

Live Defect Management on POA

An At-A-Glance guide

Document control (hidden slide)



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Abbreviations & Glossary (hidden slide)

- **Live Defect** – is a logged Incident that is present on the Live system that is, or appears to be, inconsistent with the agreed design or service specification
- **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 “#”
- **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”
- **OTI** – is the interface between Peak and TfSNow that allows Incidents to be transferred between the systems and updates to Incidents to replicate
- **KBA** – Knowledge Base Article. The term KEL is no longer to be used

LDMoaP



- We work at pace to investigate and reach a confirmed outcome. Assigned Team owners to oversee. Some Assigned Teams do not have a clear owner
- Live service trumps Project work - for investigation and qualification - we land that message and we factor capacity accordingly. Teams escalate to management if there is conflict
- We always seek to identify a workaround - and we update the Peak Workaround reference to say Yes/No
- We always look at rapid deployment options for HDR-*, Priority A/B (with implications & dependencies clearly stated). This MUST be considered at BIF and PTF
- Everything gets targeted to a numbered release fast - even if the release has no date
- We need maintenance windows and then we gear up to push through everything we can. And if we need more we ask POL. And if they say no, then the delay is on them.
- If all releases are numbered and sequenced then we can propose dates and ask for more slots from POL. If RM don't have a date then they need to go to whatever POL or POA forum is applicable to get one
- We need a cadence of maintenance windows that are sensible and relevant to the rig availability and current resource availability. POL need to acknowledge that we need regular maintenance windows irrespective of projects hogging rigs. If we are delaying fixes because of resources, rig availability or anything else then this has to be escalated so POL can decide to accept or commission changes
- We need to revisit the option for maintenance releases to go to LST only - for pace
- HNG-A removed counter maintenance releases so CBA fixes sit waiting to match a functional release date
- LST implications for sequencing of testing releases need thought
- State the Assigned Teams and state and owner - and let them change it if it is incorrect



Background

- POA has operated a Live Defect Management and Incident Management process throughout the whole term of the contract
- This slide deck takes all of the previous methods and augments them with some new fields and field values that support an improved end to end process for Incidents and Defects
- The new processes also align to the agreed 2021 definitions of a Live Defect and a branch impacting defect which have been defined with POL
- The effective management of Incidents and Defects requires the consistent use of systems by all specialist support staff and also, regrettably, relies on many manual processes
- The information in this slide deck is meant as a quick guide for all specialist support staff (MAC, 3LS, 4LS & Architects) using either Peak or TfSNow
- Specific communications have been held at team level and a Live Defect Management guide document will shortly be released to Dimensions as a fuller description

It all starts with an Incident being logged

- 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 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
- Incidents can relate to many aspects of the HNG-X solution but if they relate to the Live system then they have the potential to be Live Defects
- This may not be apparent at the outset so the situation will need to be under constant review
- If at any point the Incident is deemed to be a Live Defect, then the following slides become relevant

What is a Live Defect?

■ 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 may need fixing

To ensure that Live Defects are easily identifiable, support staff should do the following:

TfSNow – add the LiveAffectingDefect CI
Peak – add the ##LiveAffectingDefect Collection

- There may be a workaround, but the underlying issue still meets the criteria above

Live Defect progression...

- A Live Defect will start out as a Potential Live Defect until sufficient investigation has taken place
- Assuming that there is a fault, this will progress to be a Confirmed Live Defect (if it is not a fault then the Live Defect will be closed)
- A Confirmed Live Defect will need to go through the POA processes before the fix is eventually deployed to Live
- The flow below shows the progression path for a Live Defect



What is a HDR Defect?

- Live Defects that affect, or have the potential to affect, branch operations are known as HDR Defects
- HDR Defects can only apply to the Live system and are a specific classification of a Live Defect
- HDR Defects are shared with POL and progress on them is reported weekly
- HDR Defects are the highest priority of Live Defect and are communicated to postmasters by POL as part of its new ways of working
- Progress on HDR Defects is highly visible

How do you identify a HDR Defect?

