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Approval Authorities:

Name	Role	Signature	Date
John Simpkins	Peak Designer and Developer	See Dimensions for record	

0 Document Control

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0.2 Document History

Version No.	Date	Summary of Changes and Reason for Issue	Associated Change - CP/PEAK/PPRR Reference
0.1	02/01/2013	First informal draft	
0.2	17/01/2013	First draft	
1.0	03/04/2013	Approvedt	

0.3 Review Details

Review Comments by :	
Review Comments to :	

(*) = Reviewers that returned comments

Mandatory Review	
Role	**Name**
Peak Designer and Developer	John Simpkins (*)
Peak Administrator	Lionel Higman (*)
Peak Support	Dave Seddon (*)

Optional Review	
Role	**Name**
SSC Manager	Steve Parker

(*) = Reviewers that returned comments

Issued for Information	
Position/Role	**Name**

0.4 Associated Documents (Internal & External)

Reference	Version	Date	Title	Source
PGM/DCM/TEM/0001			RMG BU Generic Document Template	Dimensions
CS/MAN/011	2.0	29/06/2011	Peak User Guide	
SVM/SDM/WKI/0009	0.1	15/03/2010	Peak Disaster Recovery	Dimensions
CS/REQ/012	0.1	09/06/2003	New PinICL System Outline Requirements	PVCS
PK/TSD/001	0.1	11/11/2003	Peak Call Management System Support Document	
DE/PRO/015	2.1	25/04/2004	Post Office Account Systems Integration Directorate Incident/Defect Management	PVCS

0.5 Abbreviations

Abbreviation	Definition
CP	Change Proposal
DHTML	Dynamic Hyper Text Markup Language
EDSC	SSC stack on Peak
GDC	Global Delivery Centre (POA 4th Line Support)
GUI	Graphical User Interface
HNG-X	Horizon Next Generation
HSD	Horizon Service Desk (POA 1st and 2nd Line Support)
KEL	Known Error Log
MSC	Manage Service Change
OCP	Operational Change Procedure
OTI	Open-Systems Teleservice Interface The standard method for transferring incidents between call management systems.
PHIL	Platform Hardware Instance List
POA	Post Office Account
QC	Quality Centre
QFP	Quality Filter Process
RMF	Release Management Forum
SDA	Self-Decrypting Archive
SI	Systems Integration
SLA	Service Level Agreement
SLT	Service Level Target

SMC	System Management Centre (POA 2nd Line Support)
SSC	Software Support Centre (POA 3rd Line Support)
URL	Uniform Resource Locator

0.6 Glossary

Term	Definition
Call or Incident	A term used to reference the Incident/Defect record held in Peak
Peak	A Fujitsu Services call management system used by the Post Office Account
PinICL	Incident management system which was replaced by Peak

0.7 Changes Expected

Changes
Peak is ongoing in its design and therefore features, which may be missing at this release, might be included at a future release.

0.8 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.

0.9 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

Peak is a browser-based software incident and defect management system. It is the system used by Post Office Account (POA) Third and Fourth Line Support Units. It enables diagnostic details to be captured in a searchable format and allows the tracking of problems from detection through to resolution.

Peak was written in-house by the Software Support Centre (SSC) and is now supported by the Peak Administrator and Development Staff.

2 Scope

The purpose of this document, along with its parent document: “Peak User Guide” (CS/MAN./011), is to serve as reference to accompany the Peak client interface. To get a thorough understanding of the interface, Peak Support are advised to read the “Peak User Guide” first before reading this document.

The “Peak User Guide” covers standard user functionality whereas this document is targeted at Peak Administrators using the Peak client interface to:

- manage companies, divisions, teams, roles and user
- manage call types, target releases, closure types, target types, references, root causes
- manage products and product groups
- manage evidence types, alerts, broadcast messages and templates
- view the Peak error log, admin events and list of locked users
- and much more

The client application actually interfaces with an SQL database via several underlying tables and a limited number of views. Technical details about related tables and files are considered out of the scope of this Administration Guide.

The specialist functionalities incorporated into the Peak Incident Management System for Release Management, Change Management and Request Management are also beyond the scope of this document.

3 Outline of this Document

All the screen shots shown in this document are just examples. Peak is highly configurable so the same screen may look slightly different or have different de/activated buttons for each user depending on their role, browser and user configuration as defined in *Preferences*, etc.

Throughout this document, the same convention has been used to refer to buttons and screens/pages. The page name is shown on the top left hand side of the screen and is referred to in this document in italics whilst the buttons are shown in bold. So "**Top Ref** in *References*" means the **Top Ref** button on the *References* page. Recently tabs were introduced to the *Call Details* page so, for example the Impact tab, is referred to "*Call Details* – Impact"

Usually, there is more than one way to get to the same function but the main methods are shown below.

1. Using menu driven commands under the main headings: File, Call, Options, Conference, Admin and Help
2. Using shortcut keys
   Shortcut keys only work on the *Main Menu* screen using lower case letters and only exist for a limited number of functions – currently none of which are administrative functions. If they are mentioned in this document, then they will be shown within square brackets: "[ ]".
3. Using the buttons in the *Main Menu*

So, for example, to go to the *Messages* screen, you can use one of the following methods:

1. Via menu, Admin/Administration/User Messages
2. There is no shortcut key for this administrative function.
3. Via *Main Menu:* **Messages** button

Note that on many of the pages within Peak, if you hover over the buttons you can get tool-tips with more help.

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4 Peak Support

The Peak Administrator is responsible for <u>all</u> administrative functions that need to be done within the Peak system, including:

- creating/updating/deleting users, teams, products, product groups, releases, companies, etc.
- restricting functionality so that only selected users/teams can raise new calls (for a limited set of releases) or clone calls, etc.
- producing reports to analyse Peak calls.

Peak Development staff is responsible for supporting the live system and keeping track of any enhancement requests raised verbally/by Peak/e-mail.

Peak users should be contacting Peak Support using one of the following methods:

1. Sending an e-mail to the appropriate group mailbox:

peakDBA GRO for administration support (e.g. users, Peak routing, etc.)

or

peak GRO for system support (e.g. bugs, enhancements, etc.)

2. Raising a new Peak call with the details which should get routed to the 'Peak HelpDsk' stack.

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5 Main Menu - Administration

The *Main Menu* page is the first screen displayed immediately after successful log on.

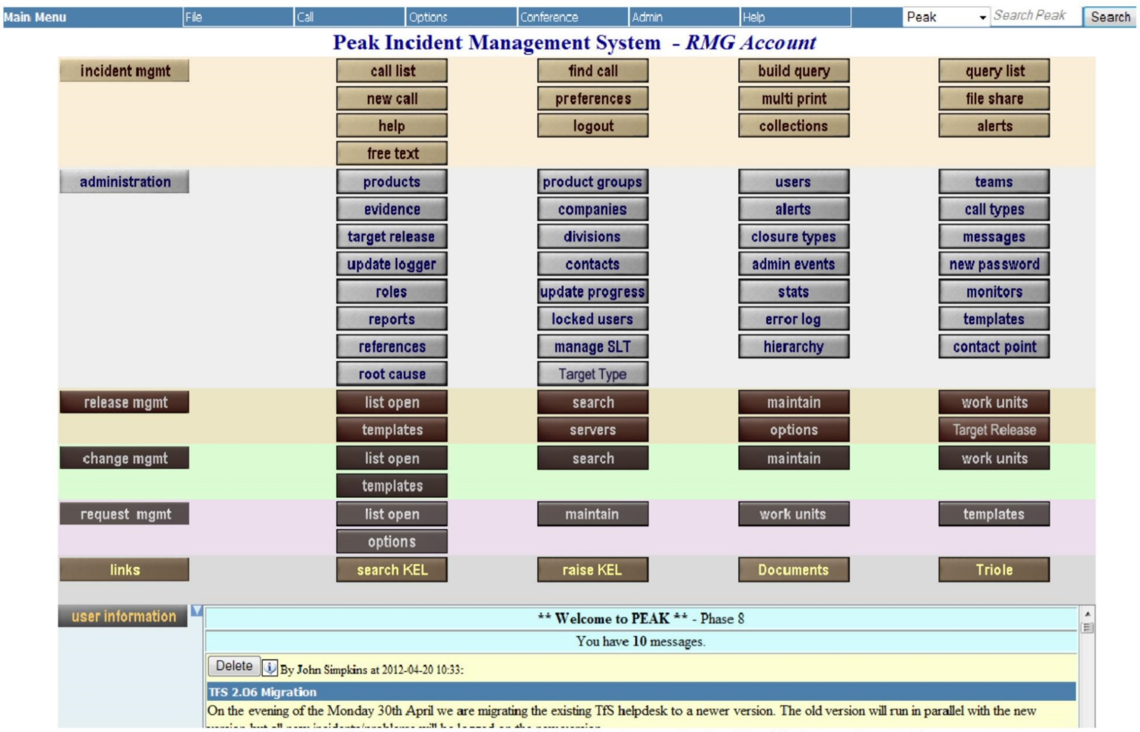

Fig.5: Main Menu page for Administrator role (with 10 broadcasts)

This page is split off into sections which are visible only if your role permits.

- Incident Management
  These functions mainly deal with standard user access to the Peak system and managing a problem or call when it was first logged through to its resolution and closure.
- Administration
  These functions are related to the administration side of Peak such as managing the list of products that Peak calls can be raised against, etc.
  Some administrative functions like changing your own password, managing templates, etc. have already been described in the "Peak User Guide" because they are available to all users. The remaining administrative functions will be the subject of the subsequent sections of *this* document.
- Release Management, Change Management and Request Management
  These functions are beyond the scope of this document.
- Links
  These functions interface to systems outside Peak e.g. SSC Website for KELs and Support documents and TRIOLE for Services (TfS).

5.1 Manage Products

From the *Products* screen, you can manage the list of products that incidents can be raised against.

This product list is shown when the User views *Call Details* - Products. Also a superset of this list can be seen in the 'Select Product' drop-down list.

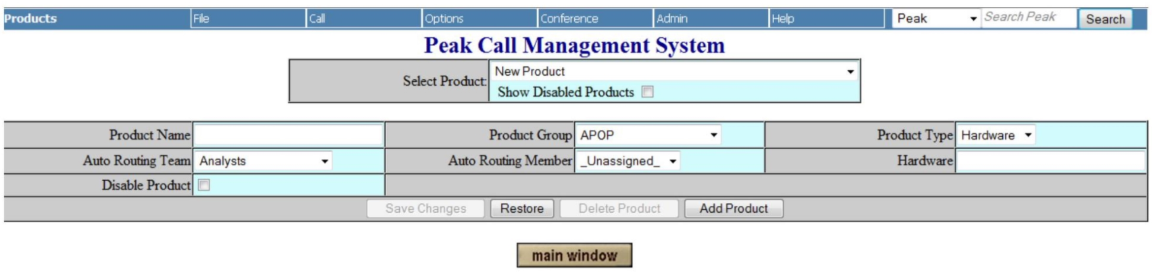

Fig.5.1: Default Products form

To create a new product:

- ➢ Choose 'Select Product=New Product' from the drop-down list.
  Ticking 'Show Disabled Products' will display all products including those set as disabled.
- ➢ Check and/or complete the fields:

Product Name	(mandatory) This must be a unique product name (e.g. Marooned Transactions)
Product Group	If none of the existing product groups are appropriate, you can create a new one (see §5.2) and then come back here to create the product.
Product Type	Select either: Hardware, Service or Software.
Auto Routing Team	This field is no longer used but must be changed from the default.
Auto Routing Member	This field is no longer used but may be left as the default '_Unassigned_'.
Disable Product	Ticking this field will temporarily remove the product from the displayed products list whereas **Delete Product** will remove the product permanently. Unticking this field will make the product visible again without you having to re-enter all the details.

