POST OFFICE ACCOUNT DEFECT MANAGEMENT REPORTING

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Document Title:	POST OFFICE ACCOUNT DEFECT MANAGEMENT REPORTING
Document Reference:	SVM/SDM/PRO/4695
CP/CWO Reference:	None
Abstract:	Description of the procedures used on the Post Office Account to produce Defect Management Reports.
Document Status:	INITIAL DRAFTS
Author & Dept:	Matthew Hatch
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Approval Authorities:

Name	Role	
		See Dimensions for record
		See Dimensions for record

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0 Document Control

0.1 Table of Contents

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0.2   Document History

Only integer versions are authorised for development.

Version No.	Date	Summary of Changes and Reason for Issue	Associated Change CWO, CP, CCN or PEAK Reference
0.1	03/10/2022	Initial draft versions not released for review	N/A
0.2	06/10/2022	New draft version with amendments following the document being used in a training session.	N/A
0.3	07/10/2022	Typo corrections.	N/A
0.4	20/10/2022	Further amendments identified during KT session	N/A
0.5	09/11/2022	New Section 2.8 Creating the POL All Live Defects Report has been added that details the instructions for creating the POL All Live Defects Report No other changes have been made to this document other than what has been detailed above.	N/A
0.6	11/11/2022	Added an instruction for new potential or confirmed Defects to add the "Date first logged at HDR (dd/mm/yyyy)" as the date of the HDR Meeting that this will be presented to POL for the first time.	N/A

0.3   Review Details

*See POA Reviewers/Approvers Matrix (PGM/DCM/ION/0001) for guidance on completing the lists below. You may include additional reviewers, if necessary, but you should generally **not exclude** any of the mandatory reviewers shown in the matrix for the document type you are authoring.*

Review Comments by:	(date by which comments should be returned)
Review Comments to:	(author's email) + POA Document Management

If preferred, you can delete the following Mandatory and Optional reviewer tables and paste in the appropriate list copied from POA Reviewers/Approvers Matrix (PGM/DCM/ION/0001).

Mandatory Review	
Role	**Name**

Optional Review	
Role	**Name**

(*) = Reviewers that returned comments

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

0.4 Associated Documents (Internal & External)

References should normally refer to the latest approved version in Dimensions; only refer to a specific version if necessary.

Reference	Version	Date	Title	Source
PGM/DCM/TEM/0001 (DO NOT REMOVE)	See note above	See note above	POA Generic Document Template	Dimensions
PGM/DCM/ION/0001 (DO NOT REMOVE)			POA Document Reviewers/Approvers Role Matrix	Dimensions
Alphabetical order please				
SVM/SDM/PRO/4317	Latest	See Dimensions	POL Horizon Defects Review Terms of Reference	Dimensions
SVM/SDM/PRO/0875	Latest	See Dimensions	Application support Strategy	Dimensions
CS/MAN/011				

0.5 Abbreviations

Abbreviation	Definition
Alphabetical order please	
HDR	Horizon Defect Review
HDR-FIN	Horizon Defect Review – Financial Impact
HDR-EXP	Horizon Defect Review – SPM Experience
SPM	Sub Post Master
PBS	Payment and Banking Service
PROD OUT	Production Out Date
SME's	System Matter Experts
HTML	Hyper Text Markup Language
PNG	Portable Network Graphics
JPEG	Joint Photographic Experts Group
CBIF	Customer Business Impact Forum
POL	Post Office LTD
MGT	Management
TfSNow	TRIOLE for ServiceNow
PEAK	Peak Incident Management System

0.6 Glossary

Term	Definition
Alphabetical order please	

0.7 Changes Expected

Changes

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0.8 Accuracy

Fujitsu Services endeavours to ensure that the information contained in this document is correct but, while 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.

0.9 Information Classification

The author has assessed the information in this document for risk of disclosure and has assigned an information classification of FUJITSU CONFIDENTIAL (INTERNAL USE ONLY).

1 Introduction

This document describes the way in which the various internal and external Defect Management reports are produced for LIVE Defects including branch impacting. It can be used as a procedural document that can be referred to and updated in line with changes and/or improvements that are made to the Defect Management reports as they evolve and change owing customer or internal requirements.

1.1 Overview of the Live Defect Management Reporting approach

1.2 The Goal

- If the Live Incident or Live Defect affects, or could affect, branch operations, we share it with POL in a weekly HDR Report and at the Horizon Defect Review (HDR) weekly meeting

1.3 Background

- The Defect Management reports are produced for internal and external distribution in order to demonstrate Fujitsu's management and communication of the LIVE affecting defects including those that have a branch impact.

- The LIVE affecting defects reported to POL will have one or more of the following collections added in order to qualify as a candidate for reporting:

  o ##LiveAffectingDefect

  o HDR-FIN – Horizon Defect Review – Financial Impact

  o HDR-EXP – Horizon Defect Review – SPM Experience

- These Defects could be in various stages whilst reporting on them to POL:

  o INVESTIGATING - A Live Defect will start out as a Potential Live Defect until sufficient investigation has taken place

    ▪ [Fujitsu internal unless linked to a bonded Incident]

  o SOLUTIONING - If a fault is confirmed then this will progress to be a Confirmed Live Defect (if it is not a fault then the Potential Live Defect will be closed)

    ▪ [Fujitsu internal as a solution still needs to be identified and agreed]

  o PROPOSED FOR - Once a solution is identified for a Confirmed Live Defect it will need to go through the POA processes before the fix is assigned to a sensible Release

    ▪ [Fujitsu internal involving developer / feature conflict check. Counter defects are discussed with POL]

  o TARGETED AT - Releases are then managed through to deployment to Live

    ▪ [Visible to all parties as the Release work starts]

2 Live Defect Management Reporting

2.1 Weekly HDR Report Creation Work Instructions

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

- o The criteria to be used to determine HDR reporting candidates to share with POL will be determined by creating a list using the following logic. The resulting list allows for the HDR candidates to be identified.
- o Prepare the report to send to POL
  - A spreadsheet format has been used to date so the previous week's POL "HDR Defects update report – dd.mm.ccyy v1.0.xlsx" 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.
    - Save the file as v0.1 initially and use v1.0 for the version that is shared with POL. As a visual reminder add WIP into cell B2 and lastly delete the "HDR Report" Tab, which contains last weeks extracted data.
    - It may be easier to create several draft versions i.e. v0.1, v0.2, v0.3 etc during the creation of the report, so that it is in a state suitable to create v1.0 to share with POL.
    - Amend the date in F3 making sure to leave it as a text field or the title of the section below it will not render correctly
- o Create the Peak extract to build the report from
  - Then, open any version of the "Peak_Defect_Management extract dd.mm.ccyy hh.mm.xlsx" spreadsheet and Enable Content and go to the Data tab "##LiveAffectingDefect" and click Refresh All. 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. Turn off AutoSave
- o Quick filtering method:
  - Go to the "HDR Report Pivot" tab