- 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
- 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)

To ensure that HDR Defects are easily identifiable, support staff should do the following:

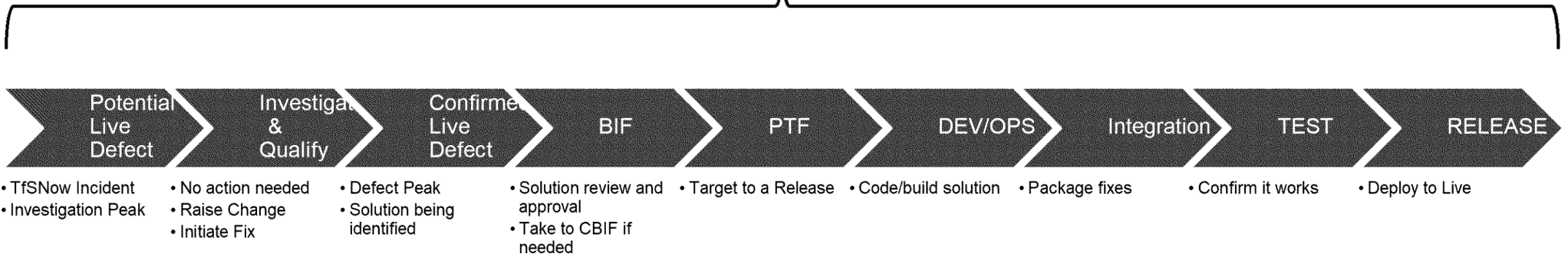
TfSNow – add the relevant HDR-* CI
Peak – add the relevant HDR-* Collection

HDR Live Defect Tracking & Reporting



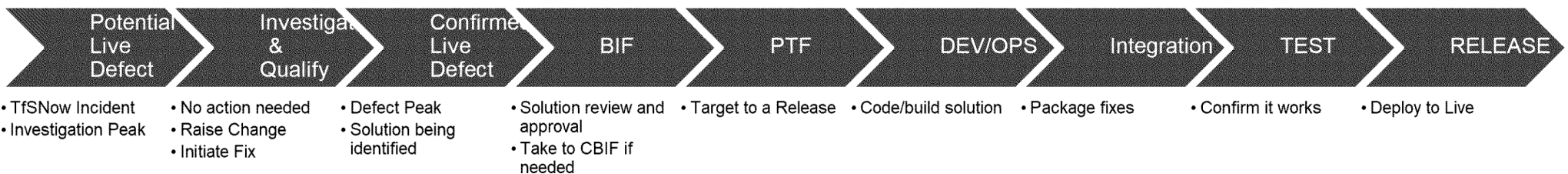
- HDR – tracks the whole lifecycle of HDR Defects

HDR



What about non-HDR Defects

- All Live Defects will follow the lifecycle shown
- If they are non-HDR Defects then these will not be reported to POL but will be reported on and managed by Fujitsu



Understanding the status of a Live Defect



- To be able to effectively track and report on Live Defects, numerous fields must be completed and maintained
- This will vary depending on whether the Live Defect is being managed through TfSNow or Peak

