**Document Title:** Peak User Guide

**Document Reference:** CS/MAN/011

**Release:** Release Independent

**Abstract:** A user guide for those new to using the Peak system (Phase 8+) and a reference point for existing users.

**Document Status:** APPROVED

**Author & Dept:** Lina Kiang, SSC

**External Distribution:** None. Internal use only.

**Security Risk Assessment Confirmed** YES security risk has been considered, see §0.9 for details.

## Approval Authorities:

| Name | Role | Signature | Date |
|---|---|---|---|
| John Simpkins | Peak Designer and Developer | | |

# 0 Document Control

## 0.1 Table of Contents

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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 | 09/12/2003 | First Draft | |
| 0.2 | 01/10/2004 | First Formal Review | |
| 0.3 | 07/07/2006 | General Enhancements<br>Additions: Companies, Release Management | Peak Phase 8 |
| 1.0 | 08/10/2004 | For Approval | |
| 1.1 | 02/10/2006 | For Review | |
| 1.2 | 14/06/2011 | Draft | |
| 2.0 | 29/06/2011 | For Approval | |
| 2.1 | 05/02/2015 | Documented enhancements made to Peak:<br>- *Call Details*: some buttons changed to tabs. Removed: broadcasts, Show/Hide Audit. Added: Open in Excel, etc.<br>- *Preferences:* changed<br>- *References*: can now add a list of references<br>- Menu bar : added Search box which also affected many of the screenshots<br>- more details on Peak e-mails<br>- new Split Grid added<br>Also added Release/Change/Request Management section §28 and expanded Release Management related sections §7.2.1, §8.1.11, §8.8 and §23.1. | |
| 2.2 | 01/07/2015 | Changes related to moving Peak servers into the Cloud including removing functionality for:<br>Java grid, Conferences, Monitor and Peak Alerter. | Peak Phase 9 |
| 3.0 | 18-Apr-2016 | Approval version | |

## 0.3 Review Details

| | |
|---|---|
| **Review Comments by :** | |
| **Review Comments to :** | Lina Kiang |

( * ) = Reviewers that returned comments

| Mandatory Review | |
|---|---|
| **Role** | **Name** |
| Peak Designer and Developer | John Simpkins |
| Peak Administrator | Billy Melrose, Amarvir Aujla |
| Peak Support | David Seddon, Gary Maxwell |
| | |

| 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 |
| DEV/GEN/SPG/0023 | 3.0 | 07/12/2010 | HNG-X Tool for Obfuscation of Counter/BAL-OSR Data: Support Guide | Dimensions |
| DES/APP/DPR/0008 | 3.0 | 06/12/2010 | Obfuscation of Counter/BAL-OSR Data for 4LS | Dimensions |
| SVM/SEC/POL/0003 | 5.0 | 17/09/2009 | Security Policy | Dimensions |
| DE/PRO/015 | 2.1 | 25/04/2004 | Post Office Account Systems Integration Directorate Incident/Defect Management | PVCS |
| DEV/APP/SPG/2144 | 1.0 | 03/04/2013 | Peak Administration Guide | Dimensions |
| WAD019 | | | Obfuscation Tool for evidence to External Peak Companies | SSC Web Site |
| | | | | |

## 0.5 Abbreviations

| Abbreviation | Definition |
|---|---|
| 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 |
| OTI | Open-Systems Teleservice Interface |
| PHIL | Platform Hardware Instance List |
| POA | Post Office Account |
| QC | Quality Centre |
| QFP | Quality Filter Process |

| | |
|---|---|
| RMF | Release Management Forum |
| RP | Release Planning |
| SDA | Self-Decrypting Archive |
| SI | Systems Integration |
| 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/included at this release, might be included/removed 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 Helpdesk 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

This document is targeted at people trying to use the Peak call management system to:

- raise new Peak calls or incidents
- view/update Peaks
- route Peak calls
- manage evidence
- close Peak calls
- and much more

The purpose of this document is to serve as a user reference to accompany the Peak client interface.

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 not included in this User Guide.

The Peak administrative functions are beyond the scope of this document.

Release Management, Change Management and Request Management functionality has been included in this document. On Peak, they can be found in the *Main Menu* page but are only visible if you are a member of the relevant teams. It is not the intention of this document to explain or describe the processes used in Release/Change/Request Management but to document the functionality that have been made available on Peak to enable these processes.

# 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 "**Close Window** in *Call Details*" means the **Close Window** button in the *Call Details* page.

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

1. Using the menu bar at the top of each Peak screen: File, Call, Options, Admin and Help or **Search**.
   For details on menu bar search, see §10.3.
2. Using shortcut keys
   Shortcut keys only work on the *Main Menu* screen and only exist for a limited number of functions. These are shown throughout this document within square brackets: "[ ]".
3. Using the buttons in the *Main Menu*

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

1. Via menu, Options/Preferences
2. Via shortcut, press "p" (<u>not</u> "P") whilst in the *Main Menu*.
3. Via *Main Menu:* **Preferences** button

The 4 main screens within Peak mentioned extensively throughout this document are:

- *Main Menu* - series of buttons; many are duplicated in the drop-down menus
- *Call List* - displays a list of incidents; shows one line per call
- *(Expanded) Call Details* - displays the (expanded) details of a particular call
- *Add Response* - where you can add a response to a call

The best way to use this document is to familiarise yourself with the basics by reading the first 6 sections of this document and then look up your specific function/screen/button/function via the Table of Contents (§0.1).

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

# 4 Getting Started with Peak

You will need access to the Fujitsu Corporate LAN, a browser and a username/password; which is supplied by e-mailing CSPOA Security.

Once you have all these elements, you may start using the Peak system immediately, as all the facilities are available on HTML pages.

There are 2 main Peak machines:

- Cloud Primary server - SSC.fs.fujitsu.com
- Cloud Standby server - SSC2.fs.fujitsu.com

In the event of a fail-over, if SSC is still available, a redirect page will be put in place to SSC2 otherwise Peak users will be e-mailed with the SSC2 URL.

## 4.1 Connecting to Peak from sites other than BRA01

If you are connecting to Peak from an external site (other than BRA01) and it is taking a long time to display the initial Peak *Logon* page or if Peak is just generally really slow then it may be due to slow DNS name resolution.

The DNS name resolution from external sites to the Primary Peak servers is very slow and impacts all requests. To remedy this, add the following entry into your c:\windows\system32\drivers\etc\Hosts file:

<SSC_IP_address> **IRRELEVANT**

where <SSC_IP_address> can be found in the *FAQ* page (within Peak via drop-down menu Help/FAQ).

To speed up access to Peak from home, if you have broadband/ADSL then you should not need to make any changes. But if you use a dial-up modem, we recommend that you use the AJAX grid and customise your search to display only those fields that you are interested in (otherwise by default many superfluous fields will be displayed).

## 4.2 Peak Support

The CSPOA Security group mailbox is responsible for managing requests for new users to the Post Office Account.

The Peak Administrator is responsible <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.

Peak Development staff are responsible for supporting the live system. They are also custodians of the Peak Enhancement Register which is a mailbox of verbal/e-mail enhancement requests we have received for Peak.

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To contact Peak Support, please use one of the following methods:

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

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

or

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

2. Raise a new Peak call with the details and route it to the 'Peak HelpDsk' team.

### 4.2.1 Peak User accounts

In order for a <u>new</u> Peak user to be configured your Management must e-mail the Peak Administrator with the following information:

- User's full name
- Fujitsu Personnel number
- Required permissions e.g. read only, normal or administrative
- Peak teams they should be a member of

### 4.2.2 Password rules

Peak passwords must 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 expire automatically after 50 days

New or locked users will be assigned a password by the Peak Administrator which must be changed at first logon. Users also have the option to change their own password if they feel their existing one has been compromised via the **New password** button in *Main Menu* (§19).

### 4.2.3 Lifecycle of Peak calls

All Peak calls go through the following lifecycle and each call <u>must</u> pass through each stage in turn:

- Open — Initial state of a Peak call
- Pending — Incident is being investigated
- Final — Investigations have finished –Final response is sent back for approval
- Closed — Final state – call is closed on the Peak system.

Peak will enforce this call lifecycle so it will not allow a Final response to be entered unless the current status is Pending and a call cannot be Closed until its status is Final.

Once an incident is closed, it will remain, at least, on the Peak database (it is not archived or deleted) so you should be able to search on calls going back to the switch-over from PinICL to Peak.

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### 4.2.4 Role Permissions

A role is assigned to each Peak user which determines what that user is allowed to do on Peak; which affects which screens and buttons are dis/enabled for that user. Most Peak users belong to the 'No administrative role' which has permissions to do the following (usually dependent on the status of the call and which team the call is assigned to):

| | |
|---|---|
| Edit Call Type | (Status=Open, Pending or Final) and (Assigned to user's team) |
| Edit Summary | (Status=Open, Pending or Final) and (Assigned to user's team) |
| Edit Subject Product | (Status=Open, Pending or Final) and (Assigned to user's team) |
| Edit root cause | (Status=Open, Pending or Final) and (Assigned to user's team) |
| Add Progress | (Status=Open, Pending or Final) and (Assigned to any team |
| Edit Reference | (Status=Open, Pending, Final or Closed) and (Assigned to any team) |
| Add Reference | (Status=Open, Pending, Final or Closed) and (Assigned to any team) |
| Edit Product | (Status=Open or Pending) and (Assigned to user's team) |
| Add Product | (Status=Open, Pending, Final or Closed) and (Assigned to any team) |
| Edit Evidence | (Status=Open, Pending or Final) and (Assigned to user's team) |
| Add Evidence | (Status=Open, Pending, Final or Closed) and (Assigned to any team) |
| Raise new call | |
| Route call | (Status=Open, Pending or Final) and (Assigned to user's team) |
| Action call | (Status:=Open or Pending) and (Assigned to user's team) |
| Clone call | (Status=Open, Pending or Final) and (Assigned to user's team) |
| Send Final | (Status=Open, Pending or Final) and (Assigned to user's team) |

The 'No administrative role' is not allowed to change the Target Release, Priority, Contact, Close calls, Send over OTI, Reopen calls or Enter SQL in Query Builder.

If your role has been set up incorrectly, please contact the Peak Administrator.

### 4.2.5 Locked user accounts

If a Peak user fails to log in after 3 attempts, the account is locked and the user will get the following warning:

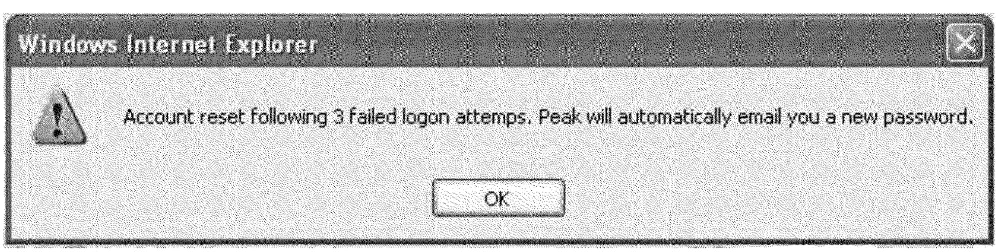


*Fig.4.2.5: Locked account warning*

Peak will then automatically reset the password and send an e-mail containing the new password to the mailbox of the registered owner of the user account.

### 4.2.6 New Products and Product Groups

If you have searched the existing products/product groups and feel that a new one is required, e-mail the Peak Administrator with the following information:

<u>New Product</u>

- Product Name
- Existing Product Group
- Owning Peak Team

<u>New Product Group</u>

- Product Group Name
- Description
- Product Family
- Owning Peak Team
- Contact Point

### 4.2.7 Companies

This is an enhanced security feature of the Peak system. It restricts people from different companies (Infinite, SSC Website users and POA Joint Testing) looking at or searching for 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

If you are routed a call, you can place an **Action** on your team/yourself (see §8.1.20) which will continue to make that call visible to you even though it is routed back to the originating company. 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.

## 4.3 Sources of Peak Calls

Three main sources can create Peak calls: They can be created by:

- external Helpdesks (e.g. TRIOLE for Service, TfS)
  (aka Customer calls/OTI calls/OTI Provider calls)
  Once the Helpdesk have determined that the problem is software and gathered evidence, the call details (along its TfS call reference) are sent across OTI interface to raise a new Peak call.
- Quality Centre (QC) system
  (aka Test or QC calls/non-OTI calls)
  QC is the defect handling system used by the Test Teams which can raise new calls on Peak.
- Peak itself
  (aka Internal calls/non-OTI calls/OTI Consumer calls)
  These types of calls can be routed around the Peak system or sent to external Helpdesks like Tfs.

### 4.3.1 TRIOLE for Services (TfS)

TRIOLE for Services (TfS) is the Helpdesk system used by Post Office Account (POA) First and Second Line Support Units to capture incident details raised by Branches, Post Office Limited and the NBSC (similar in function to Peak).

Each TfS incident has a unique call reference (e.g. TfS 3195922) which is an incrementing integer however this is used for other internal references other than Incidents so cannot be used as a count of the total incidents raised.

### 4.3.2 Open-Systems Teleservice Interface (OTI)

The Open-Systems Teleservice Interface (which is now known as the Help Desk Interface, HDI) is the interface specification used to send call details between Helpdesk systems. Primarily this is used to receive incidents from TfS into the Peak system and transfer progress details back from Peak to the originating Helpdesk and vice versa.

Initially when an OTI call is received on Peak, it is routed to the OTI Administrator team (currently the SSC) and has a status of Pending and 'Call Logger:_Customer Call_ -- EDSC'. The OTI Team is tasked with checking the integrity of incoming OTI calls and then routing them on to the relevant Peak teams/stacks or to QFP (§8.1.19.1) – this activity is known as "prescanning".

All updates or responses will be sent back over the OTI to update the originating Helpdesk; except for 'Progress Only' updates. It should take 2 minutes for Peak updates to appear on their TfS call and for TfS updates to appear on their Peak call.

Note that the maximum size of response that TfS can cope with is 4Kb so be aware that because of this limit when sending responses back across the OTI the TfS update may be truncated.

Once the OTI call has a Final response from a non-OTI enabled team, the incident will be routed back to the OTI Administrator team to check the integrity of the closure response before closing the call on Peak; which sends the final response back across the OTI and passes ownership back to the originating Helpdesk. The Helpdesk can then continue working on the call (checking back with the Branch, route the call onto another Helpdesk, etc.) before closing the call on their system.

Note that whilst a Peak call is being investigated, the Helpdesk could accidentally close or withdraw the associated OTI call. Withdrawing the OTI call will automatically change the associated Peak call status from Pending to Closed. But closing the OTI call will not change the Peak call status so any updates made on Peak will not be passed back across the OTI.

### 4.3.3 Quality Centre (QC)

The Quality Centre (QC) is the system used by the Test Teams to manage test scripts. When one of these scripts fails, it is reviewed and if they believe the failure was due to a build or software defect they can get QC to create a Peak incident.

Incidents from QC do not come via the OTI link. Initially, QC incidents are logged as being raised by 'Call Logger: QC Peak Interface user' in the 'QC Interface' team and routed to the QFP team/stack. If the QC user is also a Peak user they will be shown as the 'Call Logger' instead. Any evidence will be transferred from QC to the associated Peak (but not from Peak to QC).

Any new comments in QC are passed on to Peak and new progress in Peak is passed back to QC. QC progress is stored in HTML; therefore all updates in Peak from QC will be presented as HTML. It takes up to 10 minutes to transfer updates between the Peak and QC (via the QC interface).

When Peak investigation is complete and a Final Response is entered, the incident is routed back to the QC Interface Team waiting closure agreement from QC. If a Final Response of 'S/W Fix Released to Call Logger' is selected, the incident must have a Baseline reference of the fix otherwise the response will be rejected by Peak.

If the QC users are happy with the response, they can agree closure and the Peak call will be is automatically closed otherwise they can reject the closure and the call on Peak would become active again. Peak users may not close a QC raised incident, only a closure agreement message from the QC system can do this.

# 5 Log on and Log off

To access Peak enter the following URL into your browser (Internet Explorer 6+ and Firefox 3 are recommended):

URL IRRELEVANT

The initial *Logon* screen will be shown:

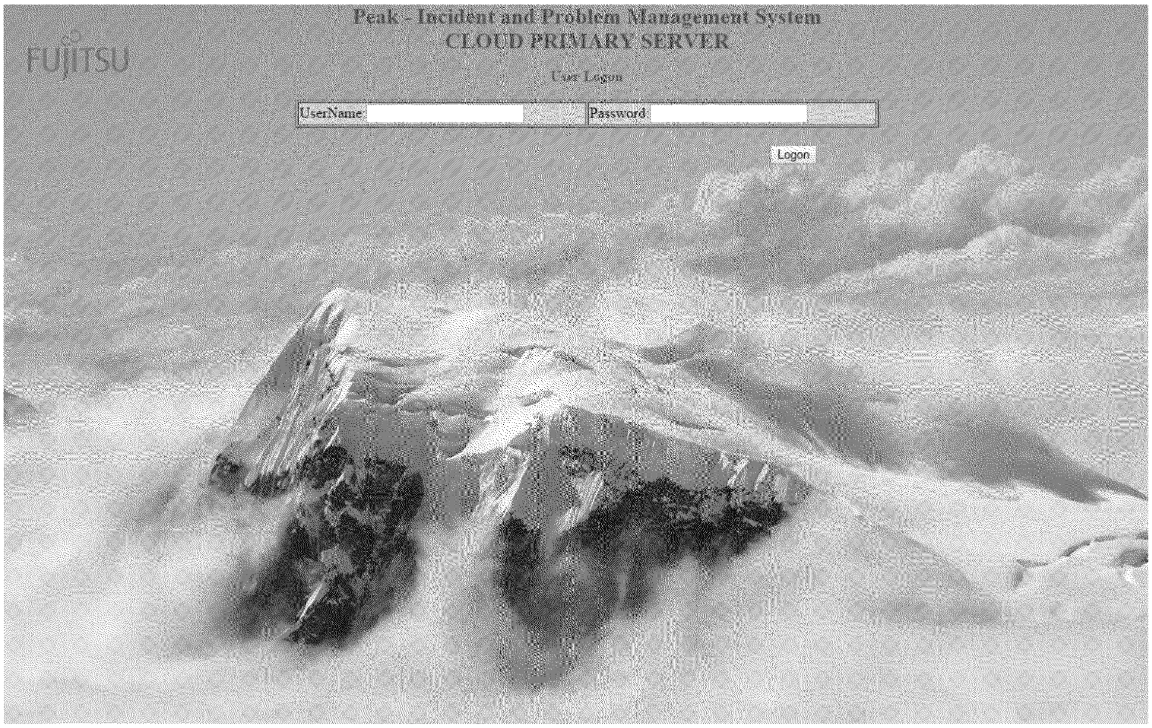


*Fig.5: Initial Logon screen*

The UserName is case insensitive but the Password is not and must be typed in exactly as it was set up (§4.2.2).

With the introduction of encryption to sensitive Peak pages (*Logon* and change *Password* screens), your browser may try to warn you whenever you access an encrypted page from an unencrypted one, that the Peak Certificate has not been signed by one of the trusted Certification Authorities. For details on this, see APPENDIX A: Peak Encryption.

To logout out, you can either use the menu, File/Logout or *Main Menu:* **Logout**. Peak users will automatically be logged out after 5 hours of inactivity.

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# 6 Main Menu

The *Main Menu* page is the first screen displayed immediately after successful validation of your user account details.

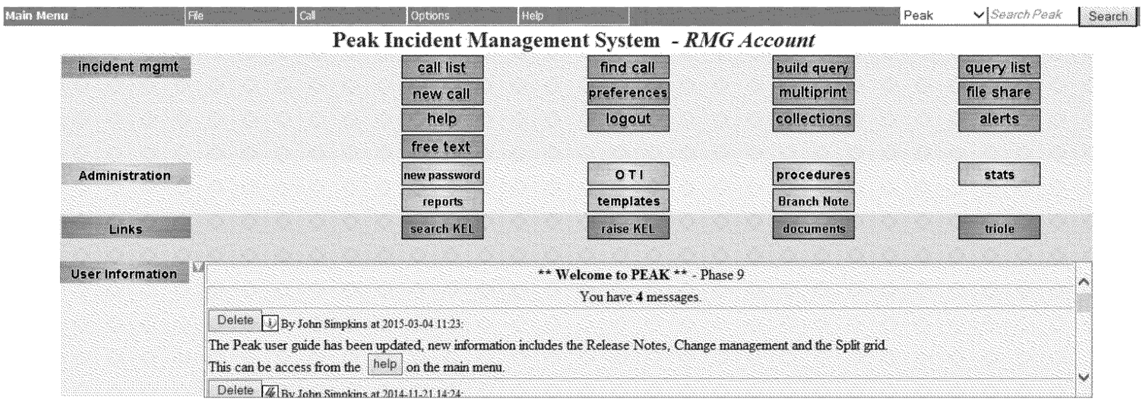



*Fig.6: Main Menu page for non-administrator role (with 4 broadcasts)*

This page is split off into sections which are visible only if your role permits (§4.2.4):

- Incident Management
  These functions mainly deal with 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 changing your password, etc.
- Links
  These functions interface to systems outside Peak e.g. SSC Website for KELs and Support documents and TRIOLE for Services (TfS).

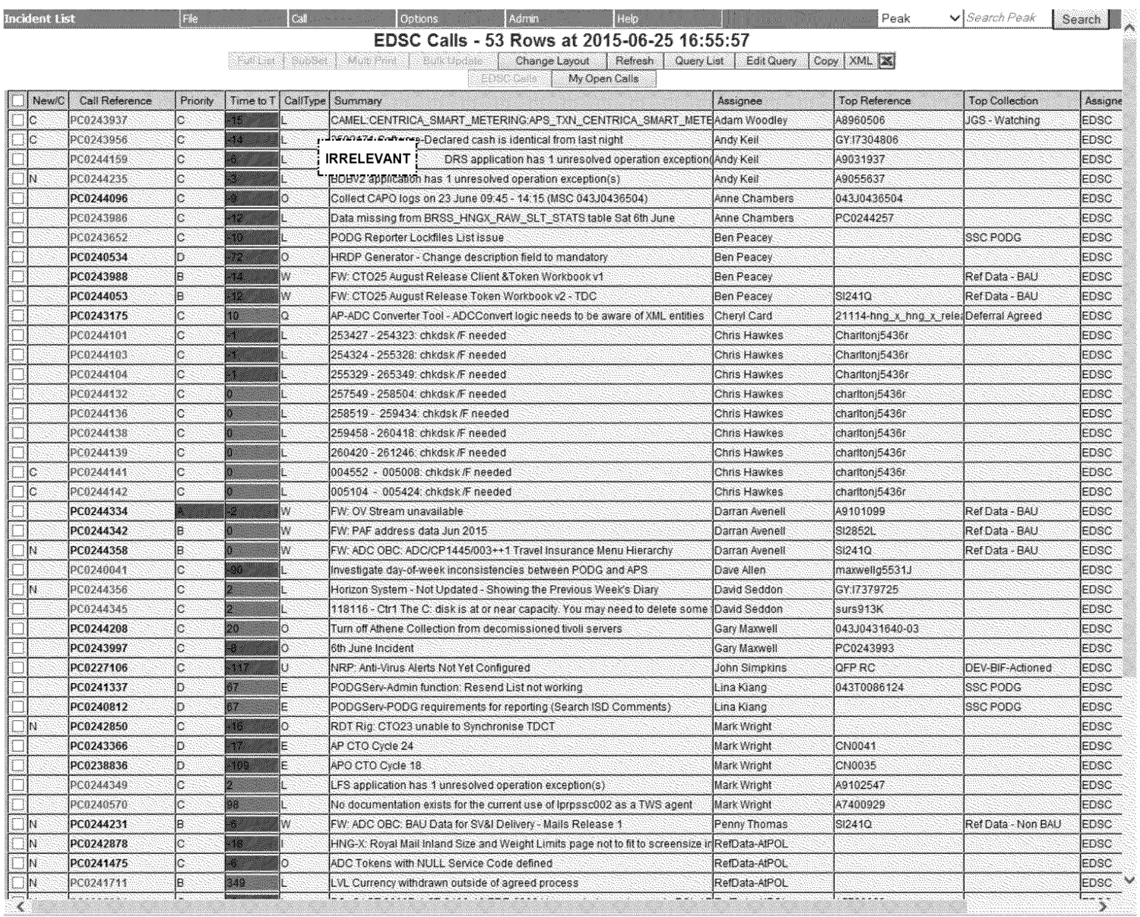
# 7 Displaying Call List – call list

The *Call List* page enables you to view a list of existing calls – ranging from all open calls on a particular stack/user to calls with a particular Reference. This list of calls can be generated by:

- running a Query (including displaying the default call list) (§11).
  For new users, the default query is set up by Peak but this can be changed via Query Builder (§11.1.5.1).
- performing a search (§10).
  Note that with a FreeText Search, you will also need to use **Create Call List** (§10.2).
- using the menu Call/Build New Query/Use CSV List (§11.3)

There are four main versions of *Call List* (called *Incident List* in HTML) grid which can be configured via *Preferences* (§13):

- HTML (default grid)



Incident List | File | Call | Options | Admin | Help | Peak | Search Peak | Search

EDSC Calls - 53 Rows at 2015-06-25 16:55:57

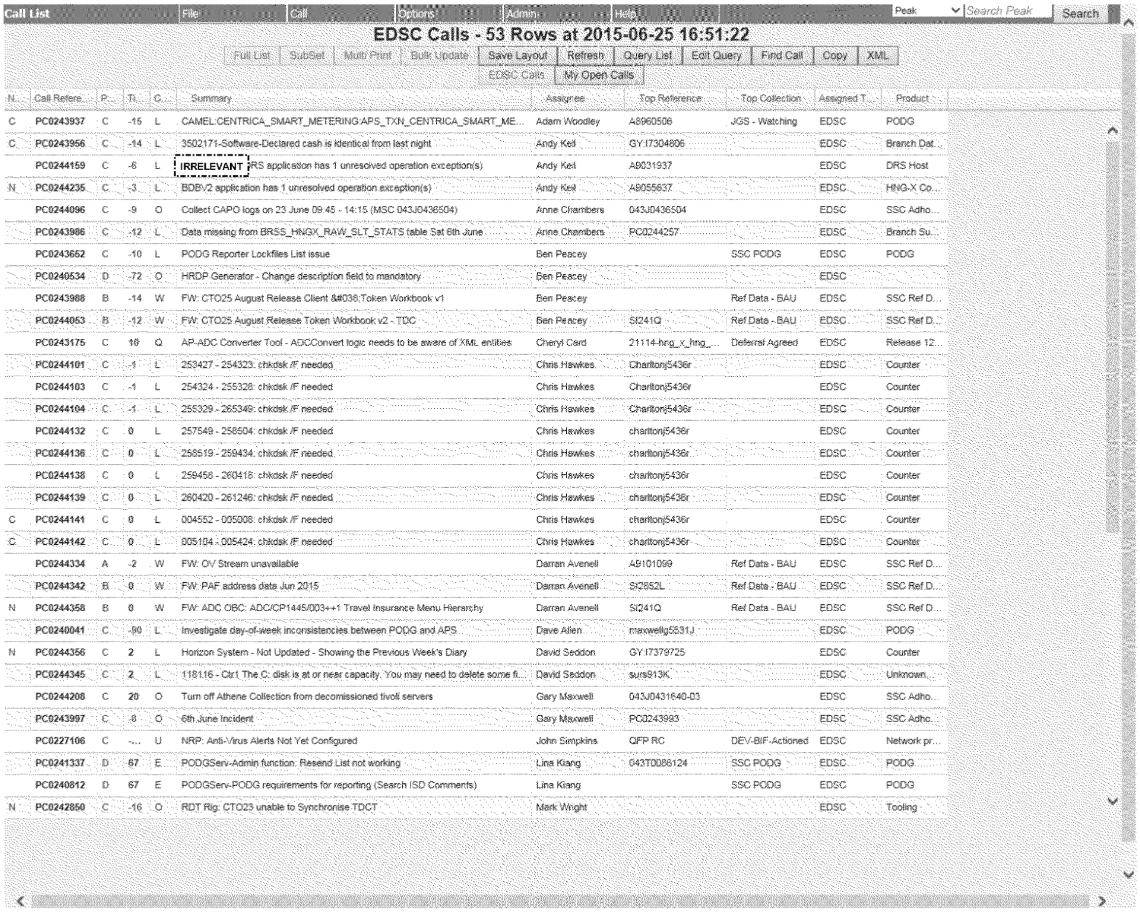
Full List | SubSet | Multi Print | Bulk Update | Change Layout | Refresh | Query List | Edit Query | Copy | XML

EDSC Calls | My Open Calls

| New/C | Call Reference | Priority | Time to T | CallType | Summary | Assignee | Top Reference | Top Collection | Assigne |
|---|---|---|---|---|---|---|---|---|---|
| C | PC0243937 | C | -15 | L | CAMEL:CENTRICA_SMART_METERING:APS_TXN_CENTRICA_SMART_METE | Adam Woodley | A8960506 | JGS - Watching | EDSC |
| C | PC0243956 | C | -14 | L | Declared cash is identical from last night | Andy Keil | GY:I7304806 | | EDSC |
| | PC0244159 | C | -6 | L | IRRELEVANT DRS application has 1 unresolved operation exception( | Andy Keil | A9031937 | | EDSC |
| N | PC0244235 | C | -3 | L | BDBV2 application has 1 unresolved operation exception(s) | Andy Keil | A9055637 | | EDSC |
| | PC0244096 | C | -9 | O | Collect CAPO logs on 23 June 09:45 - 14:15 (MSC 043J0436504) | Anne Chambers | 043J0436504 | | EDSC |
| | PC0243986 | C | -12 | L | Data missing from BRSS_HNGX_RAW_SLT_STATS table Sat 6th June | Anne Chambers | PC0244257 | | EDSC |
| | PC0243652 | C | -10 | L | PODG Reporter Lockfiles List issue | Ben Peacey | | SSC PODG | EDSC |
| | PC0240534 | D | -72 | O | HRDP Generator - Change description field to mandatory | Ben Peacey | | | EDSC |
| | PC0243988 | B | -14 | W | FW: CTO25 August Release Client &Token Workbook v1 | Ben Peacey | | Ref Data - BAU | EDSC |
| | PC0244053 | B | -12 | W | FW: CTO25 August Release Token Workbook v2 - TDC | Ben Peacey | SI241Q | Ref Data - BAU | EDSC |
| | PC0243175 | C | 10 | Q | AP-ADC Converter Tool - ADCConvert logic needs to be aware of XML entities | Cheryl Card | 21114-hng_x_hng_x_rele | Deferral Agreed | EDSC |
| | PC0244101 | C | -1 | L | 253427 - 254323: chkdsk /F needed | Chris Hawkes | Charltonj5436r | | EDSC |
| | PC0244103 | C | -1 | L | 254324 - 255328: chkdsk /F needed | Chris Hawkes | Charltonj5436r | | EDSC |
| | PC0244104 | C | -1 | L | 255329 - 265349: chkdsk /F needed | Chris Hawkes | Charltonj5436r | | EDSC |
| | PC0244132 | C | 0 | L | 257549 - 258504: chkdsk /F needed | Chris Hawkes | charltonj5436r | | EDSC |
| | PC0244136 | C | 0 | L | 258519 - 259434: chkdsk /F needed | Chris Hawkes | charltonj5436r | | EDSC |
| | PC0244138 | C | 0 | L | 259458 - 260418: chkdsk /F needed | Chris Hawkes | charltonj5436r | | EDSC |
| | PC0244139 | C | 0 | L | 260420 - 261246: chkdsk /F needed | Chris Hawkes | charltonj5436r | | EDSC |
| C | PC0244141 | C | 0 | L | 004552 - 005008: chkdsk /F needed | Chris Hawkes | charltonj5436r | | EDSC |
| C | PC0244142 | C | 0 | L | 005104 - 005424: chkdsk /F needed | Chris Hawkes | charltonj5436r | | EDSC |
| | PC0244334 | A | -2 | W | FW: OV Stream unavailable | Darran Avenell | A9101099 | Ref Data - BAU | EDSC |
| | PC0244342 | B | 0 | W | FW: PAF address data Jun 2015 | Darran Avenell | SI2852L | Ref Data - BAU | EDSC |
| N | PC0244358 | B | 0 | W | FW: ADC OBC: ADC/CP1445/003++1 Travel Insurance Menu Hierarchy | Darran Avenell | SI241Q | Ref Data - BAU | EDSC |
| | PC0240041 | C | -90 | L | Investigate day-of-week inconsistencies between PODG and APS | Dave Allen | maxwellg5531J | | EDSC |
| N | PC0244356 | C | 2 | L | Horizon System - Not Updated - Showing the Previous Week's Diary | David Seddon | GY:I7379725 | | EDSC |
| | PC0244345 | C | 2 | L | 118116 - Ctr1 The C: disk is at or near capacity. You may need to delete some | David Seddon | surs913K | | EDSC |
| | PC0244208 | C | 20 | O | Turn off Athene Collection from decomissioned tivoli servers | Gary Maxwell | 043J0431640-03 | | EDSC |
| | PC0243997 | C | -8 | O | 6th June Incident | Gary Maxwell | PC0243993 | | EDSC |
| | PC0227106 | C | -117 | U | NRP: Anti-Virus Alerts Not Yet Configured | John Simpkins | QFP RC | DEV-BIF-Actioned | EDSC |
| | PC0241337 | D | 67 | E | PODGServ-Admin function: Resend List not working | Lina Kiang | 043T0086124 | SSC PODG | EDSC |
| | PC0240812 | D | 67 | E | PODGServ-PODG requirements for reporting (Search ISD Comments) | Lina Kiang | | SSC PODG | EDSC |
| N | PC0242850 | C | -16 | O | RDT Rig: CTO23 unable to Synchronise TDCT | Mark Wright | | | EDSC |
| | PC0243366 | D | -17 | E | AP CTO Cycle 24 | Mark Wright | CN0041 | | EDSC |
| | PC0238836 | D | -109 | E | APO CTO Cycle 18 | Mark Wright | CN0035 | | EDSC |
| | PC0244349 | C | 2 | L | LFS application has 1 unresolved operation exception(s) | Mark Wright | A9102547 | | EDSC |
| | PC0240570 | C | 98 | L | No documentation exists for the current use of lprpssc002 as a TWS agent | Mark Wright | A7400929 | | EDSC |
| N | PC0244231 | B | -6 | W | FW: ADC OBC: BAU Data for SV&I Delivery - Mails Release 1 | Penny Thomas | SI241Q | Ref Data - Non BAU | EDSC |
| N | PC0242878 | C | -18 | I | HNG-X: Royal Mail Inland Size and Weight Limits page not to fit to screensize in | RefData-AtPOL | | | EDSC |
| N | PC0241475 | C | -6 | O | ADC Tokens with NULL Service Code defined | RefData-AtPOL | | | EDSC |
| N | PC0241711 | B | 349 | L | LVL Currency withdrawn outside of agreed process | RefData-AtPOL | | | EDSC |

*Fig.7a: Incident List – HTML version (default)*

- Dynamic HTML – which does not work with Firefox



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

**EDSC Calls - 53 Rows at 2015-06-25 16:51:22**

Full List | SubSet | Multi Print | Bulk Update | Save Layout | Refresh | Query List | Edit Query | Find Call | Copy | XML