CBIF Peaks Pivot	HDR Report Pivot	Defect Stage Pivot	##LiveAffectingDefect

  - Right mouse click on any part of the filter values at the top and choose "Refresh"

PROD OUT Planned Date	(Mu
Response Category	(Mu
Status	(Mu
HDR Classification	(Multiple Items)
Deferred	(All
PBS Project	(All

Calibri 11 A A %
B I ≡ A ⊞ .0 .00

- Copy
- Format Cells...
- Refresh
- Move >
- Remove "HDR Classification"
- Field Settings...
- PivotTable Options...
- Hide Field List

Count of Summary
59
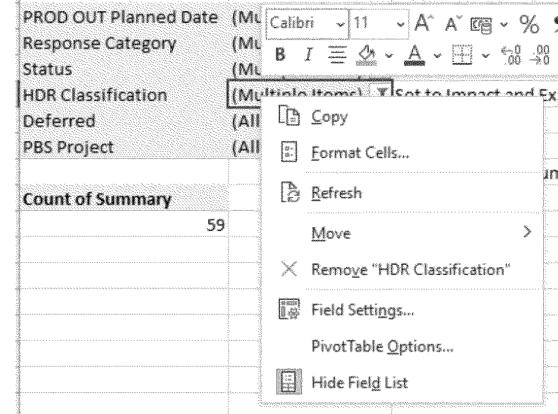
  - Check that all the filters are accurate and match the description shown:

			REFRESH ##LiveAffectingDefect TAB THEN REFRESH THIS PIVOT AND CHECK THE FILTERS AS SHOWN
PROD OUT Planned Date	(Multiple Items)	.T	Check PROD OUT Planned Date only ticks the blanks and future dates
Response Category	(Multiple Items)	.T	Check the NFF Response Categories are all unticked
Status	(Multiple Items)	.T	Untick C
HDR Classification	(Multiple Items)	.T	Set to Impact and Experience (Error needs looking at, blank is excluded)
Deferred	(All)		Set to Yes or blank
PBS Project	(All)		Set to Yes or blank
			Double click the number shown to expose the result set for reporting & rename the tab to Deferred/PBS/Other
Count of Summary			
59			

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- Ensure that you have set Deferred and PBS Project to (All)
- Pay special attention to the "PROD OUT Planned Date" which may have had new future dates added that need to be ticked
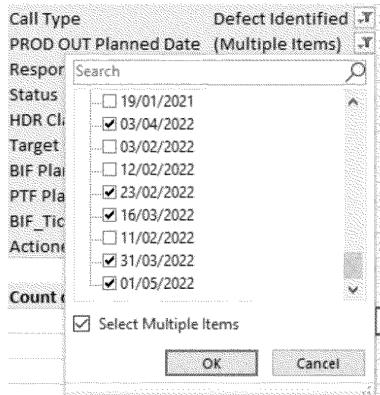
o List – Deferred, Project and HDR Live Defect Peaks
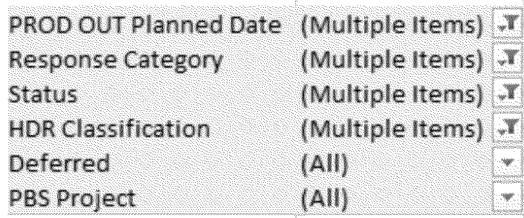
- If there are any Deferred, Project and HDR Peaks to consider, a number will appear under the Count of Summary

  o Double click on the number to open a new sheet with the relevant Peak(s) listed and rename it "HDR Report".
  o It is more likely that the result set largely matches the previous results showing in the HDR Report.
  o Compare the previous HDR report to the new list and amend accordingly so the new HDR report list matches what the system now shows
      o To do this it is worth hiding the following columns as it makes to easier to compare the data against the previous HDR Report:
          - C – Date Opened
          - D – Product
          - E – Product Group
          - G – Priority
          - H – Assignment Team
          - I – Status
          - J – Response Category
          - K – Root Cause
          - M – References
          - N – TfSNow Reference
          - O – POL SNOW Reference
          - P – Contact Name
          - R – Business Impact
- It is good idea to mark for each Defect PEAK the "Call Reference", "Description", "Target Release Type" and "Target Release" red on the HDR Report tab of the

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"Peak_Defect_Management extract dd.mm.ccyy hh.mm.xlsx" once checked against the previous HDR Defects Update Report dd.mm.ccyy.xlsx.

- Also check column AH "Planned Out Date" to ensure that any dates previously reported against in the HDR Defects Update Report under "Current Target Release Date" have not been amended or if any new dates have been added for Defects that had previously been blank.
- If any dates have been amended or added, then please add to the Current Target Release Date of the HRD Defects Update report and add a new HDR extract.
- Also check column AG Date Time Last Updated to see if any Defects have been updated in the last week. If so, check the Defects to identify the changes and if the Impact Tab has been updated then please add to the HDR Report. Other updates such as comments added to the Detail Tab may not require to be communicated to the customer as this could a JIRA reference or log needed to further investigations.