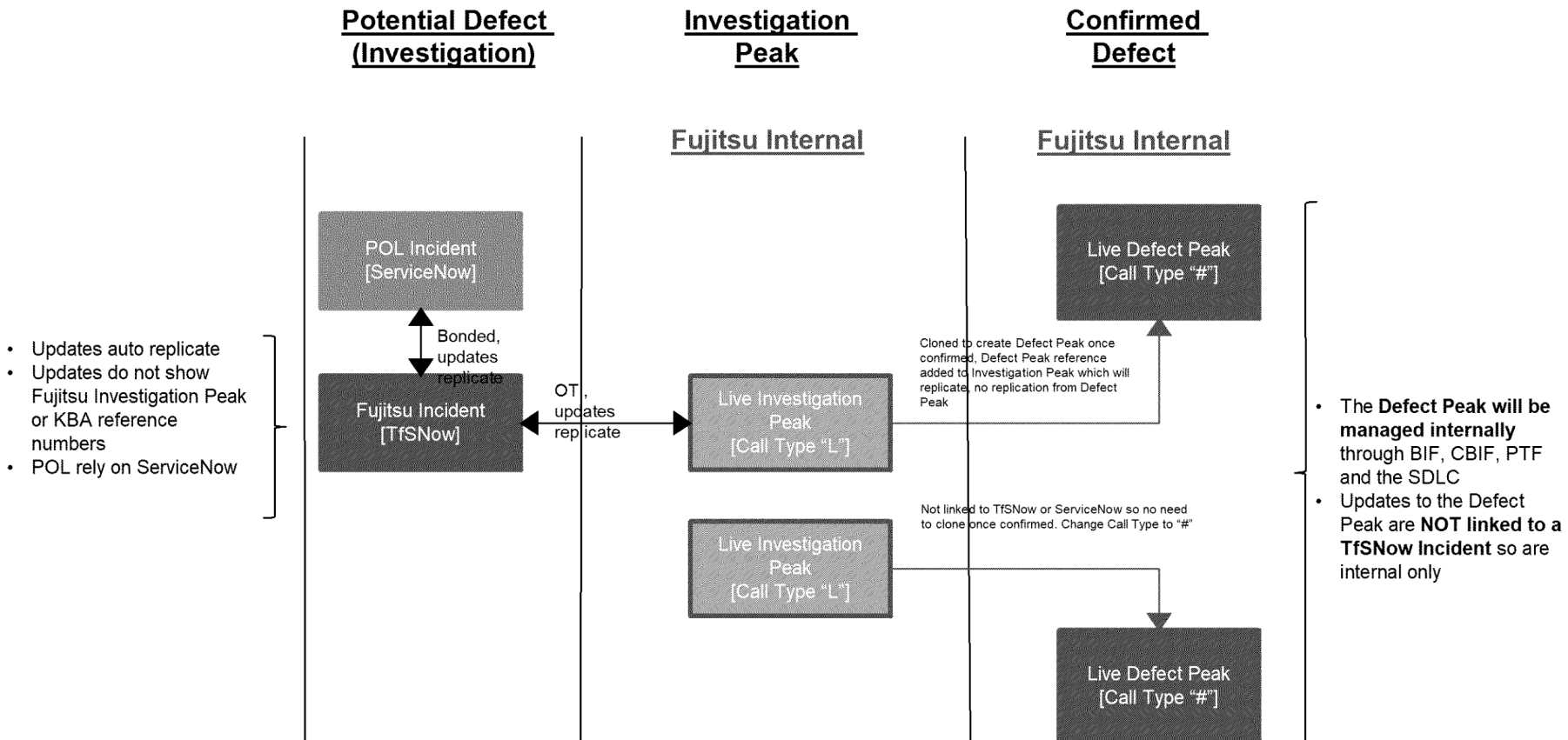
TfSNow



- **We do not reference KBAs, Peaks or internal content in TfSNow bonded Incidents.** The TfSNow Incident must 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)
- The Summary field needs to be well worded and understandable by most readers as it will be used in reports for management and POL and will affect the description fed to POL and into our own Peak system
- We should not use separate emails to share progress that is not embedded into the Incident updates
- Less qualified individuals may read Incident content so it must be well worded and should use language that is understandable to most readers
- Anyone should be able to quickly determine the current status and the next action on an Incident so as to be in no doubt that the Incident is under full control. The most effective way to do this is to make updates in “Additional comments (Customer visible)” that convey this message and avoid updates that lack context
- Category/Sub-category must not be changed on bonded Incidents or it will break the replication link
- We should use the relevant open and close categories when handling Incidents – applying additional caution with bonded Incidents to use the mutually agreed settings
- The LiveAffectingDefect CI is needed for Live Defects
- **The HDR* CIs are needed for special category Incidents and this will be set by Fujitsu management – and will trigger a new Fujitsu MAC alerting process**
- **The State field is important as it is now used to report status**
- 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.” Is to be added. After 10 days, these Incidents should be closed