- ➢ Press **Restore** (to discard your edits) or **Add Product**:

To edit or delete an existing product, choose the product name from the 'Select Product' drop-down list which will automatically populate the fields in this page with details of that product, allowing you edit those details then **Save Changes**, **Restore** (the previous saved version) or **Delete Product**.

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5.2 Manage Product Groups

From the *Prod.Groups* screen, you can manage the list of product groups; which is a collection of related products. For example, the MoneyGram product group consists of the products: MoneyGram RefData and MoneyGram Web Server. Product groups should make it easier for the User to select the correct affected product.

The Product Group and Products set up here are shown in the *Call Details* – Products tab when selection can be made using the drop-down lists or the **Find Product** button. Also a superset of this list can be seen in the 'Select Product Group' drop-down list.

Fig.5.2a: Default Prod.Group form

To create a new product group:

- Choose 'Select Product Group=New Group' from the drop-down list.
  Ticking 'Show Disabled Groups' will display all groups including those set as disabled.
- Check and/or complete the fields:

Group Number	This number is automatically generated once the Product Group has been created.
Product Group	(mandatory) This must be a unique product group (e.g. General/Other/Misc).
Description	Type in a meaningful description for the product group.
Family Product Team	Choose a product family and owning product team (currently unused).
Allow NULL Products	Tick this field to allow this product group to have no products associated with it.
Disabled	Ticking this field will temporarily remove the group (and any associated products) from the displayed product groups list whereas the **Delete Group** will remove the group permanently. Unticking this field will make the product group visible again without you having to re-enter all the details.
Contact Point Contact Name Contact Phone	Selecting a contact point may automatically fill in the contact name and contact phone (§5.14).

- Press **Restore** (to discard your edits) or **Add Group** (which will allocate a unique 'Group Number' for the product group and expand the *Prod.Groups* form and then use **>>Add Product>>** to add products, not already in a product group, to this group or **<<Remove Product<<** to remove products from this group).

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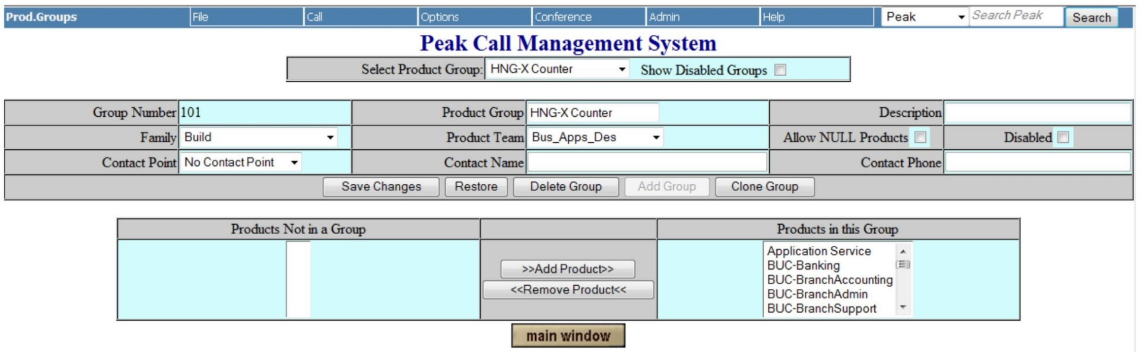

Fig.5.2b: Expanded Prod.Groups form - 'HNG-X Counter' product group

To edit, delete or clone a product group, choose the existing product group from the 'Select Product Group' drop-down list which will automatically populate the fields in this page with details of that product group, allowing you edit those details then **Save Changes**, **Restore** (the previous saved version), **Delete Group** or **Clone Group** (which creates a product group with the same *name* and details but *not* products **–** remember to change the name of the cloned product group to avoid confusion).

5.3 Manage Users (and their Passwords)

Each Peak User should have a Role and belong to at least one Team; where each Team belongs to a Division and each Division belongs to a Company.

From the *Users* screen, you can manage the accounts of the users who have access to the Peak service:

- Create or retire user accounts
- Restore a retired user account
- Change users details including full name (which may be updated automatically from the Fujitsu Personnel database), alert email and SMS, etc.
- Reset the locked account flag, retry count and password to its default known value
- View a user's queries and alerts

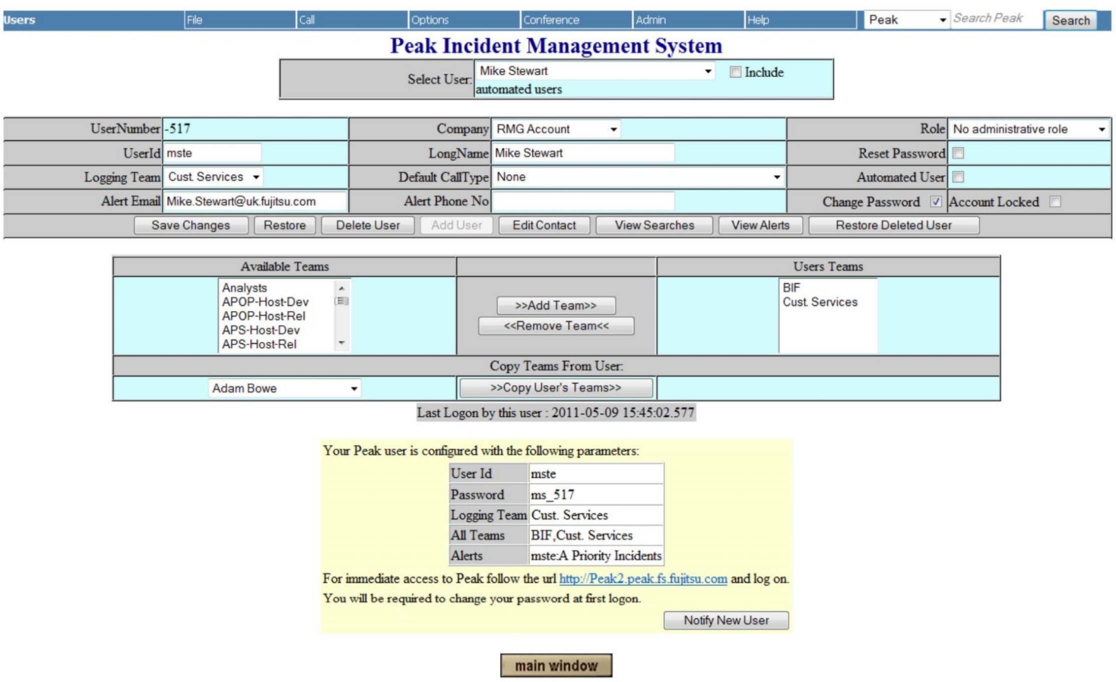

Fig.5.3: Expanded Users form

To create a new user:

- Choose ‘Select User=New User’ from the drop-down list.
  Ticking ‘Include automated users’ will display all users including those defined as automated users.
- Check and/or complete the fields:

Search Name	To get Peak to automatically complete some of the fields for you using a copy taken daily at 06:15 of the Fujitsu Personnel database, type in a minimum of 4 characters from the first name or surname then press **Search**. Then **Select** the correct name to populate the following fields: UserId, LongName, Alert Email and Alert Phone No.
UserNumber	Once the User has been created this number is automatically generated and should appear on the *Users* form in the place of ‘Search Name’ field.
Company	For more details see §5.6.
Role	For more details see §5.17.
UserId	(mandatory) This is the username used to log into Peak. If this field has not been automatically populated by the HR database then it must be manually entered. Note that the convention is to use: “<surname><first letter of forename>” e.g. “Worrall-ThompsonA”.
LongName	This is usually displayed in Peak rather than the UserId e.g. in ‘Select User’.
Reset Password	Ticking this field will reset the User’s password to the known default Peak password for that User: “<first 2 letters of the surname>_<usernumber>”.
Logging Team	For new Peak users, on entry this field is disabled. When the user has been created, this field will be set by default to ‘Default team’ and should be changed to reflect the team that calls created by this user should be logged against. When the User creates a new call, this is shown in the ‘Team’ field of the *New Call* (§5.4).
Default CallType	When the User creates a new call, this is shown in ‘Call Type’ field of *New Call.* (§5.8)
Automated User	Signifies if this account is used by Peak to automatically raise or update calls for the OTI and QC links, e-mail reader, etc.
Alert Email Alert Phone No.	The FJ HR database usually populates both of these fields (§5.7).
Change Password	This forces the User to change their password when they next logon – this field is automatically ticked for new users, after the **Add User** button has been pressed.
Account Locked	If a Peak user fails to log in after 3 attempts, the account is locked. Peak will then automatically reset the password to the known default and send an e-mail containing the new password to the mailbox registered to the user in ‘Alert Email’.

- Press **Restore** (to discard your edits), **Restore Deleted User** (§5.3.1) or **Add User** (which will allocate a unique ‘User Number’ for the user and expand the *Users* form).

The expanded *Users* form allows you to change the account details, configure the user's teams, shows you when the user last logged in and displays a summary of the account.

- Use **>>Add Team>>** and **<<Remove Team<<** to individually fine tune the 'Users Teams'. Or you can copy the teams from another Peak user by selecting that user from the drop-down list then **>>Copy User's Teams>>.**

  Note that when a new user is created, its default team is set to 'Default Team'. As part of fine tuning their team membership, 'Default Team' should be removed unless their role is some level of administrator.

- Pressing the **Notify New User** button, underneath the summary of the Peak User parameters will send the parameter summary (including 'User Id' and default 'Password') to the User's email address. This button is usually used in conjunction with the creation of a new user to send out forgotten passwords.
  Note that the **Notify New User** button will be disabled if the User only belongs to the 'Default team'.

- Press **Save Changes**, **Restore** (the previous saved version), **Delete User**, **Edit Contact** (§5.14), **View Searches** (to delete queries created by the User), **View Alerts** (to manage alerts created by the User, see §5.7) or **Restore Deleted User** (§5.3.1).

To edit an existing user, choose the full name of the user from the 'Select User' drop-down list. If you start typing in the forename, Peak will automatically home in on the long name. Once a user name has been selected, all the information about that account is retrieved from the database and displayed on the expanded *Users* form, allowing you to edit those details.

A user's default query is created when they log in for the first time (or the first time they log in after their account has been restored). When users ask to have their team memberships changed, the Peak Administrator must remember to delete their default query as part of the process otherwise the user could be confused because their default query no longer matches their team membership.

Note that a user's Peak login credentials can also be used to log onto the SSC Website. If you want more access on the SSC Website, like the ability to create (rather than just search KELs) then you will need to contact SSC Website Support (not Peak Support).

5.3.1 Restore Deleted User

Peak User accounts can never be deleted; they are just disabled or retired which means that you can restore them at a later date with minimal effort. This usually applies to people who have left and rejoined the Company.

If **Delete User** was used to retire a User, then you can restore them using **Restore Deleted User** which will display the *DelUsers* page.

Choose the relevant user from the 'Select Deleted User' drop-down list. Check the details before pressing **Restore User** or **Return to Users** (to return to the *Users* form).

Note that the 'Alert Email' field in the *Users* form will not be populated automatically by Peak when a deleted user is restored. Similarly their user ID will not be restored in the associated *Contacts* page, refer to §5.14 to correct this.

5.4 Manage Teams

Each User can be a member of one or more Teams within the same Company. Each Team is directly related to a Division and possibly sub-divided by the type of incidents that division handles.