EDSC Calls | My Open Calls

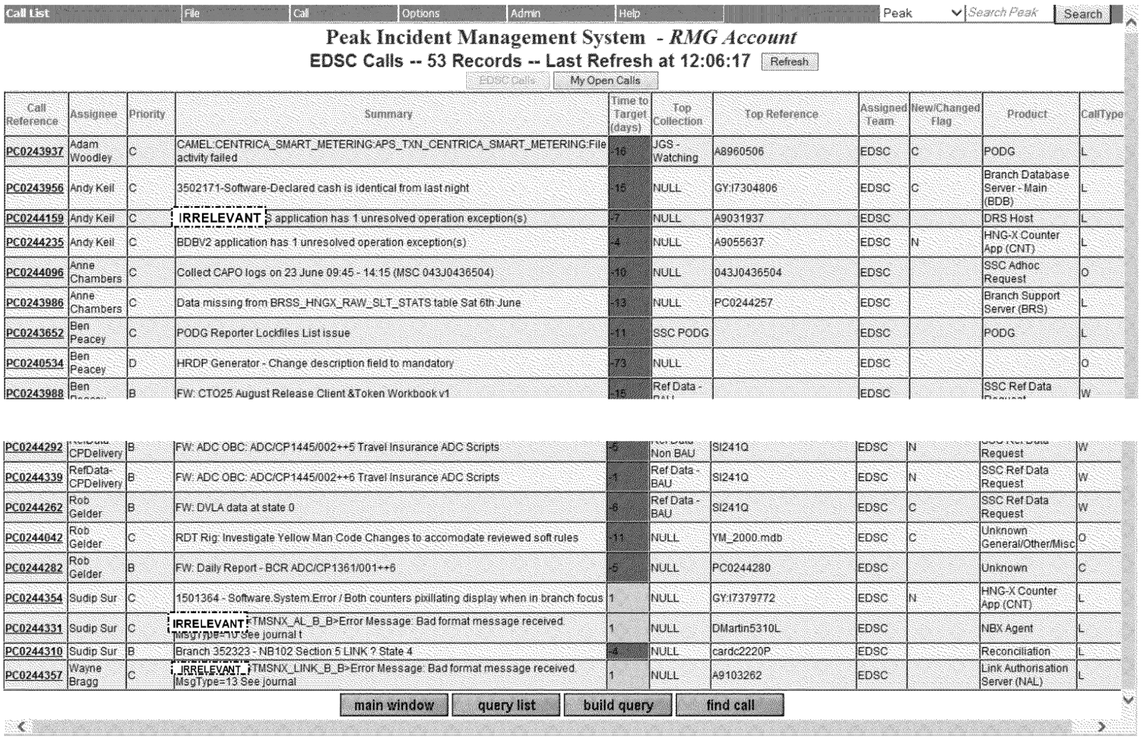
| N... | Call Refere... | P... | Ti... | C... | Summary | Assignee | Top Reference | Top Collection | Assigned T... | Product |
|---|---|---|---|---|---|---|---|---|---|---|
| C | PC0243937 | C | -15 | L | CAMEL:CENTRICA_SMART_METERING:APS_TXN_CENTRICA_SMART_ME... | Adam Woodley | A8960506 | JGS - Watching | EDSC | PODG |
| C | PC0243956 | C | -14 | L | 3502171-Software-Declared cash is identical from last night | Andy Keil | GY:I7304806 | | EDSC | Branch Dat... |
| | PC0244159 | C | -6 | L | IRRELEVANT RS application has 1 unresolved operation exception(s) | Andy Keil | A9031937 | | EDSC | DRS Host |
| N | PC0244235 | C | -3 | L | BDBV2 application has 1 unresolved operation exception(s) | Andy Keil | A9055637 | | EDSC | HNG-X Co... |
| | PC0244096 | C | -9 | O | Collect CAPO logs on 23 June 09:45 - 14:15 (MSC 043J0436504) | Anne Chambers | 043J0436504 | | EDSC | SSC Adho... |
| | PC0243986 | C | -12 | L | Data missing from BRSS_HNGX_RAW_SLT_STATS table Sat 6th June | Anne Chambers | PC0244257 | | EDSC | Branch Su... |
| | PC0243652 | C | -10 | L | PODG Reporter Lockfiles List issue | Ben Peacey | | SSC PODG | EDSC | PODG |
| | PC0240534 | D | -72 | O | HRDP Generator - Change description field to mandatory | Ben Peacey | | | EDSC | |
| | PC0243988 | B | -14 | W | FW: CTO25 August Release Client &Token Workbook v1 | Ben Peacey | | Ref Data - BAU | EDSC | SSC Ref D... |
| | PC0244053 | B | -12 | W | FW: CTO25 August Release Token Workbook v2 - TDC | Ben Peacey | SI241Q | Ref Data - BAU | EDSC | SSC Ref D... |
| | PC0243175 | C | 10 | Q | AP-ADC Converter Tool - ADCConvert logic needs to be aware of XML entities | Cheryl Card | 21114-hng_x_hng_... | Deferral Agreed | EDSC | Release 12... |
| | PC0244101 | C | -1 | L | 253427 - 254323: chkdsk /F needed | Chris Hawkes | Charltonj5436r | | EDSC | Counter |
| | PC0244103 | C | -1 | L | 254324 - 255328: chkdsk /F needed | Chris Hawkes | Charltonj5436r | | EDSC | Counter |
| | PC0244104 | C | -1 | L | 255329 - 265349: chkdsk /F needed | Chris Hawkes | Charltonj5436r | | EDSC | Counter |
| | PC0244132 | C | 0 | L | 257549 - 258504: chkdsk /F needed | Chris Hawkes | charltonj5436r | | EDSC | Counter |
| | PC0244136 | C | 0 | L | 258519 - 259434: chkdsk /F needed | Chris Hawkes | charltonj5436r | | EDSC | Counter |
| | PC0244138 | C | 0 | L | 259458 - 260418: chkdsk /F needed | Chris Hawkes | charltonj5436r | | EDSC | Counter |
| | PC0244139 | C | 0 | L | 260420 - 261246: chkdsk /F needed | Chris Hawkes | charltonj5436r | | EDSC | Counter |
| C | PC0244141 | C | 0 | L | 004552 - 005008: chkdsk /F needed | Chris Hawkes | charltonj5436r | | EDSC | Counter |
| C | PC0244142 | C | 0 | L | 005104 - 005424: chkdsk /F needed | Chris Hawkes | charltonj5436r | | EDSC | Counter |
| | PC0244334 | A | -2 | W | FW: OV Stream unavailable | Darran Avenell | A9101099 | Ref Data - BAU | EDSC | SSC Ref D... |
| | PC0244342 | B | 0 | W | FW: PAF address data Jun 2015 | Darran Avenell | SI2852L | Ref Data - BAU | EDSC | SSC Ref D... |
| N | PC0244358 | B | 0 | W | FW: ADC OBC: ADC/CP1445/003++1 Travel Insurance Menu Hierarchy | Darran Avenell | SI241Q | Ref Data - BAU | EDSC | SSC Ref D... |
| | PC0240041 | C | -90 | L | Investigate day-of-week inconsistencies between PODG and APS | Dave Allen | maxwellg5531J | | EDSC | PODG |
| N | PC0244356 | C | 2 | L | Horizon System - Not Updated - Showing the Previous Week's Diary | David Seddon | GY:I7379725 | | EDSC | Counter |
| | PC0244345 | C | 2 | L | 118116 - Ctr1 The C: disk is at or near capacity. You may need to delete some fi... | David Seddon | surs913K | | EDSC | Unknown... |
| | PC0244208 | C | 20 | O | Turn off Athene Collection from decomissioned tivoli servers | Gary Maxwell | 043J0431640-03 | | EDSC | SSC Adho... |
| | PC0243997 | C | -8 | O | 6th June Incident | Gary Maxwell | PC0243993 | | EDSC | SSC Adho... |
| | PC0227106 | C | -... | U | NRP: Anti-Virus Alerts Not Yet Configured | John Simpkins | QFP RC | DEV-BIF-Actioned | EDSC | Network pr... |
| | PC0241337 | D | 67 | E | PODGServ-Admin function: Resend List not working | Lina Kiang | 043T0086124 | SSC PODG | EDSC | PODG |
| | PC0240812 | D | 67 | E | PODGServ-PODG requirements for reporting (Search ISD Comments) | Lina Kiang | | SSC PODG | EDSC | PODG |
| N | PC0242850 | C | -16 | O | RDT Rig: CTO23 unable to Synchronise TDCT | Mark Wright | | | EDSC | Tooling |

*Fig.7b: Call List – DHTML version*

The dynamic grid does not cope well in a reduced window size. If it fails to sort a column or the drag/drop appears offset then maximise the window when performing these tasks.

If you are using DHTML with IE, the browser will try to apply older compatibility methods which will display the grid incorrectly. To circumvent this, untick Tools/Enterprise Mode on the *Call List* page (refer to Help/FAQ on Peak for more details).

- AJAX – recommended for dial-up modem users to Peak



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

**Peak Incident Management System** - *RMG Account*

**EDSC Calls -- 53 Records -- Last Refresh at 12:06:17** Refresh

EDSC Calls | My Open Calls

| Call Reference | Assignee | Priority | Summary | Time to Target (days) | Top Collection | Top Reference | Assigned Team | New/Changed Flag | Product | CallType |
|---|---|---|---|---|---|---|---|---|---|---|
| PC0243937 | Adam Woodley | C | CAMEL:CENTRICA_SMART_METERING:APS_TXN_CENTRICA_SMART_METERING:File activity failed | -16 | JGS - Watching | A8960506 | EDSC | C | PODG | L |
| PC0243956 | Andy Keil | C | 3502171-Software-Declared cash is identical from last night | -15 | NULL | GY:I7304806 | EDSC | C | Branch Database Server - Main (BDB) | L |
| PC0244159 | Andy Keil | C | IRRELEVANT S application has 1 unresolved operation exception(s) | -7 | NULL | A9031937 | EDSC | | DRS Host | L |
| PC0244235 | Andy Keil | C | BDBV2 application has 1 unresolved operation exception(s) | -4 | NULL | A9055637 | EDSC | N | HNG-X Counter App (CNT) | L |
| PC0244096 | Anne Chambers | C | Collect CAPO logs on 23 June 09:45 - 14:15 (MSC 043J0436504) | -10 | NULL | 043J0436504 | EDSC | | SSC Adhoc Request | O |
| PC0243986 | Anne Chambers | C | Data missing from BRSS_HNGX_RAW_SLT_STATS table Sat 6th June | -13 | NULL | PC0244257 | EDSC | | Branch Support Server (BRS) | L |
| PC0243652 | Ben Peacey | C | PODG Reporter Lockfiles List issue | -11 | SSC PODG | | EDSC | | PODG | L |
| PC0240534 | Ben Peacey | D | HRDP Generator - Change description field to mandatory | -73 | NULL | | EDSC | | | O |
| PC0243988 | Ben | B | FW: CTO25 August Release Client &Token Workbook v1 | -15 | Ref Data - | | EDSC | | SSC Ref Data | W |
| PC0244292 | CPDelivery | B | FW: ADC OBC: ADC/CP1445/002++5 Travel Insurance ADC Scripts | -5 | Non BAU | SI241Q | EDSC | N | Request | W |
| PC0244339 | RefData-CPDelivery | B | FW: ADC OBC: ADC/CP1445/002++6 Travel Insurance ADC Scripts | -1 | Ref Data - BAU | SI241Q | EDSC | N | SSC Ref Data Request | W |
| PC0244262 | Rob Gelder | B | FW: DVLA data at state 0 | -8 | Ref Data - BAU | SI241Q | EDSC | C | SSC Ref Data Request | W |
| PC0244042 | Rob Gelder | C | RDT Rig: Investigate Yellow Man Code Changes to accomodate reviewed soft rules | -11 | NULL | YM_2000.mdb | EDSC | C | Unknown General/Other/Misc | O |
| PC0244282 | Rob Gelder | B | FW: Daily Report - BCR ADC/CP1361/001++6 | -5 | NULL | PC0244280 | EDSC | | Unknown | C |
| PC0244354 | Sudip Sur | C | 1501364 - Software.System.Error / Both counters pixillating display when in branch focus | 1 | NULL | GY:I7379772 | EDSC | N | HNG-X Counter App (CNT) | L |
| PC0244331 | Sudip Sur | C | IRRELEVANT TMSNX_AL_B_B>Error Message: Bad format message received MsgType=10 See journal t | 1 | NULL | DMartin5310L | EDSC | | NBX Agent | L |
| PC0244310 | Sudip Sur | B | Branch 352323 - NB102 Section 5 LINK ? State 4 | -4 | NULL | cardc2220P | EDSC | | Reconciliation | L |
| PC0244357 | Wayne Bragg | C | IRRELEVANT TMSNX_LINK_B_B>Error Message: Bad format message received MsgType=13 See journal | 1 | NULL | A9103262 | EDSC | | Link Authorisation Server (NAL) | L |

main window | query list | build query | find call

*Fig.7c: Call List – AJAX version (with bottom row of buttons)*

- SPLIT Grid

A new Split (or Stack On A Page) view was added to Peak. It uses the current query that you have loaded and displays a list of the Peaks in the query on the left-hand side of the screen with the right-hand side displaying the details of the selected Peak (in a similar way to the *Expanded* view).

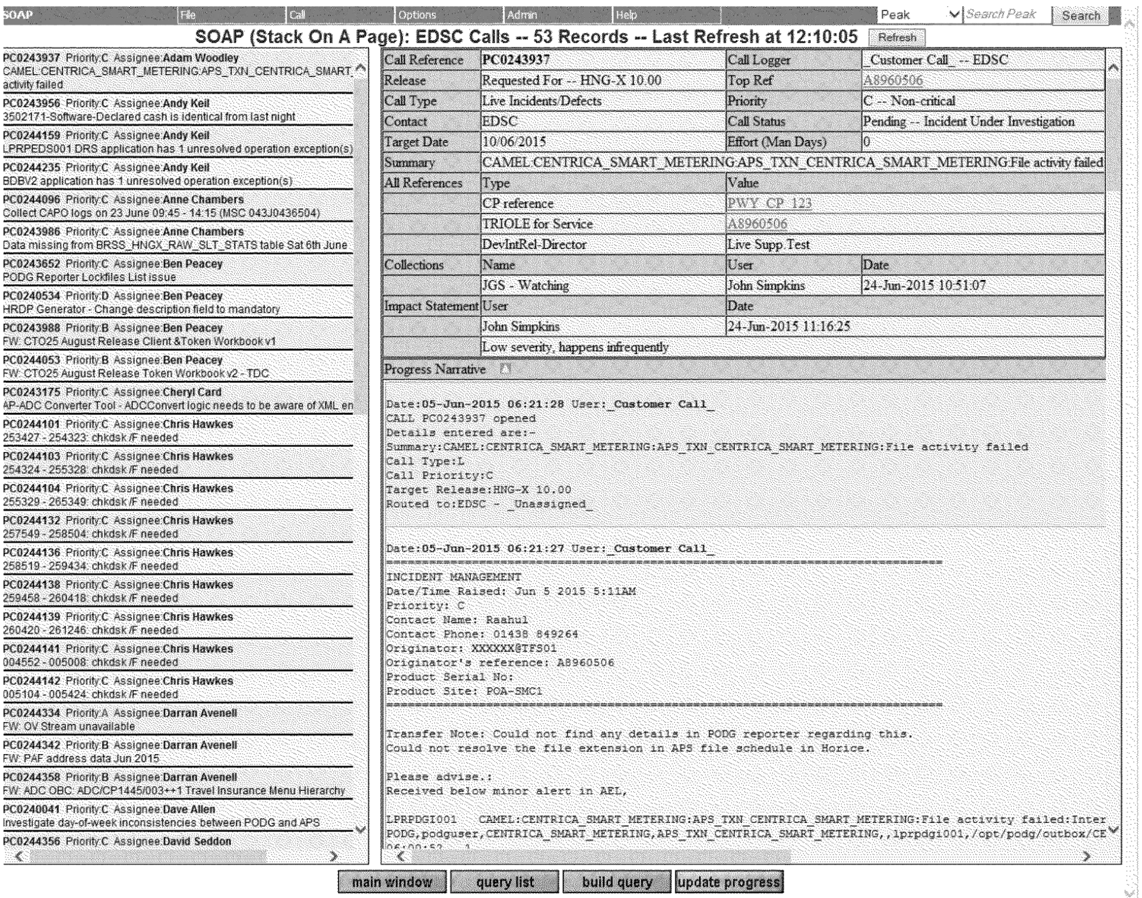



*Fig.7d: Call List – SPLIT Grid version (with bottom row of buttons)*

To update the currently displayed Peak, click **Update Progress** to open a *Call Details* window.

This grid does not automatically refresh. If you wise to refresh the Peak list you must use the **Refresh** button.

At the very top of the HTML/DHTML and bottom of the AJAX/Split *Call List* screens, there is a row of buttons containing some useful functions – most are described in the following sections otherwise they can be found under the major section headings. There may also be a (second) row of buttons at the top of *Call List* screen which show any customised queries that you have set up using Query Builder (§11) – only the first 9 queries will be displayed in alphabetical order and the disabled query is the current query.

## 7.1 Full List/SubSet (HTML/DHTML)

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These buttons will only be activated, if they are applicable. If no calls are selected, then both buttons will be greyed out. As soon as at least one call is selected, **SubSet** will be activated.

To view a subset of the displayed calls, select the subset (by using CTRL and clicking individual calls or in HTML grid, tick the boxes) then select the **SubSet** button. To return to the full list of calls, select **Full List**.

## 7.2 Bulk Update (HTML/DHTML)

This button will only be activated, if it is applicable. If no calls are selected, then the button will be greyed out. As soon as least one call is selected, **Bulk Update** will be activated.

*Bulk Update* enables you to update a group of calls (maximum is 100 calls) with the same information in one go. For example, if more than one call needs updating with the same type of details e.g. Summary, Top Collection, Progress Text, you do this by:

- Highlighting the calls you wish to update by holding down CTRL+clicking on the individual calls (or if in the HTML grid, use the tick boxes).
- Click **Bulk Update** button to open up the *Bulk Update* form (which is similar to the *New Call* page) where any changes will be applied to all the selected calls.
- When the changes have been **Save**d a results window will be displayed with any failures due to permissions.

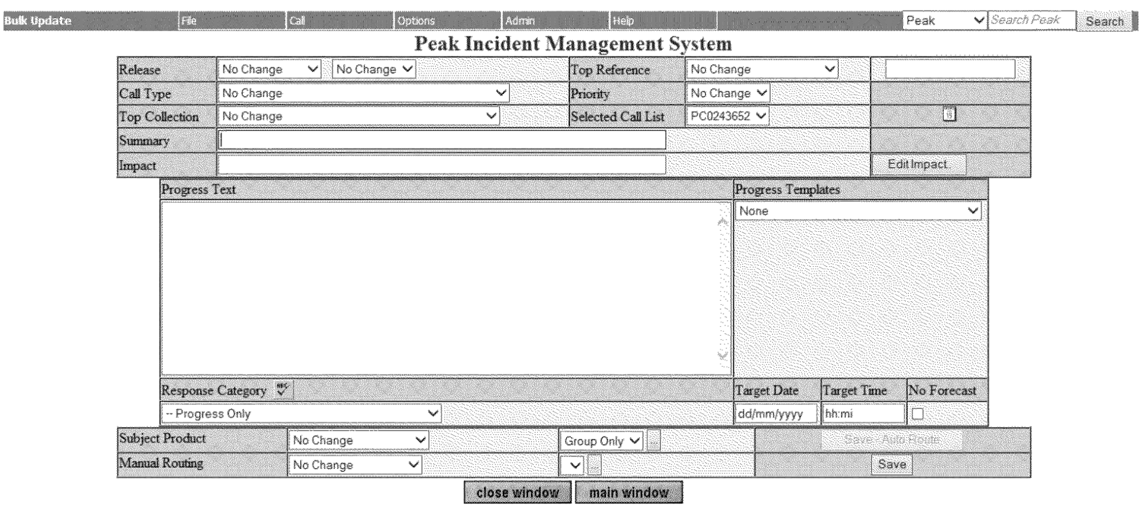


*Fig.7.2: Bulk Update form*

There is no **Close** button so it is not possible to bulk close calls but you can add a Final Response to a group of calls.

### 7.2.1 Bulk Update Release Planning (RP) records

To update several Release Planning (RP) records at the same time, click on the "" icon on the *Bulk Update* form to extend to display the Release Planning section (which is very similar to the *RelMan* page displayed via the *Release Mgt.* Tab, §8.8).

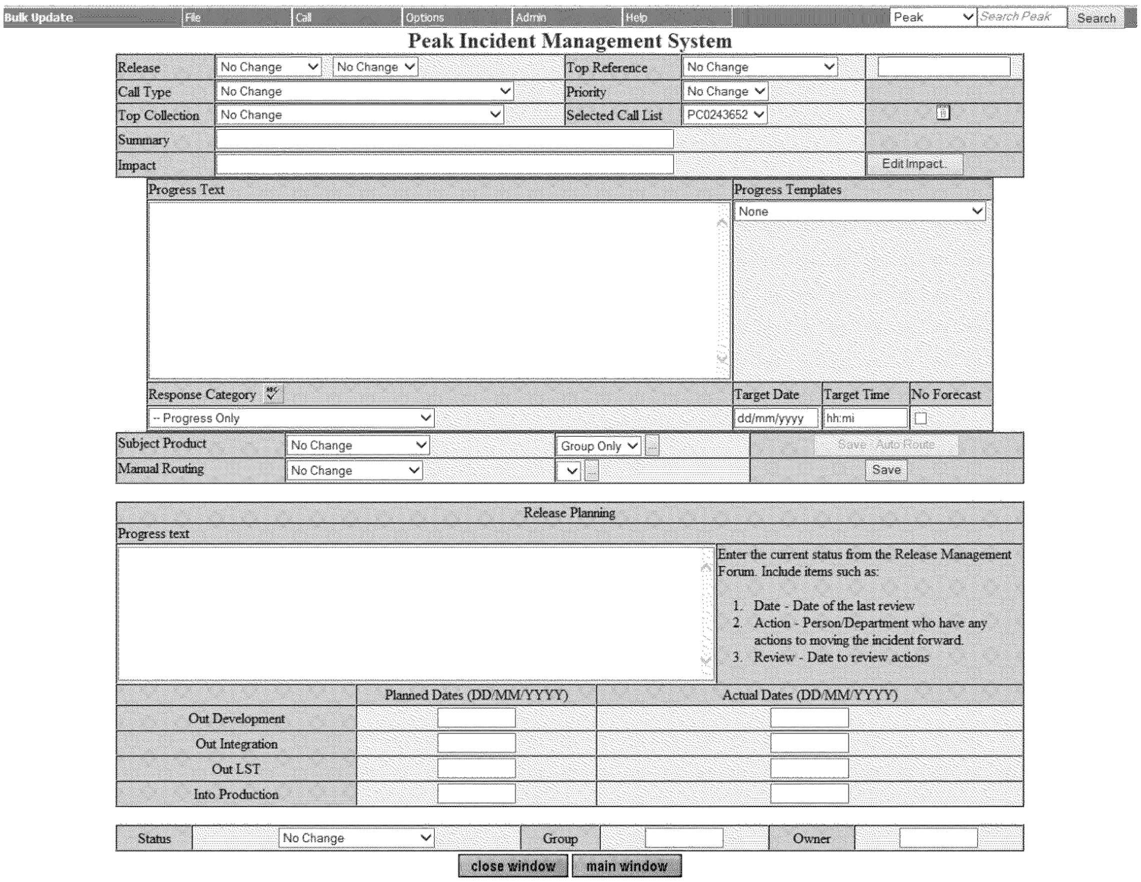


*Fig.7.2.1: Bulk Update form with Release Planning section*

Note that if the list of Peaks are added to a Collection starting with "RP-" then a new RP record will be created for each incident. If you do this, then it is recommended to add some text to the 'Progress text' field explaining why the Peaks have been added to the Collection.

Before exiting, make sure you press the **Save** button to make the RP changes to all the selected records.

## 7.3 Change Layout (HTML) and Save Layout (DHTML)

A lot of the column properties within the HTML/DHTML *Call List* can be customised and then saved; there is no method to alter the layout of the AJAX grid.

To customise the HTML layout, select the **Change Layout** button to display a sub menu for resizing and moving the columns in the grid then save any changes by pressing **Save Layout** or **Cancel Layout**.

To customise the DHTML layout, this can be done within the *Call List* grid itself:

- To change the column width
  Point the mouse at the dividing line on the right side of the column till the cursor changes to a horizontal arrow "↔" then click the left mouse button and drag to the new preferred point and release the mouse.
- To change the order of the columns
  Click and drag each column across to the desired position
- To sort a selected column
  Point and click the relevant column heading
  Note that changing the sort order in this way will only affect the current display; the order is not saved. If you wish to save a sort order, edit the query via *Build Query* (§11.1.8).
- To resize the window
  Use standard Windows techniques with the mouse (this information is not saved as a preference)
- Then select the **Save Layout** button

Any layout changes you make will only apply to the current query.

If you create a new query by editing an existing query and saving it to a different name then the layout will also be copied over from the original query.

To configure which column headings are actually displayed in the *Call List* page, use Query Builder to edit the 'Display Fields' within the relevant query (§11.1.9).

## 7.4 Refresh (HTML/DHTML/AJAX/Split)

This forces an immediate update of the data in the call grid to show any changes. There is an automatic refresh timer and this can be set via *Preferences* (§13.3.2).

## 7.5 Copy (HTML/DHTML)

You can use the **Copy** button to copy <u>all</u> the incidents in the *Call List* (including headers) into the clipboard as a tab-separated list which can then be pasted into e.g. an Excel spreadsheet which can then be manipulated or printed (§14.1).

On the HTML *Call List*, IE5+ is required and it may take some time to copy a large grid, the information will be available as soon as the **Copy** button is re-enabled.

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## 7.6 XML (HTML/DHTML)

The **XML** button will retrieve the call details for all incidents in the current *Call List* and display them on one page; in a format similar to the *Expanded* view.

This page could then be printed using the browser print option; where each incident will start on a new page.

This feature could be used to send copies of a Peak call or a list of incidents to someone by e-mail. To do this, you need a compliant XML parser (IE6+):

- Create a call list to display all the incidents you wish to send.
- Press **XML** which will eventually open a new window showing the complete call defaults for each call in the current query.
- Use the File-Save feature of the browser to the save the XML file to local disk.
- Copy the style-sheet from the Peak share (\\ssc.fs.fujitsu.com\share\PeakStyle3.xsl) to the same location as the XML file. Open the XML file in a Text Editor and change the second line that points to the style-sheet from:

  <?xml-stylesheet type="text/xsl" href="https://ssc.fs.fujitsu.com/Peak/xslt/PeakStyle3.xsl"?>
  to
  <?xml-stylesheet type="text/xsl" href="PeakStyle3.xsl"?>
- Now e-mail both files to the end user.
- If the recipient opens the XML file in a browser that complies with xslt standards (IE6 or Firefox), the call details will be displayed.

## 7.7 Open in Excel (HTML)

The " " icon, which only appears in the HTML grid, will import all the incidents currently displayed in the *Incident List* page into a Microsoft Excel Spreadsheet.

You can open or save the spreadsheet, by default the spreadsheet will have the name "peakEXCEL.xls".

If, when opening the spreadsheet, you get the following warning, respond "Yes":

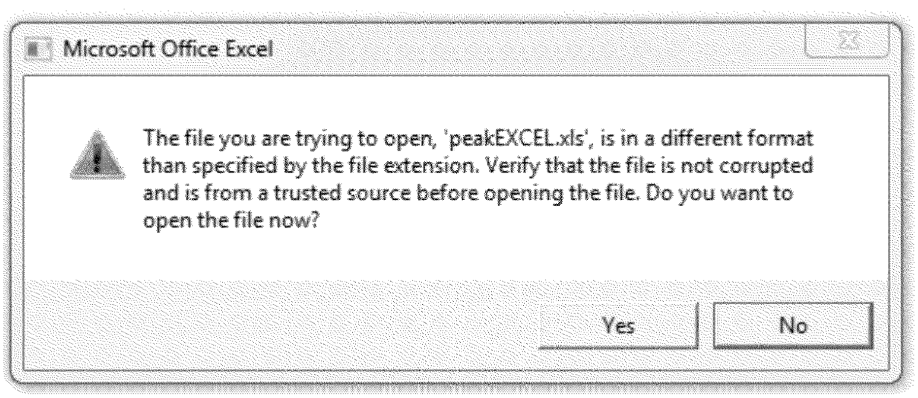


*Fig.7.7: Excel warning about peakEXCEL.xls format*

## 7.8 Search Grid for Text (DHTML)

The **Search Grid for Text** button, which only appears in the DHTML grid, will search the call details of all the incidents in the current Call List. If it finds an incident which contains your text anywhere within its call details, it is highlighted in the *Call List* page.

# 8 Displaying Call Details

To display the details for a particular call from *Call List* either double-click a call or highlight an entry and click the **Call Details** button, which will display a new page containing the properties of that call:

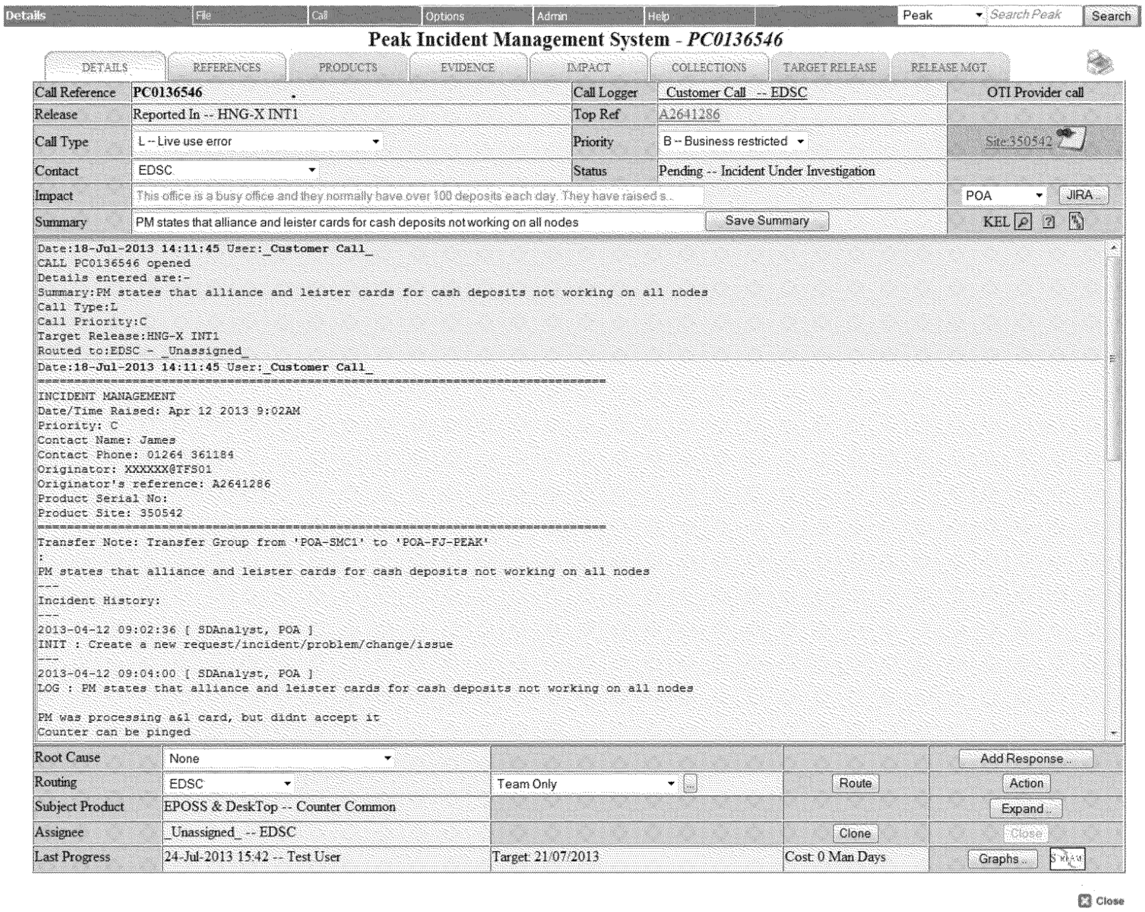


*Fig.8: Call Details raised on TfS by Branch 350542*

A lot of the incident information now appears in tabs shown at the top of the *Call Details* page. If a tab has an orange background this means that at least one item has been defined under that tab. For example, Fig.8 shows that there is at least one Reference, some Evidence, Impact and Collection associated with this particular call.

Updates to the call will appear in an area in the middle of the *Call Details* page called the Progress field. If you click on the **Expand** button, you will be able to see the progress updates, references, collections and Products listed on one page.

If a button has ellipses "(**..**)" after the name (e.g. **Add Response..**) then another screen will be displayed asking for more information but if the button name does not have ellipses (e.g. **Route**) then that operation will just happen.

You can send someone a link to a specific call, so they will be taken straight to the *Call Details* page for that call, by copying the relevant URL into the e-mail:

IRRELEVANT

## 8.1 Details tab

### 8.1.1 Call Reference

All Peak call references begin with "PC" followed by a 7-digit number which uniquely identifies each call. The call number is assigned automatically when the Peak call is created.

The Call Reference for live incidents, that is those of 'Call Type: L', will appear in red in the HTML *Call List* (§7).

### 8.1.2 Call Logger

The 'Call Logger' field will contain the name followed by the team of the user who raised the call on Peak. For customer calls, this team will be the OTI Administrator team (currently the SSC). For QC calls, this field will contain the QC PEAK Interface team.

When a Final response is added to the call, it is automatically routed back to the Call Logger to approve the response.

If you click the 'Call Logger' hyperlink, then a new e-mail template will be generated addressed to the Call Logger with the subject "Query regarding Peak PCnnnnnnn you logged".

### 8.1.3 OTI Provider call/OTI InTransit/OTI Down

You can determine the status of the OTI interface link (§4.3.2) by looking at the *Call Details* of any OTI-originated incident:

- OTI Provider call — shown if the OTI is up
- **OTI Down** — shown if the OTI is down

The OTI up/down status is set on Peak manually by SSC when the OTI Administrator informs them of a change in state (§20).

- OTI inTransit "»" — shown briefly when a Peak is sent to an external Helpdesk (e.g. TfS) to raise a new incident at that desk
- OTI Consumer — shown when a Peak has been received by the external Helpdesk. It will remain in this state until they send back a Final response.

If the status is stuck at OTI in Transit, then you can click on the icon "»" to retry the send to the external Helpdesk.

### 8.1.4 Release

This field holds information related to releases pertaining to a particular Peak call:

- Reported In indicates which release the fault was found in
- Requested For indicates which release the fix should be applied
- Proposed For indicates which release the fix is proposed for
- Targeted At indicates which release the fix is targeted at – this can be changed throughout the lifecycle of a call
- Released At indicates which release the fix was actually applied

To manage the Releases, click on the *Target Release* tab (§8.7).

### 8.1.5 Top Ref

References are used to relate resources of information to a call. These references may be used to search and display a specific set of calls via *Quick Search* or Query Builder.

The **Reference**s button will take you into the *References* page where you can **Add Reference**, **Delete** existing references and nominate a **Top Ref**erence which will make that particular reference visible in the 'Top Ref' field on top-level *Call List* and *Call Details.*

To manage the References, click on the *References* tab (§8.2).

### 8.1.6 Call Type

The 'Call Type' defines the type of call that was logged:

- L raised on the Live estate
- E Enhancement
- R Release note
- A Administrative call
- O Operational SSC
- C Cloned call
- Z Zero immediate impacts
- etc.

When you raise new calls, it is possible to set the 'Call Type' field to default to a certain call type via *Preferences* (§13). The 'Call Type' chosen may affect the list of priorities displayed in the drop-down list. Similarly, if you subsequently change the 'Call Type' which means that the current priority is now invalid, the 'Priority' will automatically change to the lowest possible priority.

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### 8.1.7 Priority

Each call must have a priority associated with it. The priority levels start from “A” to “Z” with “A” being the highest priority level and “Z” the least.

For example:

- A business is stopped
- B business is restricted
- C non-critical
- D internal

Calls logged as “A” priority will be shown in red in the *Call List* page (§7).

Priorities are originally set by the Call raiser and may be modified on Peak by authorised roles (§4.2.4).

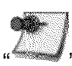
When creating new calls, if ‘Default Logging Call Type’ was selected in *Preferences* (§13) then the lowest priority available will be the default priority. Choosing a valid priority activates and populates the ‘Target Date’ and ‘Target Time’ fields at the bottom of the *New Call* screen.

Each new user will have a default alert (§17) to e-mail them if they are assigned an ‘A’ priority call.

Note that changing the priority on Peak will not automatically update the priority on the external helpdesk if the call originated over OTI.

### 8.1.8 Site/TfS Group/Branch Notes

The ‘Site’ hyperlink field exists if the call was raised via TfS by a Branch and it will contain the FAD/Branch code. An example of a TfS call raised by Branch 055003 is shown in Fig.8. Clicking on this hyperlink, will take you into TfS with a view of all open TfS calls raised on that particular site but first you must set up your TfS login details via *Preferences* (§13).

If the ‘Site’ field has an orange background and icon “” (as shown in Fig.8) then this Branch has at least one branch note associated with it. Clicking on this icon will display the notes that were set up via **Branch Note** in *Main Menu* (§25) and will allow you to include additional notes.

If the call was raised by a TfS group like ‘POA-SMC1’ then the text ‘TfS Group: POA-SMC1’ will appear in this field (as shown in Fig.8.1.11a) otherwise the field will be empty.

### 8.1.9 Contact

The ‘Contact’ field usually contains the name of the Call Logger and will be the user that the call will be returned to once a Final response has been added.

If a call is closed but the Call Logger has left the Company then the call will be routed back to the Call Logger’s team.

### 8.1.10 Status

This field indicates which stage, within the lifecycle of a call, this particular call is in: Open -> Pending -> Final -> Closed (see §4.2.3 for more details).

### 8.1.11 Release Peaks

A Release Peak is a collection of fault Peaks which are fixed in a specific Release. It should have references to all the fault Peaks and also a reference to the Release Note. This association is usually set up by the Release Management team.

The **Release Peaks** button will only appear if the call has an associated Release Peak (with Call Type: R – Release Management Forum) defined as a 'Reference'.