■ **We need any local Work Instructions or process documents updating to reflect these changes**

Incident – Peak – Defect



Peak



New fields in Peak

- **POL Problem reference** – using the prefix “POLPRB-“ so it is obvious and also searchable. Most likely only required when the Peak is declared to be a HDR Defect (see screenshot showing location of Reference fields)
- **Fujitsu Problem reference** – using the prefix “FJPRB-“ so it is obvious and also searchable. Most likely to be updated by the Fujitsu Problem Manager to ensure the link is clear (see screenshot showing location of Reference fields)
- **Workaround** – to state “Yes/No” state if an accepted workaround has been implemented. If the field is blank or contains “No” then no workaround has been identified (see screenshot for how to set the value)

Peak Incident Management System - PC0295241

Reference Type	Current Value	Top Ref	Delete	Top Ref
Call reference	PC0295241	<input checked="" type="checkbox"/>	Delete	Top Ref
Call reference	PC0295241		Delete	Top Ref
Call reference	PC0295241		Delete	Top Ref
Workaround	Yes		Delete	Top Ref

Add Reference Type: POL Problem reference, Knowledge reference, MSC Task, OCP, Other, PACT impact, POL 2000, POL 2000, PowerPlay, Problem Incident, Product Baseline, PSPD, QC Defect No, QC Severity, QSP Review, Std Alert, Std Date Chg, Release Note

Reference Value(s): POLPRB-2800000000

Expected Format(s): POLPRB-PROBXXXXXX

If adding multiple references these must be comma separated and be of the same type

Peak Incident Management System - PC0295241

Reference Type	Current Value
Call reference	PC0295241
Call reference	PC0295241
Call reference	PC0295241

Add Reference Type: Workaround

Reference Value(s): Yes

Expected Format(s): Yes

If adding multiple references these must be comma separated and be of the same type

Updated RELEASE MGT tab



- **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 (see screenshot)

DETAILS REFERENCES PRODUCTS EVIDENCE DISACT COLLECTIONS TARGET RELEASE RELEASE MGT

Index: 41203 Last Editor: John Simpkins Date/Time: 2021-07-21 16:30:16

Business Impact Forum (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 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

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

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		

Peak – critical fields and their values



- **Collection ##LiveAffectingDefect.** 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

Add Incident to Collection

##LiveAffectingDefect -- Software fault that affects the Live service [Public]	Add to Collection
##LiveAffectingDefect -- Software fault that affects the Live service [Public]	

- **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

Peak In

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	E -- Enhancement Request			
Date: 16-Jun-2021 10	G -- GDC Testing Incidents/Defects			
CALL: PC0295241 open	I -- Internal Development Incidents/Defects			
Details entered are	K -- Primark			
Summary: testing	L -- Live Incidents			
Call Type: L	M -- Problem Management			
Call Priority: D	O -- Operational (SSC)			
Target Release: HNG-	P -- Product Incidents/Defects			
Routed to: EDSC - U	R -- Release Notice Forum			
Date: 16-Jun-2021 10	S -- System Testing Incidents/Defects			
[Start of Response]	T -- Technical query			
testing dev ID	U -- Security Testing Incidents/Defects			
[End of Response]	V -- Vulnerability			
Response code to ca	W -- Reference Data Service			
Date: 16-Jun-2021 10	X -- System Management Testing Incidents/Defects			
The Call record has	Y -- Live (Non-RefData) Data Updates			
Date: 16-Jun-2021 10	Z -- 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				

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

Add Incident to Collection

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



Peak – important fields

- **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
- **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]
- **Priority** – which must be validated at all times so it is accurately shown as this will affect reporting and decision making
- **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

Impact text

Business impact: Prev and Cancel buttons are incorrectly made available to the Postmaster during the End-Of-Session script. Resulted in a Bureau Pre Order transaction being duplicated upon next login, causing a branch accounts discrepancy. The discrepancy was raised by the Postmaster to Post Office for investigation. Fujitsu have put monitoring in place which is checked on a weekly basis, and reported to Post Office if any further occurrences are identified. A single instance of the issue has been identified over the last year.