From the *Teams* screen, you can manage the teams who have access to the Peak service:

- Create or delete teams
- Add or remove users from the team
- Manage the teams default release, target releases
- Manage the team's restrictions

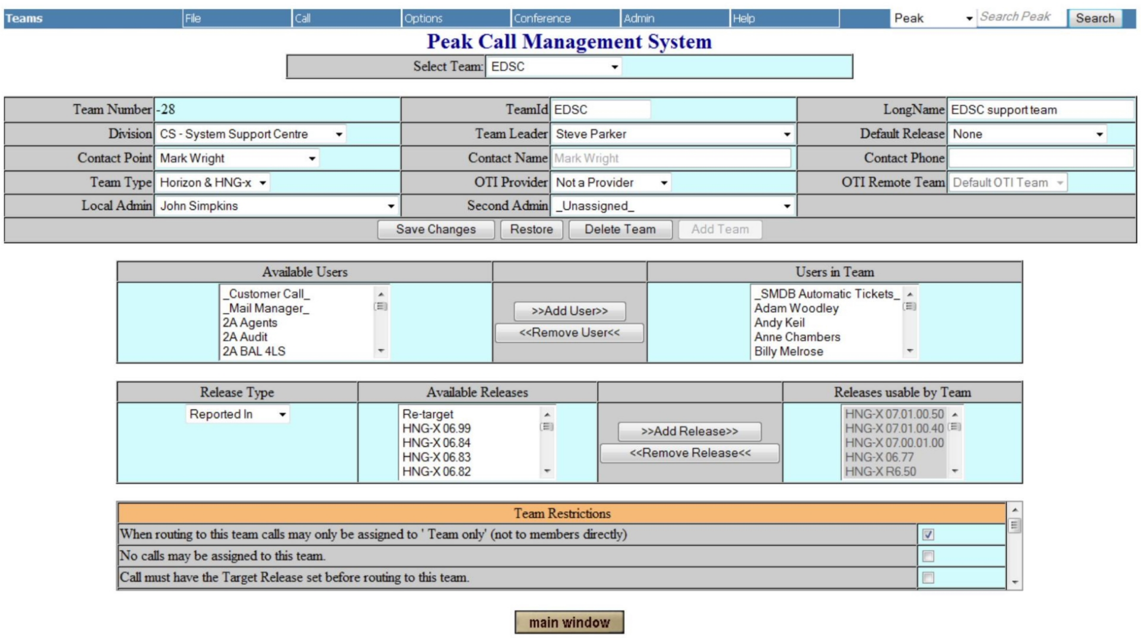

Fig.5.4: Expanded Teams form

To create a new team:

- Choose 'Select Team=New Team' from the drop-down list.
- Check and/or complete the fields:

Team Number	This number is automatically generated once the new Team has been created.
TeamId	(mandatory) This must be a unique team id (e.g. BDB-Host-Rel)
LongName	Type in a meaningful long name for the team (e.g. Branch Database Development).
Division	Define which division this team belongs to – which affects the 'Available Users' shown in the expanded *Teams* form.
Team Leader	Signifies which user is responsible for this team.
Default Release	Used when a new call is created.
Contact Point Contact Name Contact Phone	Selecting a contact point may automatically fill in the contact name and contact phone (§5.14).
Team Type	This field was used in reports produced by the Peak Administrator during the migration of Horizon to HNG-X. It may now be used to filter out teams such as SSCWebsite teams.
OTI Provider	Signifies that calls transferred to this team will be transferred over the OTI to the selected external helpdesk e.g. TfS2.06 is the current TfS helpdesk.
OTI Remote Team	Identifies the team on the external helpdesk that the call should be routed to.
Local Admin Second Admin	These fields are used in reports produced by the Peak Administrator.

- Press **Restore** (to discard your edits), **Add Team** (which will allocate a unique 'Team Number' for the team and expand the *Teams* form).

The expanded *Teams* form allows you to change the team details, configure the users and releases available to the team and the restrictions.

- Use **>>Add User>>** and **<<Remove User<<** to individually fine tune the 'Users in Team'.
- Use **>>Add Release>>** and **<<Remove Release<<** to define for each 'Release Type', the 'Releases usable by Team'. The greyed out entries under 'Releases usable by Team; are the releases added to the Default team which are available to all teams.
- To define what the team is allowed/not allowed to do, configure the 'Team Restrictions'. This includes restrictions like "The Team may not Clone any Calls" and "No calls may be assigned to this team" – use the scroll bar to see *all* the restrictions.

  If team restrictions exist then the "Team Restrictions" heading will have an orange background as show in Fig.5.4.
- Press **Save Changes**, **Restore** (the previous saved version) or **Delete Team** (which unlike **Delete User** really does delete the team.

To edit an existing team, choose the team name from the 'Select Team' drop-down list. If you start typing in the team name, Peak will automatically home in on the team name. Once a team name has been selected, all the information about that team is retrieved from the database and displayed on the expanded *Teams* form, allowing you to edit those details.

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5.5 Manage Evidence Types

Files such as MS Word documents, UNIX dumps, executables, etc. can be attached to calls as evidence. These files can originate from various operating systems and be compressed.

When a user adds evidence to a call, they can optionally specify the following properties for the source file being attached:

<u>Group</u>	<u>Item</u>
File Type	Release Note, Log file, CSV file, etc.
Compression Type	None, CPIO format, ZIP file, TAR file, etc.
Operating System	Secure Solaris UNIX, Linux, Windows 2000, etc.

The *Evidence* page enables the Peak Support to update, delete or create a new item under these existing evidence groups.

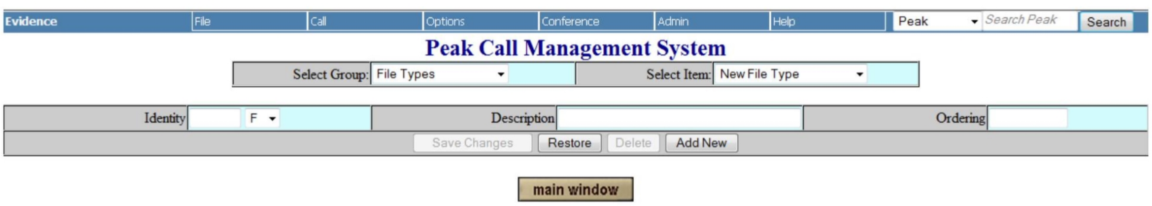


Fig.5.5: Default Evidence form

To create a new evidence type:

- Choose the appropriate evidence group from the drop-down list (e.g. 'Select Group=Compression Types').
- Choose the new item for that group (e.g. 'Select Item=New Compression').
- Check and/or complete the fields:

Identity	(visible and mandatory if you are adding a new File Type or Compression Type) Choose a letter (from 'A' to 'Z') from the 'Identity' drop-down list of unused letters. The Identity will be used to represent this new item internally on Peak and will not be displayed to the user.
Description	(mandatory) Type in a meaningful description for the new item.
Ordering	(mandatory) Type in a number between '0' and '99'. This number determines where this evidence item will appear in the list to the user (also shown in the 'Select item' drop-down list) where '0' is the top of the list. Determine where you want your new item to be positioned and choose an ordering between the items on either side of the list.

- Then press **Restore** (to discard your edits) or **Add New** item.

To edit or delete an existing evidence item, choose the evidence group and item from the drop-down lists which will automatically populate the fields in this page with the evidence details, allowing you edit those details then **Save Changes**, **Restore** (the previous saved version) or **Delete** item.

5.6 Manage Companies

Companies are an enhanced security feature of the Peak system. It restricts people from different Companies searching for and viewing each other's incidents. The rules for viewing incidents are:

- Any incident a team in a user's company has raised
- Any incident assigned to a team in a user's company
- System administrators may view any incident
- Members of the Provider company can view all calls

Company administrators may only manage users and teams belonging to their company but System administrators may manage all users and teams.

Incidents raised by users in one company are *not* visible by users in another company unless the incident is routed to a team (or actioned on a team) in that company. Users in the company that raised the incident may always view the incident.

To make a call visible to you even though it has been routed it back to the originating company; place an **Action** on your team/yourself. Correspondingly, if you add sensitive information or evidence to a call which has an action on a different company, these details will *also* be visible to that company.

Currently the Peak system has 4 Companies: Infinite, RMG Account, SSC Website users and POA Joint Testing. The *Companies* page enables the Administrator to create a new Company or update, delete an existing Company.

To create a new Company:

- ➢ Choose 'Select Company=New Company' from the drop-down list.
- ➢ Check and/or complete the fields:

Company Id	This number is automatically generated once the Company has been created.
Company Name	(mandatory) Type in a meaningful description of the company.
Company Type	Select either: Provider Company - teams in this Company can see <u>all</u> calls Supplier Company } teams in these Companies can only see calls raised or Customer Company } assigned to their own Company
Region	Select either: Fujitsu Systems, POA Suppliers or Post Office Account (not used).
Users in Company	Displays a count of how many Users are currently members of this Company.
Contact Point Contact Name Contact Phone	Selecting a contact point may automatically fill in the contact name and contact phone (§5.14).

- ➢ Press **Add** button to create the company.

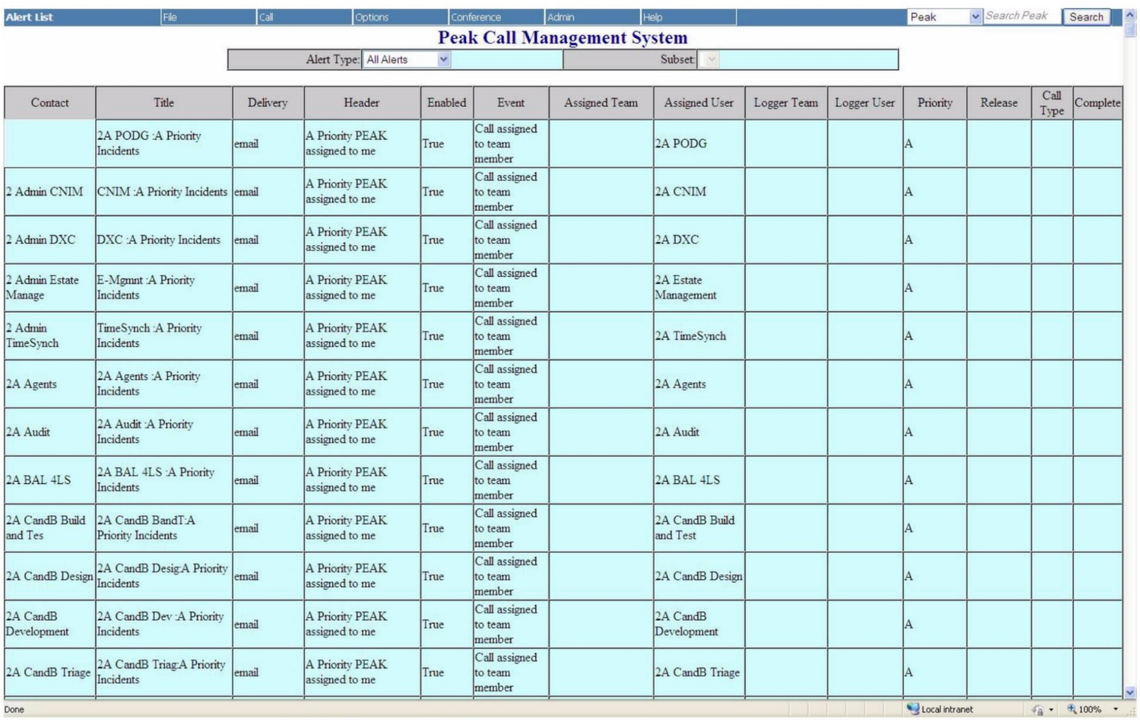
To edit or delete an existing Company, choose the company name from the 'Select Company' drop-down list which will automatically populate the fields in this page with details of that company, allowing you edit those details then **Save Changes** or **Restore** (the previous saved version).

Note that the **Delete** company button only becomes enabled if there are no users in that company. So if you want to delete a company, remove all of its users first.