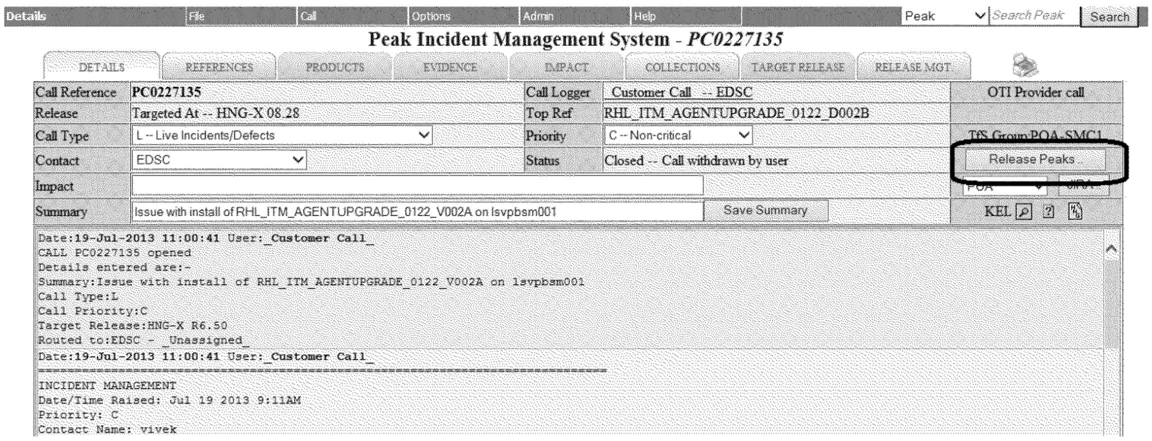



*Fig.8.1.11a: Peak PC0227135 with* ***Release Peaks*** *button*

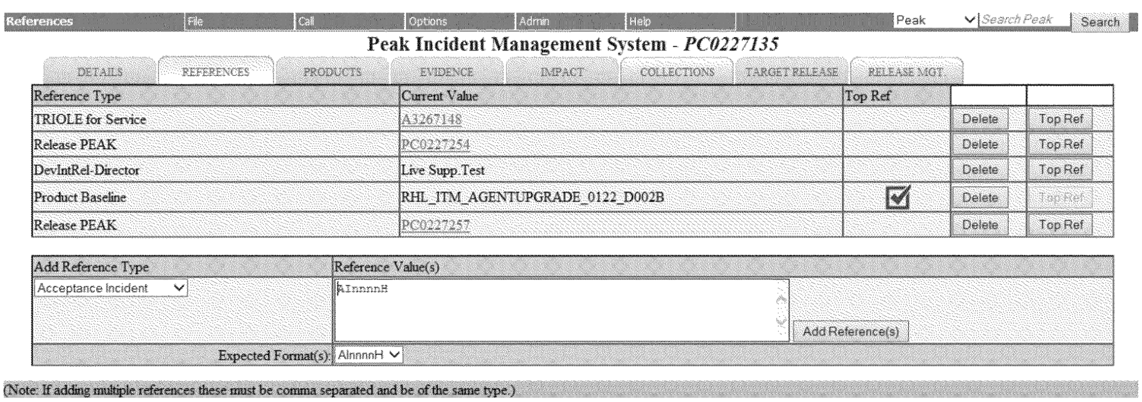



*Fig.8.1.11b: References tab shows PC0227135 has 2 associated Release Peaks*

If you click the **Release Peaks** button, the *Query List* page will show a brief summary of the progress of the Release Peaks and Release Notes associated with this Peak.

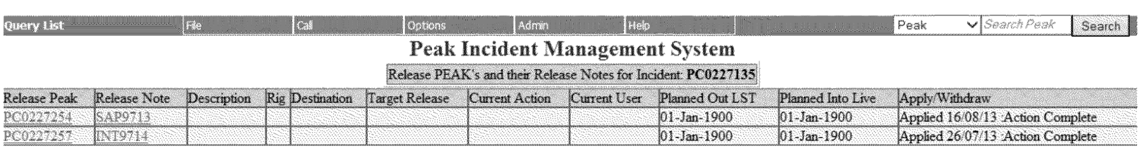



*Fig.8.1.11c: Output after pressing* ***Release Peaks*** *on PC0227135*

### 8.1.12 Business Impact

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The ‘Impact’ should give a brief description of the perceived impact, in terms of cost and scope that the incident is having on the customer or estate and is used by the Business Impact Forum (BIF) (§8.1.19.2).

Once an impact has been added, the text of the Impact will appear in orange in the *Call Details* page; the first 63 characters (depending on the font) will initially be displayed but you can use the right-arrow key to see the first 80 characters. The full impact text can be seen in the *Expanded* view and printouts.

To manage the impacts, click on the *Impact* tab (§8.5).

### 8.1.13 JIRA

JIRA is part of the Apt (Application Lifecycle Methods and Tools) framework. It is used by Development teams to create a JIRA entry to record code changes against. No code changes may be made without a JIRA record.

JIRA is a recognised standard for Project Management and it allows for code reviews as it links directly to the subversion version control software used by Fujitsu.

To create a new JIRA from a Peak, highlight the description text in the Progress area of the Peak, from the drop-down list select a project then press the **JIRA** button.

### 8.1.14 Summary

The ‘Summary’ field is used as the title of the call and can be amended as long as the call has not been closed. You can amend this field by typing text immediately into the ‘Summary’ box then click on the **Save Summary** button to commit the change.

The first 63 characters (depending on the font) of the ‘Summary’ field will initially be displayed in the *Call Details* page but you can use the right-arrow key to see the first 100 characters. The full summary text can be seen in the *Expanded* view and printouts.

The text in the ‘Summary’ field will appear greyed-out if the user’s role does not allow changes or if the call is closed (§4.2.4).

### 8.1.15 Links to KEL (Known Error Log)

These 3 icons take you directly to the Known Error Log (KEL) via the SSC website (which uses identical login credentials as the Peak system). See §26.1 for more details.

#### 8.1.15.1 Search the KEL

The “ ” icon enables you to search the KELs on the SSC Website for the best matching KEL for this call after highlighting some text in the Progress Narrative. You will be taken into the SSC website to a list of KELs that contain the highlighted text.

The icon “ ” gets Peak to suggest the best matching KEL given the existing symptoms in the call. Peak will automatically select the important words from the first progress of the incident and then search the KEL using these words. You will be taken into the SSC website to a list of the top 10 matches.

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#### 8.1.15.2 Create new HNG-X KEL

Clicking the icon " " will create a new KEL after you highlight some text in the Progress Narrative (which will appear in the 'Symptoms' of the new KEL). You will be taken into the SSC website "Create HNGX KEL" page where the 'KEL Title' and 'PEAK Call Ref' have also been automatically populated from the Peak call.

### 8.1.16 Progress

The area in the middle of the *Call Details* page is referred to as the Progress field. It displays a trail of where the call has been (audit information) and previous updates made to the call. Two background colours can be configured via *Preferences* to distinguish between different Progress updates (§13).

The text displayed in this area is read only; not editable and can contain links to References, evidence, user details/teams/admin and embedded HTML.

To see an expanded view of all the Progress Narratives (without the scrollable area) use the **Expand** button.

#### 8.1.16.1 User Details

In the Progress Narrative, if the user's name appears (usually after an update) as a hyperlink then by clicking it you can find out more information about that user such as phone number, e-mail, teams they are members of and admin details (like last logon).

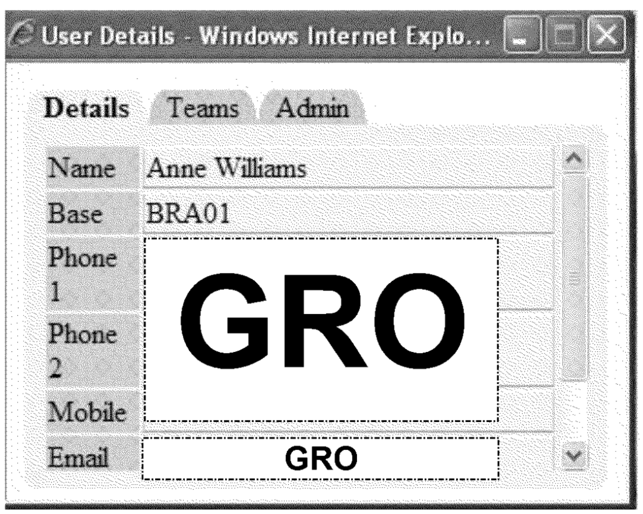


*Fig.8.1.16.1:User Details, Teams, Admin tabs*

Clicking on the 'Email' hyperlink in the 'User Details' window will generate an e-mail addressed to that user and with the 'Subject' field pre-populated with the text: "Peak Incident PCnnnnnnn".

If the user name does not appear as a hyperlink in the Progress Narrative then that user has since left the Company and been removed from Employee database.

### 8.1.17 Root Cause

The 'Root Cause' field is visible only from *Call Details* page. As a standard user, the root cause can be changed only if the call is on your Team's stack (§4.2.4). A 'Route Cause' must be specified before the call can be closed.

### 8.1.18 Add Response to a call

See §9.

### 8.1.19 Routing call to another team/user

Calls on Peak can be transferred between teams and within teams to individuals by first changing the 'Routing Team' and/or 'Routing User' fields (using the drop-down lists) then pressing the **Route** button. The default value is the currently assigned team and user. Users with the standard role may only route Open calls that are assigned to one of their teams.

If you know the user you want to route a call to but do not know which team(s) they are a member of, you may search for a user by pressing the ellipse button "**(…)**" which is next to the 'User name' field. This will display the "Choose a user" pop-up window that lists all the valid Peak users. Under 'Select User', choose the name you are looking for and then 'Select Team' will be populated with any teams that they are members of. Choose the appropriate team and press **OK** to copy these details back into your original form or **Cancel**.

Usually you will be able to route calls directly to individuals within a team. However team restrictions can be set up by the Peak Administrator, to prevent the routing of calls directly to members of a team. Instead the call will be routed to the "_Unassigned_" user within that team. This set-up is applies for calls routed to the EDSC, when a Prescanner within the SSC is responsible for routing all new unassigned calls to individual users.

Note that in the *Call Details* page, only the short name of the 'Routing Team' are displayed. But if you have IE7 or later, if you hover over the team name in the drop-down list a tool-tip will appear with the full team name.

#### 8.1.19.1 QFP Team

The Quality Filter Process (QFP) team is the gateway into Systems Integration (SI) for non-SI teams, so all calls must be routed to this team for progressing by any SI team.

The members of the QFP are representatives of all the SI design/development units. Allied to the QFP Team is the QFP Forum which has a role similar to the Release Management Forum (RMF) but which authorises the release of fixes into baseline releases, rather than the live estate. For more details see document reference DE/PRO/015.

#### 8.1.19.2 BIF Team

The Business Impact Forum (BIF) team is the initial review body for incidents raised by the live estate. They meet daily to discuss all Peaks on their stack and decide, depending on the business impact, whether a fix is justified. If it is not then the call is closed with a KEL otherwise the call will be routed through to Development to investigate and provide a fix is required. This relies upon Business Impact statements (§8.1.12) from the support and Development teams.

If an incident is urgent, it may by-pass the BIF team straight to Development but this should be stated in the Business Impact.

### 8.1.20 Action/Remove Action

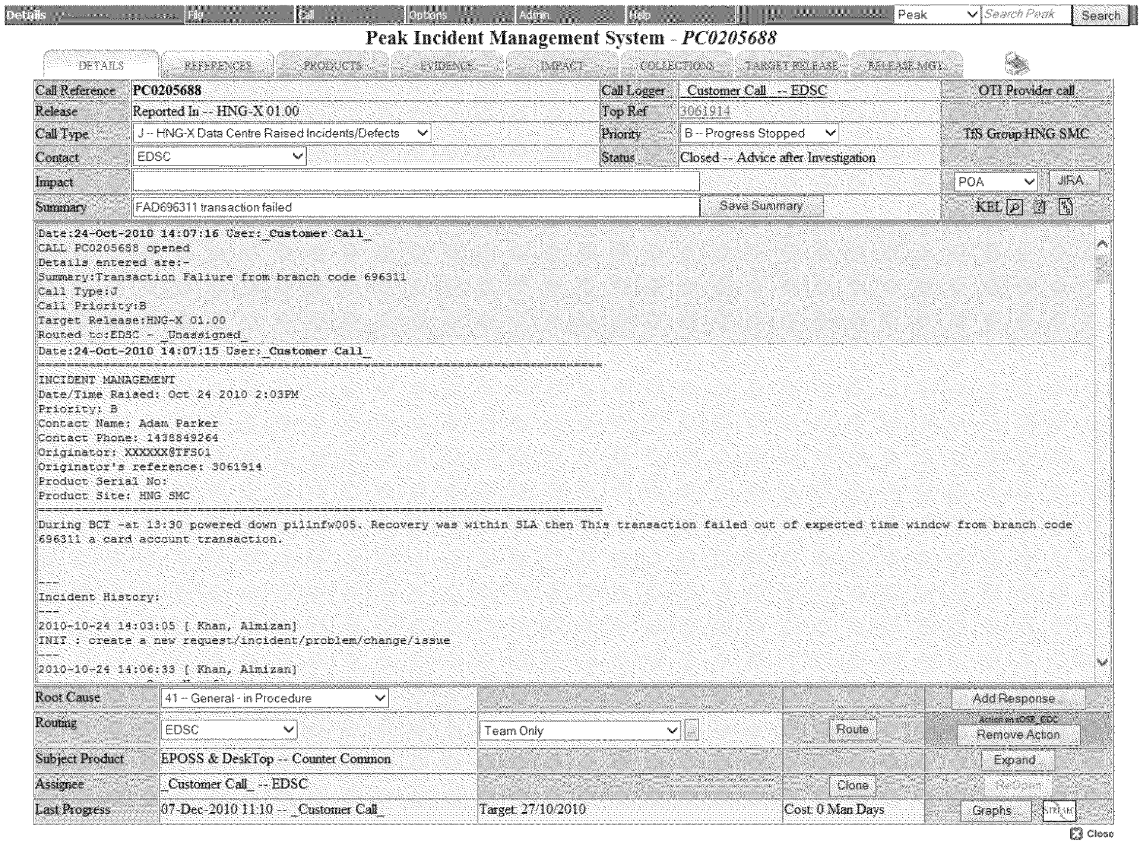


*Fig.8.1.20: 'Action on xOSR_GDC' team*

If you would like to place an action on a call to ensure that a person or team carries out certain tasks related to that incident (without losing control of the incident) then you can use this button which toggles between **Action** and **Remove Action**.

First change the Routing Team (and User) fields to the relevant team and user that you want to place an action on and then press **Action**.

Once the incident has an action defined, the **Action** button toggles to **Remove Action,** the button background changes to orange in *Call Details* and the actioned team is displayed above the button (e.g. "Action on xOSR_GDC" as shown in Fig.8.1.20).

This will cause the actioned user/team to see this call in assigned queries as if it is on their stack but the call is not actually assigned to them. By default, you will not get an alert if call is actioned on you but this can be configured via Alerts (§17).

Once the tasks related to that call have been completed, you can **Remove Action.**

Note that if you action a team in another Company then that will allow them to access the call (§4.2.7).

### 8.1.21 Subject Product

Each Peak call must be related to at least one product. If the incident has been associated with more than one product then the background to the *Products* tab will appear orange in the *Call Details*.

To manage the products related to an incident, click on the *Products* tab (§8.3).

### 8.1.22 Expanded call details

The *Call Details* page displays limited progress text, to view the progress full-screen (without the scrollable area), click the **Expand** button to get an expanded view.

#### 8.1.22.1 To save call as a file

The *Expanded* Call Details page is similar to the *Print* view and from this page, you can save the call to a HTML file:

- From the Explorer File menu, select "Save As".
- In the "Save Webpage" information box, respond **Yes** to saving webpage.
- A standard Microsoft Save Webpage window is displayed and defaulted to your local drive. Type in your filename and click **Save**.

### 8.1.23 Assignee

The 'Assignee' field shows you who the call is currently assigned to. The user name and team are concatenated and displayed in this read-only field. A call can be assigned to only one user at any one time (whilst the action may be placed on another user).

Clicking on the hyperlink in the 'Assignee' field will generate a new e-mail with the 'To' e-mail field populated with the full e-mail address of the assignee as well as the 'Subject' field populated with the text: "Query regarding Peak PCnnnnnnn you have assigned".

### 8.1.24 Clone a call

Pressing the **Clone** button will create a duplicate Peak call and display it in the *Call Details* page. The clone will look exactly like the original (including all progress history and references) except for the following:

| | |
|---|---|
| Call Reference | The clone will have its own unique Peak call reference |
| Call Logger | Name of the Cloner and their default team |
| Top Ref | A reference to the master call is made the top reference. Similarly in the master call, the cloned call is made the top reference. Most of the original references are removed other than those to external systems. |
| Call Type | "C – Cloned call" |
| Contact | Name of the Cloner |
| Status | 'Pending – Potential Problem Identified' |

| | |
|---|---|
| Progress<br><br>user | Some details about the creation date, time and user of the cloned call are added at the top, before the progress history from the master call.<br>An update showing that this call was cloned, the original call reference and are appended to the end of the original progress. Similarly the cloned call reference will be appended to the end of the master call. |
| Routing | The clone is automatically routed to the Cloner's default team and username. |
| Assignee | Name of the Cloner and their default team concatenated together. |
| Evidence | Links to all the evidence items are copied across |

Two separate incidents will then exist on Peak (with different call references) which can be dealt with independently. Call cloning only takes place on Peak so if the call originated from the OTI link, a duplicate call will not be created on e.g.TfS.

Usually you will be able to clone calls however team restrictions can be set up by the Peak Administrator, to prevent all members of a team from cloning calls. If you wish this feature to be enabled/disabled for your team, first check with the Team manager then contact the Peak Administrator.

Note that you may clone closed calls but only if your Peak role allows you to do so (§4.2.4).

### 8.1.25 Close/Reopen Peak-originated calls

The **Close/ReOpen** button will only be enabled if the call originated from Peak and your Peak role allows it; otherwise it will appear greyed out (§4.2.4).

Within the *Call Details* page, this button toggles between **Close** and **ReOpen** depending on whether the Peak call is open or closed.

For details on closing OTI-originated calls, see §9.4. Closed OTI-calls cannot be reopened using Peak.

#### 8.1.25.1 Closing Peak calls

You will only be able to **Close** Peak-originated calls and only if:

- you are a member of the Assigned team
- you are a member of the Call Logger's team
- you have Administrator privileges
- you have set a Final Response Category (via **Add Response**) and a Root Cause – but only if the call has been through the rest of the Peak lifecycle (§4.2.3)

Once the call is closed, many fields and some buttons are disabled out but it is still possible to add a response and the **ReOpen** button will remain activated.

#### 8.1.25.2 Reopening Peak calls

You will only be able to **Reopen** Peak-originated calls and only if:

- you are the Call Logger
- you are someone from within that user's team

Clicking on **Reopen** will immediately reopen the call and assign it to the current user and team. Full functionality will be returned; all the fields and buttons will be enabled again.

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Note that instead of reopening a call, you could clone a close call; but only if your Peak role allows you to do so (§4.2.4).

### 8.1.26 Last Progress

This a view-only field which displays the date, time and user who last made an update in the Response Text or Progress box for this call.

### 8.1.27 Target

This field is automatically populated with a date which is generated from the Call Type, Priority and date/time when the call was raised on the Peak system.

For example, the generated targets for incidents of the Call Type ‘L’ (Live incidents) are:

Priority A = 1 day

Priority B = 3 days

Priority C = 5 days

Priority D = 10 days

### 8.1.28 Cost in Man Days

The data in this field used to be used by the Release Management process.

Development can add the expected man days cost of the work to implement the change requested. This is added from the *Add Progress* page and may be searched using Query Builder.

### 8.1.29 Graphs

To see a simple graphical representation of the progress history of a call and how long it spent with different teams, click the **Graphs** button.

It will only show the teams after the call has been routed across to Peak so the time spent at the other end of the OTI will not be shown.

### 8.1.30 Stream

Stream is a product that the Security Team uses to register security incidents.

To generate an XML extract of a Peak call which is suitable for the Stream database, click the icon “STREAM”.How the Security Team uses this extract is beyond the scope of this document.

### 8.1.31 Close

Pressing the “Close” icon will close the current browser page.

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## 8.2 References tab

In the *References* page, you can **Add Reference**, **Delete** existing references and nominate a **Top Ref**erence which will make that particular reference visible in the 'Top Ref' field on top-level *Call List* and *Call Details* pages (§8.1.5).

To add a reference to an existing incident:

- Select the reference type from the 'Add Reference Type' drop-down list (e.g. 'MSC').
- If necessary, change the template for the reference type by using the 'Expected Format' drop-down list (e.g. '043Jnnnnnnn' and '043Jnnnnnnn-nn').
- Type in the 'Reference Value' – which must be of the 'Expected Format' - then **Add Reference**. Note that multiple references of the same type can be added provided they are comma separated.

Many references are hyperlinks to external resources e.g. TfS calls, SSC KELs, MSC Tasks, Release Notes, documents, etc. For example, if a call was raised on TfS, the TfS call reference would appear as a hyperlinked top reference (like 3245056). Clicking on this link will take you directly to that particular call in TfS but first you must set up your TfS login details via *Preferences*, see §13.

If you add a reference of type 'Product Baseline', next to the **Add Reference** button, the icon " " will appear. If you click this icon, you will be able to search then select from a list of current software baselines by typing in a minimum of 4 characters.

## 8.3 Products tab

To view the products related to an incident, in the *Call Details* screen, click the *Products* tab.

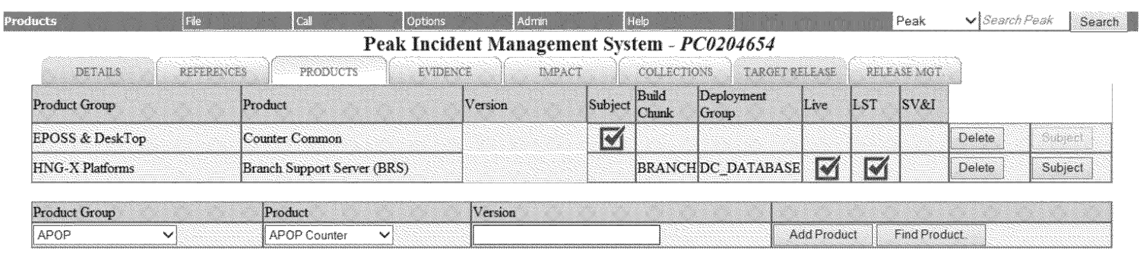


*Fig.8.3: Call associated with 2 Products*

If there are any Products already associated with the call then it will be shown in the top section of this screen (as shown in the Fig.8.3).

The first product associated with a call is automatically designated the default 'Subject Product' which means that it will appear in the *Call Details* page (§8.1.21). To change the default product, click the relevant **Subject** button in the *Products* form.

Note you will not be allowed to modify the *Products* if your role does not have the necessary privileges (§4.2.4). Consequently the middle section of the screen (as shown in the Fig.8.3) will only be visible for privileged roles to add a product to a call:

- If you know the product group and product then select a 'Product Group' which will then automatically populate the 'Product' drop-down list with only relevant products, then click **Add Product**.

Or

- If you only know the product (but not the product group) or you wish to see a list of all the available products then use **Find Product**. Start typing the product name into the 'Product name search' field and the products matching the text you entered will be displayed. Click the relevant **Select Product** button and this product/group will be copied into the *Products* page, then select **Add Product**.

If the product cannot be found then you can ask Peak to add it by clicking the 'Request a new product' link which will generate a new e-mail template addressed to Peak with the subject "Product request".

The Build Chunk, Deployment Group, Live, LST, SV&I headings are the release (deployment) groups and the rigs supporting the platform. If the 'Product Group: HNG-X Platforms' is selected then these fields will be automatically populated. This information was imported from the Platform Hardware Instance List (PHIL) document.

## 8.4 Evidence tab

Aside from text which can be directly input on to a Peak call, extra information such as log files, UNIX dumps, executables, etc. can be attached to calls as evidence (to a maximum size limit of 90Mb).

If a call has evidence attached, the *Evidence* tab will appear with an orange background in the *Call Details* page (as shown in Fig.8). There will also be a hyperlink to the evidence file in the Progress Narrative which can be used to open the evidence item directly.

The *Evidence* page will display a list of evidence files attached to this particular Peak call:

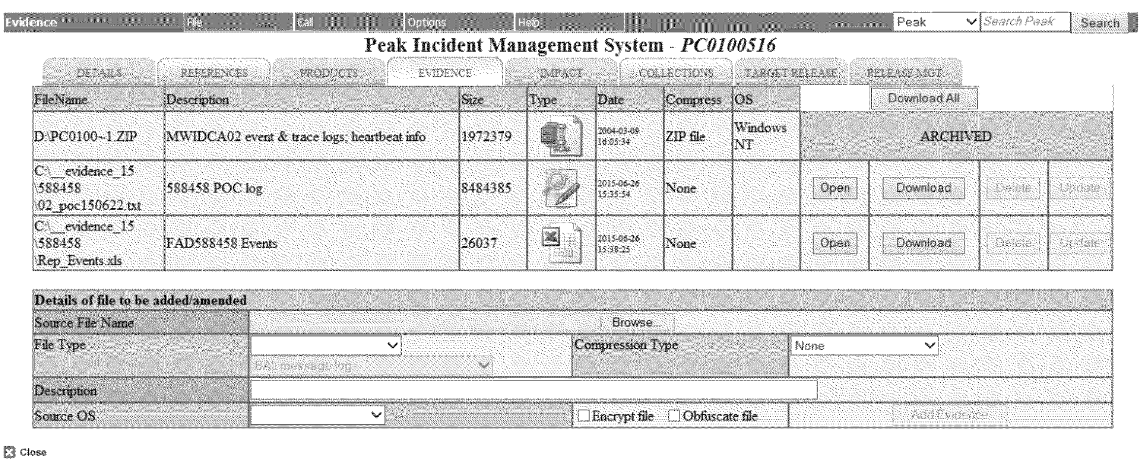


*Fig.8.4: Three evidence files: one is encrypted and one has been archived*

### 8.4.1 Adding evidence

Generally, to add a file as evidence to a Peak call:

- In the *Evidence* page, type in the 'Source File Name' (which is a mandatory field denoted by the orange background) or use the **Browse** button to display the standard Microsoft Windows "Choose file" window to locate your file then click **Open**.
- (Optional) If Peak has not correctly filled in the 'File Type' or 'Compression Type' then update these fields.
- Type in a 'Description' of the type of file or evidence attached (mandatory)
  The 'Description' field will used in the hyperlink text in the Progress Narrative; which if clicked can be used to open the evidence item.
- (Optional) Choose the 'Source OS' (Operating System).
- Click **Add Evidence** to include the chosen file to the call, the new evidence is added to the list of evidence at the top of the page.

When an evidence file is uploaded, it is given a unique internal name starting with the Peak call reference and ending with its character extension (e.g. PC0101234_123456.doc). Therefore when you open the evidence item, Windows will know which program to use to open it. But if you choose **Download**, the file will be saved using its original file name.

Compressed files can be added to calls but only if they do <u>not</u> need to be obfuscated.

#### 8.4.1.1 Encryption of evidence

Peak can be used to handle secure data by encrypting data which is uploaded as evidence.

Selecting the 'Encrypt file' option will update the Progress text to log that a file has been placed in the encryption queue. The encryption job runs every 10 minutes and will compress the file, convert it into a Self-Decrypting Archive (SDA), add the evidence item and update the Progress text with a random pass-phrase (minimum of 10 characters) along with a link to the encrypted data.

If encryption fails for any reason, the file will not be made available to download, the Call Progress will be updated with a short error message and the User who added the evidence will be sent an e-mail.

Once available, another Peak user will be able to download the encrypted (*.EXE) file and enter the pass-phrase to decrypt and access the data.

For additional security, encrypted files are deleted 28 days after the call is closed.

The software used to create the SDA is open source software AxCrypt which encrypts using AES-128 File Encryption.

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#### 8.4.1.2 Obfuscation of evidence

Before evidence containing personal/sensitive data can be passed to external Peak Companies (like the Fourth Line Offshore Support team in India GDC) it must first be obfuscated. To ensure this happens, the Obfuscation Tool has been integrated into the *Evidence* page.

The following files must be obfuscated before being sent offshore:

- counter PostOfficeCounter log
- counter message log
- BAL message log
- database exports

Files not listed above (e.g. BAL OSR logs) do not require obfuscation and may be attached in full.

Each file type has its own list of patterns that it is checking for, so you MUST select the correct type of file (e.g. 'BAL Message Log') after selecting 'File Type=Obfuscated File' and/or ticking 'Obfuscate file'. If the wrong file type is selected, the incorrect pattern file will be applied to the log and sensitive data may not get obfuscated.

If you are uploading evidence that has been logged by anything other than the default debug level (i.e. if you change the Log4j reporting level) the output will have to be checked manually for sensitive data.

The Obfuscation Tool can only deal with individual uncompressed files so the files must be presented to Peak one at a time and uncompressed:

- In the *Evidence* page, type in the 'Source File Name' (which is a mandatory field) or use the **Browse** button to display the standard Microsoft Windows "Choose file" window to locate your file then click **Open**.
- If Peak has detected that that file should be obfuscated, then you should **OK** the message:

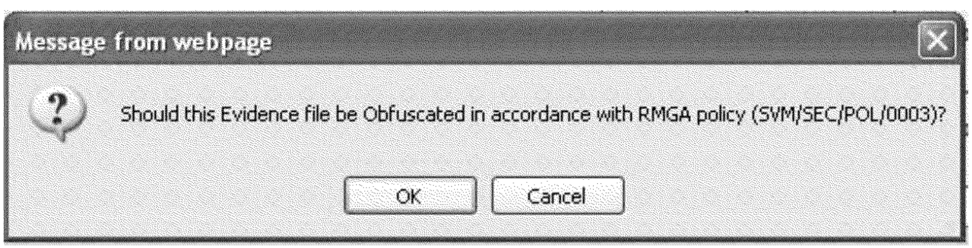


*Fig.8.4.1.2: Obfuscation message*

Then Peak will automatically fill in other fields for you, e.g. 'File Type=Obfuscated File', 'File Type=Counter Post Office Counter log', 'Compression Type=None' and 'Obfuscate file'.

- If Peak has not detected that the file should be obfuscated, then you will have to manually select 'File Type=Obfuscated File' and/or tick 'Obfuscate file'.
- Type in a 'Description' of the type of file or evidence attached (mandatory).
- Click **Add Evidence** to include the chosen file to the call.
- Then **OK** to "The file has been added to the Obfuscation queue. This incident will be updated with the link when it is available".

The obfuscation job runs every 11 minutes and will obfuscate the file, add an evidence item and update the Progress text with a link to the obfuscated data.

If obfuscation fails for any reason, the file will not be made available to download, the Call Progress will be updated with a short error message and the User who added the evidence will be sent an e-mail.

If the source file takes longer than 10 minutes to process, obfuscation will be aborted. If the source file contains anything other than plain text, the obfuscation will fail with “error 11” because it did not find any tokens to apply the pattern checks to.

More details including a definition of the error codes can be found on the SSC Web Site in WAD019 “Obfuscation Tool for evidence to External Peak Companies”.

You could continue to route the call to the relevant team/user whilst waiting for the evidence to complete obfuscation (see §8.1.19) when you will be asked to confirm that the incident may be passed to the external company with the attached evidence.

### 8.4.2 Opening/Downloading (All) attached evidence

You can view evidence attached to a call, retrieve a copy of a particular file or retrieve all the files attached to a call.

To view a file attached to a call, use the **Open** button within the *Evidence* page or you can click on the link in the Progress text. But this only works for unzipped files since Windows Internet Explorer is called directly to view the file; the file will not be unzipped before it is displayed.

To retrieve one set of evidence, click the relevant **Download** button or the **Download All** button on the top to retrieve all the non-archived evidence for the incident. When you select Save for the first time that day, you will have to navigate to the correct directory. After this, the browser should remember the last directory used for the rest of the day. FireFox has configuration parameter for setting the directory of downloaded items.

Note that the **Open** and **Download** buttons may not be enabled depending on your level of privilege.

### 8.4.3 Deleting attached evidence

For security reasons, encrypted files are automatically deleted 28 days after the call is closed. If this has happened, all the buttons (**Open**, **Download**, **Delete** and **Update**) for the archived file(s) on the *Evidence* form will be replaced by the text “ARCHIVED” (as shown in Fig.8.4).

Evidence for other types of calls are not automatically archived but you can manually remove evidence by clicking the **Delete** button next to the relevant file within the *Evidence* page.

### 8.4.4 Updating attached evidence

To update an evidence file which has already been uploaded to Peak, clicking the relevant **Update** button. This will populate the ‘Details of file to be added/amended’ area in the bottom section of the *Evidence* form with the details of the evidence item. Then you can make any necessary changes: from changing the evidence description to replacing the file then press **Update Evidence** to save your changes.

## 8.5 Impact tab

An impact can be added, deleted or updated via the *Impact* tab.

After typing in the Impact text, you can spell check the text by selecting "" (§9.2), **Clear Text** (to remove the text you just typed in), **Delete** (to delete an Impact), **Restore** (to revert back to the last saved text) or **Save Changes**.

Once added, the colour of the tab for Impact will change to orange and the Impact text will appear in orange in the 'Impact' field in *Call Details* (as shown in Fig.§8).

## 8.6 Collections tab

A Collection is a group of related calls. All the calls within a Collection can then be retrieved by building a query using the collection name (e.g. Collection – Equal To - <Collection_name>, see §11.1 for details).

If the incident has been associated with least one collection, the background to the *Collections* tab will turn orange in *Call Details* (as shown in Fig.8).

First a Collection must be defined (as described in §16) then incidents can be associated with (and then removed from) that Collection via the *Collections* tab:

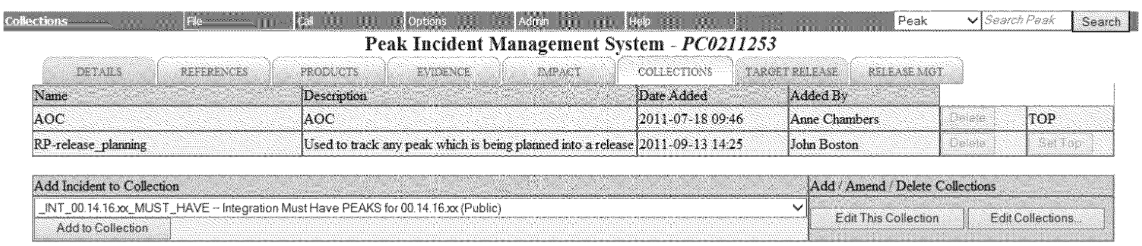


*Fig.8.6: Call associated with 2 Collections*

If there are any Collections already associated with the call then it will be shown in the top section of this screen (as shown in the Fig.8.6).

To add the call to an existing Collection, select the collection name from the 'Add Incident to Collection' drop-down list then **Add to Collection** which will then create an entry in the top section of the screen. Note that the 'Add Incident to Collection' drop-down list will only display Collections which you have permissions to update i.e. all public collections, your own privately created collections and your team's private collections

To remove this call from a Collection, press **Delete** on the relevant Collection line. The **Delete** button will only be enabled if you are the user who added the incident to the Collection or the Collection owner, otherwise it will be disabled.

You can also make a collection the top collection (which means that it will be displayed in the *Call List* if the 'Top Collection' column is configured, §7), press the **Set Top** on the relevant Collection line. Note that the **Set Top** button will only be visible if this call belongs to more than one collection.

You could define a new Collection via this *Collections* page by pressing the **Edit Collections** button which will take you straight into the Collections definitions with a blank Collection (§16). Or you could edit one of your own Collections by selecting the name via the 'Add Incident to Collection' drop-down list and then pressing **Edit This Collection**. Note that if you will be shown a blank Collection if you select a Collection that you did not create.

## 8.7 Target Release tab

Press the *Target Release* tab to display the *Releases* screen where you can view the release history, select a release type and release then **Add** it to this call. If you have administrative privileges then the **Delete** button will be enabled for you to delete an existing release. Generally, this field is set when the Peak is first created and is subsequently updated by members of the Release Management team.

The fields under the headings 'Description', 'Date Out Dev', 'Date Out PIT', 'Date Into Test', 'Date Out Test', 'Date Out Live' and 'Deploy Groups' are automatically filled in if you choose a release type of 'Targeted At' and select a release which has those properties associated with it; usually set up by Release Management.

All roles may be set the 'Reported In' release but the 'Targeted At' option is only available to roles with the Administrative privileges (§4.2.4).

The last target release added will appear in the 'Release' field in *Call Details* (§8.1.4).

## 8.8 Release Management tab

The *RelMan* page was intended to be used by the Release Management team and Release Management Forum for planning releases of deliverables.

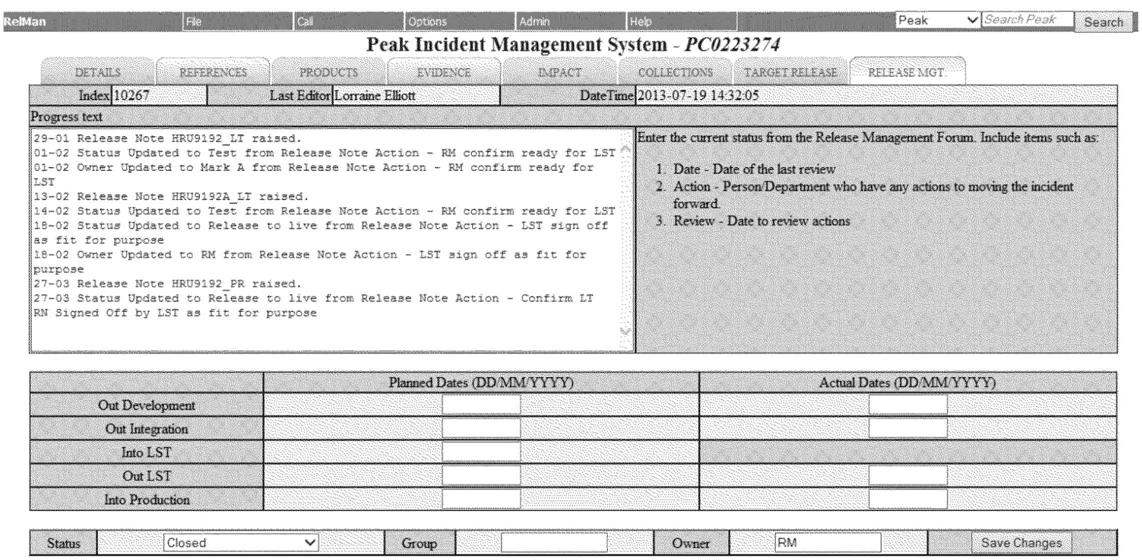


*Fig.8.8: Call Details – Release Mgmt tab of a Release Peak*

Information for the Release Planning (RP) record can be created/updated:

1. Automatically by Peak for a:

a) fault/Release Peak when it is added to a Collection (§8.6) whose name begins with "RP-" (e.g. "RP-release_planning" which is used to track every fault Peak expected to be fixed and deployed).
Note that there is no restriction on who can create a Collection starting with "RP-"(§16).
This RP information will be maintained by Release Planning.

b) Release Peak when a Release Note is created (§28.1.4).
Information from the Release Note is used to complete the *Call Details* of the Release Peak.
This RP information will be maintained by the Test and Release Management Teams.