Status update: Fujitsu have put monitoring in place which is checked on a weekly basis. The Defect has been qualified, and Targeted At R71.20

Next action: Awaiting R71.20 counter release.

Peak updates – Internal & External

- When adding Progress to a 'bonded' Peak, the default response option is '– Progress Only' and this does NOT flow back to TfSNow
 - NOTE – but it would be visible if we were asked to provide a copy of the Peak as the PDF feature takes ALL content
- If you select a Response Category then any text you add at the same time WILL flow back to TfSNow if the Peak is 'bonded'
- No References are sent to TfSNow for 'bonded' Peak, so all Documents, Baselines, KBs, and Peak references can be added for Fujitsu only access

Peak – Root Cause & Response Category

- **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. Some Root Cause options will also lead to Live Defects being qualified out and not reported on. We will exclude the following Root Cause values from Live Defects so these need to be applied with caution:

41 -- Pending -- Product Error Diagnosed
42 -- Pending -- Documentation Error Diagnosed

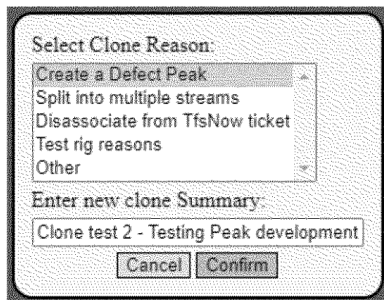
- **Response Category** – specific values have been identified to enable clarity and to spot exclusions. Although there are many values for this field, the following have important meanings – mostly is qualifying Live Defects as not defects and hence allowing their exclusion from reporting:

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

Peak Cloning

■ Cloning

- when clones are created you will be asked for a reason and this will be captured in the cloned Peak. Selecting “Create a Defect Peak” will auto set the Call Type on the clone to “#”
- You will also be asked to update the Summary so the description is unique and appropriate
- Clones now carry forward many more fields (such as Collections, Reference, Workaround, and Release Mgt meeting fields)



```
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
```

Peak – No Fault Found

These Peak field values mean No Fault Found and will cause Peaks to be excluded when counts are done of defects and progress on investigations into defects (see SVM/SDM/PRO/0875):

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 – 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 -- Gone to create Defect Peak
Response Category – 200 -- Final -- Call withdrawn by user

TfSNow may well then show a defect assigned to a different Resolver Group – but it has ceased to be something to track in Peak

HDR reporting – directly from Peak/TfSNow



Call Reference	Summary	Workaround	Fujitsu Update
PC0291532	INC6541788 : Failed Recoveries (AP client data > 4,000 characters) - FULL FIX	Yes	<p>Business impact: Clerk will be unable to transact certain AP products, e.g. National Express, Drop n Go Open Account, MoneyGram, Bureau Pre-Order. The issue has potential to occur due to APADC scripting caused by excessive length of exported AP client data > 4,000 characters.</p> <p>Status update: Testing has been completed successfully.</p> <p>Next action: Awaiting deployment in release 71.10.</p>
PC0294005	INC7712618 : FAD: 159405 St Annes 1594052 -Bureau Pre Order Transaction - node 2	Yes	<p>Business impact: Prey and Cancel buttons are incorrectly made available to the Postmaster during the End-Of-Session script. Resulted in a Bureau Pre Order transaction being duplicated upon next login, causing a branch accounts discrepancy. The discrepancy was raised by the Postmaster to Post Office for investigation. Fujitsu have put monitoring in place which is checked on a weekly basis, and reported to Post Office if any further occurrences are identified. A single instance of the issue has been identified over the last year.</p> <p>Status update: Fujitsu have put monitoring in place which is checked on a weekly basis. The Defect has been qualified, and Targeted At R71.20</p> <p>Next action: Awaiting R71.20 counter release.</p>
PC0295293	INC8217101 : Inactivity logout for End-Of-Session scripts	Yes	<p>Business impact: Inactivity timeout during the End-Of-Session script for a transaction where payment was being made by a cash withdrawal in the basket, resulted in the transaction auto-settling to cash as per Business Rule BRU-327, but outstanding recovery data resulted in a duplicate transaction being written, resulting in a branch accounts discrepancy. Fujitsu have put monitoring in place which is checked on a weekly basis, and reported to Post Office if any further occurrences are identified. A single instance of the issue has been identified over the last year.</p> <p>Status update: Fujitsu have put monitoring in place which is checked on a weekly basis. The options to remediate this defect were discussed with POL 21/07/2021 and Fujitsu will also be sharing a summary paper to help POL.</p> <p>Next action: POL to decide on its preferred course of action.</p>
PR80047806	Help Screen Freezing on the Counters in Branches	No	<p>Weekly problem update for the 19/07 that will be provided to Lorna Owens (POL)</p> <p>Update: 19/07/2021: Matthew Hatch: Awaiting an update from POL with reference to 3 POL actions.</p>