5.7 Manage Users Alerts

Alerts are activated when a specified action or trigger takes place. On the *Main Menu* there are two **Alerts** buttons:

1. “Incident Mgmt” **Alerts** button which enables standard users to create and update their own alerts (via the *User Alerts* screen). They can configure what types of alerts are generated and what action will trigger those alerts from the *User Alerts* screen. For more details see the “Peak User Guide”.
2. “Administration” **Alerts** button which is only visible to administrative roles and enables Administrators to update, delete or clone existing alerts belonging to Peak users (via the *Alert List* screen). On entry, it will display all the alerts that users have set up on the Peak system (‘Alert Type=All Alerts’):



Contact	Title	Delivery	Header	Enabled	Event	Assigned Team	Assigned User	Logger Team	Logger User	Priority	Release	Call Type	Complete
	2A PODG :A Priority Incidents	email	A Priority PEAK assigned to me	True	Call assigned to team member		2A PODG			A			
2 Admin CNIM	CNIM :A Priority Incidents	email	A Priority PEAK assigned to me	True	Call assigned to team member		2A CNIM			A			
2 Admin DXC	DXC :A Priority Incidents	email	A Priority PEAK assigned to me	True	Call assigned to team member		2A DXC			A			
2 Admin Estate Manage	E-Mgmnt :A Priority Incidents	email	A Priority PEAK assigned to me	True	Call assigned to team member		2A Estate Management			A			
2 Admin TimeSynch	TimeSynch :A Priority Incidents	email	A Priority PEAK assigned to me	True	Call assigned to team member		2A TimeSynch			A			
2A Agents	2A Agents :A Priority Incidents	email	A Priority PEAK assigned to me	True	Call assigned to team member		2A Agents			A			
2A Audit	2A Audit :A Priority Incidents	email	A Priority PEAK assigned to me	True	Call assigned to team member		2A Audit			A			
2A BAL 4LS	2A BAL 4LS :A Priority Incidents	email	A Priority PEAK assigned to me	True	Call assigned to team member		2A BAL 4LS			A			
2A CandB Build and Tes	2A CandB BandT:A Priority Incidents	email	A Priority PEAK assigned to me	True	Call assigned to team member		2A CandB Build and Test			A			
2A CandB Design	2A CandB Desig:A Priority Incidents	email	A Priority PEAK assigned to me	True	Call assigned to team member		2A CandB Design			A			
2A CandB Development	2A CandB Dev :A Priority Incidents	email	A Priority PEAK assigned to me	True	Call assigned to team member		2A CandB Development			A			
2A CandB Triage	2A CandB Triag:A Priority Incidents	email	A Priority PEAK assigned to me	True	Call assigned to team member		2A CandB Triage			A			

Fig.5.7: Alert List page showing all user alerts on Peak

You can filter this list by selecting a specific ‘Alert Type’ and ‘Subset’ from the drop-down lists.

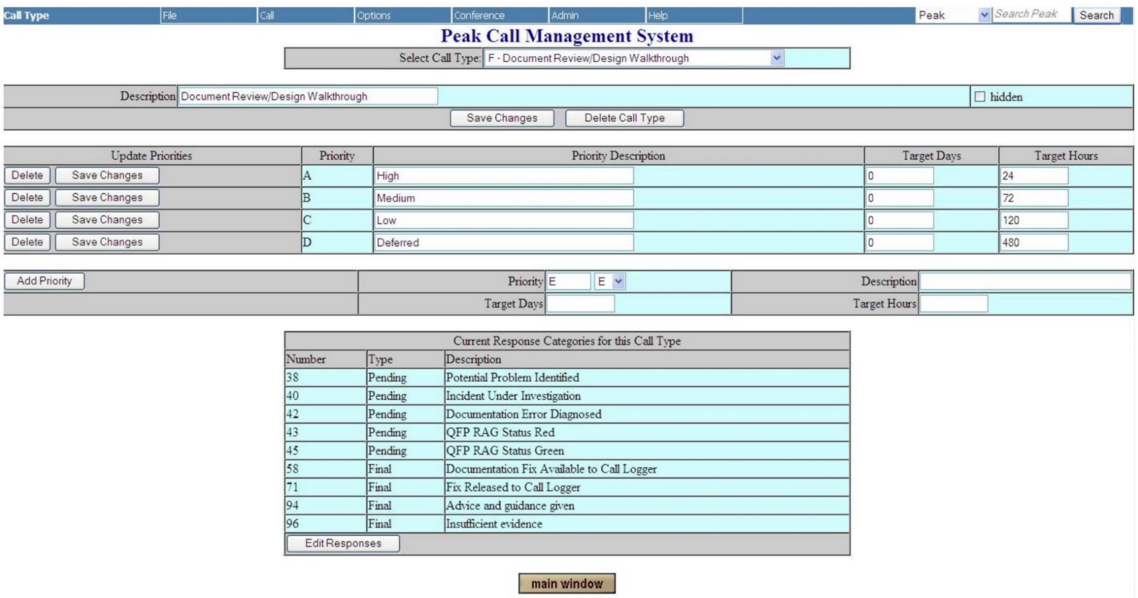
Alert Type	Subset
All Alerts	<none>
Event Type	Call arrived on team (default), Call responded to, Call closed, etc.
Delivery Type	e-mail (default), Mobile phone SMS or PEAK user message. The other Delivery Types (Pager, Rota, etc.) are not implemented in Peak.
Contact	EDSC (default), Peak users and teams.

For example, selecting ‘Alert Type=Contact’ will display all the possible contacts in the ‘Subset’ drop-down list then choosing the relevant ‘Subset’ will display any related alerts.

If you click on any of the alerts in the *Alert List* screen, you will be taken to the *Alert Update* form which will enable you to change the details of an alert belonging to another user. This form is similar to the *User Alerts* screen which is already described in the “Peak User Guide”. Then select either **Save Changes, Restore** (the last saved version), **Delete Alert** or **Clone Alert** (to create a copy of an alert for the owner which can then be edited and saved). Pressing **Alerts List** or **Alerts** will take you back to *Alert List*.

5.8 Manage Call Types

A call type identifies the type of incident raised on Peak (e.g. "L – Live Incidents/Defects", etc.). The *Call Type* screen enables an Administrator to manage the different Call Types available to Peak Users. Each Call Type has its own list of possible Priorities and Response types.



Call Type | File | Call | Options | Conference | Admin | Help | Peak | Search Peak | Search

Peak Call Management System

Select Call Type: F - Document Review/Design Walkthrough

Description: Document Review/Design Walkthrough | hidden

Save Changes | Delete Call Type

Update Priorities		Priority	Priority Description	Target Days	Target Hours
Delete	Save Changes	A	High	0	24
Delete	Save Changes	B	Medium	0	72
Delete	Save Changes	C	Low	0	120
Delete	Save Changes	D	Deferred	0	480

Add Priority | Priority: E E | Description:

Target Days: | Target Hours:

Current Response Categories for this Call Type

Number	Type	Description
38	Pending	Potential Problem Identified
40	Pending	Incident Under Investigation
42	Pending	Documentation Error Diagnosed
43	Pending	QFP RAG Status Red
45	Pending	QFP RAG Status Green
58	Final	Documentation Fix Available to Call Logger
71	Final	Fix Released to Call Logger
94	Final	Advice and guidance given
96	Final	Insufficient evidence

Edit Responses

main window

Fig.5.8: Expanded Call Type form

To create a new Call Type:

- Choose 'Select Call Type=New Call Type' from the drop-down list.
- Check and/or complete the fields:

Id	By default the next available 'Id' letter is shown but you can change it using the drop-down list. Currently on live, all the Ids appear to have been used but some Ids have been retired so can be reused - failing that we will use numbers.
Description	Type in a meaningful description for the new call type which will appear in the menu (e.g. "Document Review/Design Walkthrough").
hidden	Ticking this field will hide this Call Type. It could be used as an alternative to deletion so the history of this Call Type is not lost.

- Press **Add Call Type** (which will display an expanded *Call Type* form).

The expanded *Call Type* form allows you to change the call type details, create the Priorities and Response types associated with this call type.

- To create a priority, enter the 'Priority', 'Description', 'Target Days' and 'Target Hours' then press **Add Priority**. You can continue to add more priorities using the same method or edit an existing priority and then press **Delete** or **Save Changes** button adjacent to the relevant priority.
- To create or change the response categories, press **Edit Responses** to go to the *Categories* screen (§5.11) then select a category and use **>>Add Type>>** to add this Call Type and **Save Changes**.
- Press **Save Changes** or **Delete Call Type**.

To edit an existing Call Type; including 'hidden' Call Types, choose the call type from the 'Select Call Type' drop-down list. Once a call type has been selected, all the information about that call type is retrieved from the database and displayed on the expanded *Call Type* form, allowing you to edit those details then **Save Changes** or **Delete Call Type**.

5.9 Manage Target Releases

Incidents are grouped into releases. The *Releases* screen enables you to create, change, list and delete releases.

Once a release has been created, it needs to be added to the teams who may refer to that release. For example, the Test teams will be working with a different release set to the Live Support teams. If a release is added to the "Default team", it will be available to all teams.

Releases can be broken down into:

- Reported In
- Requested For
- Proposed For
- Targeted At
- Released At

Any User may set the 'Reported In' and 'Requested For' release, but only Administrators may set the 'Proposed For', 'Targeted At' and 'Released At' options.

To create a new release:

- Choose 'Select Release=New Release' from the drop-down list.
  Ticking 'Show invisible' will display all releases including those set as invisible.
- Check and/or complete the fields:

Release Number	This will be automatically filled in with the next available release number but it can be changed.
Release Id	(mandatory) A short description for the release (e.g. "HNG-X 02.13.01").
Invisible	Ticking this field will hide this Release. It is mainly used by Release Management who wish to 'delete' a release – only Peak Support can properly delete a release.
Sort Number	This determines the order in which the releases are displayed (e.g.in the 'Select Release' field and in the *Release List*).
Description	Type in a meaningful description for the release.
Collection	Used by Release Management to drive some of the Release reports.
Plan Out Dev Plan Out Integration Plan Into Test Plan Out Test Plan Out Live	These dates should have the format: "dd/mm/yyyy." Select **Reset Dates** to reset all these dates for this release.
Reset Dates	This button is disabled until the New Release has been created. Selecting the **Reset Dates** button will discard any updates to all the release dates and restore the previous saved dates.

- Press **Restore** (to discard your edits), **Add Release** (which will create the release and expand the *Releases* form) or **List Releases** (see §5.9.1).

The expanded *Releases* form allows you to change the release details, manage the teams who need to refer to that Release and to define which release type the release is available to.

- Use **>>Add Group>>** and **<<Remove Group<<** to fine tune the 'Assigned Deployment Groups'. All platforms are related to a Deployment Group (which begins with "DC_") and by associating a Release with these groups it limits which Peaks may be targeted to them.
- Use **>>Activate Type>>** and **<<Remove Type<<** to fine tune the 'Active Release Types' .
- Press **Save Changes**, **Restore** (to discard your edits), **Delete Release** or **List Releases** (see §5.9.1)**.**.

To edit an existing Release; including 'invisible' Releases, choose the release from the 'Select Release drop-down list or press **List Releases** (§5.9.1). Once a release has been selected, all the information about that release is retrieved from the database and displayed on the expanded *Releases* form, allowing you to edit those details.

5.9.1 List of Releases

Pressing **List Releases** will display the *Release List* page.

Release List | File | Call | Options | Conference | Admin | Help | Peak | Search Peak | Search

Peak Call Management System

Show Invisible Releases

Note: Release Types with a * against them are included in the Default Team and therefore are available to all teams.