2. Manually for:

a) a single fault/Release Peak via the *Call Details - Release Mgmt* tab

b) multiple fault/Release Peaks via *Call List*: **Bulk Update** button (§7.2.1)

Each fault or Release Peak can only have one RP record but there is a many-to-many relationship between fault Peaks and Release Peaks.

### 8.8.1 Manually Updating a Release Planning (RP) record

To manually create or update the fields in the *RelMan* form:

- If the Peak call does not have an RP record, then the form will have the attributes: 'Index=0, Last Editor=N/A, DateTime=N/A and Status=Closed'. But once an RP record is created and changes saved, these fields will be automatically populated by the Peak System.

  Once an RP record has been created, it cannot be deleted/withdrawn, to stop it appearing in any reports set Status=Closed.
- 'Progress text' is a free-format field but the standard format is to precede the text with the date. When a Release Note is moved on to a different work unit, an update will be automatically added to the Progress text field (e.g. '03-09 Status Updated to Test from Release Note Action – In Test').
- The dates under the column headed 'Planned Dates' are optional but should be maintained by the relevant team.
  If a Peak (which does not have an RP record) is targeted, an RP record will be created automatically with the 'Planned Dates' copied from the Target Release details (*Call Details – Target Release* tab).
  Note that the 'Into Production' date is automatically set to the second Sunday following the 'Out LST' date but it can be changed if necessary.
- The dates under the column 'Actual Dates' are currently not used or included in any reports.
- 'Status' shows how far through the process the Peak is (e.g. "Z-New, Impacting, Waiting Fix/Integration, Hold, Raise RN, Test, Release to Live, To be closed tomorrow or Closed").
  If an RP record is created by Peak, its status will be initially set to "Z-New".
- 'Group' is a free-format field which allows a subset of fault/Release Peaks to be logically grouped together (e.g. if they are due to be tested at the same time) and shown in the "Release Planning Summary" report (§23).
- 'Owner' is a free-format field and shows the name of the person currently owning the Peak.
- Press **Save Changes**.

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There is no audit trail on any of the fields in the *RelMan* form including the 'Progress text' so diligence is needed when removing or changing the text or fields.

## 8.9 Print

The "" icon is a quick way to print out the Call Details of the current Peak (§14.2).

# 9 Responding to a call/Progress Text

To add an update or new information to a call, use the **Add Response** button from *Call Details*.

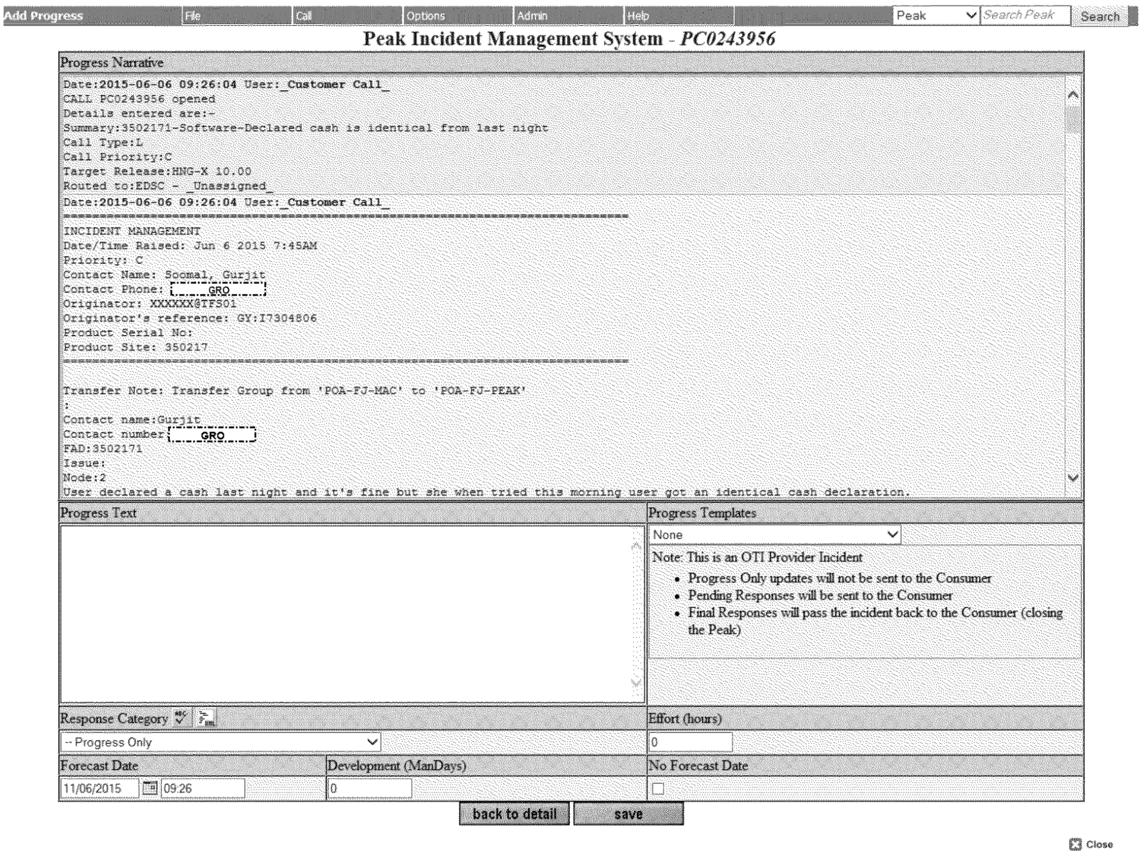


*Fig.9: Add Progress screen on an OTI call*

Then enter your update in the Progress text box and choose an appropriate 'Response Category' from the drop down list then click on **Save** (or **Back to detail** to return to the *Call Details* page without saving).

If more than one user tries to update the same call at the same time then they will be shown *Update Conflict* screen and they will be given the opportunity to save or discard their update.

Note that the maximum size of response that TfS can cope with is 4Kb so be aware that the TfS update may be truncated when sending responses back across the OTI.

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Peak incidents can also be updated by sending an e-mail:

| | |
|---|---|
| From an FJ e-mail address | To or CC field = PCnnnnnnn GRO - replace PCnnnnnnn with the relevant Peak call reference. |
| From an External e-mail address | Reply to the relevant e-mail sent from peak GRO with 'Subject: Complete Call Update PCnnnnnnn:...' and type in the progress between the [Update Start] and [Update End] blocks. |

Note that sending an e-mail using the BCC field does not work.

The process to add e-mails to incidents runs every 5 minutes and will reply via e-mail if successful or unsuccessful. The ASCII version of the e-mail body is added as Call progress and any attachments are captured as evidence.

## 9.1 Progress Narrative

Information that has already been added to the call is displayed in this field and is not editable. The content might have been transferred to Peak via the OTI or it could be text input into Progress box of the *New Call* page when the incident was first created.

Text highlighted in blue in the 'Progress Narrative' window indicates a link to files such as evidence, MSCs and SSCKELs that are attached to the call.

## 9.2 Progress Text/Response Text/Final Text

The title of this window will change dynamically depending on the 'Response Category' selected:

- Progress Text if 'Response Category: Progress Only'
  Updates of this type will not be sent to the external Helpdesk; they will just appear on the Peak.
- Response Text if 'Response Category: Pending'
  Final Text if 'Response Category: Final'
  These types of updates will be sent to the external Helpdesk (TfS or QC).

Each progress update has a unique 'name': #Progress1, #Progress2, #Progress3, etc. The name can be determined by manually counting the number of preceding updates or in the tool-tip name; by hovering within the relevant update. This enables you to create links which point directly to a specific update. So if you wanted a link to the 12th update of incident PC020804 in another call, add a **Call Reference** with the value 'PC020804#Progress12'. Alternatively, you could send someone the complete link:

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You can embed HTML into a progress update by including the text "[HTML]"; which will apply to all the text in that update. For example,

```
[HTML]
<TABLE border="1" cellpadding="1" cellspacing="0">
<TR>
<TD BGCOLOR='#CCCCCC"><B>Client</B></TD>
<TD BGCOLOR='#CCCCCC"><B>No_of_Txns</B></TD>
<TD BGCOLOR='#CCCCCC"><B>Time_in_APS workstation</B></TD>
</TR>
<TR><TD>2968</TD><TD>5</TD><TD>seconds</TD></TR>
<TR><TD>2777</TD><TD>6</TD><TD>seconds</TD></TR>
<TR><TD>2772</TD><TD>3749</TD><TD>33 mins</TD></TR>
</TABLE>
```

The table above <b>only</b> shows the differences.

which is displayed as:

Date:21-Feb-2011 14:49:03 User:Test User

| Client | No_of_Txns | Time_in_APS workstation |
| --- | --- | --- |
| 2968 | 5 | seconds |
| 2777 | 6 | seconds |
| 2772 | 3749 | 33 mins |

The table above **only** shows the differences.

*Fig.9.2: Rendered HTML in the Progress Narrative*

If there was a problem rendering the HTML then there will be a problem displaying the Peak call. To resolve this, contact the Peak Support.

Spell Checking

Clicking the icon “ ” enables you to spell check the text in this window. The *Spell Checker* pop-up will be displayed and allow you to step through potential spelling mistakes and select from a list of alternatives. To replace a word with an alternative, click on it in the drop-down list or move on to the next mistake by pressing **Skip Word**. When complete, to copy the new text back into the Progress window press **Done**; which can be used at any time to skip the rest of the spell check.

This feature is also available when creating new calls (§12.3).

Format XML

Highlight the relevant text in the Progress window then click the icon “ ” to check the format of the XML and make it more readable.

## 9.3 Progress Templates

Templates may be used to provide forms for the user to complete or guidelines for information required for a type of incident. The ‘Progress Templates’ drop-down list, on the *Add Progress* page, gives a list of possible pre-defined text templates that may be applied to the response box. When a template is selected the corresponding text is appended to the Progress area; which can then be edited before selecting a Response Category and pressing **Save**.

To create, edit or delete a Template see §24.

## 9.4 Response Category

Some guidance on Response categories is available via the *Main Menu:* **Procedures** button (currently only available to OTI Administrator roles).

Several Final response categories shown in the ‘Response Category’ drop-down list have an orange background (e.g. ’62 – Final – No fault in product’) this indicates that they are black mark closure categories for the filtering teams and they count against that team’s filtration targets. These categories should only be used in those cases where the filtering team should have been able to resolve the call themselves or they did not provide the appropriate evidence as requested in a KEL.

Depending on the call type, the process below may also be described briefly in the helpful text underneath the ‘Progress Templates’ drop-down.

### 9.4.1 Responding to Non-OTI Originated Calls

If you type in a Progress update but do not select a Response Category, the default is 'Progress Only'. This response type will just save the update to the Peak call; so, for QC incidents, the update will not be sent to QC

Pending responses will also only appear on Peak call except for QC incidents when the update is also copied back to QC.

Selecting a Final response will route the call back to the Call Logger who should check if they are happy with the response and either close the call or return it for more information (e.g. '52 - Pending - Response Rejected').

But for QC incidents, a Final response will route the call to the QC Interface team and a resolved message will be sent to the QC interface. If the QC user is happy with the response they will send a 'Closure Agreed' which will close the Peak or a 'Fix Rejected' which will route the Peak back to the last team. For more details, see §4.3.3.

### 9.4.2 Responding to OTI Originated Calls

Whilst the OTI call is in the Pending state, all updates or responses will be sent back over the OTI to update the originating Helpdesk; except for 'Progress Only' updates (which only update the Peak call). It should take 2 minutes for Peak updates to appear on their TfS call and similarly for TfS updates to appear on their Peak call. Note that any OTI updates over 4Kb sent to the TfS Helpdesk will be truncated.

Once the OTI call has a Final response, the incident will be routed back to the OTI Administrator team (currently the SSC) to check the integrity of the closure response before closing the call on Peak; which sends the Final response back across the OTI and passes ownership back to the originating Helpdesk. The Helpdesk can then continue working on the call (checking back with the Branch, route the call onto another Helpdesk, etc.) before closing the call on their system.

## 9.5 Effort (hours)

This field was used by Release Management process to identify the expected man effort the fix to a call will require.

However with the introduction of Release Planning, this field is now no longer used.

## 9.6 Forecast Date and Development (ManDays)

On the *Add Progress* page, these are fields that may be populated as part of the Release Management process.

When a Fix Impact is added by Development to a Peak, the expected date of the fix will be completed and it is entered as a 'Forecast Date'. The amount of time that the fix will take to complete is entered as 'Development (ManDays)'.

Both these fields are available to be displayed on the *Call List* and to be searched for using Query Builder.

However with the introduction of Release Planning, these fields are now no longer used.

## 9.7 No Forecast Date

By ticking 'No Forecast Date' (and also entering a Response), the 'Forecast Date' field will become disabled and is set to a date far into the future ("31/12/9999 00:00").

This means that the 'Time to Target (days)' column which, if you have configured it to be displayed in the *Call Details* page, will start counting down – ignoring core hours, weekends or Bank Holidays - from a very large number and be shown in green until it becomes overdue and will be shown in red.

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# 10 Searching for Calls

There are 4 ways to search for a particular call or a set of calls:

- Quick Search — for simple searches if you have a reference (e.g. Peak, reference, KEL, TfS incident, etc.)
- FreeText Searching — to search for text within a call
- Menu bar search — like Quick Search, for simple searches if you have a Peak reference, free text, reference, KEL, TfS incident or TfS site
- Query Builder — for more complex searches – see (§11)

A very quick way to view a call is to enter the *Call Details* page of another call and then modify the Peak reference bit of the URL address so it looks like: "…?Call Reference=<other Peak reference>".

## 10.1 Quick Search – find call [f]

*Quick Search* provides a facility for searching for a call based on the references that can be added to Peaks (call reference numbers, Release Notes, baselines, KELs or TfS call references).

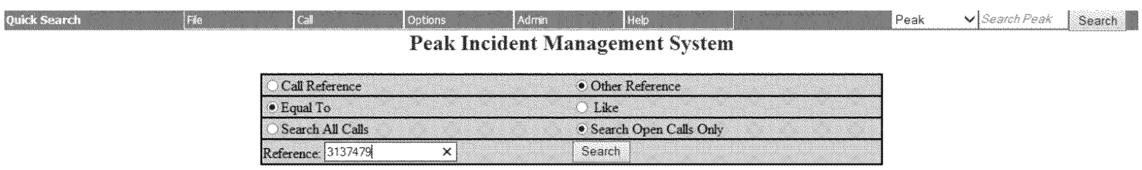


*Fig.10.1: Quick Search for TfS 3137479 amongst the open calls*

Enter a 'Reference' to search. This can be a Peak Call reference or a reference which has been added to a Peak such as Release Notes, KELs or TfS call reference (§8.1.5). No wildcards are allowed in this field and it is optional to include the "PC" Peak call reference prefix.

Then choose the relevant radio buttons depending on the kind of search you wish to do, then select **Search**:

- Decide whether the Reference given was a Peak Call Reference or Other Reference.
- Decide whether you want the search to find calls 'Equal To' or 'Like' the Reference entered.
- Define the range of the search – 'Search All Calls' or just 'Search Open Calls only'.

If only one result from the search is found then the call it is displayed directly in the *Call Details* page but if more than one result is found then the calls will be displayed in a *Call List* grid.

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## 10.2 FreeText Searching

SQL server offers a facility for string comparisons similar to Internet search engines returning results and a matching score or rank. The index used for this searching is held outside of SQL Server, which means that these queries do not have the same impact upon Peak as searching the Progress Text via Query Builder.

First, you will need to configure the type of search that is to be performed and then start the search by pressing the icon " ":

- Wildcards - Partial word matching is possible using the "*" character. (e.g. "Config* " would look for all words starting with "Config")
- Match ALL words - Search for progress updates that include all the search words (i.e. AND function). This is the default.
- Match ANY words - Search for progress updates that include any of the search words (i.e OR function). Note: This will take longer than the match ALL option and may timeout.
- Limiting matches - Restrict the returned matches to 50, 100 or Unlimited (9999).
- Ordering - The returned matches are listed in order of relevance then latest date. But if you select the 'Order By Date' it will default to Unlimited matches.

SQL server ignores some keywords which are removed before the query is executed. If your search consists entirely of ignored words a warning will be displayed.

Each progress update is searched individually (rather than the entire incident) so some Peaks may appear more than once in the results list.

Since the index is only (incrementally) rebuilt every Sunday morning at 06:30, any progress that was added during the week will not be available for searching instantly.

If the keywords appear in the progress text more than once its ranking score will increase (out of 1000) and the match will be listed higher in the results list.

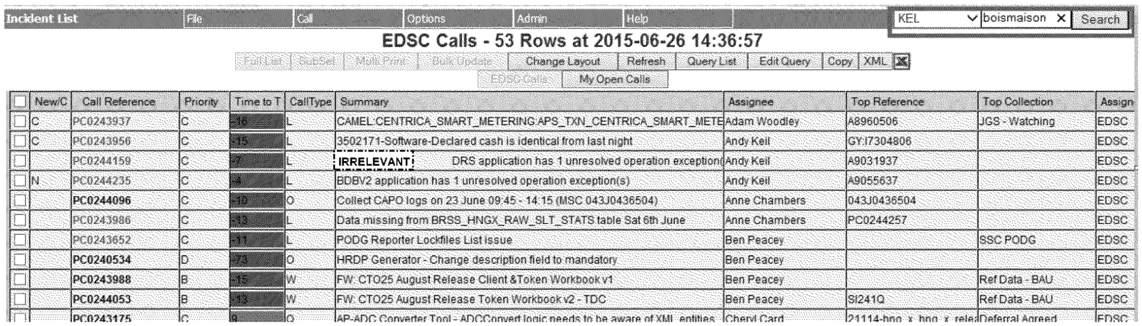
Try to make your search as specific as possible, a single word search may match several hundred updates. If they all have the same rank then only the first 50/100 matches will be displayed and may not include the incident you were really interested in.

If you want to see all the calls in the result list in a *Call List* grid, press the **Create Call List** button at the bottom of the page. This will call up the *Multi-Query* form and automatically generate a CSV list with just the matched call references (§11.3).

Some of the information above can also be found on the *FreeText* page (" **FreeText searching help**"), click on the icon "" to see the help on FreeText searching.

# 10.3 Menu bar search

The fields on the right hand side of the menu bar provide a short-cut to the various searches available on Peak:




| | New/C | Call Reference | Priority | Time to T | CallType | Summary | Assignee | Top Reference | Top Collection | Assign |
|---|---|---|---|---|---|---|---|---|---|---|
| | C | PC0243937 | C | -16 | L | CAMEL:CENTRICA_SMART_METERING:APS_TXN_CENTRICA_SMART_METE | Adam Woodley | A8960506 | JGS - Watching | EDSC |
| | C | PC0243956 | C | -15 | L | 3502171-Software-Declared cash is identical from last night | Andy Keil | GY:I7304806 | | EDSC |
| | | PC0244159 | C | -7 | L | IRRELEVANT DRS application has 1 unresolved operation exception( | Andy Keil | A9031937 | | EDSC |
| | N | PC0244235 | C | -4 | L | BDBV2 application has 1 unresolved operation exception(s) | Andy Keil | A9055637 | | EDSC |
| | | PC0244096 | C | -10 | O | Collect CAPO logs on 23 June 09:45 - 14:15 (MSC 043J0436504) | Anne Chambers | 043J0436504 | | EDSC |
| | | PC0243986 | C | -13 | L | Data missing from BRSS_HNGX_RAW_SLT_STATS table Sat 6th June | Anne Chambers | PC0244257 | | EDSC |
| | | PC0243652 | C | -11 | L | PODG Reporter Lockfiles List issue | Ben Peacey | | SSC PODG | EDSC |
| | | PC0240534 | D | -73 | O | HRDP Generator - Change description field to mandatory | Ben Peacey | | | EDSC |
| | | PC0243988 | B | -15 | W | FW: CTO25 August Release Client &Token Workbook v1 | Ben Peacey | | Ref Data - BAU | EDSC |
| | | PC0244053 | B | -13 | W | FW: CTO25 August Release Token Workbook v2 - TDC | Ben Peacey | SI241Q | Ref Data - BAU | EDSC |
| | | PC0243175 | C | 9 | O | AP-ADC Converter Tool - ADCConvert logic needs to be aware of XML entities | Cheryl Card | 21114-hno_x_hno_x_relea | Deferral Agreed | EDSC |

*Fig.10.3: Menu bar search for a KEL*

First define what item type you wish to search from the drop-down list Peak (reference), free text, reference, KEL, TfS Incident or TfS Site. Then type in the actual text to be matched into the adjacent field and press **Search**.

# 11 Queries

Queries are pre-defined search criteria which can be used to find calls quickly.

If you have not defined a default query (usually if you are a new user), Peak will create one for you which will be used to load up the *Call List* on first logon – this usually displays open calls in all of the user's teams. This query can be edited by the user via Query Builder and new queries can be added and saved in the *Query List* for future use.

## 11.1 Query Builder - build query [b]

The *Build Query* page has several parts and functionalities. Searches can be simple or complex; depending on how many conditions need to be satisfied.

Query builder acts as a Graphical User Interface (GUI) where users can use drop-down lists to select fields, operators and values to generate 'Peak Query Code' (which will automatically generate the underlying 'SQL Query Code').

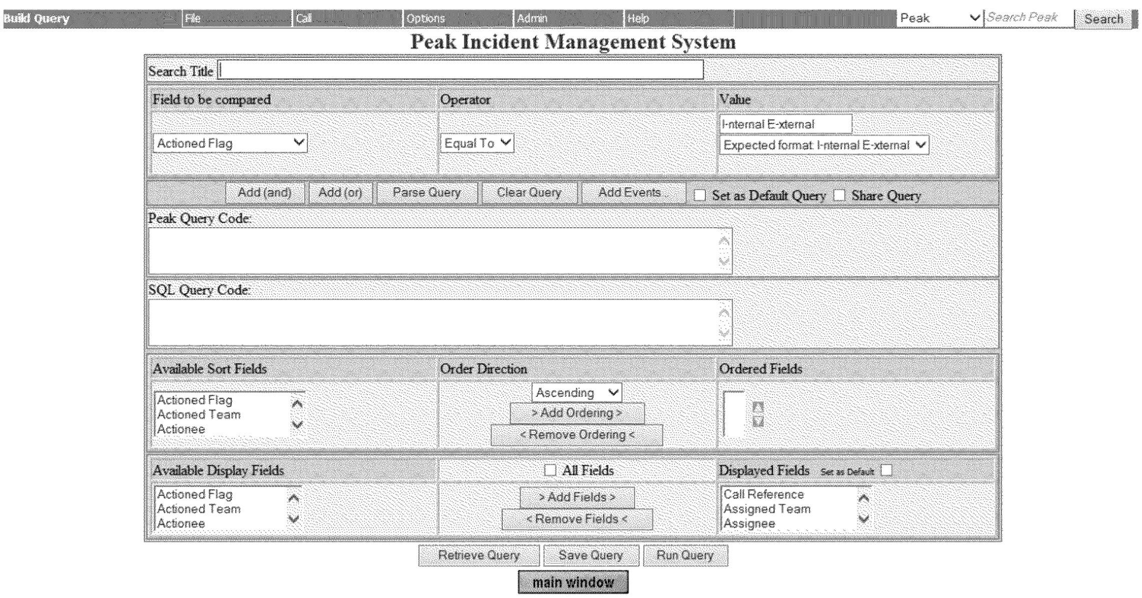



*Fig.11.1: Query Builder screen with 'SQL Query Code' window*

The 'SQL Query Code' window in Fig.*11.1* is only visible to the SQL role (§4.2.4). It enables those roles to define queries by directly entering the SQL or by editing the produced SQL script in this window.

### 11.1.1 Search Title

If you are going to store this query for retrieval in the future, it is recommended that you type some descriptive text in this field to help distinguish this query from others.

If no title is entered, then the first 50 characters of the 'Peak Query Code' will be used.

### 11.1.2 Field to be compared, Operator and Value

These three components are combined to produce a search condition. More complex queries can be generated by defining more than one condition. Results are displayed only if the resulting query is true.

The 'Field to be compared' drop-down list contains columns in the Peak call that are most frequently searched. If the column you wish to search on is not listed then e-mail the Peak Administrator to request that it is added to the list.

<u>Example of a simple search</u> To retrieve a list of <u>all</u> (open and closed) calls progressed by me in the last week:

- Select the following from the drop-down lists:

  Field to be compared = Progressed By Me
  Operator = Greater Than
  Value = [LAST WEEK]

- Click either the **Add (and)** or **Add (or)** button to populate this condition into the 'Peak Query Code' as:

  Progressed By Me – Greater Than – '[LAST WEEK]'

  and automatically generates the underlying 'SQL Query Code'.

- At this point, this simple query can be saved or just run using the **Save Query** and/or **Run Query** buttons.

### 11.1.3 Add (AND) and Add (OR)

The **Add (and)** button is equivalent to the logical AND operator where all conditions have to be true for the query to be fulfilled.

The **Add (or)** button is equivalent to the logical OR operator where only one of the conditions has to be true for the query to be fulfilled.

The 'Progressed by' query option allows you to search for progress added by another user. Due to the possible number of matches it is recommended that at least another condition is also added.

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Example of a more complex search To retrieve a list of all (open and closed) calls progressed by the user Tom Banks yesterday.

- Create the first simple search condition:

  Progressed by – Equal To – 'Tom Banks'

- Click either the **Add (and)** or **Add (or)** buttons to populate the Peak and SQL Query Code fields.
- Create the second condition:

  Date Last Updated – Equal To – '[YESTERDAY]'

- Since both conditions must be true for this query to produce the desired results then **Add (and)** must be used to combine both conditions with the "AND" operator in the Peak and SQL Query Code windows:

  Progressed by – Equal To – 'Tom Banks' AND Date Last Updated – Equal To – '[YESTERDAY]'

Note that if **Add (or)** was used, instead of **Add (and)**, then you would get a list of all the calls ever progressed by the user Tom Banks as well as a list of all calls last updated yesterday (by anyone).

### 11.1.4 Parse Query and Clear Query

If you have the SQL role then after you have made some manual changes in the 'Peak Query Code' window, use **Parse Query** to check the validity of the 'Peak Query Code' before populating the 'SQL Query Code' window with the equivalent update.

If you do not have the SQL role then **Parse Query** will be done automatically whenever a query is saved or run.

**Clear Query** will reset all the fields in the *Build Query* form.

### 11.1.5 Add Events

Peak events, such as when an incident is routed to a particular team, can be added to a end of a completed query

A pop-up window similar to *Build Query* is displayed. Simply select the fields, operators and values for a simple or complex event search then click **Add To Query** and the event will be added to the end of the 'SQL Query Code' or **Exit.**

#### 11.1.5.1 Set as Default Query

Selecting this option will make the current query your default query which will be loaded automatically upon logon and will be shown as your default query in the *Query List* (§11.2).

#### 11.1.5.2 Share Query

Selecting this option will make the current query a shared query which can then be listed and executed from the *Query List* page by any user (§11.2).

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### 11.1.6 Peak Query Code

When you click on **Add (and)** and **Add (or)**, the selected SQL statement is displayed in this window.

The content of the 'Peak Query Code' field can be edited. But you should only type in your own queries if you have extensive knowledge of the underlying views and tables in the Peak database. If you type in a column name that is not in the views used in Peak, your query will not return results that you expect.

### 11.1.7 SQL Query Code

This window is only visible if your role allows and it will display the underlying views and tables that will be used based on your search criteria.

If your role allows, you may type in your own SQL statements into the 'SQL Query Code' field. But you should only type in your own queries if you have extensive knowledge of the underlying views and tables in the Peak database. If you type in a column name that is not in the views used in Peak, your query will not return results that you expect.

### 11.1.8 Sort Fields

The set of fields: 'Available Sort Fields', 'Order Direction' and 'Ordered Fields' allow you to choose the order the results from the query will be displayed in the *Call List* page.

- Select the columns you wish to sort on by highlighting them in the 'Available Sort Fields' window.
- Choose the 'Order Direction' (ascending or descending order).
- Click the **>Add Ordering>** button to migrate your selected columns into the 'Ordered Fields' window. This box shows the fields that will be sorted and the field at the top will have the highest priority. You can change the priority of the fields by highlighting the field in 'Ordered Fields' and clicking on the up and down arrows "" and "" to increase or decrease its priority order.

If you want to remove one or more sort fields, highlight the field(s) in 'Ordered Fields' then click the **<Remove Ordering<** button.

### 11.1.9 Displayed Fields

The set of fields: 'Available Display Fields', 'All Fields' and 'Displayed Fields' allow you to define the columns to be displayed when the results of the query are returned in *Call List*.

To speed up display, deselect 'All Fields' and customise the 'Displayed Fields' list so just those columns that you are interested in are displayed.

The functionality here is similar to that explained for Sort Fields (in §11.1.8).

The default set of columns listed in the 'Displayed Fields' window can be configured via:

- 'Set as Default' (§11.1.9.2) or
- 'Default Query Fields' in *Preferences* page (§13)

The 'Call Reference' column is a mandatory field which is always shown in 'Displayed Fields' and cannot be removed.

Note that the order of the displayed columns is not configured in *Build Query* but in *Call List* (§7.3).

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#### 11.1.9.1 All Fields

This is just a quick way to display all the columns and overrides the columns listed in the ‘Display Fields’ window. By default, this box is unchecked which activates the >**Add Field>** and **<Remove Field<** buttons.

#### 11.1.9.2 Set as Default

This allows you to configure the default columns for all new future queries:

- Edit an existing query so it has the fields you wish to be default in its ‘Displayed Fields’ window.
- Tick the box named ‘Set as Default’ then **Save Query**. Note that the query must be saved for the default fields to take effect.
- This will add the new default ‘Custom’ option to ‘Default Query Fields’ in *Preferences*. Although the default option, you will still be able to change it to one of the other predefined options (§13).

### 11.1.10 Retrieve Query

Click to display a list of all your saved queries in the *Query List* page (§11.2).

### 11.1.11 Save Query

Click to store the current query in the *Build Query* page for future use. The query will then appear in the *Query List* page (§11.2).

### 11.1.12 Run Query

Click to cause the selected criteria to be run against the Peak database – without saving.

If the query is successful, the system will automatically open the *Call List* page displaying all the calls that matched your criteria.

## 11.2 Display list of queries - query list [q]

The *Query List* page displays a list of saved queries that currently exist for your user. It will show you which query has been defined as your default query (to be run at logon) and whether any are shared queries. You can choose to **Edit**, **Run** or **Del**ete your queries.

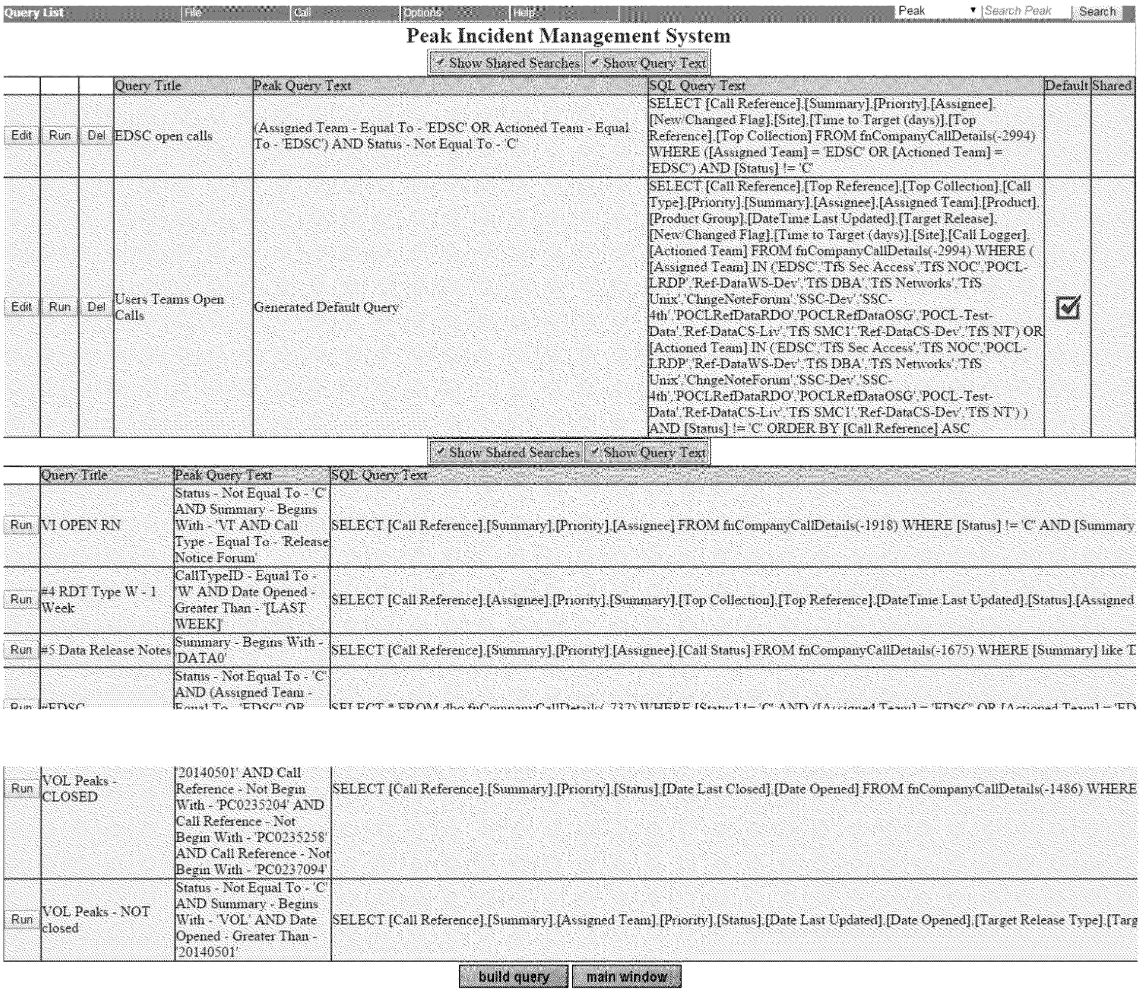


*Fig.11.2: Query List showing Shared searches and Query Texts*

If you are a new user, initially this list will just contain the default query set up by the Peak Administrator. You can change the default by creating a new query and ticking its 'Set as Default Query' box (§11.1.5.1). You will not be allowed to delete your last (default) query; otherwise Peak will not have a query to load at logon.

Shared searches are just queries that can be shared with everyone else on Peak (§11.1.5.2). The 'Show Shared Searches' field is a toggle which will hide/display the list of queries that have been shared and allows you to **Run**, but not update, them.

The 'Show Query Text' field is a toggle which will hide/display the Peak Query Text and underlying SQL Query Text for your specific and shared queries.

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## 11.3 Build query using CSV list

The *Multi-Query* form offers a quick way to enter a list of calls (as a comma separated list) which will be displayed in a *Call List* grid.

It can be instigated via the menu: Call/Build New Query/Use CSV List or via **Create Call List** which will pre-fill in the Peak references using the results from a FreeText Search (§10.2).

To generate a *Call List* just containing the calls specified:

- Select the type of references that are going to be entered (which can be Peak, QC or TfS References or Release Notes)
- Type in a comma-separated list of references
- Press **Create Call List**

# 12 Creating new Calls – new calls [n]

When a new incident is reported, there must be a formal way of tracking and fixing the problem, an incident or call must be raised and this can be done from an external helpdesk (TfS/QC) or from within Peak depending on who the incident is being reported by e.g. Post Master via HSD, Events via SMC or Testing via Testers.

This section explains how to create new Peak incidents. These calls are known as non-OTI originated or OTI Consumer incidents which can be sent across the OTI to generate Helpdesk calls.

To create a new incident directly on Peak, invoke the *New Call* page:

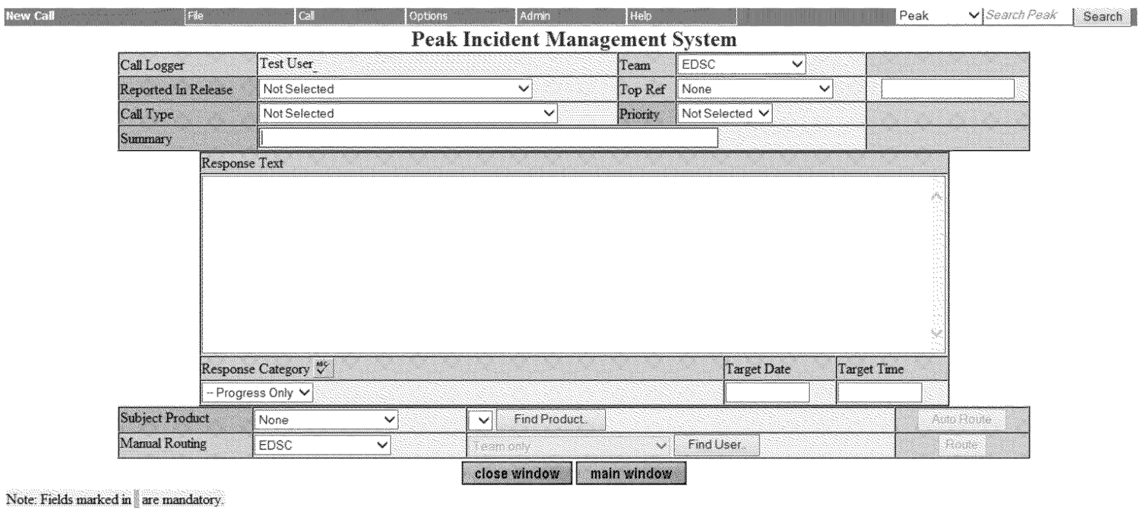


*Fig.12: Create new Peak call page*

Peak will automatically populate the 'Call Logger' and 'Team' fields with the information based on your user account details but you can change the 'Team'.