Call Reference	Summary	Call Type	Collections	Workaround	Business Impact	Target Release Type	Target Release
PC0302313	DEV - PIN Pa	Defect Iden	##LiveAffectir	No	The PIN Pad status	Proposed For	HNG-X 73.10
PC0301681	SV&I:72.30:E	Defect Iden	HDR-Fin, ##Liv	Yes	During Existing Rev	Reported In	HNG-X Rel. Ind.
PC0301437	Transaction I	Defect Iden	HDR-Fin, ##Liv	Yes	If a counter perforr	Targeted At	HNG-X 72.30
PC0301364	BTS reports :	Defect Iden	HDR-Fin, ##Liv	Yes	After a failed stock	Targeted At	HNG-X 72.30
PC0301299	BAL fix - INC	Defect Iden	.SSC3rd, ##Liv	Yes	If a clerk uses the T	Targeted At	HNG-X 38.04
PC0301174	Customer nc	Defect Iden	HDR-Fin, ##Liv	Yes	During this basket \	Proposed For	HNG-X 73.10
PC0300404	DEV - Transa	Defect Iden	##LiveAffectir	No	If Transaction Log s	Targeted At	HNG-X 72.30
PC0300338	Counter Fix -	Defect Iden	.SSC3rd, ##Liv	Yes	If a clerk uses the T	Proposed For	HNG-X 73.10
PC0300066	PBS: INC102!	Defect Iden	HDR-Fin, ##Liv	Yes	Declined transactio	Reported In	HNG-X Rel. Ind.
PC0299783	PBS Banking	Defect Iden	HDR-Fin, ##Liv	Yes	This issue is the res	Targeted At	HNG-X 72.30
PC0299322	Branch 2508!	Defect Iden	HDR-Fin, ##Liv	Yes	AP Transaction (Aut	Targeted At	HNG-X 37.01
PC0298894	PBS Comple:	Defect Iden	##LiveAffectir	No	If a PBS Balance Enc	Proposed For	HNG-X 73.10
PC0298823	PBS: Regress	Defect Iden	HDR-Fin, ##Liv	Yes	In rare cases, preve	Targeted At	HNG-X 72.20
PC0298591	PBS transact	Defect Iden	HDR-Fin, .SSCF	Yes	If the user presses	Targeted At	HNG-X 72.20
PC0298324	PBS Counter	Defect Iden	.SSCRandR, ##	No	On PBS counters wl	Targeted At	HNG-X 72.20
PC0298067	LST:R71.10 -	Defect Iden	##LiveAffectir	No	Business impact: W	Proposed For	HNG-X 73.10
PC0297965	LST:R71.10 -	Defect Iden	##LiveAffectir	No	Business impact: If	Proposed For	HNG-X 73.10
PC0297964	LST:R71.10 -	Defect Iden	##LiveAffectir	No	During Existing Rev	Proposed For	HNG-X 73.10
PC0297963	LST:R71.10 -1	Defect Iden	##LiveAffectir	Yes	There have been no	Proposed For	HNG-X 73.10
PC0297962	LST:R71.10 -	Defect Iden	##LiveAffectir	No	Existing Reversals s	Proposed For	HNG-X 73.10
PC0297878	PBS LST:R71.	Defect Iden	BIFApproved,	No	When a PBS bankin	Targeted At	HNG-X 72.20
PC0295854	LST: R70.40 C	Defect Iden	BIFApproved,	No	PBSIL does not imp	Proposed For	HNG-X 73.10
PC0294925	Obsolete He	Defect Iden	Sattars, .SSCCI	No	When help pages h	Targeted At	HNG-X 72.20
PC0293665	CBB-5606 - L	Defect Iden	##LiveAffectir		In particularly rare	Proposed For	HNG-X 73.10
PC0293598	R70.40 : ATO	Defect Iden	BIFApproved, No		For AP-ADC transac	Targeted At	HNG-X 72.20
PC0292825	INC7179929 :	Defect Iden	SSC - 4th Line,	No	See Title. this is be	Proposed For	HNG-X 73.10
PC0292708	CBB-5259 - H	Defect Iden	BIFApproved,		The history text get	Proposed For	HNG-X 73.10
PC0290005	LST:REL_IND	Defect Iden	BIFApproved,	No	When the Clerk att	Proposed For	HNG-X 73.10
PC0289922	LST: R70.20 C	Defect Iden	BIFApproved,	Yes	During a Rem In fo	Proposed For	HNG-X 73.10
PC0289127	R70.20-SV&I	Defect Iden	BIFApproved,		For some back offic	Targeted At	HNG-X 72.20

- Any that have been closed should be moved to the HDR Closed Defects section of the HDR Report and highlight in yellow:

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HDR Closed Defects (since 01/01/2022) - Moving to separate tab as at 20.05.2022 at the request of the customer

POL Reference	POL Title	Category	Fujitsu Reference	Fujitsu Title	Close Date	Reason for closure
PRB0041161	PBS NB102 Section 5 - 67 x State 4 exceptions. Banking transaction that was declined at the counter was actually processed by Vocalink and not reversed.	Impact	PC0301672	INC10882200 : PBS NB102 Section 5 - 67 x State 4 exceptions	26/07/2022	From Vocalink: System working as designed. Vocalink investigating new solution and CR will be required to resolve. Defect record closed - not a defect
PRB0041211	Payment and Banking transactions are declined when a travel money card transaction fails at the exact same as another transaction is processed	Impact	PC0302305	INC11147815 : Increase in reconciliation error requiring BIMS since 02/08/22	05/09/2022	12/09 - This was not a defect in the Fujitsu domain but a proposed temporary fix for a Worldline defect, which was not utilised as the timeline for the Fujitsu temporary fix was the same as for the Worldline permanent fix. POL Title and reference added and above statement added to the description to the HDR Extract. Revised HDR Extract added.
PRB0041211	Payment and Banking transactions are declined when a travel money card transaction fails at the exact same as another transaction is processed	Impact	PC0302278	INC11147815 : Increase in reconciliation error requiring BIMS since 02/08/22	15/09/2022	16/09 - Worldline fix successfully deployed to LIVE 14/09. Monitoring via Fujitsu Reconciliation reporting. If any further occurrences are identified, BIMS will be raised. HDR Extract updated
PRB0041242	Invalid session receipts printed before session settlement & user confused as to how to settle it	Experience	PC0302653	Invalid session receipts printed before session settlement & user confused as to how to settle it	22/09/2022	23/09 - Branch clerks can print transfer in slips which do not necessarily mean the transfer occurred, which may cause confusion. No financial impact, although the clerk may think a transfer occurred when it did not. This behaviour is as per use case CSM-124 Accept Transfer which hasn't changed since it was introduced in 2011, and is working as per design.

Release Date	HDR Extract	Screenshots
N/A		
N/A	HDR Export PC0302305.html	PC0302278ScreenFlows.pdf
14/09/2022	HDR Export PC0302278.html	PC0302278ScreenFlows.pdf
N/A	HDR Export PC0302653.html	PC0302653_Invalid-&-valid-receipts / Transfer In Example Journey.pdf

- Any that are new should be added to the list and highlighted in red on the HDR Report tab whilst they are checked and completed
  - These then need scrutiny to ensure they look correctly tagged as HDR. This will require the Peak to be read and checked
  - If they are HDR, then the Impact tab needs checking to ensure it is complete and reads well. Any amendments should be referred to the SMEs for updates to be added to Peak
  - If the new Live Affecting HDR Peak is still under investigation and such details as RCA, Fix etc. have not be identified it is advisable that on the impact tab, at the start of the description field the following is added "EARLY NOTIFICATION".
  - This enables Fujitsu to inform Post Office of a new defect whilst its still being investigated and confirmed to be a defect.