Release Id	Name	Order	Reported In	Requested For	Proposed For	Targeted At	Released At
819	Re-target	999	19	0	96*	4*	0
1216	HNG-X 07.12	800	0	0*	0*	3*	0*
1218	HNG-X 07.14	800	0	0*	0*	0*	0*
1219	HNG-X 07.15	800	0	0*	0*	0*	0*
1220	HNG-X 07.16	800	0	0*	3*	7*	0*
1233	HNG-X 07.17	800	0	0*	0*	1*	0*
1166	HNG-X 07.00.01.00	790	0*	0*	0*	2*	0*
1167	HNG-X 07.01.00.40	790	0*	0*	0*	0*	0*
1168	HNG-X 07.01.00.50	790	1*	0*	0*	0*	0*
1182	HNG-X 06.99	761	0	0*	0*	0*	0*
1232	HNG-X 06.96	760	0	0*	0*	0*	0*
1212	HNG-X 06.85	759	0	4*	0*	0*	0*
1213	HNG-X 06.86	759	0	4*	0*	1*	0*
1185	HNG-X 06.77	759	0*	0*	0*	7*	0*
1190	HNG-X 06.80	759	0	0*	0*	0*	0*
1191	HNG-X 06.81	759	0	0*	0*	0*	0*
1181	HNG-X 06.76	759	0	0*	0*	6*	0*
1205	HNG-X 06.82	759	0	0*	0*	0*	0*
1206	HNG-X 06.83	759	0	0*	0*	0*	0*
1207	HNG-X 06.84	759	0	0*	2*	7*	0*
1177	HNG-X 06.70	758	0	0*	1*	12*	0*
1179	HNG-X 06.72	758	0	0*	0*	1*	0*
1119	HNG-X 06.55	757	0	0*	0*	0*	0*
1120	HNG-X 06.56	757	0	0*	0*	5*	0*
1121	HNG-X 06.57	757	0	0*	0*	5*	0*
1123	HNG-X 06.59	757	2	0*	1*	11*	0*
1124	HNG-X 06.60	757	0	1*	1*	17*	0*
1125	HNG-X 06.61	757	2	0*	0*	51*	0*
1126	HNG-X 06.62	757	0	0*	0*	8*	0*

Fig.5.9.1: Release List page

This page shows how many Peak incidents exist for each release type (e.g. Reported In, Requested For, etc.) and release (e.g. HNG-X R4).

By default, the state of the ‘Show Invisible’ releases tick box from the previous page (*Releases)* is carried forward to this page and vice versa.

The default order of the list is as set in the ‘Sort Number’ and ‘Release Id’ fields in *Releases* but you can sort each column by clicking on the title heading.

Note that release types shown with an asterix (*) against them are included in the “Default team” and therefore available to all teams.

You can select a release to be edited by clicking the relevant entry in *Release List*, and you will be taken back to *Releases* with the chosen release details filled in.

5.10 Manage Divisions

Divisions are a grouping of Teams within a Company. They are used to construct a hierarchy of incident ownership for management reports.

The *Divisions* form enables Administrator to create, change and delete divisions.

To create a new division:

- Choose 'Select Division=New Division' from the drop-down list.
- Check and/or complete the fields:

DivisionId This number is automatically generated once the new Division has been created.

Division Name (mandatory)

Company Define the company that this is a division of.

Support Manager Choose the Support Manager for the division from the drop-down list.

Description Type in a meaningful description of the new division.

Contact Point Selecting a Contact Point from the drop-down list will automatically fill in the
Contact Name Contact Name and/or Contact Phone (§5.14) or you could type in a new Contact.
Contact Phone Name and Phone.

- Press **Restore** (to discard your edits) or **Add Division** (which will create the division and expand the *Divisions* form).

The expanded *Divisions* form allows you to change the division details and configure which teams are in this division.

- Use **>>Add Team>>** and **<<Remove Team<<** to individually fine tune the 'Teams in this Division'. Note that you can only add teams to this division if it appears in the 'Teams Not in a Division' list (that is, if the team is currently not a member of any division). This means that if you want to change the team's division then you must remove the team from its original division first.
- Press **Save Changes**, **Restore** (the previous saved version) or **Delete Division**.

To edit an existing division, choose the division name from the 'Select Division' drop-down list. If you start typing in the team name, Peak will automatically home in on the team name. Once a division name has been selected, all the information about that division is retrieved from the database and displayed on the expanded *Divisions* form, allowing you to edit those details.

5.11 Manage Closure Types

The *Categories* form is used to create new response categories (e.g. '62 – No fault in product') and assign them to Call Types (e.g. 'A – Administrative use', 'C – Cloned call', 'L – Live Incidents/Defects', etc.).

You can get to the *Categories* page by pressing *Main Menu*: **Closure Types** or by pressing *Call Type:* **Edit Responses** (§5.8).

To create a new response category:

- ➢ Choose 'Select Category=New Category' from the drop-down list.
- ➢ Check and/or complete the fields:

Category Number	(mandatory) Choose a previously unused category number (greater than zero).
Description	Type in a meaningful description for the new category (e.g.' No fault in product').
Response Type	Define whether this category is for a Pending (default) or Final response. Note that a response type of 'Pending' will not close the call whereas 'Final' will.
Report Pivot	This field is used in reports produced by the Peak Administrator. Select one of the following: Raised Awaiting Resolution (default) Fixed Awaiting Test Resolved Awaiting Closure Resolved Awaiting Fix

- ➢ Press **Display List** (see §5.11.1), **Restore** (to discard your edits) or **Add Category** (which will create the release and expand the *Releases* form).

The expanded *Categories* form allows you to change the category details and associate this particular Response category with one or more Call Types.

- ➢ Use **>>Add Type>>** and **<<Remove Type<<** to edit the 'Categories Call Types' – which will be added in ascending id order.
- ➢ Press **Save Changes**, **Restore** (the previous saved version) or **Delete Category** (to delete this category).

To edit an existing response category for this call type, choose the category name from the 'Select Category' drop-down list or press **Display List** (§5.11.1). Once a category name has been selected, all the information about that category is retrieved from the database and displayed on the expanded *Categories* form, allowing you to edit those details.

5.11.1 List of Categories

Pressing **Display List** will display the *Category List* page. This page shows all Call Types (e.g. 'A – Administrative use', 'C – Cloned call', etc.) are associated with all or a particular Category (e.g. '62').

By default, the 'Category' will be pre-filled with the category chosen in the previous page (*Categories*) and the 'Call Type=All Call Types' (by default) but both fields can be altered using the drop-down lists.

You can select a category to be edited by clicking the relevant entry in *Category List*, and you will be taken back to *Categories* with the chosen category filled in.

5.12 Managing User Messages

Peak Administrators can broadcast messages to all Peak users, a particular company, specific team or user. These Information messages are shown in the *Main Menu* and can be used to advise users of new developments in Peak, any planned outages, etc. (see the “Peak User Guide” for more details).

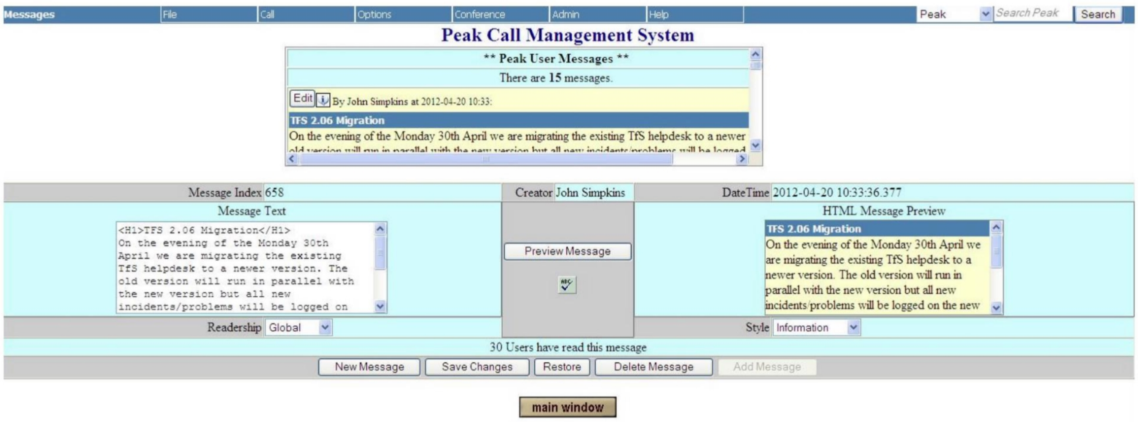


Fig.5.12: Messages screen- viewing existing memo

The top of the *Messages* screen shows a sorted list (with the latest broadcast at the top) of all the Peak User Messages that have been sent and either have not been read and then deleted by all its intended recipients or have not been deleted by the Administrator. Note that if a memo is intended for one user and that user reads/deletes it then it will no longer appear in this list.

To send a new broadcast:

➢ Check and/or complete the fields:

Message Index Creator DateTime	These will be automatically generated once the broadcast has been created.
Message Text Message Preview	Type in the message as HTML; which can contain hyperlinks or pictures. To check the HTML is correct, you can **Preview Message** which will render the HTML in the ‘HTML Message Preview’ field. To check the spellings, you can use ““to run the spell checker.
Readership	Define the Users you wish to see the broadcast: Global (default is all Peak users) Company } If you select any of these 3 options, you will also need Team } to define the specific Company, Team or User. User }

Style	Define the type of broadcast: Information (default) Warning Enhancement Administration Another type of broadcast is: Alert sent when a user configures an alert to send a "PEAK user message" when a specific event has been triggered (see the "Peak User Guide" for more details).

- Press **New Message** (to clear the whole form), **Restore** (to discard your edits) or **Add Message** (to generate the 'Message Index', 'Creator' and 'Date Time' then actually send the broadcast).

To edit a broadcast that has already been sent so that any Users, who have not read/deleted the broadcast, will see the updated version however those Users who have read/deleted the previous version will not see the new version:

- Use the scroll bar in the '** Peak User Messages ***' field to find your broadcast. Then press the **Edit** button next to the message. This will populate the rest of the fields in the *Messages* form with its details for you to change.
- You can see a count of how many users have read the message:"X Users have read this message".
- Press **New Message**, **Save Changes** (to send out your changes to the existing message), **Restore** (the previous saved version) or **Delete Message** (to remove the message from the Peak System).

Note that new users will automatically receive all undeleted broadcasts targeted at them.

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5.13 Update Call Logger

Once a Final Response is added to an incident, it is routed back to the incident Call Logger. Normally this is what is required but sometimes the logger is not the correct person to return the incident to or maybe the logger has left the company. The *Call Logger* form allows the Administrator to change the Call Logger of a Peak incident to another user in the same logging team.

To change the Call Logger of an incident:

- Type in the Peak incident reference in ‘Select Call’ (with the format: “PC0nnnnnn”) then click **Find.**
- The *Call Logger* form will be expanded to display some of the properties from the original Peak call, including ‘Summary’, ‘Status’ and ‘Current Call Logger’. Use this information to verify that this is the relevant incident.

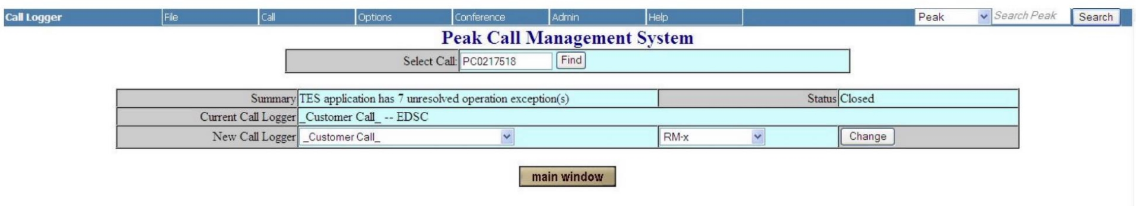


Fig.5.13: Expanded Call Logger screen

- Select the ‘New Call Logger’ from the drop-down list of users and teams then click **Change**.
- The *Call Logger* form will be re-displayed with an updated ‘Current Call Logger’.

Any changes made here will be recorded and seen via *Admin Events* (§5.15).

5.14 Manage Contacts

When a new user is created, Peak automatically creates a contact for the user using much of the same details. The *Contacts* page enables the Administrator to create, change, and delete a User's Contact details. It can also be used to store additional information on Peak users like personnel id, contact desk phone and address/job description.

Note that Peak Alerts are sent to the 'Alert Email' and 'Alert Phone' entries set up in the *Contacts* page; which could differ from that defined in the *Users* page.