Checklist guide for Peak stack management

There's a Peak in my stack...

A checklist guide for Peak stack owners (and support specialists updating Peaks)

- ☐ Should this be in my stack? If not, then route it to the right Assigned Team
- ☐ Is the Peak assigned to the correct person (not off sick, still on POA)? If not, then reassign it
- ☐ Is it a potential Live Defect? If so, add the ##LiveAffectingDefect Collection
- ☐ If it is a potential Live Defect, what needs doing to progress it to Defect Identified or to qualify it as NOT a Live Defect?
- ☐ If it is a Live Defect, it should be Call Type "L" or "H" – so change it if needed
- ☐ If it is Call Type "H - Defect Identified", is it bonded to POL's SNOW – if so, it needs to be cloned and then closed (it is ok if it is only bonded to TfsNow)
- ☐ Is it, or could it be, branch impacting – if so, add the HDR-Fin or HDR-Exp Collection
- ☐ If it has a HDR-* Collection – is it being treated as high priority – regardless of Priority field value?
- ☐ If it has a HDR-* Collection – is the Impact field up to date and well worded so that POL will understand it?
- ☐ Is the Workaround Reference added with Yes selected where a suitable workaround is in place?
- ☐ Has anything changed that would mean the ##LiveAffectingDefect or HDR-* Collections are no longer correct and should be removed? If so, remove them
- ☐ If it is Defect Identified, when will it be taken to BIF? Set the BIF Action
- ☐ If it is Defect Identified, and has been approved at BIF, when will it be taken to PTF? Set the PTF Action
- ☐ If it is Defect Identified, and has been Targeted in PTF, when will work start to create the required fix?
- ☐ Is the Response Category correct?
- ☐ Is the Product and Product Group correct?
- ☐ When was it last updated – and is that an acceptable timespan?
- ☐ Have discussions taken place over email or in meetings that should be added to the Peak to ensure a full record is available?
- ☐ How long is it since the Peak was raised – and is that acceptable or does a review need doing?
- ☐ Do the latest updates read well and make sense? If not, change them and coach the creator
- ☐ Is it clear who (specifically) is expected to take the next action? If not, make it clear and notify the person expected to act
- ☐ If you are waiting for someone external to your team to take action – challenge them to make progress
- ☐ Peaks with the following Response Categories that have the ##LiveAffectingDefect Collection should be Call Type "H" as a fix is needed. Change it if necessary

41 -- Pending -- Product Error Diagnosed
 42 -- Pending -- Documentation Error Diagnosed
- ☐ Peaks that are Status "F" should have an accurate Root Cause added before being closed. Make sure it is updated
- ☐ Peaks recently closed with any of the following Response Categories are deemed to have been No Fault Found with no fix action needed. Is this correct? If not, have the Peaks re-opened and corrected