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- o Ensure that the Date first logged at HDR (dd/mm/yyyy) is completed with the date of the next meeting (normally a Monday) for which this potential or confirmed new Defect will be presented to POL in the HDR meeting. Field from the Impact Tab illustrated below:

Date first logged at HDR (dd/mm/yyyy)	24/10/2022

- o When the report is ready to submit, the highlighting on the new rows should be changed to yellow
- o Extract the list showing:

- o POL Reference (from column BI)
- o POL Title (from column BN or set to N/A for a new entry)
- o Category (from column BF)
- o Fujitsu Reference (the Peak Call Reference from column A)
- o Summary (the Peak Summary field from column B)
- o Confirmed Defect (set to "Yes" if Call Type in column F is "Defect Identified" or "No" otherwise)
- o Workaround (from column Q)
- o Update (manually updated to pick out any changes made week to week on the Peak in question – if nothing has changed (as is typical once a Peak is Targeted At) then the "No change since dd/mm/ccyy" will probably be ok to leave as is. If any updates are identified, set this cell to YELLOW FILL
- o Target Release Type (from column S)
- o Target Release (from column T)
- o HDR Extract
  - ▪ Create the file to embed:
    - ▪ This is created within Peak from the Impact tab
    - ▪ Open the Peak and go to the Impact tab

    - ▪ Click on the Export icon on the top right


    - ▪ A view of the Impact screen is presented in a new window
    - ▪ Right mouse click and choose "Save as"
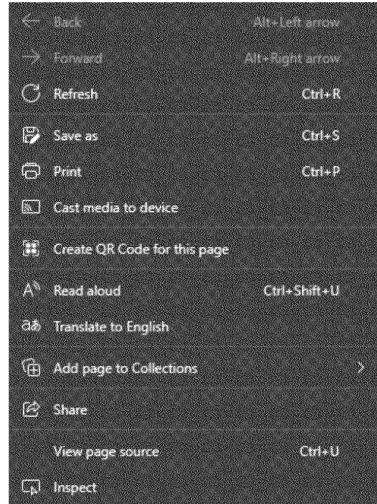
- Save the file
  o Embed the file
    - Click on the cell into which the saved HTML file is to be added
    - Click on the Insert menu option at the top

    - Click on Object in the Text section

    - Click on the "Create from File" option on the screen that appears

    - Click on Browse and then navigate to and click on the relevant file and select "Insert"
    - Then click OK
    - The file will be inserted into the cell in the HDR report

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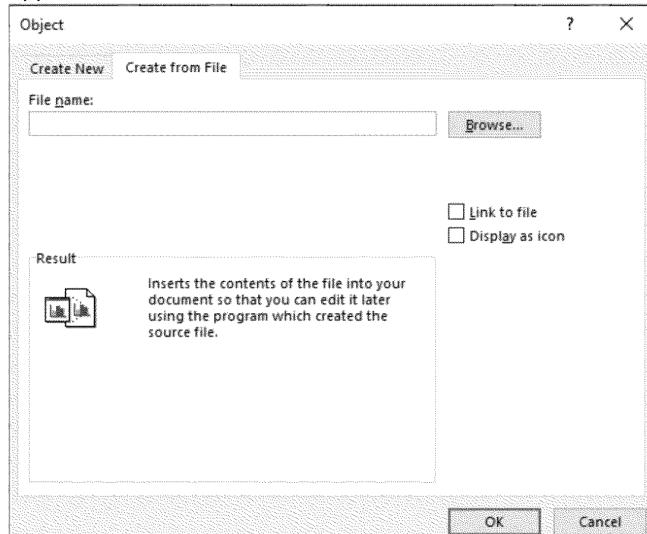
- o Screenshots
  - If any screenshots have been requested or are needed, first save the screenshot to a file (PNG or JPEG)
- o Embed the file
  - Click on the cell into which the saved HTML file is to be added
 - Click on the Insert menu option at the top
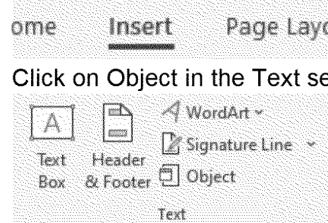
  - Click on Object in the Text section
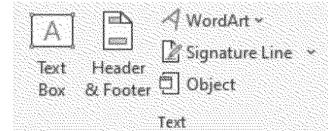
  - Click on the "Create from File" option on the screen that appears
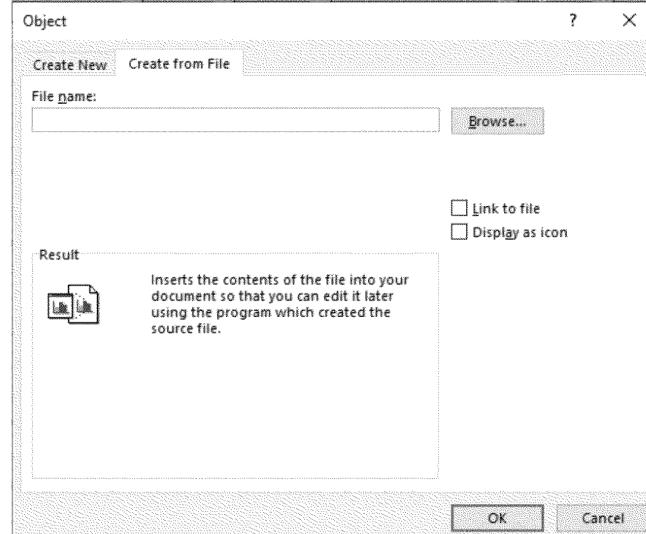
  - Click on Browse and then navigate to and click on the relevant file and select "Insert"
  - Then click OK
  - The file will be inserted into the cell in the HDR report
  - If it is a PDF document, you will need to click on Display as icon checkbox

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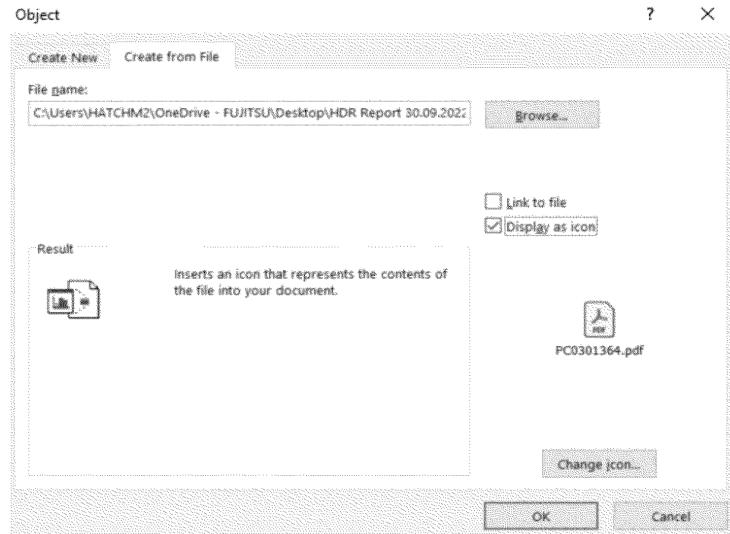
- o Click OK and then resize the PDF document in the cell
- o Once all details are added please ensure that all the row illustrating the new Defect is highlighted in yellow.