To create a new contact:

- Choose 'Select Contact=New Contact' from the drop-down list.
- Check and/or complete the fields:

Contact Id	This number is automatically generated once the new Contact has been created.
User	(mandatory) Select the user from the drop-down list from which the contact details will be based.
Company	This will be automatically generated from the Company of the User once the new Contact has been created.
Forename Initials Surname	When a new user is created, these fields are copied from the *Users* page but they can be changed here in the *Contacts* form.
Alert Email Alert Phone	Alerts are sent to the email and phone entries defined in these fields.
UK Id	If this field is populated, then it will be used to match on the User in the Personnel database each night and extract their 'Alert Email', 'Contact Phone' and 'Address/Job Description'.
Contact Phone Address/Job Description	Unless the 'UK Id' field is empty, these fields will be automatically updated each night with information from the Personnel database.

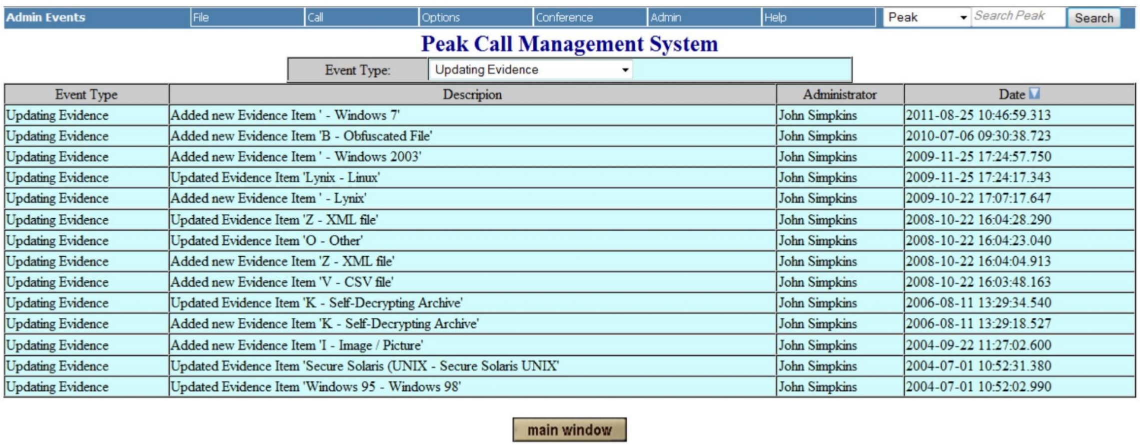
- Press **Restore** (to discard your edits) or **Add Contact** (which will allocate a unique 'Contact Id' for the new Contact.

To edit, delete or view alerts for a contact, choose the existing contact name from the 'Select Contact' drop-down list which will automatically populate the fields in this page with details of that contact, allowing you edit those details then **Save Changes**, **Restore** (the previous saved version), **Delete Contact** or **View Alerts** (to manage alerts created by the User, see §5.7).

5.15 View Admin Events

Whenever an administrative change is made to Peak, an event is recorded for audit purposes. The *Admin Events* page will display a read-only list of these events which can be filtered by Event Type.

To view all the administrative events of a selected type, choose the relevant 'Event Type' from the drop-down list.



Event Type	Description	Administrator	Date
Updating Evidence	Added new Evidence Item ' - Windows 7'	John Simpkins	2011-08-25 10:46:59.313
Updating Evidence	Added new Evidence Item 'B - Obfuscated File'	John Simpkins	2010-07-06 09:30:38.723
Updating Evidence	Added new Evidence Item ' - Windows 2003'	John Simpkins	2009-11-25 17:24:57.750
Updating Evidence	Updated Evidence Item 'Lynix - Linux'	John Simpkins	2009-11-25 17:24:17.343
Updating Evidence	Added new Evidence Item ' - Lynix'	John Simpkins	2009-10-22 17:07:17.647
Updating Evidence	Updated Evidence Item 'Z - XML file'	John Simpkins	2008-10-22 16:04:28.290
Updating Evidence	Updated Evidence Item 'O - Other'	John Simpkins	2008-10-22 16:04:23.040
Updating Evidence	Added new Evidence Item 'Z - XML file'	John Simpkins	2008-10-22 16:04:04.913
Updating Evidence	Added new Evidence Item 'V - CSV file'	John Simpkins	2008-10-22 16:03:48.163
Updating Evidence	Updated Evidence Item 'K - Self-Decrypting Archive'	John Simpkins	2006-08-11 13:29:34.540
Updating Evidence	Added new Evidence Item 'K - Self-Decrypting Archive'	John Simpkins	2006-08-11 13:29:18.527
Updating Evidence	Added new Evidence Item 'I - Image / Picture'	John Simpkins	2004-09-22 11:27:02.600
Updating Evidence	Updated Evidence Item 'Secure Solaris (UNIX - Secure Solaris UNIX'	John Simpkins	2004-07-01 10:52:31.380
Updating Evidence	Updated Evidence Item 'Windows 95 - Windows 98'	John Simpkins	2004-07-01 10:52:02.990

Fig.5.15: Admin Events page

For each event, the 'Event Type', 'Description', which Administrator did the update and when they did it is shown. The default order of the event list is ascending date order (with the latest change at the top) but you can sort each column by clicking on the title heading.

5.16 New Password (all users)

Refer to the "Peak User Guide" for details of this function.

Note the secure *Password* page enables users to change their own password whilst Administrators need to use the *Users* screen (§5.3) to change the password for *any* user.

5.16.1 Password rules

Peak passwords adhere to the following rules:

- minimum length of 7 characters
- MUST contain at least one capital letter, lowercase letter and non-alphabetic character (digit or special character such as *, %, #, etc.)
- last 6 passwords cannot be reused
- Passwords will automatically expire after 50 days
- Failure to logon 3 times locks the account

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5.17 Manage Roles

A role is assigned to each Peak user. Their role determines what buttons are dis/enabled for that user and what the user is allowed to do on Peak; which is usually dependent on the status of the call and which team the call is assigned to). For example, the task of routing an incident has the following possible permissions:

Route Call, Status Open, Assigned to user's Team
Route Call, Status Open, Assigned to any Team

Route Call, Status Pending, Assigned to user's Team
Route Call, Status Pending, Assigned to any Team

Route Call, Status Final, Assigned to user's Team
Route Call, Status Final, Assigned to any Team

Route Call, Status Closed, Assigned to any Team

Most Peak users belong to the 'No administrative role' (the default role) which is not allowed to change the Target Release, Priority, Contact, Close calls, Send over OTI, Reopen calls or Enter SQL in Query Builder.

To give an up-to-date and instant view of which user belongs to which role and what each role can do, a spreadsheet is maintained by the Peak Administrator.

Note the Company Administrator role may only update the users in their own company whereas the System Administrator role may manage all users and teams.

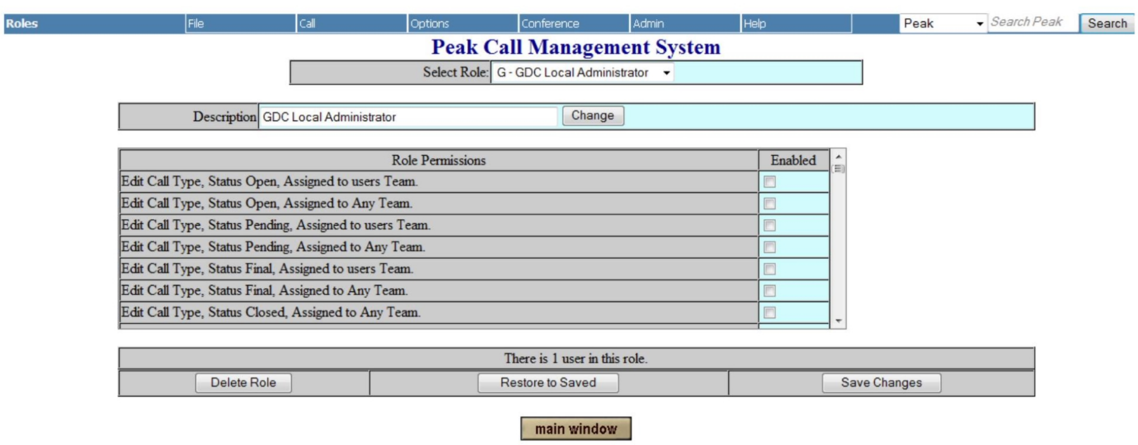


Fig.5.17: Expanded Roles form

To create a new role (e.g. "G – GDC Local Administrator):

- Choose 'Select Role=New Role' from the drop-down list.
- Check and/or complete the fields:

Id	By default the next available 'Id' letter is shown but you can change it using the drop-down list.
Description	Type in a meaningful description for the new role which will appear in the menu (e.g. GDC Local Administrator").

- Press **Add New Role** (which will display an expanded *Roles* form).

The expanded *Roles* form allows you to change the role description, set permissions for the role and delete the role.

- To change the description, type in a new 'Description' and then press **Change**.
- To enable permissions for this role, tick the box adjacent to the relevant permission and disable by unticking the box. Use the scroll bar to see all the available permissions.
- You can see a count of how many users associated with this role:"There are X users in this role".
- Then press **Delete Role** (even if there are users associated with the role – these users will automatically have their role changed to 'No administrative role' in the *Users* page), **Restore to Saved** or **Save Changes**.

To edit an existing role, choose the role from the 'Select Role' drop-down list. Once a role has been selected, all the information about that role is retrieved from the database and displayed on the expanded *Role* form, allowing you to edit those details then **Save Changes** or **Delete Role**.

5.18 Update Progress

Normally once progress has been added to a Peak incident, it cannot be altered. But if the progress contained an unprintable character which meant that it could not be displayed or if the progress contained secure information which should have been obfuscated then the *Progress Text* page will enable an Administrator to alter historical progress.

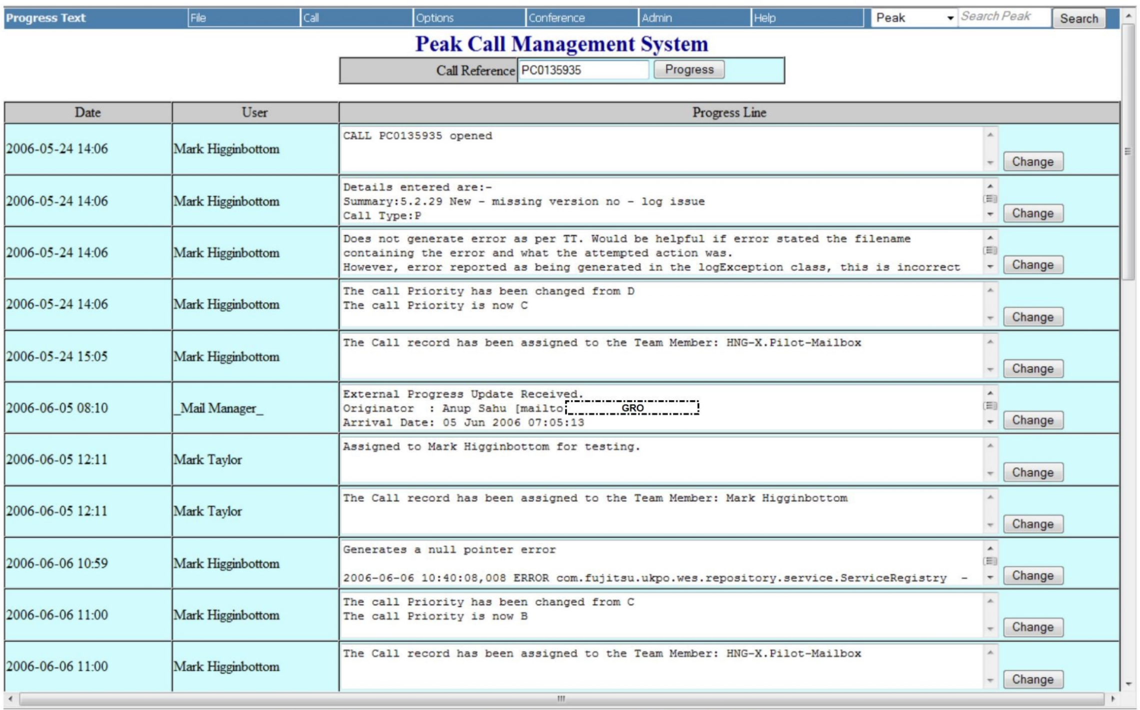


Fig.5.18: Progress Text page – 'PC0135935' progress

To update the progress of an incident:

- Type in the 'Call Reference' (e.g. PC0135935) then click **Progress**. This will display all the progress related to this call along with 'Date', 'User' who added the progress and the 'Progress Line'.
- Change the relevant 'Progress Line' (if necessary use the scroll bars to see more text) and then click **Change**.
- A pop-up box will be shown for you to type in the Update Progress Administrator password before the progress is updated and logging an event that can be seen via *Admin Events* (§5.15).