The mandatory fields are initially shown in orange and are: 'Reported In Release', 'Call Type', 'Priority', 'Summary' and 'Subject Product'. As each mandatory field is populated, its colour will change from orange to grey (normal). When the last mandatory field has been completed, the **Route** button will be activated and when selected, a new Peak call reference will be generated then the call will be assigned to the specified team or individual

The current process does not allow Development to raise new calls or clone calls. They have to contact someone in the OTI Administrator team (currently the SSC) to do this task on their behalf.

Generally the fields on this page are as described in sections: §8: Displaying Call Details and §9: Responding to a Call. If there is a difference in functionality or more explanation is required then they are listed below.

If you cannot create a new Peak call it could be because you are a member of the 'Read Only' role. Contact the Peak Administrator if you wish to change this.

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New Peak incidents can also be created by sending an e-mail :

| | |
|---|---|
| From an FJ e-mail address | To or CC field = new@ GRO<br>To create a Peak of Call Type='O' (Operational).<br>Default values will populate the Priority=C, Release=HNG-X Rel Ind, etc. but these can be superseded in the e-mail body by specifying e.g. "PeakPriority:A". |
| From an FJ e-mail address | To or CC field = refdata@ GRO<br>To create a Peak of Call Type='W' (Reference Data Service).<br>Similar to new@ GRO but with different defaults: Priority=B, Product=SSC Ref Data Request, etc.<br>The priority of the Peak may also be set by changing the Importance of the e-mail (High Importance=Priority A). |
| From a POL/Royal Mail e-mail address | To or CC field = peak@ GRO<br>Used by POL/Royal Mail to create new Reference Data Peaks. |

Note that sending an e-mail using the BCC field does not work.

The process to create Peak incidents from e-mails runs every 5 minutes and will reply via e-mail if successful (with the Peak reference) or unsuccessful. The ASCII version of the e-mail body is added as the Call details whilst the original e-mail and attachments are captured as evidence.

## 12.1 Reported In Release

Each team has their own list of possible releases when raising a new call. The list changes if you choose a different call logging team. If you are a member of multiple teams you may do this at the time of raising a new call by changing the 'Team' in the top selection box.

If the release you require is not available in any of your teams, contact the Peak Administrator to make the release available to the appropriate team.

For more information, see §8.1.4.

## 12.2 Top Ref

If you wish to define a top reference when creating a new call, the procedure is very similar to that explained in §8.1.5, when adding references to existing *Call Details*.

To add a reference to a new incident:

- Select the reference type from the 'Top Ref' drop-down list (e.g. 'MSC').
- This will display two boxes to the right of 'Top Ref' which are equivalent to the 'Reference Value' and 'Expected Format' fields in the *References* page (§8.1.5).
- If necessary, change the template for the reference type by using the Expected Format drop-down list (e.g. '043Jnnnnnnn' and '043Jnnnnnnn-nn').
- Type in the Reference Value – which must be of the expected format.

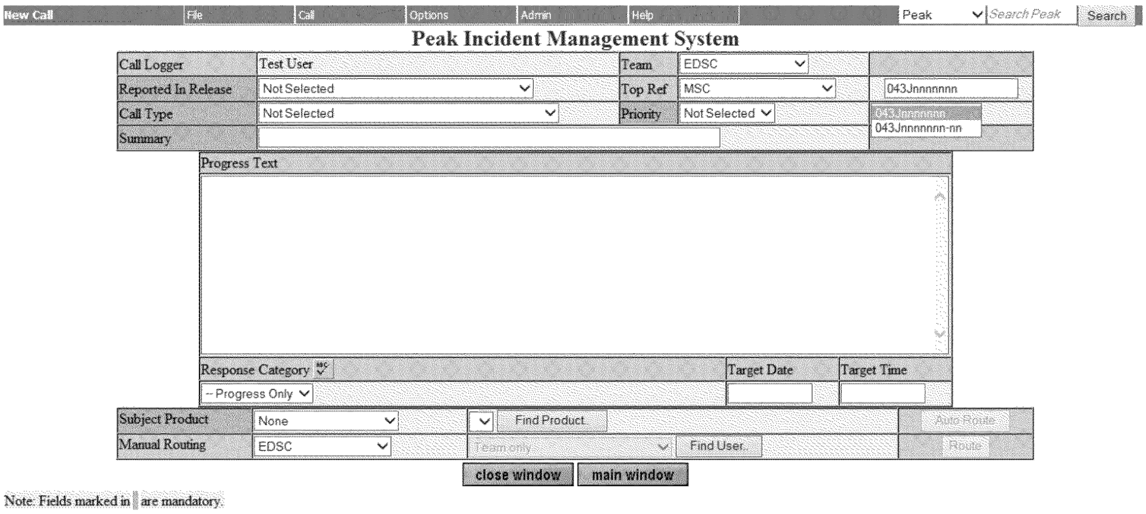


*Fig.12.2: Defining an MSC top reference for a new call*

## 12.3 Response Text/Progress Text

The title of this window (Response Text or Progress Text).will change dynamically depending on the 'Call Type' selected.

Any information deemed relevant can be added as text to the call. Within this window, you can embed HTML into a progress text and run spell checker "ABC✓".

For more details about this field see §9.2.

## 12.4 Response Category

The contents of the 'Response Category' drop-down list will vary depending on the 'Call Type' that was selected.

Use this drop-down list to define the response category of the text that you entered in the 'Response Text/Progress Text' field (Progress Only or Pending).

See §9.4 for more information.

## 12.5 Target Date and Time

'Target Date' is the timescale within which a fault Peak call should be resolved. It is dependent on the Call Type and Priority so once both of these fields have been selected, the 'Target Date' and 'Target Time' fields will both be automatically be generated from the current date and time.

'Target Time' is displayed in local time.

See §8.1.27 for more information.

## 12.6 Auto Route/Route

All new calls must be initially routed to a Peak team. If required, that Peak team can then route the call onwards to an external helpdesk like TfS.

Calls can be routed to teams/users within Peak or to external systems like TfS; but only if your Peak role allows you to do so (§4.2.4).

Once the mandatory fields have been completed, the **Route** button will become enabled. By default, new calls will be routed to the 'Call Logger' but you can specify another team or user (via the 'Manual Routing' drop-down lists and **Find User**) then click **Route.** This will commit the details of the call to the Peak database, allocate a unique Peak reference and route the call to the relevant stack.

If the **Route** button does not become activated when all the other fields in the *New Call* has been completed, this could be because you are running an older version of IE which does not correctly handle the javascript commands that enables this button. You can either upgrade to (at least) IE6 Service Pack 1 or set the 'Priority' of the call last, which will cause a page refresh.

Note that the **Auto Route** button was disabled with a view to be removed. However it is now thought that it may be re-enabled to replace the manual QFP role. It will route to the team associated with the Subject product.

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# 13 Setting User Preferences [p]

The *Preferences* screen allows individual users to customise Peak. Any changes made in this screen are automatically saved and activated otherwise use the Back button on the Browser to cancel.

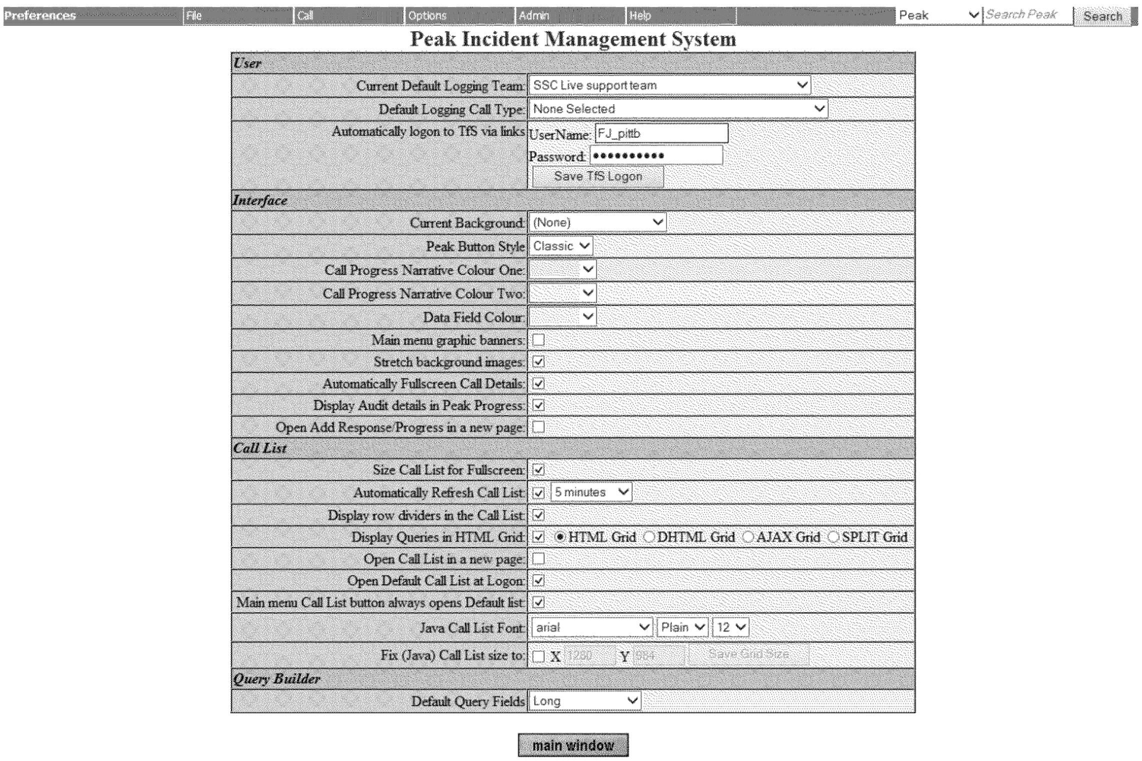


*Fig.13: User Preferences page*

Note that any configuration changes made via *Preferences* will not affect any existing windows that were open before the update was made.

## 13.1 User

### 13.1.1 Current Default Logging Team

When a new account is created, the Peak Administrator will set up this value.

Some users belong to more than one team. This option allows these users to select a different default team so that any new calls created by them are now logged as being raised by this new team (§12).

If you only belong to one team then there will be only be one option in the drop-down list.

### 13.1.2 Default Logging Call Type

You can use this option to set the 'Call Type' field to default to a certain call type when a new call is raised (§8.1.6).

### 13.1.3 Automatically logon to TfS via links

This option relates to any links that when clicked take you directly into TfS (§8.1.5 and 8.1.8); without you having to provide your login credentials each time. To enable this to happen, you must set up your TfS Username and Password login details within *Preferences* and then **Save TfS Logon**.

Once setup, you will be able to view a particular call in TfS that has been set up via *References* (§8.1.5), or view a list of calls raised on TfS by a particular Branch via 'HNG-X Site' in *Call Details* (§8.1.8)

For this facility to work, the password in this field needs to be kept in sync with your actual your TfS password.

## 13.2 Interface

### 13.2.1 Current Background

This option changes the background image that appears as wallpaper when you log into Peak client.

There are a selection of backgrounds but if you would like to make your image available to everyone then e-mail Peak Support.

### 13.2.2 Peak Button Style

Select the style of Peak buttons from a selection (default is Metal).

### 13.2.3 Call Progress Narrative Colour One/Two

Define two background colours which are used to highlight alternating progress updates in a call.

### 13.2.4 Data Field Colour

Define the background colour which is used to highlight data items on pages.

### 13.2.5 Main menu graphic banners

These are graphical backgrounds displayed on the *Main Menu*, relating to the style of buttons available (i.e. Glass or Metal).

### 13.2.6 Stretch background images

If the background picture is smaller than the screen resolution, the picture will be tiled in the background. If selected, the picture will be stretched to completely fill the background.

### 13.2.7 Automatically Fullscreen Call Details

To ensure that whenever you display the *Call Details* page it will always open in a wider and bigger view select the 'Automatically Fullscreen Call Details' option.

### 13.2.8 Display Audit Details in Peak Progress

If this option is selected then audit information is displayed in the *Call Details* page and *Expanded* view.

Conversely, if this option is deselected then no audit information will be displayed.

### 13.2.9 Open Add Response/Progress in a New Page

If this option is ticked, whenever a user selects **Add Response**, the new *Add Progress* page will be displayed in a separate window.

## 13.3 Call List

### 13.3.1 Size Call List for Fullscreen

This option only applies to the HTML grid.

By default, the HTML *Call List* grid comes with a set of scroll bars which can be removed by selecting the 'Size Call List for Fullscreen' option. This also means that if you print the page in landscape you will get a nicer printout of the call list; without the scroll bars (§14.1).

In IE, to toggle between full-screen mode (which removes the IE menus and tabs and fills the whole screen with just the Peak window) and the regular view, select View/Full Screen from the IE Menu bar or press F11.

### 13.3.2 Automatically Refresh Call List

This option only applies to the HTML, DHTML and Split grids (not AJAX).

Set the frequency that Peak should refresh or update the incidents in the *Call List* (default is 10 minute intervals). If you do not select this option, you can use the **Refresh** button in *Call List* to force a refresh whenever you wish.

### 13.3.3 Display Row Dividers in the Call List

Horizontal lines are drawn between each call in the HTML *Call List* grid.

### 13.3.4 Display Queries in HTML Grid

If you select this option, you can then choose which one of four HTML grids (HTML, DHTML, AJAX or Split) the results from queries (via the *Call List* page) is to be displayed (default is HTML).

The HTML version is robust in that it will work with most browsers but it has the limitation in that any more than 100 rows will cause the query to slow down so this grid should only be used if the call list has less than 200 rows.

The DHTML version has the benefit of being a dynamic grid with improved functionality (i.e. client-side sorting, dynamic column sizing and column ordering) but it may be slower.

The AJAX version is a simple, lightweight grid but with very fast XML data refresh (once every minute). This fast refresh rate is achieved by just getting back the changed text; not the whole page. But the disadvantages of this grid is that it cannot be customised, sorted or columns re-sized and there is no bulk update.

The Split version gives yet another view of the Peak calls but grid refresh is not automatic so has to be done manually.

For a pictorial representation of the grids, see §7.

### 13.3.5 Open Call List in a new page

If this option is ticked, whenever a user opens a *Call List*, it will be opened in a separate window preserving the page the user on.

### 13.3.6 Open Default Call List at Logon

If this option is not selected then, after you have logged into Peak, you will be left at the *Main Menu*.

If this option is selected then you will be left at the *Call List* page after the default query has been run (as configured in Query Builder, §11.1.5.1).

However, even if this option is selected, to ensure that everyone sees any new broadcast messages (§27), or if you have any undeleted messages, you will be taken straight to the *Main Menu* to read your messages before being allowed to continue.

### 13.3.7 Main menu Call List button always opens Default list

If selected, when the **Call List** button on the *Main Menu* is pressed, the default query (as configured in Query Builder, §11.1.5.1) will be opened otherwise the last query loaded will be opened.

### 13.3.8 Java Call List Font

This option defines the font, font style and size to be used by the Java *Call List* which was not supported from Peak Phase 9+.

### 13.3.9 Fix (Java) Call List size

This allows you to customize your Java *Call List* to a specific size rather than the default full screen and **Save** it. This functionality was not supported from Peak Phase 9+.

## 13.4 Query Builder

### 13.4.1 Default Query Fields

This option relates to the type or level of fields that will be displayed in the 'Displayed Fields' list when building a new query via Query Builder. It can be set to one of the following pre-defined levels:

- Release Details
- Minimal (default)
- Medium
- Long
- Custom (optional)

The 'Custom' option will only appear if you have previously defined a customised set of default query fields within Query Builder (§11.1.9.2).

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# 14 Printing calls

Several options exist within Peak for printing incidents depending on what type of print output you want.

## 14.1 Print a call list

If you want a printout which is effectively a screen capture then, at the appropriate screen, select from the IE menu: File/Print which will display the standard Microsoft Printer options window. This method can be used to print a HTML/DHTML/AJAX call list. Note that in HTML, if you set the 'Size Call list for Fullscreen' option in *Preferences* then the scroll bars will not appear in the printout (§13).

Another method that can be used to print the call list is to use **Copy** from the *Call List* to copy the grid into an Excel Spreadsheet and then print its contents. For more details see §7.5.

## 14.2 Print individual call details

To print the call details for a single call, first view the incident via *Call Details* then click the icon "" (§8.9) or *Expanded* Call Details (§8.1.22) then use the **Print** button provided by Peak.

## 14.3 Print multiple call details – multiprint [m]

Call details from several incidents can be printed in one go by using this option which can be invoked using one of the following:

1. *Main Menu*: click the **Multi print** button
2. drop-down menus at the top of each page: select Options/Multi-Print
3. shortcut key: press "m" key on the *Main Menu* page ("[m]")

An empty *Multi-Print* screen will be displayed when called via the above 3 methods. In the 'Calls to be printed' field, type in a comma separated list of the call references to be printed (e.g. "PC0083330, PC0089261, PC0093131") then press the **Print Calls** button else **Cancel Printing**.

4. (HTML/DHTML) **Multi Print** button in *Call List*. This button will become activated as soon as you select at least one call.

To select the calls, in HTML use the tick boxes on the left-hand side of each call and in DHTML CTRL+click individual calls. As soon as you press **Multi Print** Peak will start printing the first call.

Each call reference starts off in the 'Calls to be printed' window then it is removed as the Microsoft Print window appears for you to select the printer and click Print. Then depending on whether the print was successful, the call reference will appear in 'Calls printed' or in 'Calls in Error'.

Note that the Microsoft Print window will be displayed before an attempt is made to print the incident (as well as for each retry). This is because *Multi-Print* opens a new hidden page for each call and automatically prints it before moving on to the next call. IE does not allow for web pages to print themselves without prompting the user.

# 15 File Share [s]

The *File Share* screen enables you to temporarily upload a file to the Peak server which later can be downloaded by other users; which do not have to be Peak users.

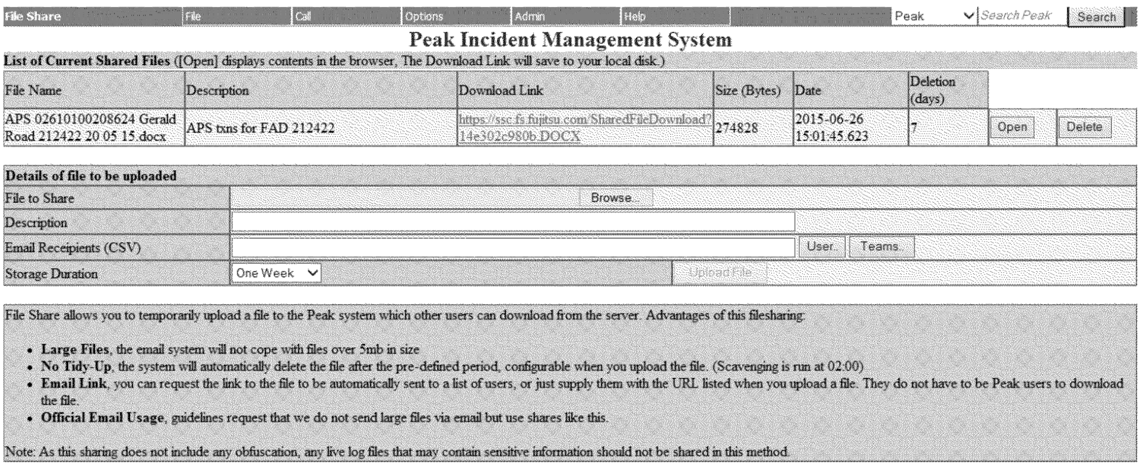



*Fig.15: File Share page with an existing uploaded file.*

Company guidelines request that we do not send large files via e-mail but instead use shares like this. The Company e-mail will not cope with files over 5Mb in size whereas files up to 90Mb can be shared in this way:

1. Type in or **Browse** to the file you wish to share.
2. Type in a brief description of the file
3. Type in a list of the e-mail recipients separated by commas (e.g. “alan.brown GRO barbara.long GRO. If you do not know the e-mail address you can search for it by **User** name or Peak **Team**.
   An e-mail will automatically be sent to the recipients (as well as yourself as the instigator) with the subject “File Share Notification” containing a link to the file (or you could upload the file and copy the ‘Download Link’ URL into an e-mail yourself).
4. Select how long the file should be kept for on the Peak server (from one week to one year). Peak will automatically delete the file after the configured period. Scavenging runs at 2am daily.
5. Press **Upload File**.

Once the file has been uploaded, you can select **Open** to display the contents in the browser or **Delete**. To retrieve a copy of the file, click on the ‘Download Link’ and then Save to your local disk.

File Share has no facility to perform any obfuscation. If it is required then you will have to do this yourself by calling the stand-alone version of the Obfuscation Tool (see document reference DEV/GEN/SPG/0023) before uploading the file onto Peak.

Note that files bigger than 90Mb can still use the Peak share but the file must be uploaded manually by the Peak Support, e-mail Peak with your request and details.

# 16 Collections [c]

Collections allow a user to group a set of related calls under a defined name. These calls can then be retrieved by building a query using the collection name (e.g. Collection – Contains - <Collection_name>, see §11.1 for details).

To define or create a new Collection:

- Decide who you want to be allowed to update the calls in this Collection.
  - Private/Any Team  restricted to the creator (default)
  - Private/<Team>  restricted to any user in the selected <Team>
    In this case, Peak will automatically add the text "(Team)" to the end of the Collection description in the 'Add Incident to Collection' drop-down list.
  - Public  unrestricted; anyone may add/remove incidents in this Collection – tick 'Public'.
    In this case, Peak will automatically add the text "(Public)" to the end of the Collection description in the 'Add Incident to Collection' drop-down list.

  Note that anyone who adds a Peak to a Collection may also remove them. But the owner may remove any Peaks from a Collection.
- Select 'New Collection'
- Type in a name and description for the Collection
- Press **Create Collection**.

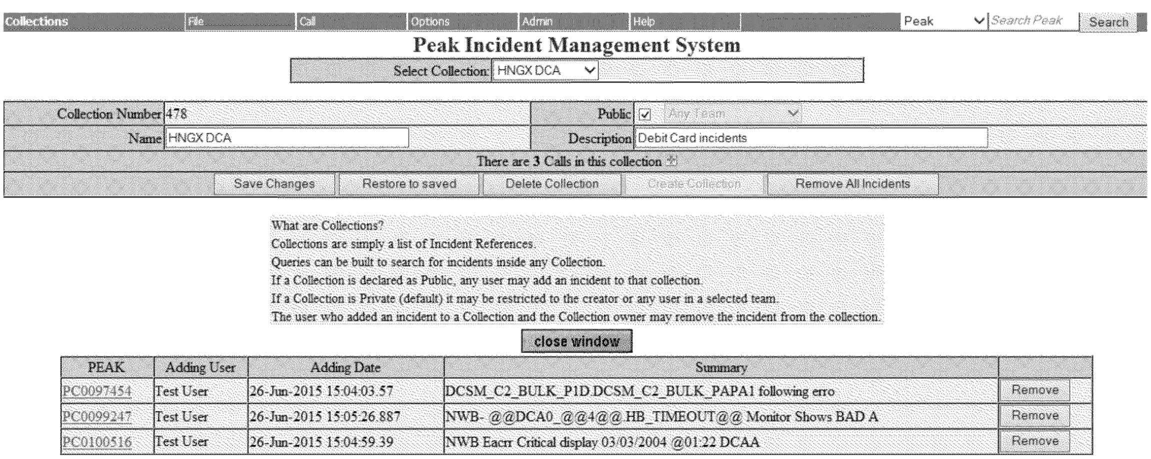



*Fig.16: Collection showing the 3 associated calls.*

To update an existing Collection, use the 'Select Collection' drop-down list to choose the relevant Collection name. Note that the drop-down list will only display collections that you have permissions to change i.e. your own public and privately created collections.

Once a Collection has been created, the **Create Collection** button is disabled but the **Save Changes**, **Restore to saved**, **Delete Collection** and **Remove All Incidents** buttons are available. The Collection can now be populated with calls via the *Collections* tab in *Call Details* (§8.6).

After having updated any of the fields in this *Collections* page, for the change to take effect use the **Save Changes** button otherwise **Restore to saved** to ignore any updates and restore the *Collections* page to the last saved version.

If there is at least one call associated with a collection, you can press the icon "+", next to the legend "There are N Calls in this collection", to display an embedded list of these calls. From here, you can click on the Peak reference link to view the call details or **Remove** a particular call from the Collection. Note that the **Remove All Incidents** button will remove all the calls associated with a Collection.

**Delete Collection** will remove the selected Collection and any associations that this Collection had with any calls will also be severed.

Here follows some examples of the ways Collections can be used.

<u>Example 1</u> Release Management review a number of Peak incidents each week. Usually they e-mail out a list of these calls to all those involved in the review and they print and read the list before attending.

Release Management could create a new Collection named 'RMF to be reviewed', then they can add those calls to be reviewed at the next meeting to the collection.

Release Management could then create a new Query that lists all the calls in this Collection

(Collection – Equal To – 'RMF to be reviewed')

and mark it as shared.

The review members could run this shared query to create a call list of those calls to be reviewed, they could highlight all the calls and use multi print to print all the calls.

The Collection could be kept up-to-date with and new additions to the review, if they want other people to be able to add calls to this collection they would make it public.

<u>Example 2</u> Peter is in the Support Unit. Sometimes he may diagnose a call which he then passes on to Development, however he would be interested in the progress of this call and would not like to lose sight of it. He can create a private collection, add any calls of interest to it and create a query to display all calls in the collection.

# 17 Alerts [a]

Alerts are activated when a specified action or trigger takes place. You can configure what types of alerts are generated and what action will trigger those alerts from the *User Alerts* screen.

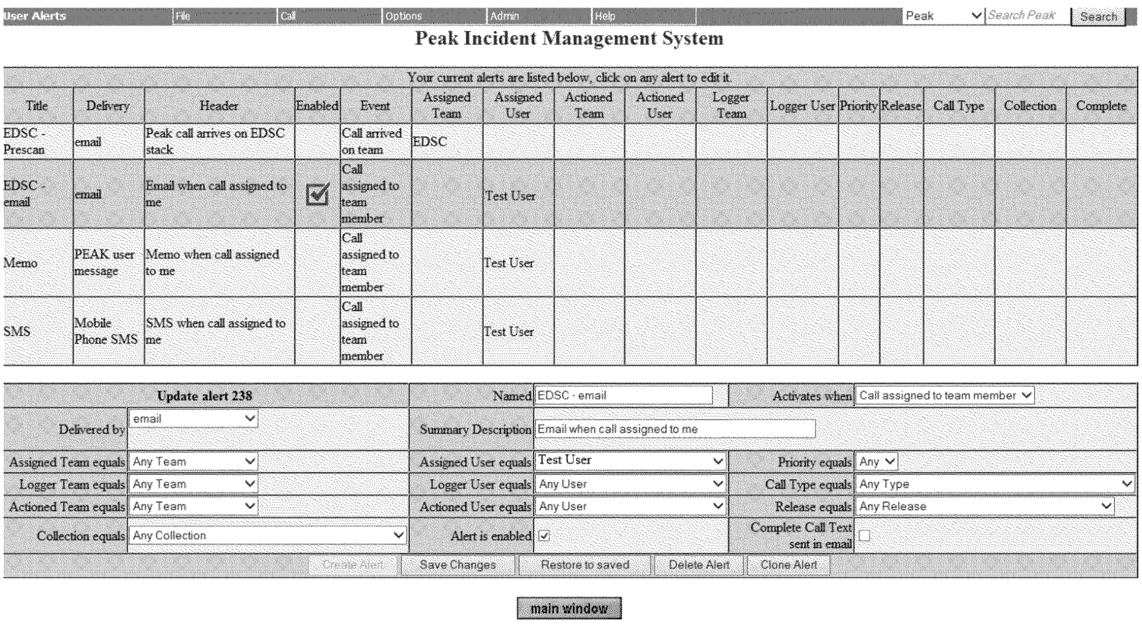
To create a new Alert:

- Type in a name and summary description for the Alert
- Decide which single action will activate the alert from the ‘Activates when’ drop-down list:
  - Call arrived on a team
  - Call assigned to a team member
  - Call closed
  - Target Release changed
  - Call arrived on system
  - etc.
- Select the type of alert you want delivered using the ‘Delivered by’ drop-down list:
  - Email
    sent to your e-mail address registered on Peak (or in the Company database) and it will include a HTTP link to the Peak call
  - Mobile Phone SMS (Short Message Service)
    delivered to your mobile phone. Once ‘Mobile Phone SMS’ has been selected, a field will appear for you to type in a mobile phone number. If you have registered an Alert phone number with Peak (e.g. when your Peak user was created, §4.2.1) then this number will be retrieved and displayed but you can change it.

    If you wish to register or change your registered Alert phone number on Peak, get in touch with the Peak Administrator.
  - PEAK user message
    shown in the *Main Menu* page immediately after you have logged in (§27).
- Adjust the following set of fields to further specify your alert or leave them unchanged; so everything is matched:
  - Assigned Team/User equals
  - Priority equals
  - Logger Team/User equals
  - Call Type equals
  - Actioned Team/User equals
  - Release equals
  - Collection equals

  For example, to create an alert when a call arrives on <u>any</u> team then just set the trigger as ‘Call arrived on team’. But to generate an alert when a call arrives on a specific team, you must also select the team name from the ‘Assigned Team equals’ list.

- Tick 'Alert is enabled' otherwise the alert will be created but not activated.
- Ticking 'Complete Call Text sent in email' means that the Peak details will be attached in HTML format to the e-mail alert. Once received, the e-mail recipient may submit a progress update to the Peak by replying to the mail and typing their progress between the [Update Start] and [Update End] blocks which appears in the e-mail body (§9).
- Press **Create Alert** to generate the alert.




| Title | Delivery | Header | Enabled | Event | Assigned Team | Assigned User | Actioned Team | Actioned User | Logger Team | Logger User | Priority | Release | Call Type | Collection | Complete |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EDSC - Prescan | email | Peak call arrives on EDSC stack | | Call arrived on team | EDSC | | | | | | | | | | |
| EDSC - email | email | Email when call assigned to me | ☑ | Call assigned to team member | | Test User | | | | | | | | | |
| Memo | PEAK user message | Memo when call assigned to me | | Call assigned to team member | | Test User | | | | | | | | | |
| SMS | Mobile Phone SMS | SMS when call assigned to me | | Call assigned to team member | | Test User | | | | | | | | | |



*Fig.17: Updating an existing Alert*

All new Peak users are automatically set up with an enabled alert which will send them an e-mail when they are assigned an 'A' priority call but you can change this alert so that the e-mail triggers on calls of <u>any</u> priority. To update an existing alert:

- Click on the alert that you wish to change at the top half of the *User Alerts* screen, which will highlight the alert in orange and then update the bottom half of the form with its details (as shown in Fig.17).
- Change 'Priority equals' to 'Any'
- Update the 'Named' and 'Summary Description' fields to reflect this change in functionality
- To create a new Alert and keep the existing 'A' priority alert, press **Clone Alert**.
  To save these changes to the existing alert, press **Save Changes** or **Restore to saved** to cancel the changes and **Delete Alert** will remove this Alert altogether.

You will not be alerted to changes that you yourself have initiated. Therefore if you assign a call to yourself and you have an alert which triggers when you are assigned a call, you will not receive the alert.

# 18 Help [h] and FAQ

This document is available from within Peak via drop-down menu: Help/On-line Help or via *Main Menu*: **Help**. There is also a link from the Frequently Asked Questions (FAQ) page.

The *FAQ* page is available from within Peak via drop-down menu Help/FAQ. This is a quick aid to help solve the most common questions faced by Peak users. They are listed in no particular order and the Browser Find facility (CTRL+F) can be used to search within the *FAQ* page.

# 19 New Password

Normally after 50 days your Peak password will expire but you can change it before that via *Main Menu*: **New Password** and then pressing the **Change** button.

The Peak password rules are explained in §4.2.2.

# 20 OTI (OTI Admin role only)

The *Set OTI* screen allows you to set the OTI interface status and the default ‘Release: Reported In’ for any calls that originated from across the OTI.

The OTI status can be configured to be up or down. If the status is down, a warning message will be shown in OTI-originated calls on the top right-hand corner of the *Call Details* screen (§8.1.3):

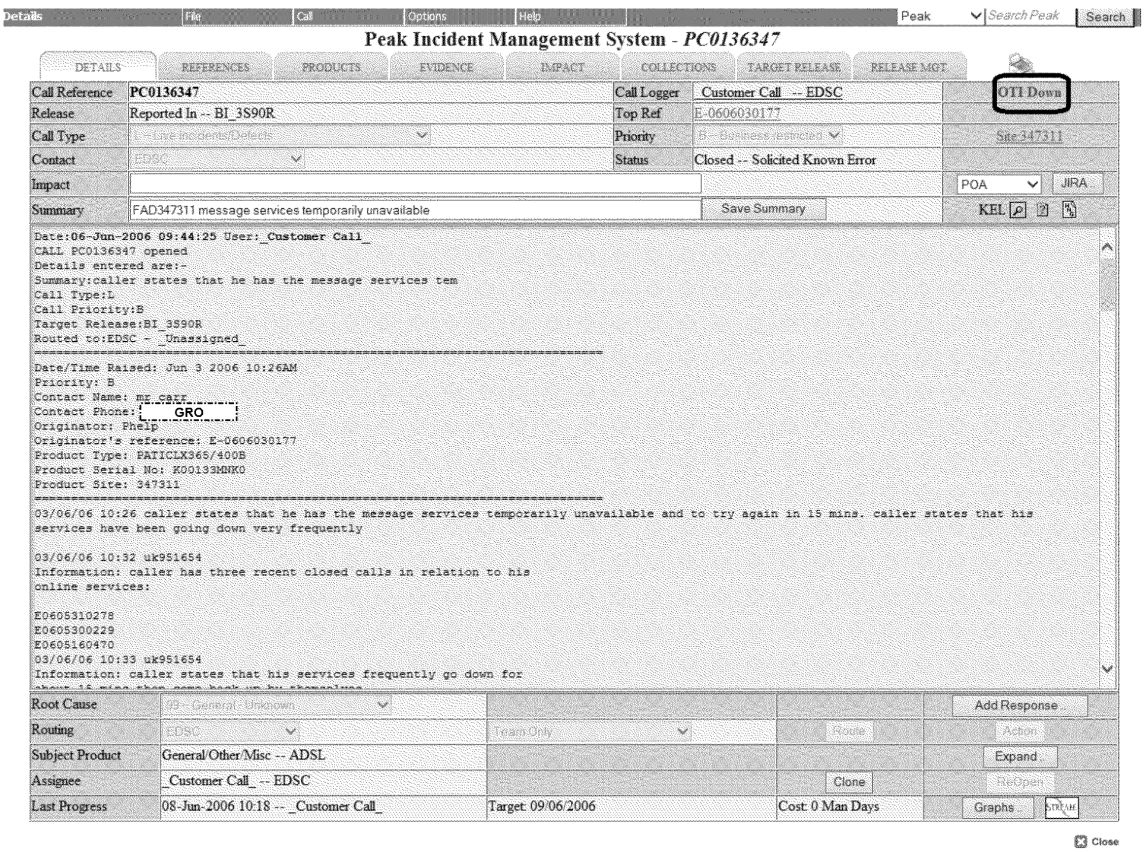



*Fig.20: “OTI Down” warning and default Release:’Reported In’*

# 21 Procedures (OTI Admin role only)

Clicking the **Procedures** button will display a document which describes how SSC team members should perform internal procedure known as “Prescan”.

# 22 Stats

This option will take you to the Peak Statistics page.

You can see an overview of the Peak incident metrics or drill-down to information based on Team, Product, Tickets, Call Type or Releases.

# 23 Reports

This option will take you into the *Reports* page which is an alphabetic list of reports requested by various groups. Some of the reports available include:

| **Name** | **Description** |
|---|---|
| Level 4 Reports | Level 4 incident and defect reports |
| Live Incident by Team | count of live incidents by Team |
| Obfuscation Report | Obfuscation attempts with Peak reference, user, return codes |
| Release Status | count of incidents by Release Status |
| SLT Summary | list of all open incidents with active SLTs |
| Tivoli Team Transfer Report | list of Tivoli Teams and the Peaks transferred into/out of those teams by month |

Clicking on the Report 'Name' will either allow you to generate or open and save the report.