FYI ONLY – MANUAL FILTERING
- o If the HDR Report Pivot is absent or corrupted, then the manual filtering is as follows
- o Go to the ##LiveAffectingDefect tab and filter as follows:
  - Set the filter on Response Category [column J] to exclude the No Fault Found values (see Appendix A)
  - Set a filter on HDR Classification [column BF] to exclude blanks
  - Set a filter on Planned Out Live [column AH] so the dates are in the future or blank (it has not been deployed)
  - Exclude closed Peaks where Status [column I] is "C" – as these may have been fixed outside of a release by Ingenico themselves
- o Then the 1 List needs to be created that can be used to compare against the previous week's report:
- o Deferred Live Defect Peaks
  - Set the filter on Deferred [column BH] to "Yes"
  - 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
- o Project Live Defects
  - Set the filter on PBS Project [column BG] to "Yes"
  - These are unlikely to be discussed at HDR as they are part of the ongoing Project Manager regular review calls
- o Non-Project Live Defects (likely originating from an Incident during normal service delivery)
  - Change the filter on PBS Project [column BG] to exclude "Yes"
  - These require more comprehensive information as these will be discussed at the HDR meeting
  - Extract the list as described above
- o These previously were listed as individually in their own sections but is now reported all together.

A.1 2.2 Weekly CBIF Submission Extract Work Instructions

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

- o Create the Peak extract to build the report from
  - Open any recent version of the "Peak_Defect_Management extract dd.mm.ccyy hh.mm.xlsx" 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. Turn off AutoSave
- o Quick way
  - Go to the "CBIF Peaks Pivot" tab

  - Right mouse click on any part of the filter values at the top and choose "Refresh"

  - Check that all the filters are accurate and match the description shown:

			REFRESH ##LiveAffectingDefect TAB THEN REFRESH THIS PIVOT AND CHECK THE FILTERS AS SHOWN
Call Type	Defect Identified	.T	Set to Defect Identified
PROD OUT Planned Date	(Multiple Items)	.T	Set to future date or blanks
Response Category	(Multiple Items)	.T	Untick the No Fault Found categories
Status	(Multiple Items)	.T	Exclude C
HDR Classification	(blank)	.T	Set to blanks
Target Release Type	(Multiple Items)	.T	Exclude Targeted At
BIF Planned Date	(Multiple Items)	.T	Exclude blanks
PTF Planned Date	(blank)	.T	Set to blanks
BIF_Ticked_Questions	(Multiple Items)	.T	Exclude blanks
Actioned Team	(blank)	.T	Set to blanks
			Double click the number shown to expose the result set (usually nothing)
Count of Summary			

  - Pay special attention to the "PROD OUT Planned Date" which may have had new future dates added that need to be ticked

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- If there are any CBIF Peaks to consider, a number will appear under the Count of Summary

    o Double click on the number to open a new sheet with the relevant Peak(s) listed
    o Go to "Collating the results" below
  o Manually filtering way
    - Go to the ##LiveAffectingDefect tab

    - Call Type [column F] is "# - Defect Identified" (a fix is needed)
    - Set the filter on Response Category [column J] to exclude the No Fault Found values (see Appendix A)
    - Set a filter on HDR Classification [column BF] to blanks
    - BIF Planned Date [column U] must not be blank (it has to have been to a BIF meeting)
    - Target Release Type [column S] is not Targeted At (as this means it has gone through PTF already)
    - PTF Planed Date [column AA] must be blank (it has not been to PTF)
    - Planned Out Live [column AH] date is in the future or blank (it has not been deployed)
    - The Actioned Team [column AJ] must be blank (i.e. not BIF (not ready for CBIF) or PTF (gone past the CBIF step))
    - BIF_Ticked_Questions [column AM] is not blank (BIF selected it for CBIF)
    - Go to "Collating the results" below
  o Collating the results:

    - Check that each Peak(s) in the result set is/are correctly marked by reviewing the Peak Details and looking at the Release Management (Release MGT) tab for notes that clarify. Any Peaks that are confirmed as CBIF candidates then need a CBIF Proposal creating as this is what will be submitted to POL.

    - CBIF is part of the HDR meeting and any proposals should be submitted along with the weekly HDR report for discussion at the weekly HDR meeting with POL.

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A.2 Appendix A – No Fault Found Response Category values

Peaks with the following Response Categories are deemed to be No Fault Found as no action was required to remedy the issue raised. In some cases this is because the fault is within an area of the system that is managed using TfSNow and hence Peak is not the source of the Live Defect information.

Response Category – 68 -- Final -- Administrative Response
Response Category – 95 -- Final -- Advice after Investigation
Response Category – 94 -- Final -- Advice and guidance given
Response Category – 70 -- Final -- Avoidance Action Supplied
Response Category – 200 -- Final -- Call withdrawn by user
Response Category – 120 -- Final -- Cloned to create Defect Peak
Response Category – 72 -- Final -- Duplicate Call
Response Category – 58 -- Final -- Documentation Fix Available to Call Logger
Response Category – 66 -- Final -- Enhancement Request
Response Category – 96 -- Final -- Insufficient evidence
Response Category – 62 -- Final – No fault in product
Response Category – 63 -- Final -- Programme Approved – No Fix Required
Response Category – 64 -- Final – Published Known Error
Response Category – 100 -- Final -- Route call to TfS
Response Category – 97 -- Final -- Unspecified insufficient evidence
Response Category – 98 -- Final -- User error

2.3 Updating the PIVOT Tab of the Weekly Defect Update Report

The Pivot tab of the Weekly Defect Update report provides a table and graph that illustrates 1) The Proposed For 2) Targeted At 3) TBC for the Defects displayed in the HDR Report – Open Defects by Target Release and HDR collection i.e. Impact and Experience.