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

22.10.2021 (Steve Browell)

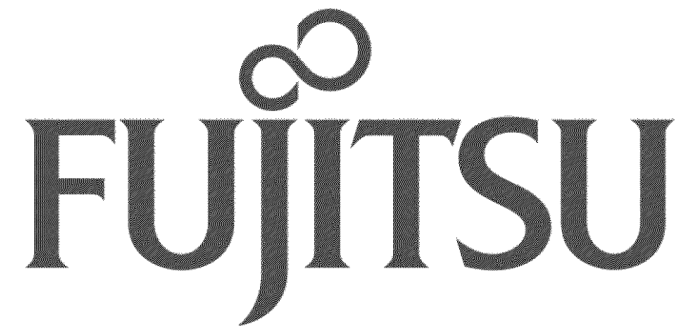
Checklist guide for TfSNow Assignment Groups

There's an Incident in my TfSNow Assignment Group...

A checklist guide for TfSNow Assignment Group owners (and support specialists updating TfSNow Incidents)

- ☐ Should this be in my Assignment Group? If not, then route it to the right Assignment Group
- ☐ Is the Incident assigned to the correct person (not off sick, still on POA)? If not, then reassign it
- ☐ Is the Summary field a clear description that others will understand?
- ☐ If the Incident is not bonded to POL ServiceNow, does it have the right Open category?
- ☐ Is it a potential Live Defect? If so, add the LiveAffectingDefect CI
- ☐ If it is a potential Live Defect, what needs doing to progress it to a confirmed defect or to qualify it as NOT a Live Defect?
- ☐ Should POL be aware? If so, the Incident will need to be logged by MAC with the required specific Categories so it can be bonded to POL ServiceNow so POL can be kept updated with progress
- ☐ Is it, or could it be, branch impacting – if so, ensure MAC are asked to add the HDR-Fin or HDR-Exp CI
- ☐ If it has a HDR-* CI – is it being treated as high priority – regardless of Priority field value?
- ☐ If it has a HDR-* CI – is a recent entry in the “Additional comments (Customer visible)” field up to date and well worded so that POL will understand it?
- ☐ Is the State field correctly set?
- ☐ Is a workaround available (this will show in the Peak – if applicable – as the Workaround Reference will be set to Yes)? If so, make sure that the “Additional comments (Customer visible)” field clearly states this – especially if this Incident is bonded to POL ServiceNow
- ☐ Has anything changed that would mean the ##LiveAffectingDefect or HDR-* Collections are no longer correct and should be removed? If so, remove them
- ☐ If it is a confirmed defect, when will the resolution action be taken e.g. is it linked to a TfSNow Change?
- ☐ When was it last updated – and is that an acceptable timespan?
- ☐ Have discussions taken place over email or in meetings that should be added to the Incident to ensure a full record is available?
- ☐ How long is it since the Incident was raised – and is that acceptable or does a review need doing?
- ☐ Do the latest updates read well and make sense? If not, change them and coach the creator
- ☐ If the Incident is bonded to POL ServiceNow, does the latest update to the “Additional comments (Customer visible)” field make it clear to POL what the status is? If not, add an update that does
- ☐ Is it clear who (specifically) is expected to take the next action? If not, make it clear and notify the person expected to act
- ☐ If you are waiting for someone external to your team to take action – challenge them to make progress
- ☐ Is the Incident Suspended as no further Fujitsu action is needed? If so, and after 10 working days have elapsed, the Incident should be closed
- ☐ If the Incident is being closed, ensure it has the right Closure code and has the correct minimum dataset added (as per local work instructions):
 - ☐ Line of Summary
 - ☐ Root Cause
 - ☐ Resolution
 - ☐ Internal/External
 - ☐ Fujitsu SME
 - ☐ POL Stakeholder
- ☐ Incidents recently closed should be checked. If they were closed with no action required by Fujitsu, does the Incident clearly state that? If they were closed following action taken by Fujitsu, does the Incident clearly state that?

22.10.2021 (Steve Browell)



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