## 23.1 Release Management Reports

Several reports apply specifically to Release Management including:

| **Name** | **Description** |
|---|---|
| Deployment Group report | list of platforms and their associated Build Chunk and Deployment Group |
| LST RM-x Release Plan | list of all Release Peaks currently assigned to the Peak users: PRE-LST, RMx-PreLST, LST and RMx-LST. |
| Release Planning Chunks | Releases are done in chunks (or Deployment Groups). This report is a breakdown by Release and Deployment Group in each release and the status of each Group. |
| Release Planning Platforms | list of all current RP platforms and LST release note platforms |
| Release Planning Summary | designed for use by Customer Service Prayers but can be used for tracking any release or set of fault Peaks that reside in a Collection and have Release Planning records |
| Releases by Planned Live Date | list of fault/Release Peaks grouped by their planned 'Into Production' dates |
| Releases by Planned LST Date | list of fault/Release Peaks grouped by their planned 'Out LST' dates |
| Target Release Report | all Target Releases and their attributes |

Note that a Peak without an RP record will NOT be included on any reports. Similarly a Peak with an RP record but not in a Collection may NOT be included in certain reports (e.g. "Release Planning Summary").

# 24 Templates

If you find that you or your team are typing in the same or similar text over and over again in call responses, you should use templates. You will be able to call up the template from the *Add Progress* page (via the 'Progress Templates' drop-down list), edit it before saving it as your response (§9.3).

Templates can be used by anyone but they may be owned by a particular team to restrict editing.

To manage templates, use the **Templates** button on the *Main Menu*.

To create a new template, set 'Select Template=New Template', type in a 'Template Name' and specify the 'Owning Team' (from any of the teams you are a member of); this restricts further changes to the template to members of that team only. Type in the template text and when finished press **Add Template**.

To edit an existing template, select the template name from the 'Select Template' drop-down list. You will be allowed to change 'Template Name', 'Owning Team' or template text then press **Save Changes** or **Restore**. Otherwise use **Delete Template** to remove the template from the System.

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# 25 Branch Note (OTI Admin role only)

The *Main Menu:* **Branch Note** button is only available to OTI Administrator roles.

The *Branch Notes* screen can be used to add information about a particular branch (e.g. that it is a VIP site or AEI-enabled branch). This note will then be visible in all calls raised by that Branch; in the *Call Details*.

There are two ways to enter the *Branch Notes* form to create, add or view notes:

- To create the first branch note for a branch, you must use the **Branch Note** button in *Main Menu*.
  You will be asked to type in the FAD/Branch Code then click on the icon " " before the *Branch Notes* screen is displayed. This method can also be used to view and add more branch notes.
- If the Site has a call with a branch note associated with it, then you can go into the *Call Details* for that call and click on the icon " " to view and add more branch notes (§8.1.8).

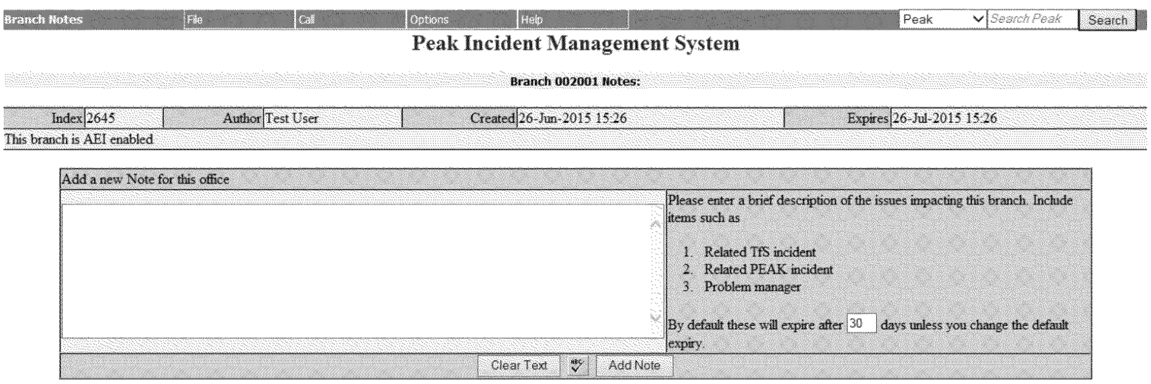


*Fig.25: Adding another Branch Note for FAD 002001*

After typing in the text for the branch note, you can change the default expiry of 30 days then select **Clear Text** (to remove the text you just typed in), Spell Check " " (to spell check the text, §9.2) or **Add Note** (which will actually create the branch note).

Note that the only way to delete a Branch Note is to wait for its expiry date to end.

# 26 Links to external systems

## 26.1 Known Error Log (KEL)

The Known Error Log (KEL) exists on the SSC website and is a collection of known defects, incidents and problems that can be searched using a combination of keywords.

The KEL system can be accessed directly from the **Search KEL** or **Raise KEL** buttons on the *Main Menu* but only if you have a UK or SSC domain login. If you are a non-UK or non-SSC domain user then you will be presented with the NT domain login window.

KELs are primarily used by First and Second Line Support to determine if the problem being reported has been seen before and therefore can be resolved without routing the call on to Peak. If a KEL exists then it should contain useful information such as the extent of the problem, who the call should be routed to, any work-around information, if a fix is due to be released, etc. If a KEL does not exist then the call can be routed to the Peak System along with evidence for further investigation.

Hints on searching the KEL can be found by clicking on 'KEL searching' on the *KEL Search* web page.

Usually KELs are created when a software error has been identified; this can be by First or Second Line Support, the SSC or even Testers (QC). If the KEL is raised with Peak call reference, then the KEL reference will be automatically added to the Peak as a 'Reference' (§8.1.5). KELs may also be created for non-software problems which could cause many Branches to phone the Helpdesk with the same issue.

If you are unable to create KELs but you can log onto the SSC Website, contact the SSC to enable this facility.

Any calls returned from Development should have an associated KEL which may need to be updated by the SSC before the closure response is sent back to the Originator. This ensures that KELs contain current information so that the Helpdesk are always referring to the latest and relevant information.

Helpful guidelines on how to create KELs can be found by clicking on 'KEL create notes' and 'KEL formatting notes' on the *Create HNGX KEL* web page.

## 26.2 Documents

The SSC website holds lots of support documentation generated by Development (e.g. High and Low Level Designs, Support Guides, etc.) and Post Office Limited (e.g. Branch Focus issues, Operations Manuals, etc.).

The Document Searches page can be accessed directly from the **Documents** button on the *Main Menu* but only if you have a UK or SSC domain account.

## 26.3 TRIOLE for Services (TfS)

TfS incidents may be viewed by connecting to the TfS website which requires a TfS account.

Any Peak incidents which were transferred over the OTI from TfS will have an automatically generated 'Top Ref' of 'TRIOLE for Service' containing the TfS reference. Clicking on this reference will take you directly to the incident in TfS; provided you have set up your TfS logon credentials (§13).

# 27 User Information

Peak Support can broadcast messages to all Peak users, a particular company, specific team or user. Usually these messages are used to advise users of new developments in Peak and any planned outages.

New users automatically receive all messages broadcast since Peak first went live.

If a new message is delivered whilst you are logged in, you will not see the message until the page is refreshed. When you have read a message, you may be removed from your list by pressing **Delete**.

User information is sorted in date order with newest messages at the top but this order can be changed by clicking on the arrow "▼"or "▲" next to the **User Information** button.

Note that you cannot avoid seeing new messages in the *Main Menu* screen. Even if you tick the *Preferences* option 'Open Default Call List when Logon' (§13), you will not be able to by-pass the *Main Menu* if you have any undeleted or new messages. With this in mind, you could create an alert to send you a Peak User Message when it is triggered (§17).

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# 28 Release/Change/Request Management

The Release, Change and Request Management processes were integrated into the Peak System at Phase 8.

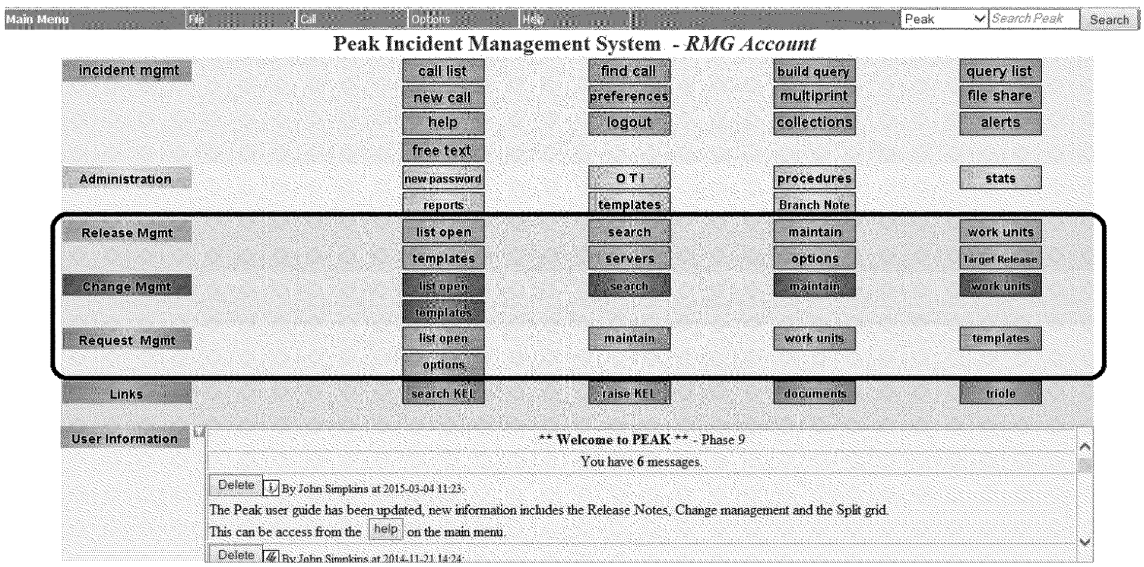



*Fig.28: Main Menu with Release/Change/Request Mgmt buttons*

The Peak System can be used to:

- list open Release/Change/Request Notes
- search for Release/Change Notes
- maintain Release/Change/Request Notes
- manage Work Flow Units for Release/Change/Request Notes
- manage Templates for Release/Change/Request Notes
- manage the list of Servers used in Release Notes
- manage Release/Request Note options e.g. locations, rigs, parent MSCs
- manage Target Releases for Release Notes
- manage Release Planning records (§8.8)

The "Release Mgmt", and "Request Mgmt", sections, on the *Main Menu* page, will only be visible if you are a member of the HNG-X Release Management ("RM-x") team. Similarly the "Change Mgmt" section will only be visible if you are a member of the "EDSC" team.

Although their functionality is very similar, the following sections are fairly independent so you could just skip straight to the relevant section.

## 28.1 Release Management (RM)

The Release Management processes of tracking fault Peak calls through a pre-defined work flow to resolution (from targeting at a release to deployment to live) and release planning centres on the creation of Release Planning records (which are described in §8.8) and Release Notes.

The following is a brief description of how to use the Release Management system on Peak:

1. (Optionally) On the PIT website, list the Work Packages for a specific platform build list. Tick those work packages that you want to include in the Release Note then choose [Create Release Note] which will take you to the *Release Note* screen on the Peak website.

   On the Peak website, select the **Maintain** button in the Release Management section of the *Main Menu* to view the Maintain *Release Note* page.

2. Create a new Release Note with some basic details (or select an existing Release Note to **Clone**) and **Save Changes**.

   Creating a new Release Note will automatically create an associated Release (or Container/Carrier/ Controlling) Peak containing a reference back to the original Release Note. By cloning, you may elect to use the same Release Peak as the existing Release Note.

3. At this stage, you may apply a template which will automatically populate your new Release Note with the details (including any Work Plan) pre-defined in the template. Otherwise you will have to manually type in the details and add the Work Units individually to your new Release Note.

   A Work Plan is a pre-defined route that the Release Note needs to take via various Contacts/Actionees in the work units before it can be released.

4. Start the process by pressing **Route to Step 1** of the Work Plan which will route the Release Peak and Note to the first Contact defined in the Work Plan.

5. Progress the Release Note by clicking on the Release Note reference in the *References* tab of the Release Peak. You may add a **Comment**, mark the current task as **Complete** (which will automatically route it to the next unit in the plan) or **Reject** the task (which will route it back to the previous unit).

6. Release Notes will remain open until it has been **Withdraw**n, deleted or the last step in the Work Plan has been **Complete**d.

### 28.1.1 Release Peaks

A Release Peak is a collection of fault Peaks which are fixed in a specific Release. It should have references to all the fault Peaks and also a reference to the Release Note. This association is usually set up by the Release Management team (using §7.2 or §8.2).

Each Release Note has an associated Release (or Container/Carrier/Controlling) Peak. It is possible, by cloning Release Notes, to have several Release Notes associated with the same Release Peak. It is the Release Peak (and associated Release Note) which is actually routed around the Contacts as defined in the Work Plan.

Since a Release Peak is just a Peak of Call Type='R – Release Notice Forum' with a reference to the Release Note, you may add evidence to the Peak as normal. This allows large amounts of text that are inappropriate in the Release Note or evidence from a test to be attached.

The Release Peak can be found and updated in the following places:

- If you are the current Actionee then the Release Peak will automatically appear on your stack.
- **Search** for the Release Note then click the 'PEAK' link (§28.1.3)
- **Maintain** the Release Note then press **Show PEAK** (§28.1.4)
- Click **back to detail** in the Progress *Release Note* (§28.1.3.1)
- If the Release Peak has been set up correctly as a reference in the fault Peaks then it can also be found by clicking on the 'Release Peak' link in:
  - *References* tab of the fault Peak (§8.2)
  - **Release Peaks** button in *Call Details* of the fault Peak (§8.1.11)

## 28.1.2 List Open Notes

Selecting the **List Open** button in the *Main Menu: Release Mgmt* section displays a summary list of all the Release Notes that are currently active (i.e. not withdrawn, deleted nor completed).

Open RNB | File | Call | Options | Admin | Help | Peak | Search Peak | Search

**Peak Incident Management System**

**Outstanding Release Notes**

| Release Notes | Date Raised | Software Id | Release | Reason | Problem | Platform | Rig | Location | Current Action | Assignee |
|---|---|---|---|---|---|---|---|---|---|---|
| HRU1011_PR | 2014-01-21 18:17:43 | | HNG-X 10.00.00.00 TPM Upgrade | CP941 PC0227848 PC0228505 | HRU10011_PR - R10 EPM - PSPID Request for P10.00.0.50 (POA_BLD 818) | LST - Various Platforms | LIVE (PR) | IRE11 | Produce PR PSPID & send output to RMx | CM |
| HRU10138B_LT | 2014-02-20 07:59:34 | | HNG-X 09.26 | | HRU10138B_LT - PSPID Request for PSPID P09.26.01.40 (BLD816) - Syslog Server Build | Syslog Server (SYS) | LST | IRE19,IRE11 | In Test | RMx-LST |
| HRU10261_LT | 2014-02-26 15:27:39 | | HNG-X 09.26 | PC0231796 | HRU10261_LT - 09.26 - Manual delivery of Manual Baseline (ACD) | Domain Controllers - Active Directory (ACD) | LST | IRE19 | LST sign off as fit for purpose | RMx-LST |
| HRU10298_LT | 2014-03-07 09:03:26 | | HNG-X 09.26 | PC0232017 | HRU10298_LT - 09.26 - Manual delivery of Manual Baseline (EAS) | Sysman Availability Server (EAS) | LST | IRE19 | In Test | RMx-LST |
| HRU10498_LT | 2014-04-29 14:55:10 | | HNG-X 10.63 | | HRU10498 - PSPID Request for 10.63.00.40 LST Audit Maintenace (BLD869) | LST - Various Platforms | LST | IRE19,IRE11 | Release Note Closed | RM |
| HRU10524_PR | 2014-05-13 14:05:01 | | HNG-X Rel. Ind. | A907323 | HRU10524_PR - HNG-X Rel. Ind. - Manual Delivery of Manual Baseline - (SOL Patch May) | NMS - CiscoWorks (NCW) | LIVE (PR) | IRE11,IRE19 | RM authorise application to Live via MSC | RM |
| HRU10593B_PR | 2014-09-22 10:43:09 | | HNG-X 11.02.00.40 | | HRU10593B_PR - PSPID Request for 11.02.00.50 - BLD922 - LIVE SYSMAN Upgrade | PR - Various Platforms | LIVE (PR) | IRE11,IRE19 | RM authorise application to Live via MSC | RM |
| HRU10647_PR | 2014-07-23 10:32:06 | | HNG-X 10.08.00.50 | | HRU10647_PR - PSPID Request for 10.08.00.50 - BLD901 - Live Smart Metering | PR - Various Platforms | LIVE (PR) | IRE11 | RM authorise application to Live via MSC | RM |
| HRU10688_LT | 2014-06-26 | | R9LST | PC0231796 PC0232093 PC0233350 | HRU10688_LT - 09.26 - Manual Delivery | Syslog Server (SYSv2) | LST | IRE19 | In Test | RMx- |

*Fig.28.1.2: List of Open Release Notes*

On entry to the *Open RNB* screen, the “Release Notes” are sorted in ascending alphabetical order but the order can be toggled to descending alphabetical by clicking the up and down arrows (“▲” and “▼”).

There may be hyperlinks to the Peaks/CPs/MSCs and Progress *Release Notes* (§28.1.3.1); where it will display information about the state of the Release Note and which team within the Release Management process the Note is currently with.

## 28.1.3 Search Notes

To find baselines on Peak:

1. Select the **Search** button in the *Main Menu: Release Mgmt* section to find baselines in Release Notes that match your search criteria. You can select at most 3 components which are then combined to produce a search condition for Release Notes:

- From the ‘Matching Field’ drop-down list in the *Search RNB* form, select a Release Note field that you wish to match on.
- Type in the search text which will be used in conjunction with the ‘Matching Field’. This field is case insensitive, accepts “%” as the wildcard symbol but can be left blank to match everything.

  Select the status of Release Notes to be searched (Open and Complete Notes, Open Notes only or Complete Notes only).
- Press **Start Search** or **Main Window** (to return to the *Main Menu)*.

For example, to search for completed Release Notes originated by the user ‘jones’:
select ‘Matching Field=Originating User’,
type in ‘Search Text=jones’ and
choose ‘RNB Status=Complete Notes only’.


Search RNB File Call Options Admin Help Peak Search Peak Search

Peak Incident Management System

Release Note Search

| Matching Field | Search Text | RNB Status | |
|---|---|---|---|
| Release Number | HRU91 | Open and Complete Notes | Start Search |

Search Results : 111 Matches

| ReleaseNote | PEAK | Reason | Problem Description | Location | Rig | Release | Date Raised | Logger | Current Step |
|---|---|---|---|---|---|---|---|---|---|
| HRU9101_LT | PC0222561 | PC0221004 PC0222214 | HRU9101_LT - 06.60 - Manual Delivery of Auto Baseline (RHL) | IRE19,IRE11 | LST | HNG-X 06.60 | 2012-12-18 08:01:00 | Lorraine Elliott | Withdrawn |
| HRU9102_LT | PC0222562 | PC0221479 | HRU9102_LT - 06.15 - Manual Delivery of Auto Baseline (Various) | IRE19,IRE11 | LST | HNG-X 04.62 | 2012-12-18 08:06:39 | Lorraine Elliott | Withdrawn |
| HRU9102A_LT | PC0222562 | PC0221479 PC0222562 | HRU9102A_LT - 06.15 - Manual Delivery of Auto Baseline (Various) | IRE19 | LST | HNG-X 04.62 | 2012-12-21 15:37:55 | Lorraine Elliott | |
| HRU9103_LT | PC0222563 | PC0222037 | HRU9103_LT - -06.15 - Manual Delivery of Auto Baseline (EMD,EES) | IRE19,IRE11 | LST | HNG-X 04.62 | 2012-12-18 08:11:56 | Lorraine Elliott | Withdrawn |
| HRU9103_PR | PC0222563 | PC0222037 | HRU9103_PR - -06.15 - Manual Delivery of Auto Baseline (EMD,EES) | IRE11,IRE19 | LIVE (PR) | HNG-X 06.15 | 2013-06-10 08:15:30 | Lorraine Elliott | |
| HRU9103A_LT | PC0222563 | PC0222037 | HRU9103A_LT - -06.15 - Manual Delivery of Auto Baseline (EMD,EES) | IRE19,IRE11 | LST | HNG-X 04.62 | 2012-12-31 10:48:10 | Tyrone Cozens | |
| HRU9104_LT | PC0222564 | PC0222037 | HRU9104_LT - 06.15 - Manual Delivery of Auto Baseline (RHL) | IRE19,IRE11 | LST | HNG-X 04.62 | 2012-12-18 08:15:58 | Lorraine Elliott | |
| HRU9104_PR | PC0222564 | PC0222037 | HRU9104_PR - 06.15 - Manual Delivery of Auto Baseline (RHL) | IRE11,IRE19 | LIVE (PR) | HNG-X 06.15 | 2013-06-17 10:13:38 | Lorraine Elliott | |
| HRU9105_LT | PC0222565 | PC0222181 | HRU9105_LT - 06.15 - Manual Delivery of Auto Baseline (RHL) | IRE19,IRE11 | LST | HNG-X 04.62 | 2012-12-18 08:21:20 | Lorraine Elliott | Withdrawn |
| | | | HRU9106_LT - 06.15 - | | | HNG- | 2012- | Lorraine | |

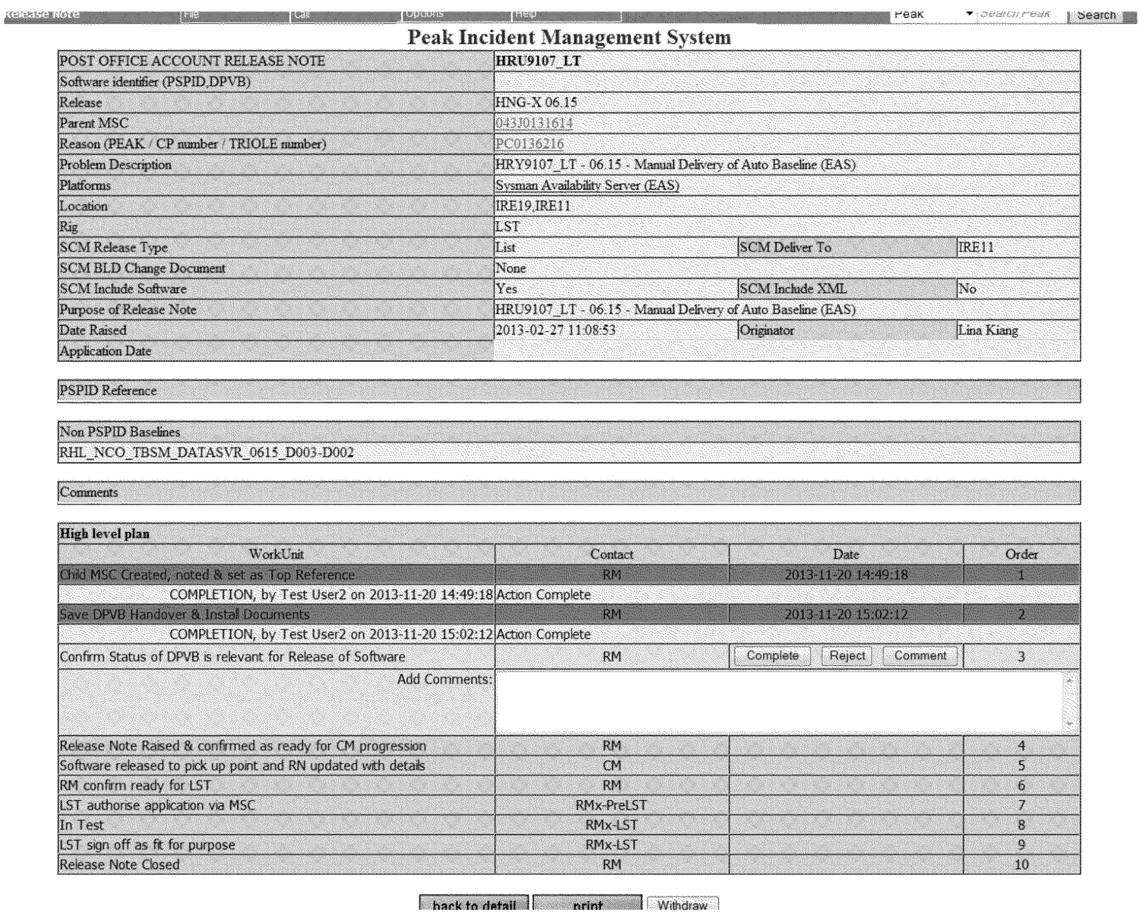
*Fig.28.1.3: Expanded Search RNB page – with search results*

When the search is complete, the *Search RNB* page will be expanded to show the number of matches found along with a summary list of the matching Release Notes. The fields shown include hyperlinks to the Release and Fault Peaks/CPs/MSCs and Progress *Release Note* (§28.1.3.1); where it will display information about the state of the Release Note and which team within the Release Management process the Note is currently with.

#### 28.1.3.1 Progress Release Note

There are two pages called *Release Note* in Peak and they enable you to update different aspects of the Release Note. In this document, they have been distinguished by the names:

- Maintain *Release Note* is the *Release Note* page to be used to create, update the details and work flow template of a Release Note (§28.1.4). It is displayed via the Main Menu: **Maintain** button.
- Progress *Release Note* is the *Release Note* page to be used to progress the work flow of the Release Note. It is displayed by clicking on the 'Release Note' link in:
  - **List Open** Release Note then click the 'Release Notes' link (§28.1.2)
  - **Search** for the Release Note then click the 'Release Note' link (§28.1.3)
  - *References* tab of the Release Peak then click the 'Release Note' link (§8.2)
  - **Release Peaks** button in *Call Details* of the fault Peak (§8.1.11)



Peak Incident Management System

| | | | |
|---|---|---|---|
| POST OFFICE ACCOUNT RELEASE NOTE | **HRU9107_LT** | | |
| Software identifier (PSPID,DPVB) | | | |
| Release | HNG-X 06.15 | | |
| Parent MSC | 043J0131614 | | |
| Reason (PEAK / CP number / TRIOLE number) | PC0136216 | | |
| Problem Description | HRY9107_LT - 06.15 - Manual Delivery of Auto Baseline (EAS) | | |
| Platforms | Sysman Availability Server (EAS) | | |
| Location | IRE19,IRE11 | | |
| Rig | LST | | |
| SCM Release Type | List | SCM Deliver To | IRE11 |
| SCM BLD Change Document | None | | |
| SCM Include Software | Yes | SCM Include XML | No |
| Purpose of Release Note | HRU9107_LT - 06.15 - Manual Delivery of Auto Baseline (EAS) | | |
| Date Raised | 2013-02-27 11:08:53 | Originator | Lina Kiang |
| Application Date | | | |

| |
|---|
| PSPID Reference |

| |
|---|
| Non PSPID Baselines |
| RHL_NCO_TBSM_DATASVR_0615_D003-D002 |

| |
|---|
| Comments |

| High level plan | | | |
|---|---|---|---|
| WorkUnit | Contact | Date | Order |
| Child MSC Created, noted & set as Top Reference | RM | 2013-11-20 14:49:18 | 1 |
| COMPLETION, by Test User2 on 2013-11-20 14:49:18 | Action Complete | | |
| Save DPVB Handover & Install Documents | RM | 2013-11-20 15:02:12 | 2 |
| COMPLETION, by Test User2 on 2013-11-20 15:02:12 | Action Complete | | |
| Confirm Status of DPVB is relevant for Release of Software | RM | Complete Reject Comment | 3 |
| Add Comments: | | | |
| Release Note Raised & confirmed as ready for CM progression | RM | | 4 |
| Software released to pick up point and RN updated with details | CM | | 5 |
| RM confirm ready for LST | RM | | 6 |
| LST authorise application via MSC | RMx-PreLST | | 7 |
| In Test | RMx-LST | | 8 |
| LST sign off as fit for purpose | RMx-LST | | 9 |
| Release Note Closed | RM | | 10 |

back to detail | print | Withdraw

*Fig.28.1.3.1a: Progress Release Note page for HRU9107_LT*

Using Progress *Release Note*, you can view all the details of the Release Note with hyperlinks (if they exist) to the Parent MSC and Reason (Peak/CP/Triole) and Platforms (which will display in a pop-up window, all the servers in the server group set up in §28.1.7) and update the High Level Plan.

The Work flow actions in the High level plan section are colour-coded:
yellow - denotes the current work step to be actioned
orange - denotes the work steps that have yet to be actioned
green - show the completed/withdrawn work steps (along with a timestamp)
The grey text shows the completed/rejected actions and comments in ascending time order within each Work flow step. Since rejecting a step will cause the work flow to return to the previous step, the High level plan may not the best place to get a time order view of events, instead see the progress text in the Release Peak.

At the bottom of the Progress *Release Note* page, you can see the *Call Details* of the Release Peak by pressing **back to detail**, **print** or **Withdraw** (to remove all outstanding actions and mark the Release Note as complete).

To progress the Release Note, you can type a comment into the 'Add Comments' field then press **Comment** which will just add your text to current Work Unit. Pressing the **Reject** button, which is enabled for all steps except for step 1, will display the following pop-up window (along with helpful tooltips):

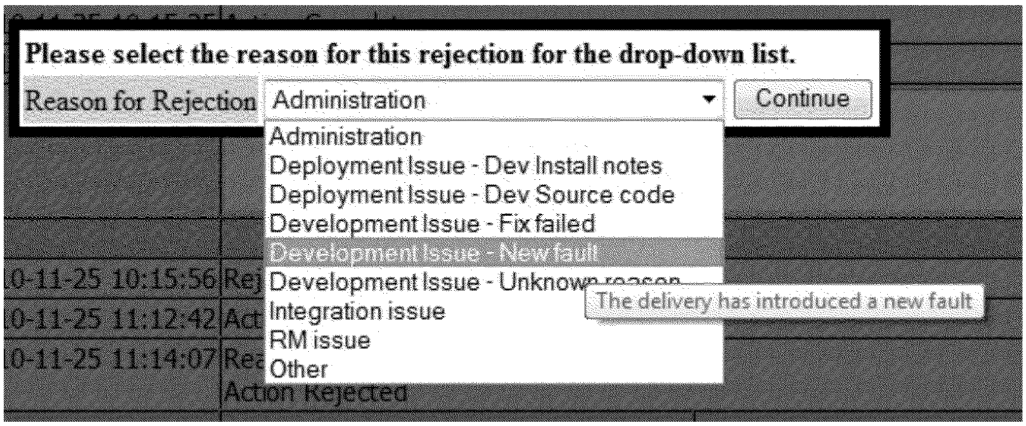



*Fig.28.1.3.1b: Release Note Rejection reasons*

Choose a rejection reason from the drop-down list then select **Continue** to add it and any typed in comments and route the Note back to the previous work unit.

Pressing the **Complete** button will add any typed in comments and route the Note onto the next work unit. But if you are completing the last step of the Work Plan, the following pop-up will appear to enable you to select enter more details on the status (Applied, Partial Applied, Regressed or Withdrawn):

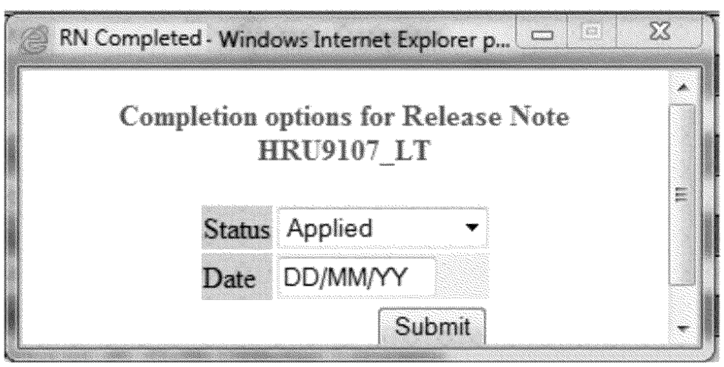



*Fig.28.1.3.1c: Release Note Completion options*

**Submit** will copy the typed in comment and Completion information into the last Work Unit and into the Progress *Release Note* 'Application Date' field and then close the Release Note.

### 28.1.4 Maintain Notes

There are two pages called *Release Note* in Peak and they enable you to update different aspects of the Release Note. The Progress *Release Note* is described in §28.1.3.1.

The Maintain *Release Note* form is shown when the **Maintain** button is pressed. It should be used to create, clone, edit, delete or withdraw Release Notes, apply a standard template, view the Release (or carrier) Peak and add/delete actions to the work plan.

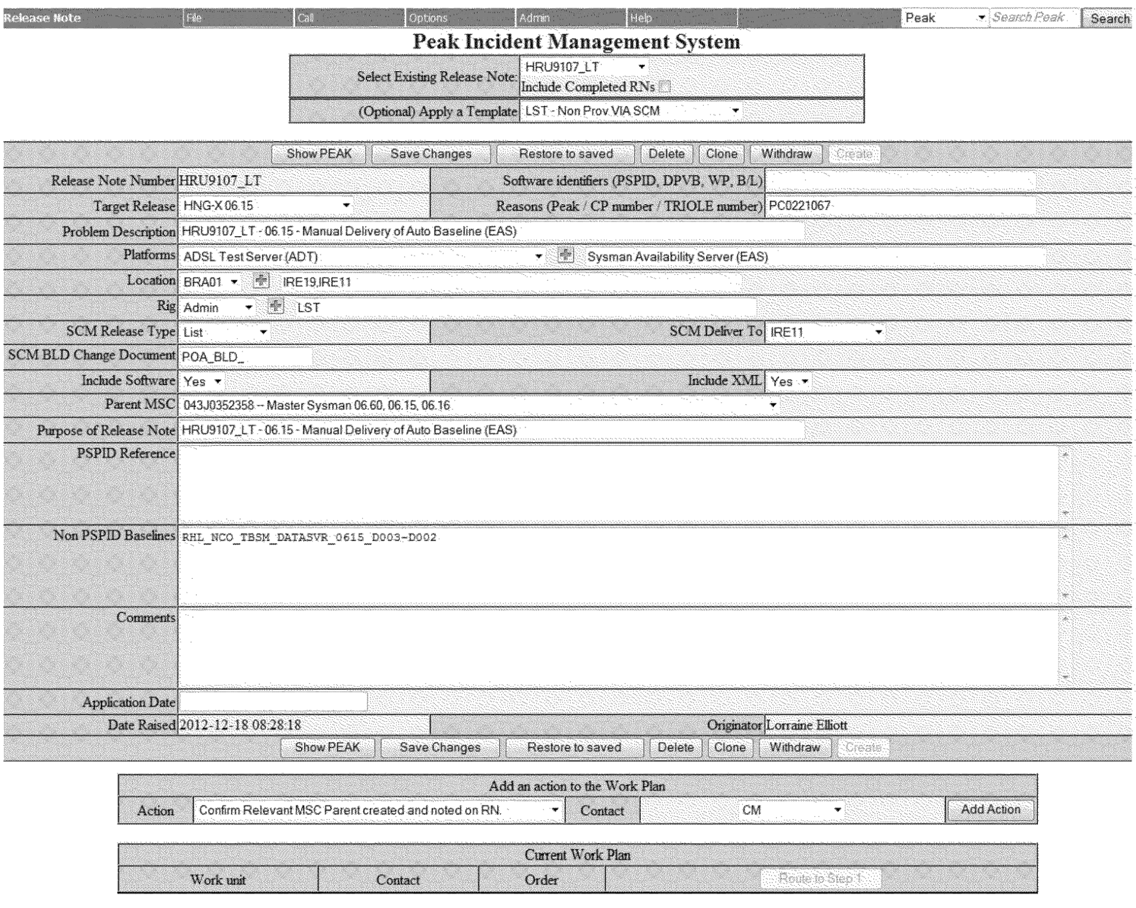



*Fig.28.1.4a: Expanded Maintain Release Note page for Release Note HRU9107_LT*

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Release Notes can be created in one of the following ways:

1. By cloning an existing Release Note
   Select an existing Release Note, then **Clone** it as a new Release Note. When prompted, type in the new Release Note number and decide if the same Release (or Carrier) Peak should be used,
2. Manually without using a template
   By typing everything into the Maintain *Release Note* form from scratch as well as defining the actions in the work plan.
   A Release Note without a template will display the banner line “No Template is assigned to this Release Note”.
3. Using a template
   Templates can only be applied to existing Release Notes (i.e. those with a Release Note Number). If you want to create a new Release Note based on a template, first you have to create a basic Release Note. Be aware that any details you type in may be overwritten when the template is applied so entering just the mandatory fields at this stage should be sufficient. Then select the template to apply; which may have some pre-defined work flow actions and make any necessary adjustments.