If no new defects are added to the report, then the table and graph can be refreshed to pick up any changes by following the below steps:

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- On the Pivot tab, select a cell within the table and then right click, to bring up the menu
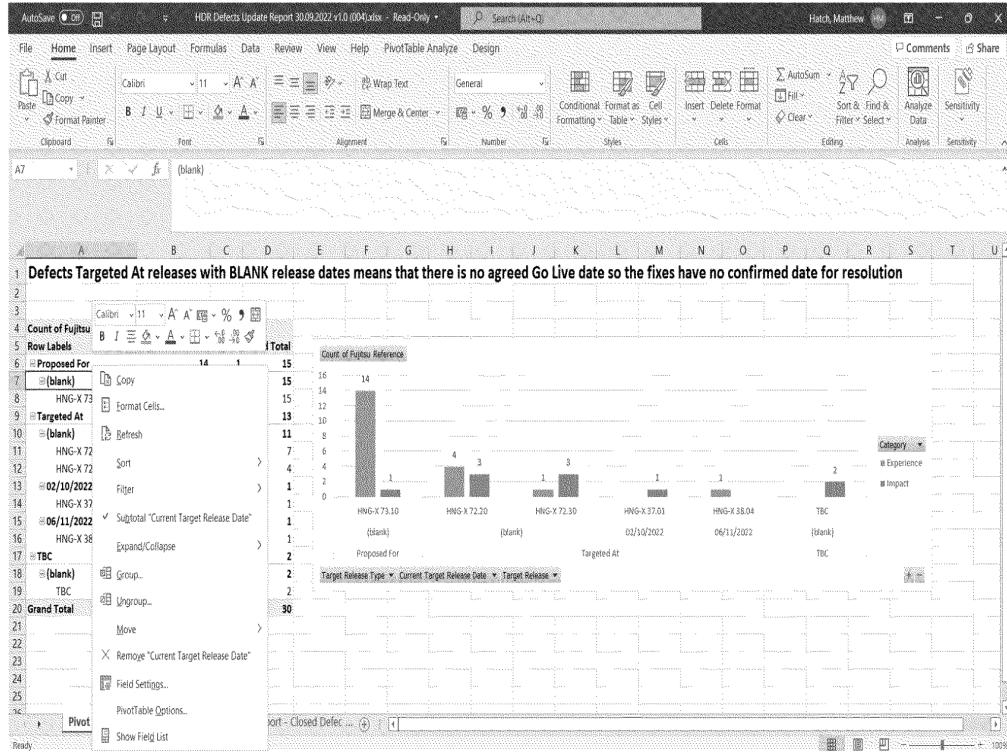
- On the menu click on refresh to update the table and graph

- If new defects have been added to the HDR Report – Open Defects, then select the

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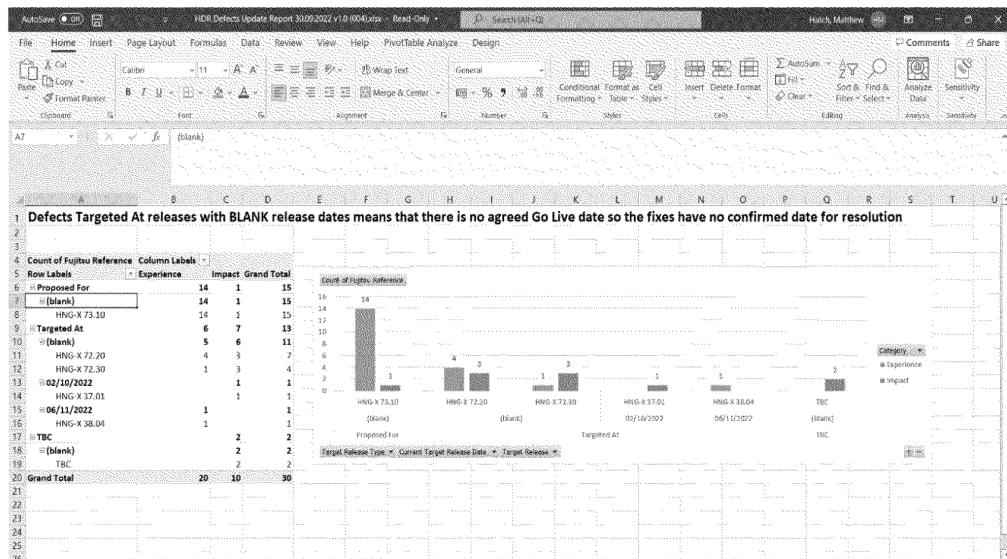
PivotTable Analysis menu bar
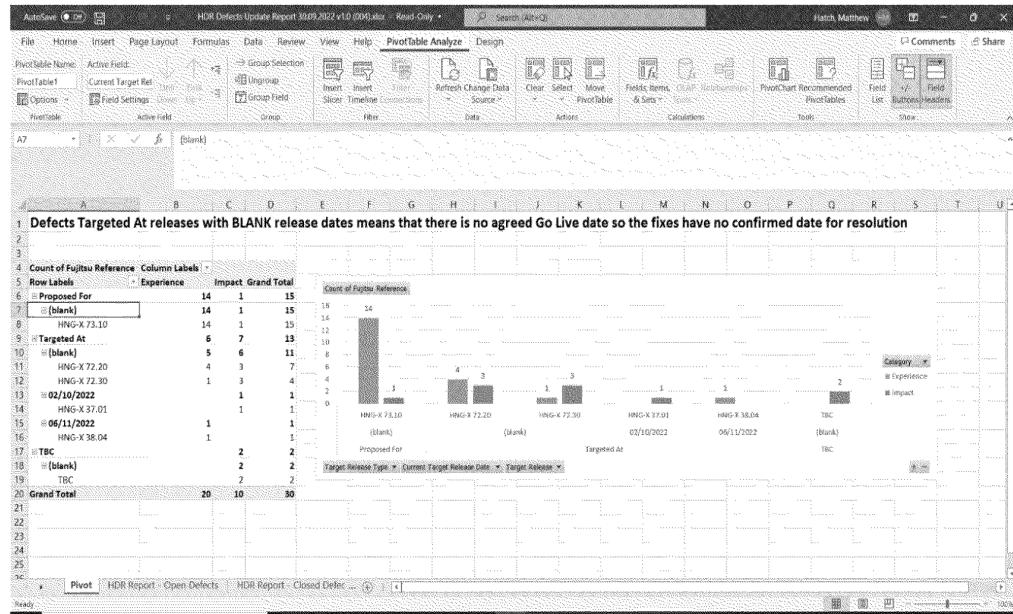
- Then select Change Data Source from this meu click on Change Data Source
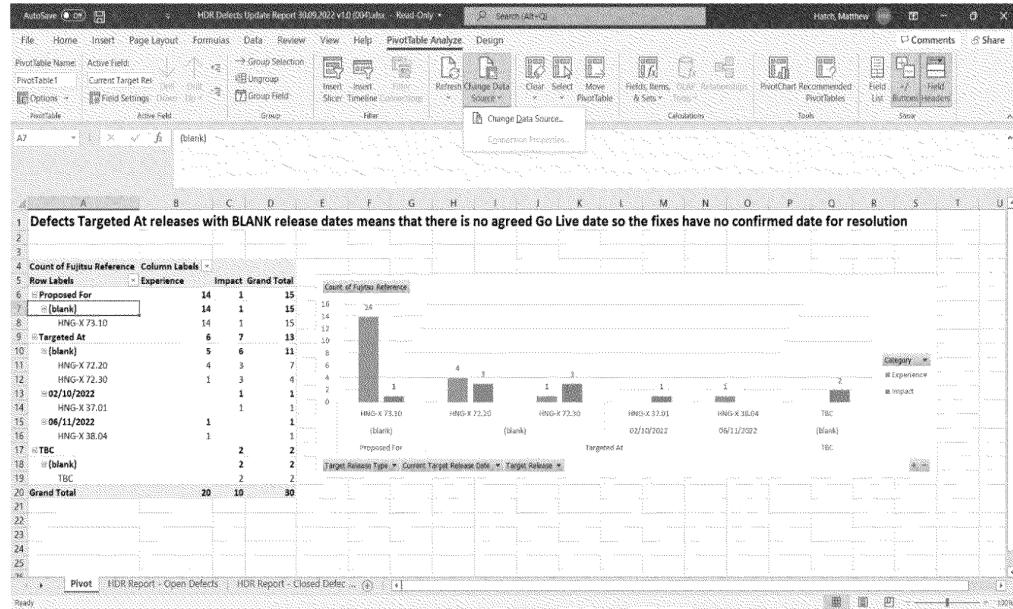
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- The Change PivotTable Data Source menu will be displayed