5.19 Stats (all users)

Refer to the “Peak User Guide” for details of this function.

5.20 Monitors (all users)

Refer to the “Peak User Guide” for details of this function.

5.21 Reports (all users)

Refer to the “Peak User Guide” for details of this function.

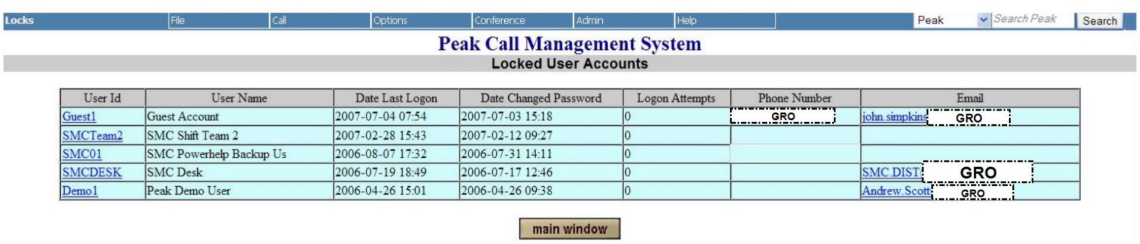
5.22 View Locked Users

Users can get locked out of Peak in one of two ways:

- after 3 or more failed logon attempts
  In this case, Peak will automatically reset the User’s password to the known default, unlock them and then email the password to the User using the address set in the *Users* page.

or

- if Peak Administrator decides to intentionally set the user account to locked (via the *Users* screen).
  The *Locks* page lists old defunct Peak user accounts that were locked by Peak Administrator – sorted with most recent at the top.



User Id	User Name	Date Last Logon	Date Changed Password	Logon Attempts	Phone Number	Email
Guest1	Guest Account	2007-07-04 07:54	2007-07-03 15:18	0	GRO	john.simpkins GRO
SMCTeam2	SMC Shift Team 2	2007-02-28 15:43	2007-02-12 09:27	0		
SMC01	SMC Powerhelp Backup Us	2006-08-07 17:32	2006-07-31 14:11	0		
SMCDESK	SMC Desk	2006-07-19 18:49	2006-07-17 12:46	0		SMC.DIST GRO
Demo1	Peak Demo User	2006-04-26 15:01	2006-04-26 09:38	0		Andrew.Scott GRO

Fig.5.22: List of users locked out of Peak

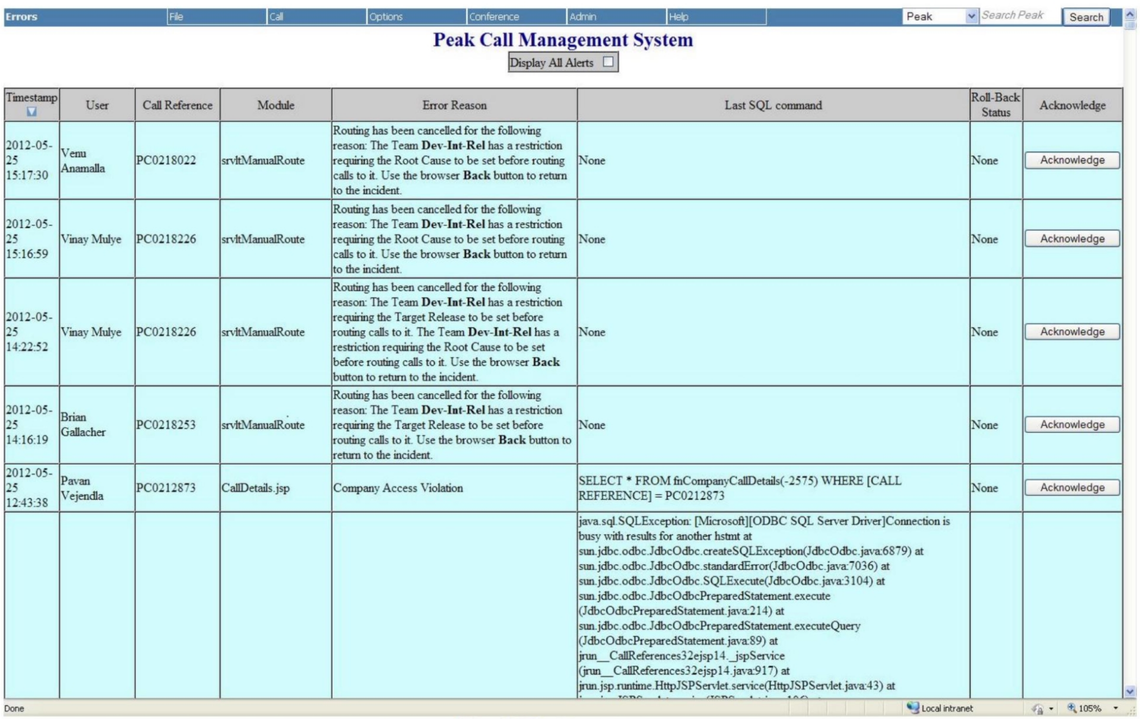
If you click on the ‘User Id’ link, you will be taken to the *Users* page from where you can unlock the account (§5.3).

If there is an ‘Email’ link, then clicking on it will generate an email to that user with the “Subject: Locked Peak Account”.

5.23 View Error Log

If a user experiences an error whilst using Peak they will be taken to the standard Error page, details of the error are logged and an e-mail is automatically sent to the Peak Administrator's mailbox – to be dealt with by Peak Development.

On entry, the *Errors* page lists all the user generated errors that have not been acknowledged – sorted with most recent at the top (but you can sort each column by clicking on the title heading).



Timestamp	User	Call Reference	Module	Error Reason	Last SQL command	Roll-Back Status	Acknowledge
2012-05-25 15:17:30	Venu Anamalla	PC0218022	srvltManualRoute	Routing has been cancelled for the following reason: The Team **Dev-Int-Rel** has a restriction requiring the Root Cause to be set before routing calls to it. Use the browser **Back** button to return to the incident.	None	None	Acknowledge
2012-05-25 15:16:59	Vinay Mulye	PC0218226	srvltManualRoute	Routing has been cancelled for the following reason: The Team **Dev-Int-Rel** has a restriction requiring the Root Cause to be set before routing calls to it. Use the browser **Back** button to return to the incident.	None	None	Acknowledge
2012-05-25 14:22:52	Vinay Mulye	PC0218226	srvltManualRoute	Routing has been cancelled for the following reason: The Team **Dev-Int-Rel** has a restriction requiring the Target Release to be set before routing calls to it. The Team **Dev-Int-Rel** has a restriction requiring the Root Cause to be set before routing calls to it. Use the browser **Back** button to return to the incident.	None	None	Acknowledge
2012-05-25 14:16:19	Brian Gallacher	PC0218253	srvltManualRoute	Routing has been cancelled for the following reason: The Team **Dev-Int-Rel** has a restriction requiring the Target Release to be set before routing calls to it. Use the browser **Back** button to return to the incident.	None	None	Acknowledge
2012-05-25 12:43:38	Pavan Vejendla	PC0212873	CallDetails.jsp	Company Access Violation	SELECT * FROM fnCompanyCallDetails(-2575) WHERE [CALL REFERENCE] = PC0212873	None	Acknowledge
					java.sql.SQLException: [Microsoft][ODBC SQL Server Driver]Connection is busy with results for another hstmt at sun.jdbc.odbc.JdbcOdbc.createSQLException(JdbcOdbc.java:6879) at sun.jdbc.odbc.JdbcOdbc.standardError(JdbcOdbc.java:7036) at sun.jdbc.odbc.JdbcOdbc.SQLExecute(JdbcOdbc.java:3104) at sun.jdbc.odbc.JdbcOdbcPreparedStatement.execute (JdbcOdbcPreparedStatement.java:214) at sun.jdbc.odbc.JdbcOdbcPreparedStatement.executeQuery (JdbcOdbcPreparedStatement.java:89) at jrun__CallReferences32ejsp14._jspService (jrun__CallReferences32ejsp14.java:917) at jrun.jsp.runtime.HttpJSPServlet.service(HttpJSPServlet.java:43) at		

Fig.5.23: Errors page

This will display all the errors along with 'Timestamp, 'User' who caused the error, "Module', 'Error Reason', 'Last SQL command' and 'Roll-Back Status'.

Once an error has been investigated, it can be **Acknowledge**d which removes the error from this particular list but its details will not be deleted.

Ticking the 'Display All Alerts" box will list *all* user-generated errors; whether they have been acknowledged or not.

The types of errors that Peak Support should be worried about are Timeouts and SQL Exceptions. Although an e-mail is also sent to the Peak mailbox, the *Errors* page displays more detail and can be used in the trend analysis of errors.

5.24 Templates (all users)

Refer to the "Peak User Guide" for details of this function.

In the *Template* screen, only templates which are categorised as 'visible' are shown in the 'Select Template' drop-down list. If the User selects a template, owned by a team they are not a member of, then the details of the template are displayed but it cannot be edited and the **Add Template**, **Save Changes**, **Restore** and **Delete Template** buttons will be disabled

Note that as long as the User is a member of the team who owns the template then they can create and manage their incident progress templates.

5.25 Manage Reference Types

References to Work Instructions, MSCs, OCPs, Peaks, etc. may be associated with a Peak incident. Some references (like KELs and TfS calls) will appear as hyperlinks; which enables the User to click on the link to be taken directly to the reference which could be on an external system. Refer to the “Peak User Guide” for details on how to create and use references.

The *References* page enables Administrators to create, change or delete the reference types available to the User and their associated templates.

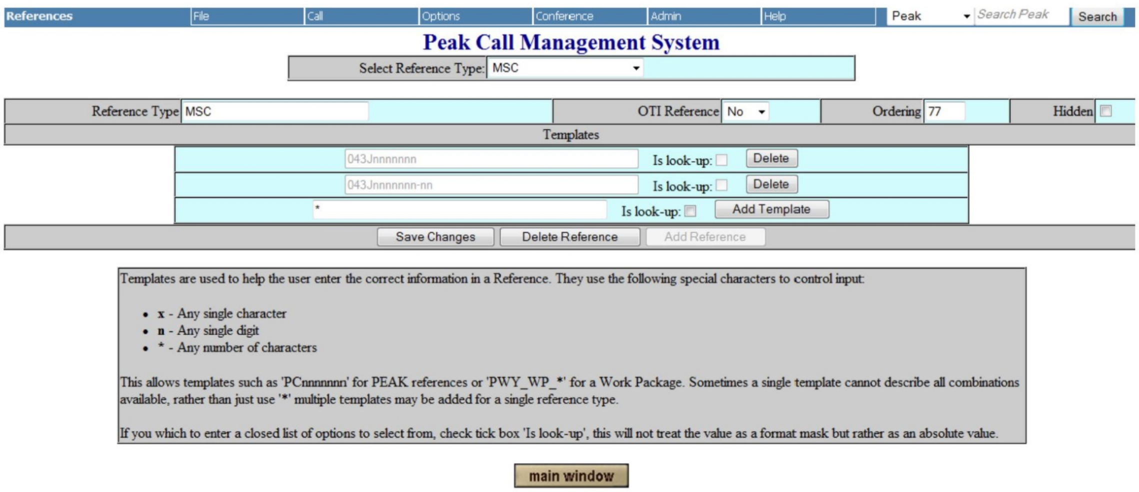


Fig.5.25: Expanded References page – ‘MSC’ reference type with two templates

To create a new reference type:

- Choose ‘Select Reference Type=New Reference Type’ from the drop-down list.
- Check and/or complete the fields:

Reference Type	(mandatory) This must be a unique reference type.
OTI Reference	Selecting Yes’ used to hide this reference in the *References* form so that users could not see or delete them. However, this has now been superseded by the ‘Hidden’ flag on this form.
Ordering	Specify where this reference type will appear in the drop-down list.
Hidden	If ticked, Users will not be able to select this reference type since it will not appear in the ‘Add Reference Type’ drop-down list in the *References* form. This hides references used just by the system such as OTI, etc. so Users cannot see them moreover delete them.