To create a new Release Note:

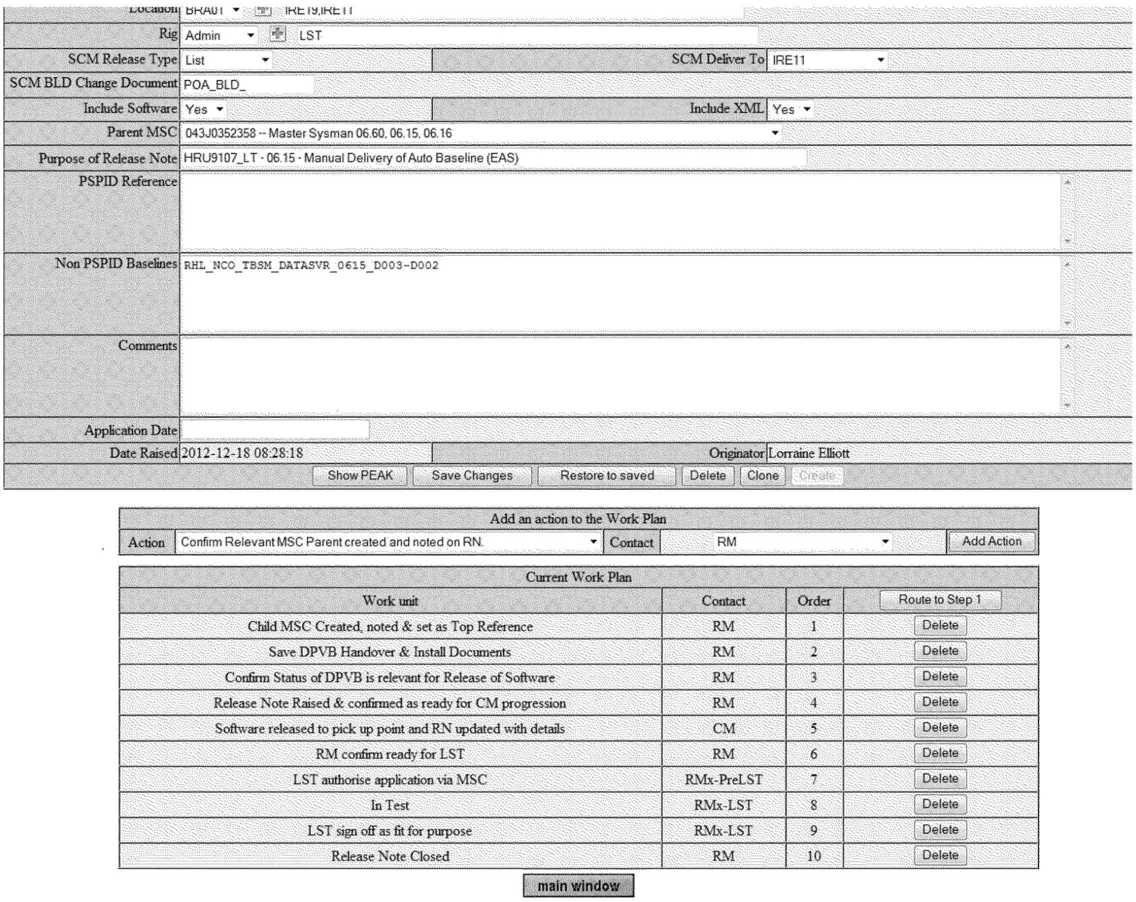
- Choose ‘Select Existing Release Note=New Release Note’ from the drop-down list.
  Ticking ‘Include Completed RNs’ will display all (not withdrawn, deleted nor completed) Release Notes in the drop-down list.
  Leave ‘(Optional) Apply a Template=No Template’. But if a template has been applied to the Release Note then this field will contain the template name.
- The mandatory fields in the Maintain *Release Note* form are: ‘Release Note Number’, ‘Problem Description’ and ‘Purpose of Release Note’.
- By default, the ‘Release Note Number’ field will be pre-filled on entry with what Peak calculates to be the next Release Note Number – which can be changed if necessary.
- The options in the following drop-down lists are managed via functions within *Main Menu*:

  | | |
  |---|---|
  | Target Release | in *Releases* via **Target Release** (§28.1.9) |
  | Platforms | in *Servers* via Release Mgmt: **Servers** (§28.1.7). |
  | Location | in *RNOptions* – Locations via Release Mgmt: **Options** (§28.1.8). |
  | Rig | in *RNOptions* – Target Rigs via Release Mgmt: **Options** (§28.1.8) |
  | Parent MSC | in *RNOptions* – Parent MSCs via Release Mgmt: **Options** (§28.1.8) |

  The other drop-down lists are managed by the Administrator.
- The icon “ ” which appears in the ‘Platforms’, ‘Location’ and ‘Rig’ fields allows you to append the item from the selected from the drop-down list to the field to the right or you could just type in a list of items separated by a comma (e.g. “BRA01,IRE11,LEW02”).
- Press **Create** (the Release Note to expand the Maintain *Release Note* form).
  Creating a Release Note will also create a Release Peak (§28.1.1) with references back to the Release Note in the *Release* tab and a Release Planning record (§8.1.11). If entries were entered in the ‘Reasons (Peak/CP number/TRIOLE number)’ field of the Release Note then these references will also be carried forward to the Release Peak.
  To get directly to the Release Peak from the Release Note, use the **Show Peak** button in the Maintain *Release Note* page.

- Once the Release Note has been created, a template may be applied. The fields which can be pre-defined by a template (§28.1.6) are:
  Location
  Rig
  Parent MSC
  Comments
  Work Plan (Work unit, Contact and Order)

- To manually construct a Work Plan, select an 'Action' using a drop-down list which was created via **Work Units** (§28.1.5) and a Contact; to whom the Release Peak will be routed when it is time for that work unit to be actioned.




| Work unit | Contact | Order | Route to Step 1 |
|---|---|---|---|
| Child MSC Created, noted & set as Top Reference | RM | 1 | Delete |
| Save DPVB Handover & Install Documents | RM | 2 | Delete |
| Confirm Status of DPVB is relevant for Release of Software | RM | 3 | Delete |
| Release Note Raised & confirmed as ready for CM progression | RM | 4 | Delete |
| Software released to pick up point and RN updated with details | CM | 5 | Delete |
| RM confirm ready for LST | RM | 6 | Delete |
| LST authorise application via MSC | RMx-PreLST | 7 | Delete |
| In Test | RMx-LST | 8 | Delete |
| LST sign off as fit for purpose | RMx-LST | 9 | Delete |
| Release Note Closed | RM | 10 | Delete |

*Fig.28.1.4b: Expanded Maintain Release Note page with initial Work Plan*

Then press **Add Action** to append the new action to the list under 'Current Work Plan' along with an 'Order' which is the next in the sequence.
If the order of the work units is incorrect then you must **Delete** the relevant work units (which will automatically adjust the 'Order' field) and then recreate the new actions in the correct sequence.

- Press **Route to Step 1** to initiate the work plan by routing the Release Peak to the Contact defined in the first work unit.

To edit a Release Note, choose the Release Note number from ‘Select Existing Release Note’ drop-down list. This will automatically populate the fields in this page with details of the Note allowing you to edit those details. Press **Show PEAK** (to display the associated Release Peak), **Save Changes, Restore to saved, Delete** (Release Note and its associated Work Units), **Clone** (to create a clone of this Release Note), **Withdraw** (which removes all outstanding actions and mark the Release Note as complete but does not delete it), **Add Action** (to the Release Note), **Delete** (the relevant work unit from the Note) or **Route to Step 1** to route the Release Note to the Contact in the first work unit).

Once the Work Plan has been initiated, it is still possible to change elements of the Release Note. For example, the figure below shows that Steps 6 to 10 have yet to be completed, these steps can be **Delete**d or **Add Action** can be used to add new actions to the end of the sequence.
If you change the template then you will be warned that any existing work units will be replaced and the new Work Plan will be taken back prior to Step 1 (and the **Route to Step 1** button will be enabled again).

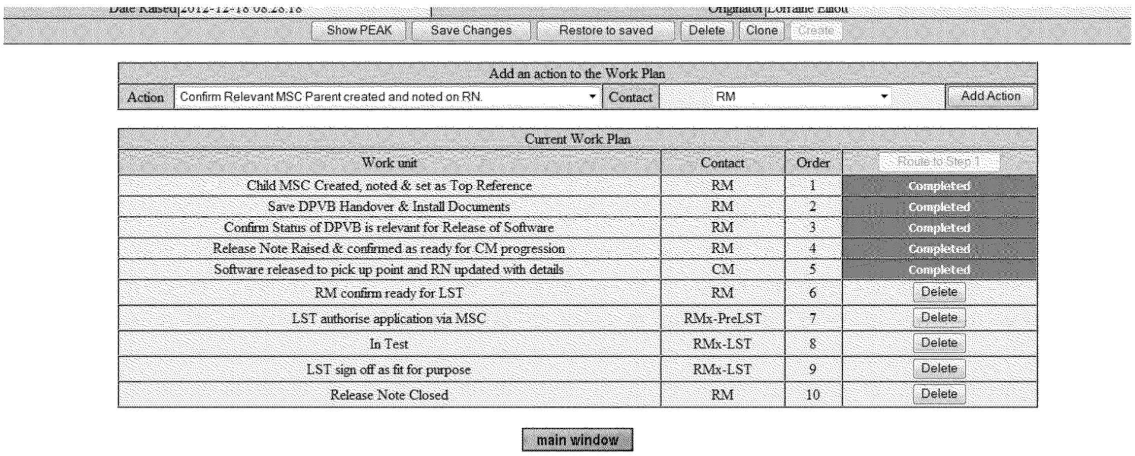



*Fig.28.1.4c: Expanded Maintain Release Note page with initiated Work Plan*

## 28.1.5 Manage Work Flow Units

Selecting the **Work Units** button allows you to create and manage the properties of a work unit. Each work unit describes a work action that must be completed and which team is responsible for that action.

Once created, work actions can be combined in an order which defines the complete process or work flow for a particular type of Release Note (e.g. in a Release Note for a Counter fault, the work plan starts with ‘Release Note Peak Created’ and ends with ‘Release Authorisation’). To save typing in the same sequence of work actions, use templates (§28.1.6).

Once a work plan has been applied to a Release Note and then initiated, the Peak System will manage the work flow and record the comments made at each stage. But it is the responsibility of the individual Contacts to ensure that they perform their actions and update Peak with the status. Actionees can either add a **Comment**, **Complete** their action (so the process moves forward to the next step), **Reject** it (so the process moves back to the previous step) or the Release Note can be **Withdraw**n (and completed).

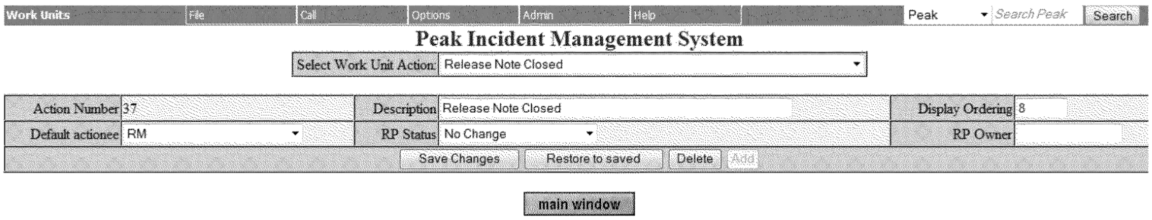



*Fig.28.1.5: The "Release Note Closed" work unit*

To create a new work flow unit:

- Choose 'Select Work Unit Action=New Action' from the drop-down list.
- Enter the properties of the new Work Unit Action.
  The 'Action Number' will be automatically generated once the action has been created.
  The 'Display Ordering' field defines where in the list of work units this particular action will be displayed (e.g. in the 'Select Work Unit Action' field, *Template* and Manage *Release Note* pages).
  The 'Default actionee' specifies who will be shown by default as the 'Contact' in the Maintain *Release Note* (§28.1.4).
  If this Work step, within an active Release Note, is automatically updated by Peak the 'RP Status' and 'RP Owner' defined here, this will be shown as an audit trail in the 'Progress text' field of the Release Planning record (§8.8).
- Press **Add** (new work unit).

To edit, delete or view an existing work unit action, choose the action from 'Select Work Unit Action' drop-down list. Once an item has been selected, all the information about that option is retrieved from the database and displayed on the *Work Units* form, allowing you to edit those details then use **Save Changes, Restore to saved** or **Delete** (the work unit).

## 28.1.6 Manage Templates

Selecting the **Templates** button allows you to manage templates for Release Notes. A template may contain pre-loaded information in each field of a Release Note including a complete work plan (using the work units created in *Work Units,* §28.1.5). Once created, the template can be selected from the Maintain *Release Note* form via the '(Optional) Apply a Template' drop-down list (§28.1.4). Note that a template may only be applied to a saved Release Note.

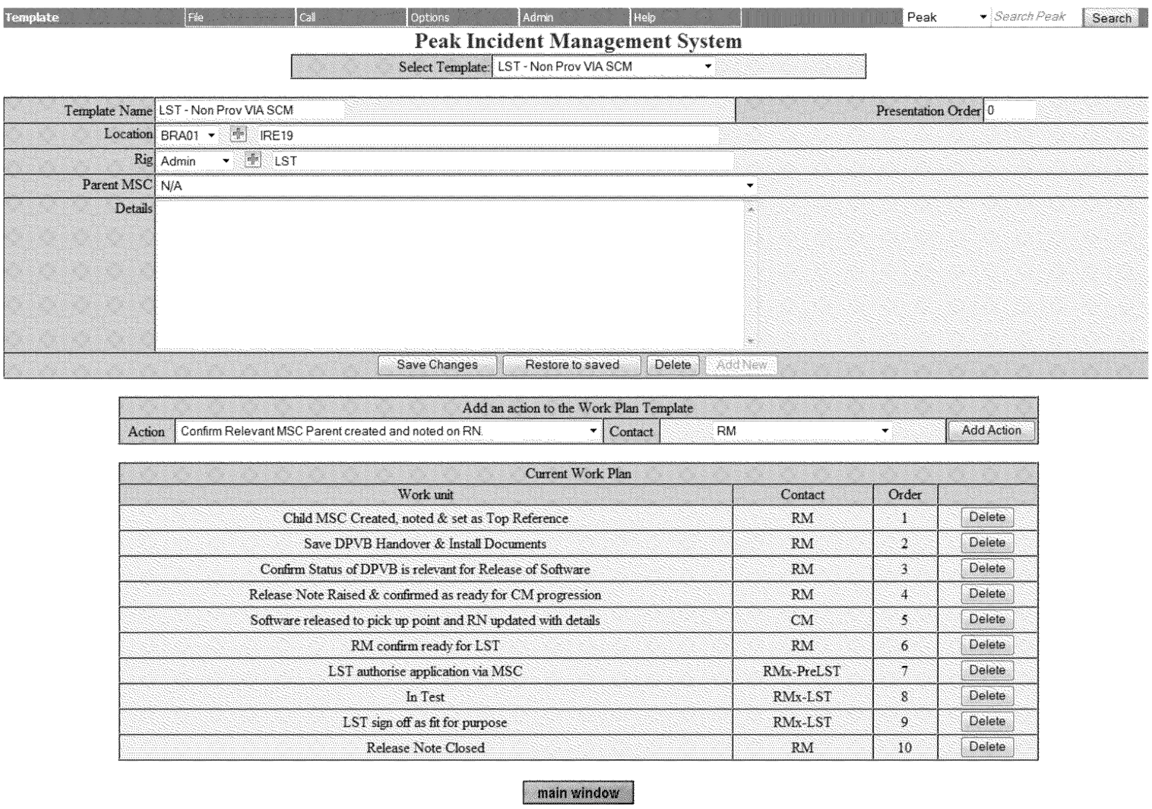



*Fig.28.1.6: Expanded "LST – Non Prov VIA SCM" Template*

To create a new template:

- Choose 'Select Template=New Template' from the drop-down list.
- Type in a (mandatory) 'Template Name'.
  The 'Presentation Order' determines where this template name will be displayed in Action lists.
  The locations/rigs/parent MSCs set up in *RNOptions* (§28.1.8) are displayed in this drop-down list.
  The icon "" which appears in the 'Platforms', 'Location' and 'Rig' fields allows you to append the item from the selected from the drop-down list to the field to the right or you could just type in a list of items separated by a comma (e.g. "BRA01,IRE11,LEW02").
  The 'Details' field is a free-text field and is displayed when the template is selected in 'Comments' field of the Maintain *Release Note* page.

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- Press **Add New** (which will create the template and expand the *Template* form).
- (Optionally) Add action(s) to the Work Plan Template by selecting an action which was created in *Work Units* (§28.1.5) and .a Contact.
  Press **Add Action** to append the new action to the list under ‘Current Work Plan’ along with an ‘Order’ which is the next in the sequence.
  If the order of work units is incorrect then you must **Delete** the relevant work units (which will automatically adjust the ‘Order’ field) and then recreate the new actions in the correct sequence.

To edit, delete or view the templates, choose the template name from ‘Select Template’ drop-down list. This will automatically populate the fields in this page with details of that template allowing you to edit those details then use **Save Changes, Restore to saved, Delete** (template and its associated Work Units), **Add Action** (to the Work Plan) or **Delete** (the relevant work unit from the Plan).

### 28.1.7 Manage Server List

Selecting the **Servers** button allows you to manage the Server Group list which is displayed in the ‘Platforms’ drop-down list in Maintain *Release Note* (§28.1.4). You can create a server group and (optionally) define servers within that group.

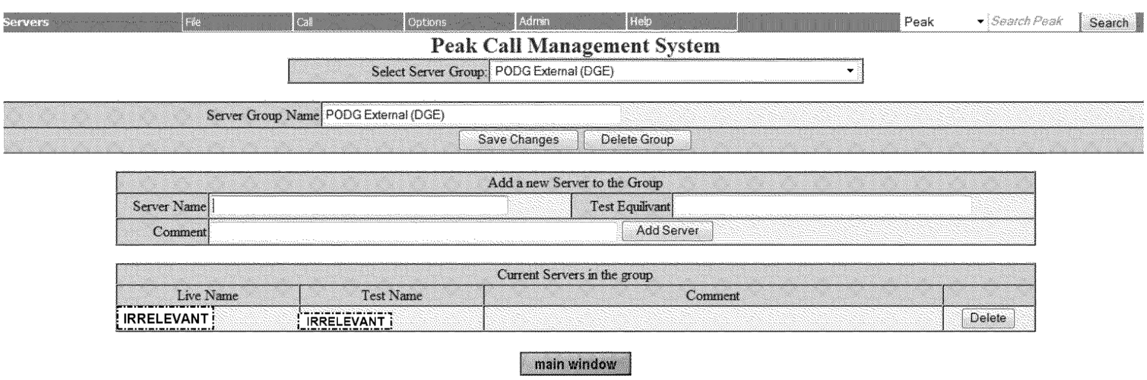


*Fig.28.1.7: Expanded Servers form*

To create a new server group:

- Choose ‘Select Server Group=New Group’ from the drop-down list.
- Type in the name of the new Server Group in ‘Server Group Name’ field
- Press **Add Group** (which will create the server group and expand the *Servers* form).
- (Optionally) Add server(s) to the new server group by filling their details.
  Press **Add Server** to append the details of the new platform to the list under ‘Current Servers in the group’.

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To edit, delete or view the servers group or servers, choose the existing server group name from the 'Select Server Group' drop-down list. This will automatically populate the fields in the *Servers* page with details of that server group, allowing you to edit those details then use **Save Changes** (to the server group name), **Delete Group** (including any associated servers), **Add Server** (to the server group) or **Delete** (the relevant server from the group).

It is not possible to edit a server in a server group; you must **Delete** the server then **Add Server** again but with the correct details.

Once defined, the association between a group of servers with its server group can be seen in a pop-up window displayed when you are updating the work flow. In the Progress *Release Note* form (shown in Fig.28.1.3.1a), click on the 'Platforms' link.

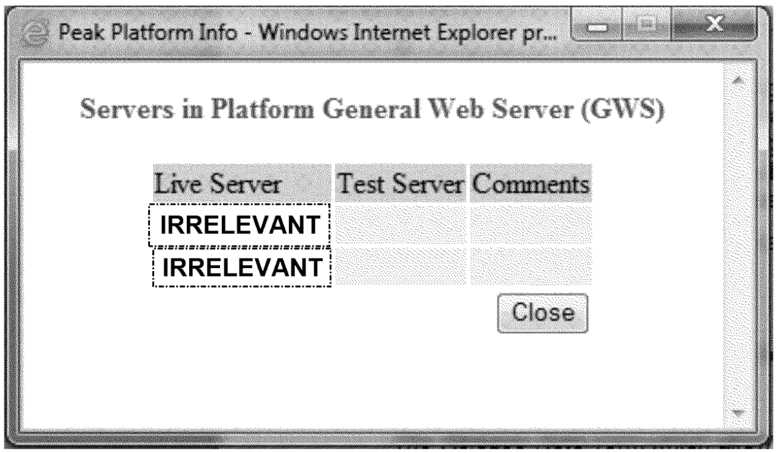


*Fig.28.1.7a: Server information pop-up*

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## 28.1.8 Manage Option Lists

Selecting the **Options** button allows you to configure the items shown in the drop-down selection lists for the following fields in Maintain *Release Note* (§28.1.4) and *Templates* (§28.1.6):

- Location
- Parent MSC
- Rig

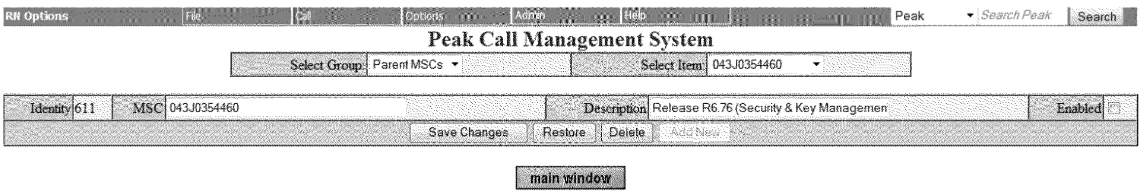



*Fig.28.1.8: RN Options form*

To create a new item for the location, parent MSC or rig selection list:

- ➢ Choose ‘Select Group=Locations, Parent MSCs or Target Rigs’ from the drop-down list. This selection will determine what other fields are displayed on the *RN Options* form.
- ➢ Set ‘Select Item=New Location, MSC or Rig’.
- ➢ Complete the details of the new item.
  The ‘Identity’ will be automatically generated once the item has been created.
  Unticking the ‘Enabled’ field will temporarily remove this item from the relevant selection list without being deleted permanently whereas ticking this field will make the item visible without you having to re-enter all the details.
- ➢ Press **Add New** (option).

To edit, delete or view an existing option, choose the group type from ‘Select Group’ then the item name from ‘Select Item’ drop-down lists. Once an item has been selected, all the information about that option is retrieved from the database and displayed on the *RN Options* form, allowing you to edit those details then use **Save Changes, Restore** (the previous saved version) or **Delete** (the item from the option list permanently).

### 28.1.9 Manage Target Releases

The *Releases* form is used to manage the Target Releases list and, since the same list is displayed within Release Management and within Peak Incidents, it can be invoked in one of two ways:

1. Selecting the **Target Release** button within the *Main Menu: Administration* section allows the Peak Administrators to configure the releases drop-down selection list in the *Call Details – Target Release* tab (§8.7).
2. Selecting the **Target Release** button within the *Main Menu: Release Mgmt* section allows the Release Management team to configure the 'Target Release' drop-down selection list in the Maintain *Release Note* (§28.1.4)

The *Releases* form allows details (like a Collection and release planning dates) to be associated with a specific release which is then applied to Peak incidents when they are targeted at that release. If a Release Planning (RP) record is not attached to the fault Peak, then when the Peak is targeted at a release, the Peak will be added to the specified Collection and an RP record will be created using the dates defined in this form. If an RP record is already attached to the Peak, then the dates will not be added into the RP record.

*The "Peak Administration Guide" (DEV/APP/SPG/2144) contains a full description of this function so it will not be included in this document.*

Note that you can print and save a report of the current list of Target Releases and their properties via *Main Menu*: **Reports** and choosing the "Target Release Report" (§23.1).

### 28.1.10 Call Details: Release Peaks

Refer to §8.1.11. for details on the **Release Peaks** button which appears in the *Call Details* of incidents which have an associated Release Peak defined as a 'Reference'.

### 28.1.11 Call Details: Release Management tab

Refer to §8.8. for details on the Release Planning (RP) record found in the *Release Management* tab which appears in the *Call Details* of all incidents.

### 28.1.12 Call List: Bulk Update Release Planning records

Refer to §7.2.1 for details on how to update the Release Management fields for several incidents in one go.

### 28.1.13 Reports: Release Management Reports

Refer to §23.1. for details on the reports available for Release Management.

## 28.2 Change Management (CM)

The Change Management processes of ensuring that enhancements (like the monthly processing of APS Client files through the Reference data rig) are tracked through a pre-defined work flow to completion centres on the creation of Change Notes.

The following is a brief description of how to use the Change Management system on Peak:

1. On the Peak website, select the **Maintain** button in the Change Management section of the *Main Menu* to view the *Enhancements* screen.
2. Create a new Change Note (or select an existing Change Note to **Clone**) and **Save Changes**.

   Creating a Change Note (even by cloning) will automatically create a new associated Carrier (or Container/Controlling) Peak containing a reference back to the original Change Note.
3. At this stage, you may apply a template which will automatically populate your new Change Note with the details (including any Work Plan) pre-defined in the template. Otherwise you will have to manually type in the details and add the Work Units individually to your new Change Note.

   A Work Plan is a pre-defined route that the Change Note needs to take via various Contacts/Actionees in the work units before it can be released.
4. Start the process by pressing **Route to Step 1** of the Work Plan which will route the Change Note and Carrier Peak to the first Contact defined in the Work Plan.
5. Progress the Change Note by clicking on the Change Note reference in the *References* tab of the Carrier Peak. You may add a **Comment**, **Accept** that the current task has completed (which will automatically route it to the next unit in the plan) or **Reject** the task (which will route it back to the previous unit).
6. Change Notes will remain open until it has been deleted or the last step in the Work Plan has been **Accepted.**

### 28.2.1 Carrier Peaks

Each Change Note has one and only one associated Carrier (or Container/Controlling) Peak. It is the Carrier Peak (and associated Change Note) which is actually routed around the Contacts as defined in the Work Plan.

Since a Carrier Peak is just a Peak of Call Type='E – Enhancement Request' with a reference to the Change Note, you may add evidence to the Peak as normal. This allows large amounts of text that are inappropriate in the Change Note or evidence from a test to be attached.

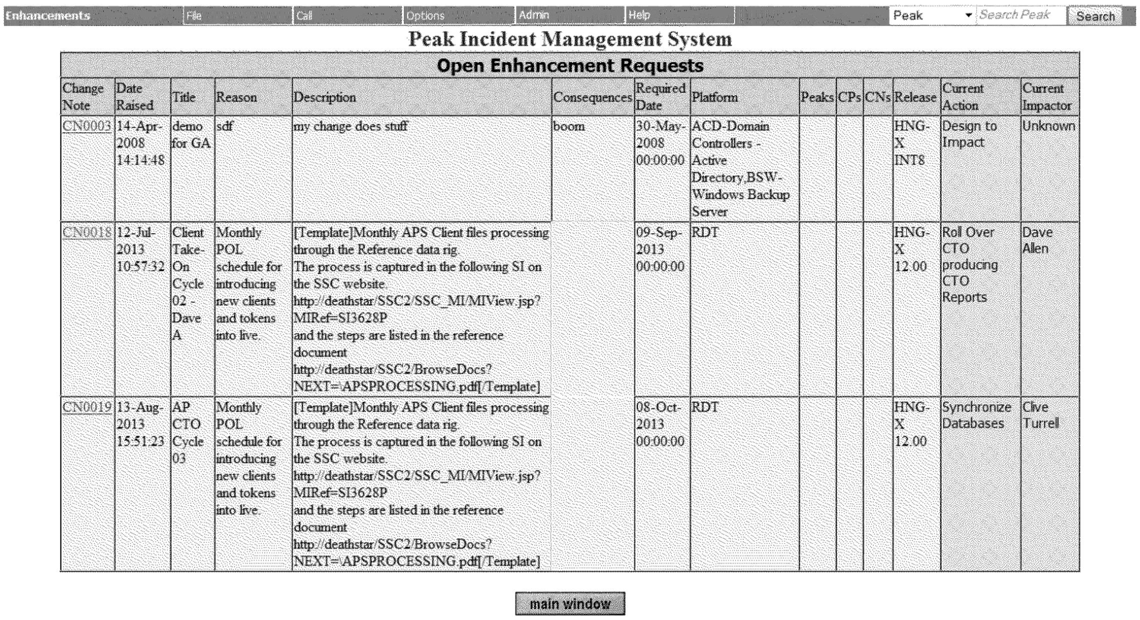
The Carrier Peak can be found and updated in the following places:

- If you are the current Actionee then the Carrier Peak will automatically appear on your stack.

- **Maintain** the Change Note then click the " " icon in the 'Change Number' field (§28.2.4)
- Click **back to detail** in the Progress Change Note (§28.2.3.1)

### 28.2.2 List Open Notes

Selecting the **List Open** button in the *Main Menu: Change Mgmt* section displays a summary list of all the Change Notes (or Enhancements) that are currently active (i.e. neither deleted nor completed).



Enhancements | File | Call | Options | Admin | Help | Peak | Search Peak | Search

Peak Incident Management System

Open Enhancement Requests

| Change Note | Date Raised | Title | Reason | Description | Consequences | Required Date | Platform | Peaks | CPs | CNs | Release | Current Action | Current Impactor |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| CN0003 | 14-Apr-2008 14:14:48 | demo for GA | sdf | my change does stuff | boom | 30-May-2008 00:00:00 | ACD-Domain Controllers - Active Directory,BSW-Windows Backup Server | | | | HNG-X INT8 | Design to Impact | Unknown |
| CN0018 | 12-Jul-2013 10:57:32 | Client Take-On Cycle 02 - Dave A | Monthly POL schedule for introducing new clients and tokens into live. | [Template]Monthly APS Client files processing through the Reference data rig. The process is captured in the following SI on the SSC website. http://deathstar/SSC2/SSC_MI/MIView.jsp?MIRef=SI3628P and the steps are listed in the reference document http://deathstar/SSC2/BrowseDocs?NEXT=\APSPROCESSING.pdf[/Template] | | 09-Sep-2013 00:00:00 | RDT | | | | HNG-X 12.00 | Roll Over CTO producing CTO Reports | Dave Allen |
| CN0019 | 13-Aug-2013 15:51:23 | AP CTO Cycle 03 | Monthly POL schedule for introducing new clients and tokens into live. | [Template]Monthly APS Client files processing through the Reference data rig. The process is captured in the following SI on the SSC website. http://deathstar/SSC2/SSC_MI/MIView.jsp?MIRef=SI3628P and the steps are listed in the reference document http://deathstar/SSC2/BrowseDocs?NEXT=\APSPROCESSING.pdf[/Template] | | 08-Oct-2013 00:00:00 | RDT | | | | HNG-X 12.00 | Synchronize Databases | Clive Turrell |

main window

*Fig.28.2.2: List of Open Change Notes*

On entry to the *Enhancements* screen, the “Change Notes” are sorted in ascending alphabetical order but the order can be toggled to descending alphabetical by clicking the up and down arrows (“” and “”).

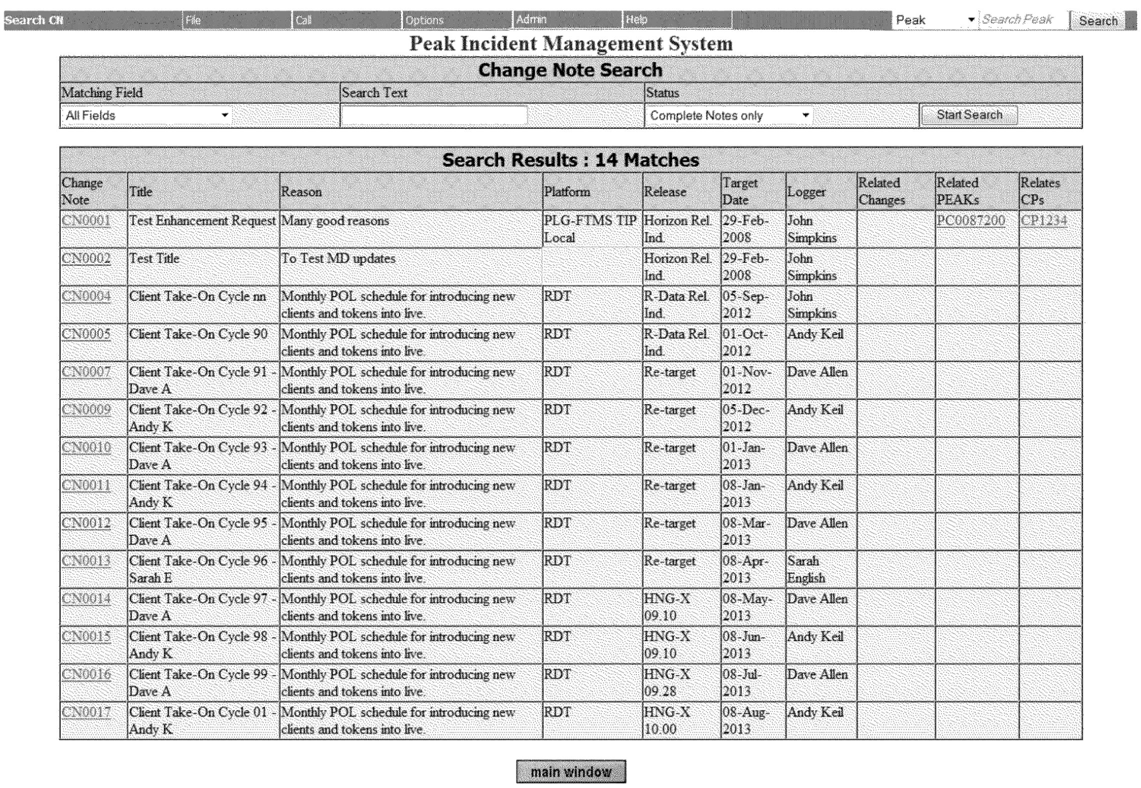
There may be hyperlinks to related Peaks/CPs/CNs and Progress Change Notes (§28.2.3.1); where it will display information about the state of the Change Note.

### 28.2.3 Search Notes

To find enhancements in Peak:

- Select the **Search** button in the *Main Menu: Change Mgmt* section to find enhancements in Change Notes that match your search criteria. You can select at most 3 components which are then combined to produce a search condition for Change Notes:
- From the 'Matching Field' drop-down list in the *Search CN* form, select a Change Note field that you wish to match on.
- Type in the search text which will be used in conjunction with the 'Matching Field'. This field is case insensitive and "%" is accepted as the wildcard symbol but can be left blank to match everything.
- Select the status of Change Notes to be searched (Open and Complete Notes, Open Notes only or Complete Notes only).
- Press **Start Search** or **Main Window** (to return to the *Main Menu)*.

For example, to search for completed Change Notes originated by the user 'jones':
select 'Matching Field=Originator',
type in 'Search Text=jones' and
choose 'Status=Complete Notes only'.



Search CN | File | Call | Options | Admin | Help | Peak | Search Peak | Search

Peak Incident Management System

Change Note Search

| Matching Field | Search Text | Status | |
|---|---|---|---|
| All Fields | | Complete Notes only | Start Search |

Search Results : 14 Matches

| Change Note | Title | Reason | Platform | Release | Target Date | Logger | Related Changes | Related PEAKs | Relates CPs |
|---|---|---|---|---|---|---|---|---|---|
| CN0001 | Test Enhancement Request | Many good reasons | PLG-FTMS TIP Local | Horizon Rel. Ind. | 29-Feb-2008 | John Simpkins | | PC0087200 | CP1234 |
| CN0002 | Test Title | To Test MD updates | | Horizon Rel. Ind. | 29-Feb-2008 | John Simpkins | | | |
| CN0004 | Client Take-On Cycle nn | Monthly POL schedule for introducing new clients and tokens into live. | RDT | R-Data Rel. Ind. | 05-Sep-2012 | John Simpkins | | | |
| CN0005 | Client Take-On Cycle 90 | Monthly POL schedule for introducing new clients and tokens into live. | RDT | R-Data Rel. Ind. | 01-Oct-2012 | Andy Keil | | | |
| CN0007 | Client Take-On Cycle 91 - Dave A | Monthly POL schedule for introducing new clients and tokens into live. | RDT | Re-target | 01-Nov-2012 | Dave Allen | | | |
| CN0009 | Client Take-On Cycle 92 - Andy K | Monthly POL schedule for introducing new clients and tokens into live. | RDT | Re-target | 05-Dec-2012 | Andy Keil | | | |
| CN0010 | Client Take-On Cycle 93 - Dave A | Monthly POL schedule for introducing new clients and tokens into live. | RDT | Re-target | 01-Jan-2013 | Dave Allen | | | |
| CN0011 | Client Take-On Cycle 94 - Andy K | Monthly POL schedule for introducing new clients and tokens into live. | RDT | Re-target | 08-Jan-2013 | Andy Keil | | | |
| CN0012 | Client Take-On Cycle 95 - Dave A | Monthly POL schedule for introducing new clients and tokens into live. | RDT | Re-target | 08-Mar-2013 | Dave Allen | | | |
| CN0013 | Client Take-On Cycle 96 - Sarah E | Monthly POL schedule for introducing new clients and tokens into live. | RDT | Re-target | 08-Apr-2013 | Sarah English | | | |
| CN0014 | Client Take-On Cycle 97 - Dave A | Monthly POL schedule for introducing new clients and tokens into live. | RDT | HNG-X 09.10 | 08-May-2013 | Dave Allen | | | |
| CN0015 | Client Take-On Cycle 98 - Andy K | Monthly POL schedule for introducing new clients and tokens into live. | RDT | HNG-X 09.10 | 08-Jun-2013 | Andy Keil | | | |
| CN0016 | Client Take-On Cycle 99 - Dave A | Monthly POL schedule for introducing new clients and tokens into live. | RDT | HNG-X 09.28 | 08-Jul-2013 | Dave Allen | | | |
| CN0017 | Client Take-On Cycle 01 - Andy K | Monthly POL schedule for introducing new clients and tokens into live. | RDT | HNG-X 10.00 | 08-Aug-2013 | Andy Keil | | | |

main window

*Fig.28.2.3: Expanded Search CN page – with search results*

When the search is complete, the *Search CN* page will be expanded to show the number of matches found along with a summary list of the matching Change Notes. The fields shown include hyperlinks to related Changes/Peaks/CPs and Progress Change Note (§28.2.3.1); where it will display information about the state of the Change Note.