- Change the Table/Range to cover all the active rows and then click ok
- This will then return you to the Pivot Tab

- Again it is worth refreshing the table.

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2.4 Providing updates to POL Questions in the meeting and additional questions

As a result of the weekly HDR meeting there maybe questions raised by POL that you will need to read the Defect PEAK or engage the required technical resource to gain the required updates to add to the Impact Tab so a revised HDR Extract can be provided in the next HDR Report.

Additionally, POL may send questions on HDR Defect PEAKS in order to gain clarification, that will again need to be added to the Impact Tab so a revised HDR Extract can be added to the HDR Report.

These actions can be performed outside of the producing of the weekly HDR Update Report in order to be ready to add the report against the appropriate HDR Defect PEAK in the report.

2.5 Sending POL the Weekly HDR Report

- Once all the required changes have been added to the HDR Report, you are now in a position to create v1.0 to send to POL by approximately 10:00 on a Friday morning, in preparation for the HDR meeting with POL on a Monday morning (Usually 11:45). If you send it a little late owing to awaiting an update from a technical resource, that is not a big issue as long as it is sent to POL by close of play on the Friday.

  o Open the latest draft version of the report i.e. HDR Defects Update Report v0.2

  o Ensure that all the required updates, HDR Extracts and Screenshots have been added to the report. This includes checking against the actions from the minutes of the previous meeting sent by POL in order to ensure that the required information to answer POL questions is included in the HDR Extracts for the appropriate HDR Defect PEAKS. This will assist in confirming the status of the Fujitsu actions from the previous meeting.

  o If so, remove the word "WIP" into cell B2 and save the report as "HDR Defects update report – dd.mm.ccyy v1.0.xlsx"

  o Next prepare the email to be sent to POL that the report needs to be attached to. Please see example of the weekly email for the HDR Update Report below:

    From: Hatch, Matthew
    Sent: Friday, September 30, 2022 10:12 AM
    To: Paul I Smith < GRO >; Lisa.millar(GRO
    Cc: Bansal, Steve (BRA01) < GRO >; Browell, Steven
    GRO >; Bothick, Sandie < GRO >; POA
    DutyManager < GRO
    Subject: HDR Defects Update Report - 30.09.2022 - v1.0

    Good Morning Paul and Lisa,

    There are <u>NO CBIF</u> candidates to put forward this week and <u>NO NEW DEFECTS</u> to raise.

    There is also <u>FOUR</u> updates to the existing entries, that have been highlighted in yellow in the update column.

    Changes to report and updates:

    - The pivot has been updated
    - The four updates are:
      o 1 has had the Target Release updated.

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- o 1 has Status Update amended to reflect POL questions
- o 1 has RCA updated etc amended to reflect POL questions
  - Already provided revised HDR to POL on Monday 26th of September.
- o 1 has the latest problem update.
- The one closed defect from last week:
  - o PC0302653 - Invalid session receipts printed before session settlement & user confused as to how to settle it
    - The HDR extract has been updated to reflect POL accepting that this is not a defect and is working as per design, as result of meeting held on Wednesday 28th of September.

There are <u>NO OPEN ACTIONS</u> for Fujitsu – as I have engaged technical resources and updated the HDR Extracts for the below:

- PC0302313   DEV - PIN Pad Record Not Updated To Show When Responsive/Non-responsive during logon or unlock
- PC0302653   Invalid session receipts printed before session settlement & user confused as to how to settle it - (closed)
  - o Meeting held on Wednesday 28th of September as highlighted above.

I approve the minutes from the HDR Meeting on Monday 26/09 from a Fujitsu perspective.

