 1 Incident for XXX. Incident reference XXXX. Incident is with XXXX. (If engineering give the ETA). Next update at XXX* |
| 4 | Notify the POL live service desk of Incident | Contact 0845 604 5204 and advise you are calling from IMT to inform them that an Urgency 1/Priority 1 incident for a VIP site has been logged and provide details. Agree a time/date for next action and continue to contact POL where applicable. |
| 5 | Monitor Incident | Monitor incident progression and when the engineer has resolved the issue send an SMS text message to distribution list **SMS Internal & SMS FMS Group** *VIP site XXX has logged an Urgency 1/priority1 Incident for XXX. Incident reference XXXX. Incident is with XXXX. Engineer/BT are working/have resolved on the issue.* |

**Should a VIP Site go down outside of these core hours, POA DM and POL will be notified as soon as is possible between 08.00 and 09.00 hrs.**

The list of VIP sites is located M:\HSH Documents\Service Control\VIP Site list.

## 5.2  Hot Sites Process

Hot sites are sites which POL would like increased focus on and enhanced communication in the event of an Incident.  The Hot Site list is transient and can be updated by POL or Fujitsu Services. The Hot Site list is made up of 2 types of Hot-sites:

1) Ad-Hoc Hot Sites (those which have experienced significant issues / high profile complaints / history of issues.)  The addition of these will be at the request of POL, and the removal of them will be discussed at the BS ORF.

2) High Profile OBC activity. The OBC team will request the addition of high profile openings, relocations, or conversions to the hot sites list.  These branches should remain on the list for 2 weeks.

Any branch on the hot sites list has a flag marker in the Incident Management System so that the HSD are aware that the branch should follow the process below:

Applicable only if a HOT site logs an Urgency 1/Priority 1 Incident or Online Services call.

| No | Task | How |
|----|------|-----|
| 1 | Send notification email | Send a notification email to: The Hot Site Escalation D-list<br><br>*HOT site XXX has logged an Urgency 1/Priority 1 call for XXX. Incident reference XXXX. Incident is with XXXX. (If engineering give the ETA). Next update at XXX* |
| 2 | Send an SMS | Send an SMS text message is also sent to the **SMS HOT List**<br><br>*HOT site XXX has logged an Urgency 1/Priority 1 Incident for XXX. Incident reference XXXX. Incident is with XXXX. (If engineering give the ETA). Next update at XXX* |
| 3 | Provide agreed updates to POA DM/POL live service desk | Please provide updates on the following<br><br>1. Engineer ETA's & Delay's.<br>2. Engineer Updates and New Issues.<br>3. If the Incident has been escalated to any other departments.<br>4. Any updates from a Third Party.<br>5. When Engineer has completed work and what he has done with parts used (Engineer Summary).<br>6. Site must be contacted after fault has been resolved to check all is working. |

**Should a HOT Site go down outside of these core hours, POA DM and POL will be notified as soon as is possible between 08.00 and 09.00 hrs.**

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# 6 Service Desk Service Metrics

## 6.1 SLTs

The SLTs are specified in the Service Desk Service Description (SVM/SDM/SD/0001), and are measured and reported as detailed in Service Description section 3.3.1.1.1. The specific method of calculation for each target is detailed below.

| SLT | Method of Calculation |
|---|---|
| Calls Answered within 30 seconds | *(Calls Answered within 30s/Total Calls Answered)\*100%* |
| Average Time to Answer | *Sum (Time agent picks up a call - Time call assigned to agent)/Total calls (Seconds)* |
| Calls not answered (Abandoned) | *((Total calls abandoned – calls abandoned < 10 s)/Total calls offered))\*100%* |
| First Time Fix | *(Total Incidents – Number incidents where a piece of equipment has failed twice in 24 hrs)/Total Incidents))\*100%* |
| Availability of Service Desk Voicemail Service outside of Service Desk Standard hours | *((Total number of non-std hours – Number Hours VM not available)/Total number non-std hours))\*100%* |
| Voicemail calls raised out of the Service Desk Day on the Fujitsu Services call logging system responded to next Working Day with ring back commencing at 08:00hrs. | *((Total VM calls raised – Number of VM not responded to next day)/ (Total Number VM calls raised))\*100%* |
| Software incidents resolved by re-boot or the application of a work-around <= 15 minutes | *((Total number of SW incidents resolved by re-boot or workaround - Total number of SW incidents resolved by re-boot or workaround resolved in <= 15 minutes)/ (Total number of SW incidents resolved by re-boot or workaround))\*100* |
| Software incidents resolved by re-boot or the application of a work around < = 30 minutes | *((Total number of SW incidents resolved by re-boot or workaround - Total number of SW incidents resolved by re-boot or workaround resolved in <= 30 minutes)/ (Total number of SW incidents resolved by re-boot or workaround))\*100%* |

## 6.2 OLTs

The OLTs associated with the Service Desk relate to the Complaints Process as documented in "POA Customer Services End-to-End Complaints Process" (SVM/SDM/PRO/0003).

| OLT | Method of Calculation |
|---|---|
| Standard Complaint Response time | *Details of the date complaint arrived & returned to POL is captured in spreadsheet – difference between is captured & calculated.* |
| High Profile Complaint Response | *Time of arrival of complaint & return of complaint is capture & difference between is calculated.* |

## 6.3 Service Desk MIS

### 6.3.1 Daily Reporting

The HSD provide daily SLA numbers and weekly average call duration via email to POL. The HSD use reasonable endeavours to supply these stats by midday on the next working day.

### 6.3.2 Monthly Reporting

The HSD provide a monthly report of all metrics as depicted below – this report is distributed via email, the format may change & and some matrix's will also be provided in a different format in the Service Review Book.

- Telephony SLA 1 Answered

- Telephone SLA 2 Abandonment

- Voicemail Response Time

- First time fix: % of customer aervice calls resolved during the first call

- Number of Calls Offered

- Number of Calls Answered

- Number of Calls Abandoned

- Total Outbound Calls Volume

- Number of Calls Abandoned > 40 Seconds

- Number of Calls Answered < 30 Seconds

- Number of Calls Answered < 10 Seconds

- Customer Experience (Call Coaching)

- Operations Utilisation (% spent not spent in unavailable state

- Average Call Duration (ACD)

- Average Time to Answer (seconds) Time from call in the queue to Agent answering call

- Repeat Calls: Customer Call Chase

- Repeat Calls: Third Party/Engineer Update

- Volume of New HSD Incidents raised on Triole

- Total Branches in estate

- Total counters in estate

- Call Multiplier: (Contacts to new Call/Incidents tickets ratio)

### 6.3.3 Adhoc Reporting

When requested, the HSD will use reasonable endeavours to produce service information, in electronic / and or hard paper copy, and shall deliver this information to POL within five days or to agreed timescales. In the event that significant incremental resource or system cost may be incurred by Fujitsu in carrying out this request, there may be a charge associated with this request as detailed in the Management Information Service: Service Description (SVM/SDM/SD/0016).

**Horizon Service Desk Joint Working Document**

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