- One or more templates can be set up for each reference type. Templates help users to enter the correct format for the reference. To define the format of your new reference type, use the following special characters in the 'Template' field:

x	to mean any single character (including digits)
n	to mean any single digit
*	to mean any number of characters (including digits)

For example, defining the template "AInnnnH" means that the expected format for the reference is the characters "AI" followed by 4 digits ending with the "H" character.

Sometimes it is not possible for a single template to describe all the combinations available so rather than use "*", you should create multiple templates for the single reference type.

Is look-up	If ticked, the value in the 'Template' field will be treated as an absolute value (like 'High', 'Medium', 'Low') rather than a format mask (e.g. 'n' representing any digit or 'x'representing any character). Use this to generate a fixed list of options for the User to select from. For example, the 'MSC' reference type can only be one of two possible values so it has two templates: '043Jnnnnnnn' and '043Jnnnnnnn-nn'.

- Press **Add Reference** to create the reference type and any associated templates.

To edit, delete or view reference types or their templates, choose the existing reference type from the 'Select Reference Type' drop-down list. This will automatically populate the fields in this page with details of that reference, allowing you edit those details then use **Delete** (to delete the template), **Add Template** (to add another template) or **Save Changes**, **Delete Reference** (which deletes the reference as well as its templates).

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5.26 Manage Service Level Targets (SLT)

Service Level Targets (SLTs) are calculated from the time an incident is routed to a selected team and/or user. Incidents with different priorities may have different SLTs.

The report "SLT Summary" (in the *Reports* page) shows a list of all the open incidents with active SLTs.

The *SLTs* page enables Peak Support to create, change or delete the SLTs for incidents.

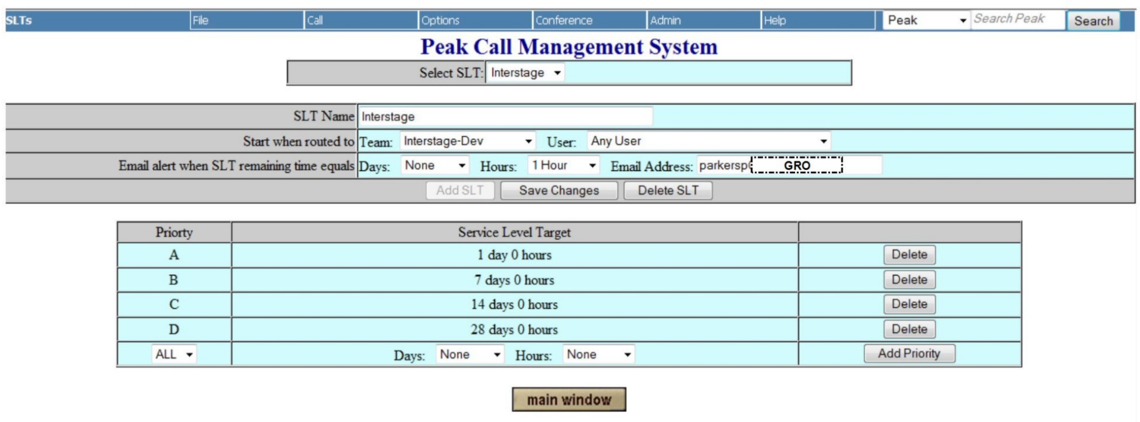

Fig.5.26: Expanded SLTs form – 'Interstage' SLT with 4 Priorities

To create a new SLT:

- Choose 'Select SLT=New SLT' from the drop-down list.
- Check and/or complete the fields:

SLT Name Name the Service Level Target.

Start when routed to
Team At which point do you want to start measuring from: when the call is routed from the
User specified team and/or user.

Email alert when SLT remaining time equals
Days You may set up an email alert when the SLT remaining time equals the Days/Hours
Hours specified.
Email Address

- Press **Add SLT** to create the SLT and expand the *SLTs* form.

The expanded *SLTs* form allows you to change the SLT details, associate different SLTs with different priorities or delete the SLT.

- Choose a Priority from the drop-down list ('default=ALL'), a Service Level Target in Days/Hours then press **Add Priority**. You can add more priorities for this SLT in the same manner or **Delete** an existing priority.
- Then press **Save Changes** or **Delete SLT**.

To edit or delete an existing SLT, choose the SLT name from the ‘Select SLT’ drop-down list. Once an SLT has been selected, all the information about that SLT is retrieved from the database and displayed on the expanded *SLTs* form, allowing you to edit those details and priorities then **Save Changes** or **Delete SLT**.

5.27 Manage Reporting Hierarchy

The *Hierarchy* page was intended to be used in reports created by the Peak Administrators but in reality they use a different mechanism external to Peak. However its functionality will be described in this document for completeness.

This page enables the creation, update or deletion of the reporting hierarchy used to break down incidents, by 5 levels of management. Any hierarchies containing a selected user at a specified reporting level can also be modified.

To create a new reporting hierarchy for a selected manager (e.g. 'Level 4– Analysts –David Cooke'):

- Choose 'Select Manager=New Manager' from the drop-down list.
- Check and/or complete the fields:

Level	Define which hierarchy level is being defined: between 'Level 1' and 'Level 5'.
Title	(mandatory) Give the hierarchy a meaningful name (e.g. 'Analysts').
Manager	Choose a manager for this reporting level (e.g. 'David Cooke').
Previous Hierarchy	If you are defining a Level 1 hierarchy then you can select a division otherwise select a previous level from the hierarchy.

- Press **Add New** to create the hierarchy and expand the *Hierarchy* form to display the 'Company', 'Division' and the hierarchy of each report containing the specified manager at the current reporting level.

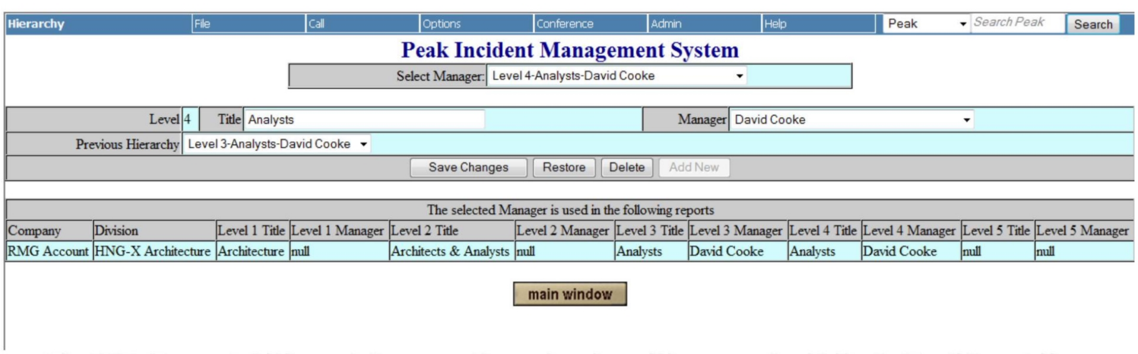

Fig.5.27: Expanded 'Hierarchy' page - all reports where 'Manager=David Cooke' is at 'Level 4'

To edit or delete an existing hierarchy, choose the hierarchy title from the 'Select Manager' drop-down list. Once a hierarchy has been selected, all the information about that hierarchy is retrieved from the database and displayed on the expanded *Hierarchy* form, allowing you to edit those details then **Save Changes**, **Restore** (the previous saved version) or **Delete** (the manager).

5.28 Manage Contact Points

Contact points are used in the Hierarchy reports (§5.27) and they represent external contacts, not users, e.g. Company, Division, External Alerts (which is not supported in Peak), Product or Team.

To create a new contact point:

- Define what type of contact point you wish to create from the 'Contact Type' drop-down list: Company, Division, External, Product or Team – this selection affects the entries displayed in the 'Contact Name' field.
- Choose 'Contact Name=New Contact' from the drop-down lists.
- Check and/or complete the fields:

ContactId	This number is automatically generated once the Contact has been created.
Contact Type	Type of contact point: Company, Division, External, Product or Team.
Name	Type in the name of the Contact.
Address Contact Phone Mobile Number Email	(not used)

- Press **Restore** (to discard your edits) or **Add Contact** (to create the contact point and display a count of how many times a Contact Type has referred to this Contact Point).

To edit or delete an existing contact point, choose the 'Contact Type' and the contact name from the 'Contact Name' drop-down lists. Once a contact has been selected, all the information about that contact is retrieved from the database and displayed on the *Contacts* form, allowing you to edit those details then **Save Changes**, **Restore** (the previous saved version) or **Delete Contact**.

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5.29 Manage Root Causes

Before closing a problem or incident, the user should identify the root cause. For reporting reasons, users are only allowed to select from a finite list of possible root causes. The *RootCause* page allows the administrator to manage this list.

To create a new root cause:

- Choose ‘Select Root Cause=New Root Cause’ from the drop-down list.
- Check and/or complete the fields:

Cause Code	(mandatory) Type in a Cause Code which has not already been used and can be a numeric of any value.
Description	(mandatory) Give the root cause a meaningful name.
Sort Number	(default is 0 which is the top of the list) This value determines the order in which the root causes are displayed (e..g in the ‘Select Root Cause’ field and in the *Peak Root Cause* pop-up box).

- Press **Restore** (to discard your edits) or **Add New** (root cause).

To edit or delete an existing root cause, choose the root cause from the ‘Select Root Cause’ drop-down list. Once a root cause has been selected, all the information about that root cause is retrieved from the database and displayed on the *RootCause* form, allowing you to edit those details then **Save Changes**, **Restore** (the previous saved version) or **Delete** (the root cause).

5.30 Manage Target Types

The *Target Type* page allows the administrator to manage the list of Release Types that incidents can be reported against. This should show the release life of an incident or defect e.g. Reported In, Requested For, Proposed For, Targeted At, and Released At.

To create a new target type:

- Choose 'Select Type=New Release Type' from the drop-down list.
- Check and/or complete the fields:

Identity	This number is automatically generated once the type has been created.
Description	Give the target type a meaningful name.
Ordering	This determines the order in which the types are displayed.
Admin Level	Only Users with Admin Level roles (as defined in §5.27) can set these Target Types.

- Press **Add New** (release target).

To edit or delete an existing target type, choose the target type name from the 'Select Type' drop-down list. Once a type has been selected, all the information about that target type is retrieved from the database and displayed on the *Target Type* form, allowing you to edit those details then **Save Changes**, **Restore** (the previous saved version) or **Delete** (the target type).

5.31 Branch Note (OTI Admin role only)

Refer to the "Peak User Guide" for details of this function.

5.32 OTI (OTI Admin role only)

Refer to the "Peak User Guide" for details of this function.

5.33 Procedures (OTI Admin role only)

Refer to the "Peak User Guide" for details of this function.