- o Then add the report version 1.0 "HDR Defects update report – dd.mm.ccyy v1.0.xlsx" to the email and send to

2.6 Saving the reports, minutes and emails to SharePoint

In order to have an audit record of the HDR Defect Update reports, emails sent to POL and emails and minutes of the meetings sent by POL to Fujitsu, there is a SharePoint location whereby all of these emails and documents are held. Following the sending of the weekly report to POL, or responding to POL emails with questions or the receiving of meeting minutes from POL please save them to the below SharePoint location:

<u>Service Management - Horizon Defects Review (HDR) - started June 2021 - All Documents (sharepoint.com)</u>

2.7 LIVE Defect Management Monthly Report Creation

To create the monthly Live Defect Management for POA stack owners and leadership, follow these steps:

- o Create the Peak extract to build the report from
  - Then, open any version of the "Peak_Defect_Management extract dd.mm.ccyy hh.mm.xlsx" 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. Turn off AutoSave
- o Prepare the report
  - A spreadsheet format has been used to date so the previous month's "POA_Live_Defect_Management Monthly Report dd.mm.ccyy hh.mm.xlsx" should be used as the basis for the new report. To show history, copy the white box on the top left of the Summary tab and paste it to the right as an image (you may need to delete a previous image)

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- • Save the file with the same date and time values as the Peak extract created earlier so you know which extract the report relates to
- o Go to the ##LiveAffectingDefect tab and filter as follows

Then the 5 tabs are derived as follows:

Check the range of values in the Call Type column. If there are any that are neither "Live Incident" nor "Defect Identified" then these need to be looked at to decide whether to treat them as one of these 2 categories. There shouldn't be any, but if there are, it is most likely to be Vulnerability which can be treated as Defect Identified. If so, amend the filtering below where ** is shown.

- o **Still Investigating**
  - • Clear all filters
  - • Filter the Planned Out Live date so it is in the future or blank (it has not been deployed)
  - • Filter out the No Fault Found Response Category values (see Appendix F)
  - • Filter Call Type to "Live Incident" ONLY **
    - ▪ *Consider filter on Status to exclude "C"losed – but beware the closures may be wrong*
  - • Extract the columns shown on the tab from the filtered list and paste the values into the report
  - • Expand/contract the Stack owner column by copying/pasting the formula so all rows are attributed to a name
- o **DI – Solutioning**
  - • Clear all filters
  - • Filter the Planned Out Live date so it is in the future or blank (it has not been deployed)
  - • Filter out the No Fault Found Response Category values (see Appendix F)
  - • Filter Call Type to "Defect Identified" ONLY **
  - • Filter "Target Release Type" to exclude "Targeted At" and "Proposed For"
    - ▪ *Consider filter on Status to exclude "C"losed – but beware the closures may be wrong*
    - ▪ *Manually add back in any that are "Targeted At" or "Proposed For" and Target Release is "Re-target" if there are any*
  - • Extract the columns shown on the tab from the filtered list and paste the values into the report.

2.8 Creating the POL All Live Defects Report

Fujitsu have agreed to create a report called "POL All Live Defects Report" on a fortnightly basis and send to POL.

In order to create the report please following the below instructions:

1. Run the "Peak_Defect_Management extract dd.mm.ccyy hh.mm.xlsx" update and rename the file accordingly
   a. Update the filters on all tabs and Refresh the content
   b. Save the file
   c. Turn off autosave
2. Create the "HNG-X - All Live Defects Report for POL - dd.mm.ccyy.xlsx" file by copying the previous version (the POL report)
   a. Update the Front Page to put the correct dates at the top
3. Go back to "Peak_Defect_Management extract dd.mm.ccyy hh.mm.xlsx"
   a. Go to the Defect Stage Pivot tab and click on the number to the right of Grand Total
   b. This will create a new sheet with all the Peaks on that you need
   c. The columns then need reordering ready for placing into the POL report
   d. In order…
      i. Cut column BJ and paste it prior to column A

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1. Wrap Text will probably switch on so select all content and put Wrap Text back off
   1. Cut column BG and paste it prior to column E
   2. Cut column BI and paste it prior to column F
   3. Cut column T and paste it prior to column G
   4. Cut column S and paste it prior to column H
   5. Cut column BJ and paste it prior to column I
   6. Cut column X and paste it prior to column J
   7. Cut column BK and paste it prior to column K
   8. Cut column BF and paste it prior to column L
   9. Cut column BO and paste it prior to column M
   10. Cut column BV and paste it prior to column N
   11. Cut column BY and paste it prior to column O
1. Sort column A A-Z (1 - Investigating will be at the top)
2. For all top rows where Defect Status is 1- or 2- blank out columns J, K, and L
3. Filter column BO (Impact:Date of Issue) to dates AFTER the last report AND including Blanks - to show only those that have changed since the last report was run
   i. Filter column E (HDR Classification) to blanks only - the HDR ones will have been scrutinised already
   ii. Check columns M, N and O read well and request amendments if not - apply manual edits to this extract to save repeating above steps
1. Remove filter column E (HDR Classification) and filter column AX to show those declared HDR since the last report
   i. Check columns M, N and O read well and request amendments if not - apply manual edits to this extract to save repeating above steps
1. Clear the filter to show all rows (Menu - Data - Clear for speed)
2. Select from row 2 until the end and take columns A-O
3. Copy the text
1. Go back to "HNG-X - All Live Defects Report for POL - dd.mm.ccyy.xlsx"
   a. Place cursor on cell A2 and Paste values
   b. Check that there are no extra rows from the previous report - delete if there are
   c. Unhide the tab "By Release" and Refresh it
   d. Select all contents except the header row and then paste alongside as an image
   e. Crop the image to remove the Pivot table "-" symbols
   f. Cut the image and paste it on the Front Page - resize and position correctly
   g. Hide the "By Release" tab
   h. Save the spreadsheet
   i. Select the entire "All Live Defects" sheet (top left corner left of A and above 1
   j. Double click a row marker to cause resizing to fit contents
   k. Amend the screen so you can see columns M, N and O
   l. Slowly scroll down the file adjusting any cell heights where content looks to end oddly to ensure all content is visible
   m. File Print and select "Print Entire Workbook"
   n. Set printer to "Microsoft Print to PDF"
   o. Check Preview of all pages
   p. Press Print
   q. Save file as "HNG-X - All Live Defects Report for POL - dd.mm.ccyy.pdf"
1. Go back to "Peak_Defect_Management extract dd.mm.ccyy hh.mm.xlsx" and delete the sheet you manipulated to create the view for POL
   a. Save the file
   b. Close the file

- On the day of issue, send to Rohit Gogna ⸢　　　**GRO**　　　⸥; Paul I Smith ⸢　　**GRO**　　⸥ in POL.

✉

HNG-X - All Live
Defects Report for P

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- Forward a copy of the Sent Item to POA recipients: Hatch, Matthew < GRO >; Bansal, Steve (BRA01) GRO >; Duhaney, Joan GRO >; Racon, Rosie GRO >; Allen, Graham (BRA01) GRO >; Walton, Daniel < GRO >; Evans, Steve (BRA01) steve.a.evans GRO Browell, steven < GRO

FW_ HNG-X - All
Live Defects Report

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