#### 28.2.3.1 Progress Change Note

There are two views of the Change Note in Peak and they enable you to update different aspects of the Note. In this document, they have been distinguished by the names:

- Maintain Change Note is the *Enhancements* page to be used to create, update the details and work flow template of a Change Note (§28.2.4). It is displayed via the Main Menu: **Maintain** button.
- Progress Change Note is the *Change Man.* page to be used to progress the work flow of the Change Note. It is displayed by clicking on the 'Change Note' link in:
    - **List Open** Change Note then click the 'Change Note' link (§28.2.2)
    - **Search** for the Change Note then click the 'Change Note' link (§28.2.3)
    - *References* tab of the Release Peak then click the 'Change Note' link (§8.2)

Change Man. | File | Call | Options | Admin | Help | Peak | Search Peak | Search

**Peak Incident Management System**

| **HORIZON ONLINE CHANGE MANAGEMENT** | **CN0018** | | |
|---|---|---|---|
| Title | Client Take-On Cycle 02 - Dave A | | |
| Date Raised | 2013-07-12 10:57:32 | Originator | Dave Allen |
| Required Implementation | 2013-09-09 00:00:00.000 | | |
| Related Change Requests | | | |
| Related PEAKs | | | |
| Related CPs | | | |
| Release | HNG-X 12.00 | | |

| Description of Change Proposed |
|---|
| Monthly APS Client files processing through the Reference data rig.<br>The process is captured in the following SI on the SSC website.<br>http://deathstar/SSC2/SSC_MI/MIView.jsp?MIRef=SI3628P<br>and the steps are listed in the reference document<br>http://deathstar/SSC2/BrowseDocs?NEXT=\APSPROCESSING.pdf |

| Reason for Change |
|---|
| Monthly POL schedule for introducing new clients and tokens into live. |

| Consequences if Not Approved |
|---|
| |

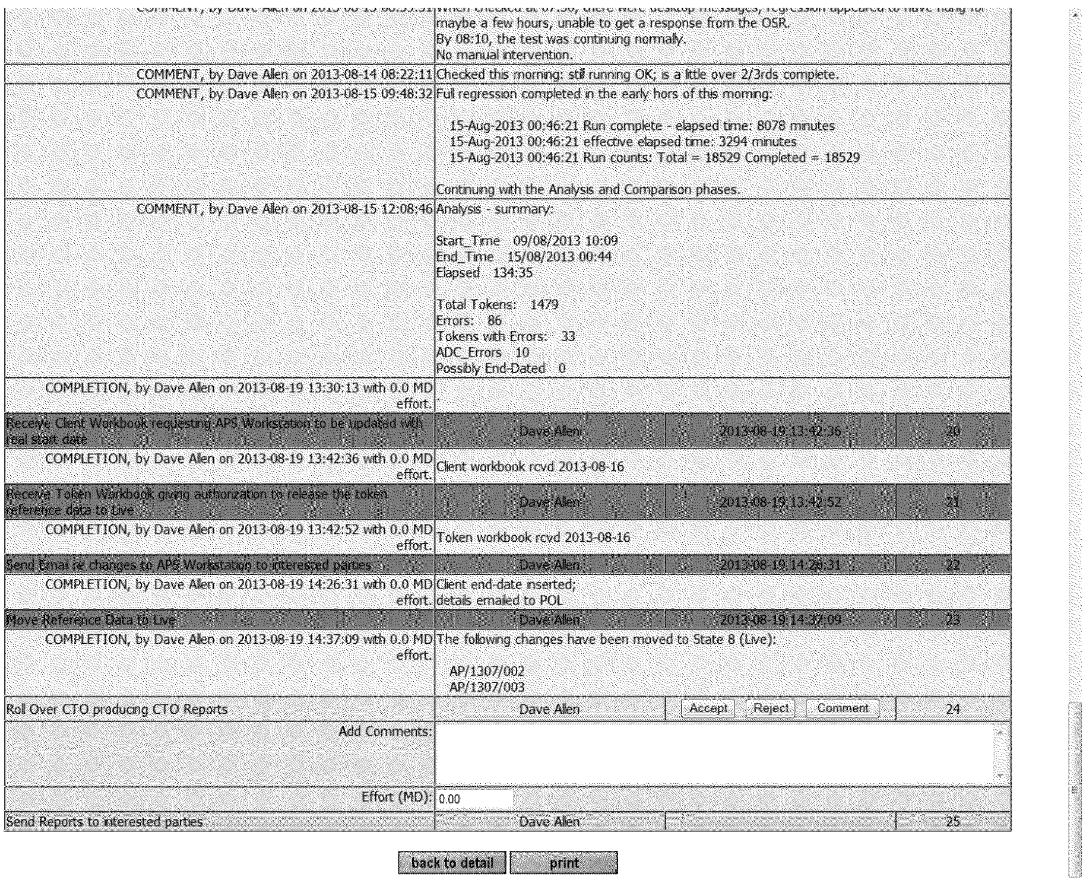
| Platforms and Applications Affected |
|---|
| RDT |

| **Change Control Steps** | | | |
|---|---|---|---|
| Change | Contact | Date | Order |
| Receive Notification of the next cycle via Client and Token Workbooks | Dave Allen | 2013-07-12 11:25:52 | 1 |
| COMPLETION, by Dave Allen on 2013-07-12 11:25:52 with 0.0 MD effort. | Rcvd 2013-07-03 | | |
| Receive Reference Data from MDM | Dave Allen | 2013-07-12 11:31:24 | 2 |
| COMPLETION, by Dave Allen on 2013-07-12 11:31:24 with 0.0 MD effort. | Rcvd 2013-07-03 | | |
| Check all Reference Data received | Dave Allen | 2013-07-12 11:32:40 | 3 |
| COMPLETION, by Dave Allen on 2013-07-12 11:32:40 with 0.0 MD effort. | Confirmed 2013-07-12 | | |
| Client Reference Data released to Live and Token Reference to RDDT | Dave Allen | 2013-07-12 11:46:34 | 4 |
| COMMENT, by Dave Allen on 2013-07-12 11:40:56 | No Client ref data in this cycle | | |
| COMPLETION, by Dave Allen on 2013-07-12 11:46:34 with 0.0 MD effort. | Ref data advanced OK | | |
| Assess PODG impact of any Client additions / changes / deletions | Dave Allen | 2013-07-12 14:32:15 | 5 |
| COMPLETION, by Dave Allen on 2013-07-12 14:32:15 with 0.0 MD effort. | No impact: Client 2375 will be ceased, but this uses PODGGirobank as the effective client so there is no impact on PODG. | | |

*Fig.28.2.3.1a: Progress Change Man. page for Change Note CN0018*

Using Progress Change Note, you can view all the details of the Change Note with hyperlinks (if they exist) to related Change Notes/Peaks/CPs and update the Control Steps.

The Work flow actions in the High level plan section are colour-coded:
yellow denotes the current work step to be actioned
orange denotes the work steps that have yet to be actioned
green show the completed work steps (along with a timestamp)
The grey text shows the completed/rejected actions and comments in ascending time order within each Work flow step. Since rejecting a step will cause the work flow to return to the previous step, the High level plan may not be the best place to get a time order view of events, instead see the progress text in the Carrier Peak.



| | | | | |
|---|---|---|---|---|
| | maybe a few hours, unable to get a response from the OSR.<br>By 08:10, the test was continuing normally.<br>No manual intervention. | | | |
| COMMENT, by Dave Allen on 2013-08-14 08:22:11 | Checked this morning: still running OK; is a little over 2/3rds complete. | | | |
| COMMENT, by Dave Allen on 2013-08-15 09:48:32 | Full regression completed in the early hors of this morning:<br><br>15-Aug-2013 00:46:21 Run complete - elapsed time: 8078 minutes<br>15-Aug-2013 00:46:21 effective elapsed time: 3294 minutes<br>15-Aug-2013 00:46:21 Run counts: Total = 18529 Completed = 18529<br><br>Continuing with the Analysis and Comparison phases. | | | |
| COMMENT, by Dave Allen on 2013-08-15 12:08:46 | Analysis - summary:<br><br>Start_Time 09/08/2013 10:09<br>End_Time 15/08/2013 00:44<br>Elapsed 134:35<br><br>Total Tokens: 1479<br>Errors: 86<br>Tokens with Errors: 33<br>ADC_Errors 10<br>Possibly End-Dated 0 | | | |
| COMPLETION, by Dave Allen on 2013-08-19 13:30:13 with 0.0 MD effort. | | | | |
| Receive Client Workbook requesting APS Workstation to be updated with real start date | Dave Allen | 2013-08-19 13:42:36 | | 20 |
| COMPLETION, by Dave Allen on 2013-08-19 13:42:36 with 0.0 MD effort. | Client workbook rcvd 2013-08-16 | | | |
| Receive Token Workbook giving authorization to release the token reference data to Live | Dave Allen | 2013-08-19 13:42:52 | | 21 |
| COMPLETION, by Dave Allen on 2013-08-19 13:42:52 with 0.0 MD effort. | Token workbook rcvd 2013-08-16 | | | |
| Send Email re changes to APS Workstation to interested parties | Dave Allen | 2013-08-19 14:26:31 | | 22 |
| COMPLETION, by Dave Allen on 2013-08-19 14:26:31 with 0.0 MD effort. | Client end-date inserted;<br>details emailed to POL | | | |
| Move Reference Data to Live | Dave Allen | 2013-08-19 14:37:09 | | 23 |
| COMPLETION, by Dave Allen on 2013-08-19 14:37:09 with 0.0 MD effort. | The following changes have been moved to State 8 (Live):<br><br>AP/1307/002<br>AP/1307/003 | | | |
| Roll Over CTO producing CTO Reports | Dave Allen | Accept Reject Comment | | 24 |
| Add Comments: | | | | |
| Effort (MD): | 0.00 | | | |
| Send Reports to interested parties | Dave Allen | | | 25 |

back to detail print

*Fig28.2.3.1b: Progress Change Man. page for Change Note CN0018*

To progress the Change Note, you can type a comment into the 'Add Comments' field then press **Comment** which will just add your text to current Work Unit. Pressing the **Reject** button, which is enabled for all steps except for step 1, will add any typed in comments and route the Note back to the previous work unit. Pressing the **Accept** button will add any typed in comments and route the Note onto the next work unit - if you are completing the last step of the Work Plan, the Change Note is also closed.

At the bottom of the Progress Change Note page, you can see the *Call Details* of the Carrier Peak by pressing **back to detail** or **print**.

## 28.2.4 Maintain Notes

There are two views of the Change Note in Peak and they enable you to update different aspects of the Note. The Progress *Change Note* is described in §28.2.3.1.

The Maintain Change Note (*Enhancements)* form is shown when the **Maintain** button is pressed. It should be used to create, clone, edit or delete Change Notes, apply a standard template, view the Carrier (or container) Peak and add/delete actions to the work plan.

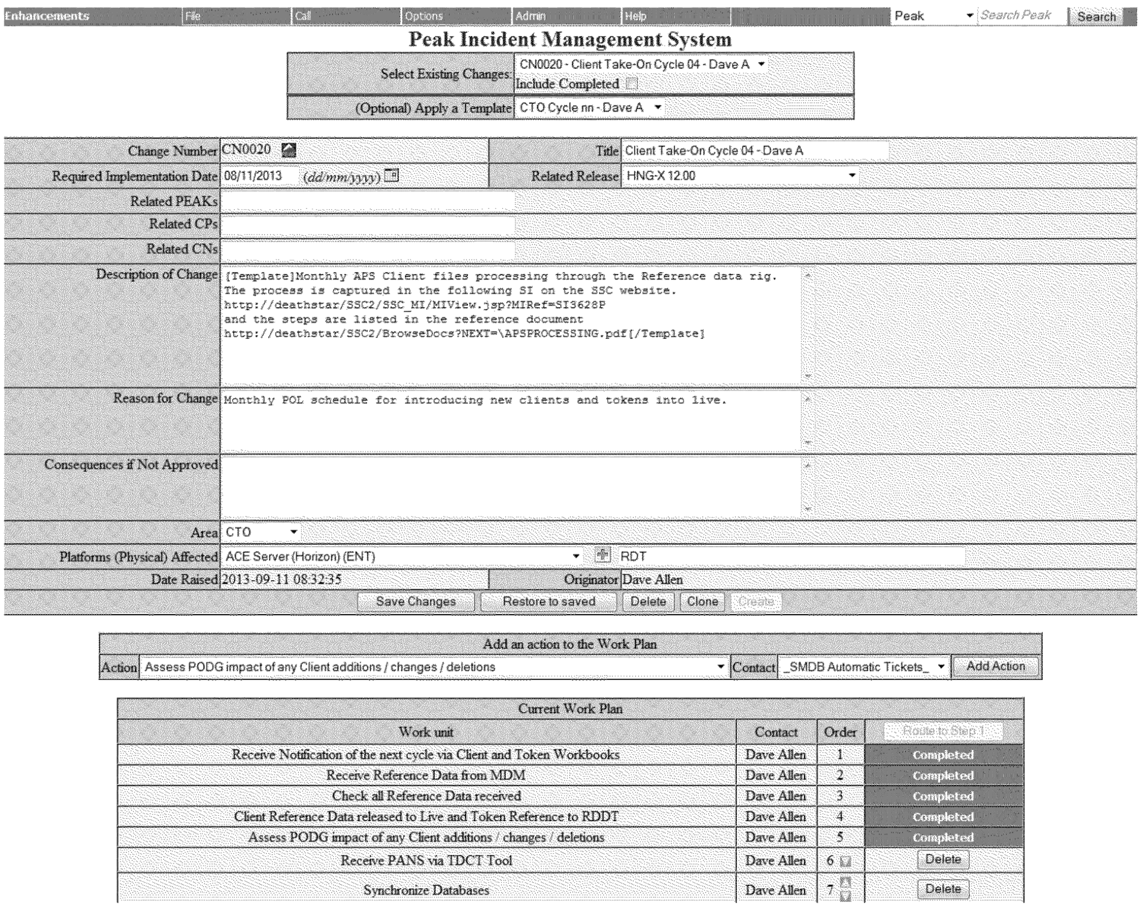



*Fig.28.2.4a Expanded Maintain Enhancements page for Change Note CN0020*

Change Notes can be created in one of the following ways:

1. By cloning an existing Change Note
   Select an existing Change Note, then **Clone** it as a new Change Note. If cloning succeeded, the new Change Number is automatically displayed in the Maintain *Enhancements* form.
2. Manually without using a template
   By typing everything into the Maintain *Enhancements* form from scratch as well as defining the steps in the work plan.
3. Using a template
   Templates can only be applied to existing Change Notes (i.e. those with a Change Number). If

you want to create a new Change Note based on a template, first you have to create a basic Change Note. Be aware that any details you type in may be overwritten when the template is applied so entering just a 'Title' and a 'Required Implementation Date' at this stage should be sufficient. Then select the template to apply; which may have some pre-defined work steps and make any necessary updates.

To create a new Change Note:

- Choose 'Select Existing Changes=New Change' from the drop-down list.
  Ticking 'Include Completed' will display all (neither deleted nor completed) Change Notes in the drop-down list.
  Leave '(Optional) Apply a Template=No Template'. But if a template has been applied to an existing Change Note then this field will contain the template name.
- All the options in the drop-down lists are managed by the Administrator:
  Related Release
  Area
  Platforms (Physical) Affected
- The icon "" which appears in the 'Required Implementation Date' field will pop-up a calendar to help you complete a date in the correct format.
- The icon "" which appears in the 'Platforms (Physical) Affected' field allows you to append the item from the selected from the drop-down list to the field to the right or you could just type in a list of items separated by a comma (e.g. "PODG External (DGE),PODG Internal (DGI)").
- Press **Create** (the Change Note to generate a new Change Number, expand the Maintain *Enhancements* form) and create a Carrier Peak (§28.2.1); with references back to the Change Note in the *Release* tab. To get directly to the Carrier Peak from the Change Note, click the icon "PEAK" which appears in the 'Change Number' field.
- Once the Change Note has been created, a template may be applied. The fields which can be pre-defined by a template (§28.2.6) are:
  Title
  Description of Change
  Reason for Change
  Consequences if Not Approved
  Platforms (Physical) Affected
  Work Plan (Work unit, Contact and Order)
- To manually construct a Work Plan, select an 'Action' using a drop-down list which was created via **Work Units** (§28.2.5) and a Contact; to whom the Carrier Peak will be routed when it is time for that work unit to be actioned.
  Then press **Add Action** to append the new action to the list under 'Current Work Plan' along with an 'Order' which is the next in the sequence.
  If the order of the work units is incorrect then use the up and down arrows ("" and "") to adjust the position of a particular action. Pressing **Delete** will just remove the relevant work unit from the work plan.
- Press **Route to Step 1** to initiate the work plan by routing the Carrier Peak to the Contact defined in the first work unit.

To edit a Change Note, choose the Change Note number from 'Select Existing Changes' drop-down list. This will automatically populate the fields in this page with details of the Note allowing you to edit those details. Press **Save Changes, Restore to saved, Delete** (Change Note and its associated Work Units), **Clone** (to create a clone of this Change Note), **Add Action** (to the Change Note), **Delete** (the relevant work unit from the Note) or **Route to Step 1** (to route the Change Note to the Contact of the first work unit).

Once the Work Plan has been initiated, it is still possible to change elements of the Change Note. For example, Fig.28.3.4b shows that Steps 6 to 25 have yet to be completed, these steps can be **Delete**d, re-ordered or **Add Action** can be used to add new actions to the end of the sequence.
If you change the template then you will be warned that any existing work units will be replaced and the new Work Plan will be taken back prior to Step 1 (and the **Route to Step 1** button will be enabled again).

Action: Assess PODG impact of any Client additions / changes / deletions | Contact: _SMDB Automatic Tickets_ | Add Action

| Current Work Plan | | | |
|---|---|---|---|
| Work unit | Contact | Order | Route to Step 1 |
| Receive Notification of the next cycle via Client and Token Workbooks | Dave Allen | 1 | Completed |
| Receive Reference Data from MDM | Dave Allen | 2 | Completed |
| Check all Reference Data received | Dave Allen | 3 | Completed |
| Client Reference Data released to Live and Token Reference to RDDT | Dave Allen | 4 | Completed |
| Assess PODG impact of any Client additions / changes / deletions | Dave Allen | 5 | Completed |
| Receive PANS via TDCT Tool | Dave Allen | 6 | Delete |
| Synchronize Databases | Dave Allen | 7 | Delete |
| Confirm code levels on RDT rig (Counters / BALs / BRDB / RDDS) | Dave Allen | 8 | Delete |
| Perform Mini Regression on RDDT Counter | Dave Allen | 9 | Delete |
| Analyze Results of Mini Regression | Dave Allen | 10 | Delete |
| Client Workbook authority to update the APS Workstation | Dave Allen | 11 | Delete |
| Move Reference Data to RDDOV | Dave Allen | 12 | Delete |
| Inject Paystation or Sideways File (if required) | Dave Allen | 13 | Delete |
| Perform CTO Harvesting on RDDIV Counter | Dave Allen | 14 | Delete |
| Analyze Results of Harvesting | Dave Allen | 15 | Delete |
| Send Harvested Files to OSG | Dave Allen | 16 | Delete |
| Receive Token Workbook authorizing the release of Test files to Clients | Dave Allen | 17 | Delete |
| Re-confirm code levels on RDT rig (Counters / BALs / BRDB / RDDS) | Dave Allen | 18 | Delete |
| Perform Full Regression | Dave Allen | 19 | Delete |
| Receive Client Workbook requesting APS Workstation to be updated with real start date | Dave Allen | 20 | Delete |
| Receive Token Workbook giving authorization to release the token reference data to Live | Dave Allen | 21 | Delete |
| Send Email re changes to APS Workstation to interested parties | Dave Allen | 22 | Delete |
| Move Reference Data to Live | Dave Allen | 23 | Delete |
| Roll Over CTO producing CTO Reports | Dave Allen | 24 | Delete |
| Send Reports to interested parties | Dave Allen | 25 | Delete |

main window

*Fig.28.2.4b: Expanded Maintain Enhancements page for Change Note CN0020*

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### 28.2.5 Manage Work Flow Units

Selecting the **Work Units** button allows you to create and manage the properties of a work unit. Each work unit describes a work action that must be completed and who is responsible for that action.

Once created, work actions can be combined in an order which defines the complete process or work flow for a particular type of Change Note (e.g. in a Change Note for the monthly APS ref data Client Take-On cycle, the work plan starts with 'Receive Notification of the next cycle via Client and Token Workbooks' and ends with 'Send Reports to interested parties). To save typing in the same sequence of work actions, use templates (§28.2.6).

Once a work plan has been applied to a Change Note and then initiated, the Peak System will manage the work flow and record the comments made at each stage. But it is the responsibility of the individual Contacts to ensure that they perform their actions and update Peak with the status. Actionees can either add a **Comment**, **Reject** the action (so the process moves back to the previous step) or **Accept** it (so the process moves forward to the next step or, if at the last step, closes the Change Note).

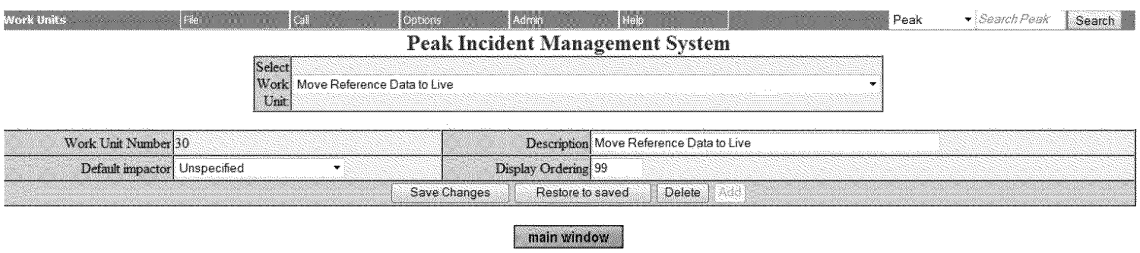


*Fig.28.2.5: The "Move Reference Data to Live" work unit*

To create a new work flow unit:

- Choose 'Select Work Unit=New Work Unit' from the drop-down list.
- Enter the properties of the new Work Unit Action.
  The 'Work Unit Number' will be automatically generated once the action has been created.
  The 'Display Ordering' field defines the order in which the actions will be displayed (e.g. in the 'Select Work Unit' field, *Template* and Manage *Enhancements* pages).
  The 'Default impactor' specifies who will be shown by default as the 'Contact' in Maintain *Enhancements* (§28.2.4).
- Press **Add** (new work unit).

To edit, delete or view an existing work unit action, choose the action from 'Select Work Unit' drop-down list. Once an item has been selected, all the information about that option is retrieved from the database and displayed on the *Work Units* form, allowing you to edit those details then use **Save Changes, Restore to saved** or **Delete** (the work unit).

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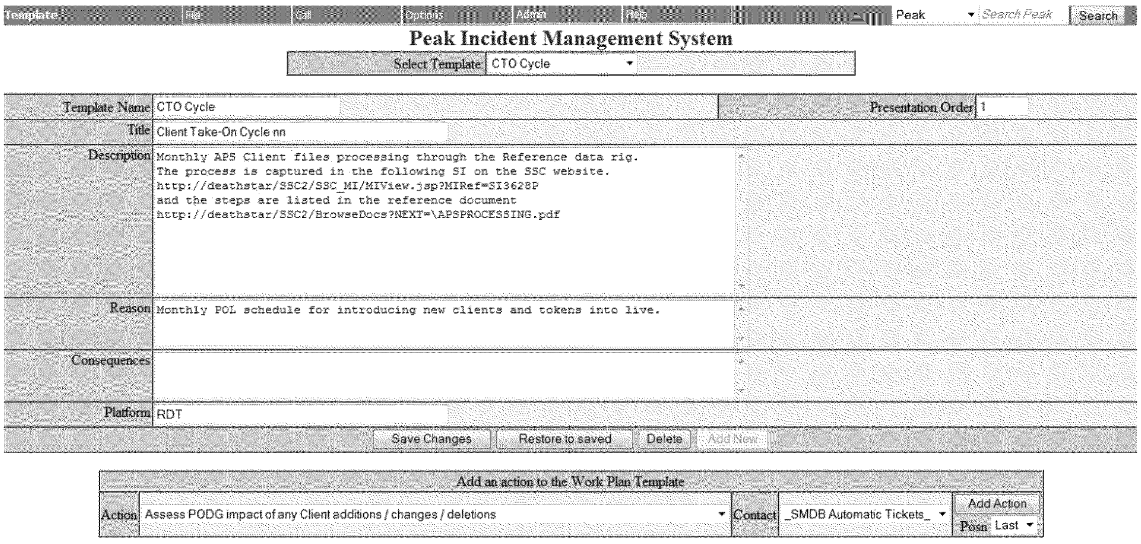
### 28.2.6 Manage Templates

Selecting the **Templates** button allows you to manage templates for Change Notes. A template may contain pre-loaded information in each field of a Change Note including a complete work plan (using the work units created in *Work Units,* §28.2.5). Once created, the template can be selected from the Maintain *Enhancements* form via the '(Optional) Apply a Template' drop-down list (§28.2.4). Note that a template may only be applied to a saved Change Note.




| Current Work Plan | | | |
|---|---|---|---|
| Work unit | Contact | Order | |
| Receive Notification of the next cycle via Client and Token Workbooks | Ref Data CTO User | 1 | Delete |
| Receive Reference Data from MDM | Ref Data CTO User | 2 | Delete |
| Check all Reference Data received | Ref Data CTO User | 3 | Delete |
| Client Reference Data released to Live and Token Reference to RDDT | Ref Data CTO User | 4 | Delete |
| Receive PANS via TDCT Tool | Ref Data CTO User | 5 | Delete |
| Synchronize Databases | Ref Data CTO User | 6 | Delete |
| Perform Mini Regression on RDDT Counter | Ref Data CTO User | 7 | Delete |
| Analyze Results of Mini Regression | Ref Data CTO User | 8 | Delete |
| Client Workbook authority to update the APS Workstation | _SMDB Automatic Tickets_ | 9 | Delete |
| Move Reference Data to RDDOV | Ref Data CTO User | 10 | Delete |
| Perform CTO Harvesting on RDDIV Counter | Ref Data CTO User | 11 | Delete |
| Inject Paystation or Sideways File (if required) | Ref Data CTO User | 12 | Delete |

*Fig.28.2.6: Expanded "CTO Cycle" Template*

To create a new template:

- Choose 'Select Template=New Template' from the drop-down list.
- Type in a (mandatory) 'Template Name'.
  The 'Presentation Order' determines where this template name will be displayed in Action lists. The remaining fields are free-text fields which are displayed when the template is selected on the Maintain *Enhancements* page.
- Press **Add New** (which will create the template and expand the *Template* form).
- (Optionally) Add action(s) to the Work Plan Template by selecting an action which was created in *Work Units* (§28.2.5) and .a Contact.

Use the 'Posn' drop-down list to determine where the new action should be positioned then press **Add Action** to append the new action into the list under 'Current Work Plan'.
If the order of work units is incorrect then you must **Delete** the relevant work units (which will automatically adjust the 'Order' field) and then recreate the new actions in the correct sequence.

To edit, delete or view the templates, choose the template name from 'Select Template' drop-down list. This will automatically populate the fields in this page with details of that template allowing you to edit those details then use **Save Changes, Restore to saved, Delete** (template and its associated Work Units), **Add Action** (to the Work Plan) or **Delete** (the relevant work unit from the Plan).

## 28.3 Request Management (RqM)

The Request Management processes of ensuring that requests are tracked through a pre-defined work flow to completion centres on the creation of Request Notes.

The following is a brief description of how to use the Request Management system on Peak:

1. On the Peak website, select the **Maintain** button in the Request Management section of the *Main Menu* to view the *Request Note* screen.
2. Create a new Request Note (or select an existing Request Note to **Clone**) and **Save Changes**.

   Creating a new Request Note will automatically create an associated Carrier (or Container/Controlling) Peak containing a reference back to the original Request Note. By cloning, you may elect to use the same Carrier Peak as the existing Request Note.
3. At this stage, you may apply a template which will automatically populate your new Request Note with the details (including any Work Plan) pre-defined in the template. Otherwise you will have to manually type in the details and add the Work Units individually to your new Request Note.

   A Work Plan is a pre-defined route that the Request Note needs to take via various Contacts/Actionees in the work units before it can be released.
4. Start the process by pressing **Route to Step 1** of the Work Plan which will route the Request Note and Carrier Peak to the first Contact defined in the Work Plan.
5. Progress the Request Note by clicking on the Request Note reference in the *References* tab of the Carrier Peak. You may add a **Comment**, mark the current task as **Complete** (which will automatically route it to the next unit in the plan) or **Reject** the task (which will route it back to the previous unit).
6. Request Notes will remain open until it has been deleted or the last step in the Work Plan has been **Complete**d**.**

### 28.3.1 Carrier Peaks

Each Request Note has an associated Carrier (or Container/Controlling) Peak. It is possible, by cloning Request Notes, to have several Request Notes associated with the same Carrier Peak. It is the Carrier Peak (and associated Request Note) which is actually routed around the Contacts as defined in the Work Plan.

Since a Carrier Peak is just a Peak of Call Type='R – Release Notice Forum' with a reference to the Request Note, you may add evidence to the Peak as normal. This allows large amounts of text that are inappropriate in the Request Note or evidence from a test to be attached.

The Carrier Peak can be found and updated in the following places:

- If you are the current Actionee then the Carrier Peak will automatically appear on your stack.
- **Maintain** the Request Note then press **Show PEAK** (§28.3.3)
- Click **back to detail** in the Progress *Request*s (§28.3.2.1)

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## 28.3.2 List Open Notes

Selecting the **List Open** button in the *Main Menu: Request Mgmt* section displays a summary list of all the Request Notes that are currently active (i.e. neither deleted nor completed).

Requests | File | Call | Options | Admin | Help | Peak | Search Peak | Search

**Peak Incident Management System**

**Outstanding Requests**

| Request | Date Raised | Priority | Release | Request Type | Description | Date Required | Platform | Rig | Location | Current Action | Assignee |
|---|---|---|---|---|---|---|---|---|---|---|---|
| REQ0002 | 14-Jul-2008 11:44:40 | C | HNG-X INT7 | BRA01 Build | Test Description 2 | 14-Jul-2008 | | | | SSC Test | John Simpkins |
| REQ0003 | 14-Jul-2008 11:55:51 | C | HNG-X INT7 | BRA01 Build | test 3 | 15-Jul-2008 | | | | None configured | Unknown |
| REQ0004 | 15-Jul-2008 09:48:15 | C | HNG-X INT7 | BRA01 Build | Another Test | 16-Jul-2008 | AC SIGNING SERVER | ST | BRA01 | None configured | Unknown |
| REQ0005 | 15-Jul-2008 10:45:56 | C | HNG-X INT7 | BRA01 Build | Template Test | 16-Jul-2008 | AC SIGNING SERVER | ST | BRA01 | SSC Test | John Simpkins |
| REQ0006 | 16-Jul-2008 10:28:58 | C | HNG-X INT7 | BRA01 Build | test no default template | 17-Jul-2008 | | | | None configured | Unknown |
| REQ0007 | 16-Jul-2008 10:29:57 | C | HNG-X INT7 | BRA01 Build | test with default template | 17-Jul-2008 | | | | SSC Test | John Simpkins |
| REQ0008 | 18-Jul-2008 10:31:54 | C | AAALK-1 | BRA01 Build | test ASAP | ASAP | AC SIGNING SERVER | Admin | BRA01 | Route via QC admin | Lionel Higman |
| REQ0009 | 22-Jul-2008 15:53:27 | C | HNG-X INT7 | BRA01 Build | test | 23-Jul-2008 | | | | SSC Test | John Simpkins |
| REQ0010 | 23-Jul-2008 10:01:54 | C | HNG-X INT7 | BRA01 Build | test | 30-Jul-2008 | | | | SSC Test | John Simpkins |
| REQ0011 | 29-Jul-2008 11:06:57 | C | HNG-X INT7 | BRA01 Build | TEst Fault Peaks | 30-Jul-2008 | AC SIGNING SERVER | ST | BRA01 | Route via QC admin | Lionel Higman |
| REQ0012 | 05-Aug-2008 15:58:38 | C | HNG-X INT7 | BRA01 Build | test | ASAP | | | | SSC Test | John Simpkins |
| REQ0013 | 05-Aug-2008 16:09:18 | C | HNG-X INT7 | BRA01 Build | test auto gen req | ASAP | AC SIGNING SERVER | ST | BRA01 | SSC Test | John Simpkins |
| REQ0014 | 06-Aug-2008 15:49:21 | C | HNG-X INT7 | BRA01 Build | Some rndom summary | ASAP | AC SIGNING SERVER | ST | BRA01 | SSC Test | John Simpkins |
| REQ0015 | 06-Aug-2008 16:09:07 | C | HNG-X 01.08 | BRA01 Build | ST - REQ0015 - test summary | ASAP | AC SIGNING SERVER | ST | BRA01,IRE11,IRE19 | Route via QC admin | CM |
| REQ0016 | 06-Aug-2008 16:09:58 | C | HNG-X INT7 | BRA01 Build | REQ0016 - Test summary with no rig | ASAP | AC SIGNING SERVER | | BRA01 | SSC Test | John Simpkins |
| REQ0017 | 12-Aug-2008 16:21:11 | C | HNG-X INT7 | BRA01 Build | ST - REQ0017 - some random summary | ASAP | AC SIGNING SERVER | ST | BRA01 | SSC Test | John Simpkins |

main window

*Fig.28.3.2: List of Open Request Notes*

On entry to the *Requests* screen, the “Request Notes” are sorted in ascending alphabetical order but the order can be toggled to descending alphabetical by clicking the up and down arrows (“▲” and “▼”).

There is a hyperlink to Progress *Requests* (§28.3.2.1); where it will display information about the state of the Request Note.

### 28.3.2.1 Progress Requests

There are two views of the Request Note in Peak and they enable you to update different aspects of the Note. In this document, they have been distinguished by the names:

- Maintain *Request Note* is the *Request Note* page to be used to create, update the details and work flow template of a Request Note (§28.3.5). It is displayed via the Main Menu: **Maintain** button.
- Progress *Requests* is the *ITU Requests* page to be used to progress the work flow of the Request Note. It is displayed by clicking on the ‘Request Note’ link in:
    - **List Open** Request Note then click the ‘Request’ link (§)
    - *References* tab of the Release Peak then click the ‘Request Note’ link (§8.2)

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ITU Request | File | Call | Options | Admin | Help | Peak | Search Peak | Search

**Peak Incident Management System**

| | | | |
|---|---|---|---|
| POST OFFICE ACCOUNT ITU REQUEST NOTE | **REQ0015** | | |
| Priority | C -- Non-Urgent (Tidy Up) | | |
| Release | HNG-X 01.08 | | |
| Request Type | BRA01 Build | | |
| Contact | John Simpkins | | |
| Date Required | ASAP | | |
| Fault PEAKs | | | |
| Request Description | ST - REQ0015 - test summary | | |
| Platforms | AC SIGNING SERVER | | |
| Location | BRA01,IRE11,IRE19 | | |
| Rig | ST | | |
| MSC | | | |
| Date Raised | 06-Aug-2008 16:09:07 | Originator | John Simpkins |

DPVBs

Special Instructions

**High level plan**

| WorkUnit | Contact | Date | Order |
|---|---|---|---|
| PEAK creation | CM | 2013-09-17 14:57:37 | 1 |
| Comment, by Lina Kiang on 2013-09-17 14:57:34 | Done on 06/08/2008 | | |
| Completion, by Lina Kiang on 2013-09-17 14:57:37 | Action Complete | | |
| Route via QC admin | CM | Complete  Reject  Comment | 2 |
| Add Comments: | | | |
| SSC Test | CM | | 3 |

back to detail | print

*Fig.28.3.2.1: Progress Requests page for Request Note REQ0015*

Using Progress *Requests*, you can view all the details of the Request Note with hyperlinks (if they exist) to related Request Notes/fault Peaks/MSCs and update the Control Steps.

The Work flow actions in the High level plan section are colour-coded:
yellow denotes the current work step to be actioned
orange denotes the work steps that have yet to be actioned
green show the completed work steps (along with a timestamp)
The grey text shows the completed/rejected actions and comments in ascending time order within each Work flow step. Since rejecting a step will cause the work flow to return to the previous step, the High level plan may not the best place to get a time order view of events, instead see the progress text in the Carrier Peak.

To progress the Request Note, you can type a comment into the 'Add Comments' field then press **Comment** which will just add your text to current Work Unit. Pressing the **Reject** button, which is enabled for all steps except for step 1, will add any typed in comments and route the Note back to the previous work unit. Pressing the **Complete** button will add any typed in comments and route the Note onto the next work unit - if you are completing the last step of the Work Plan, the Request Note is also closed.

At the bottom of the Progress Request Note page, you can see the *Call Details* of the Carrier Peak by pressing **back to detail** or **print**.

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### 28.3.3 Maintain Notes

There are two views of the Request Note in Peak and they enable you to update different aspects of the Note. The Progress *Requests* page is described in §28.3.2.1.

The Maintain *Request Note* form is shown when the **Maintain** button is pressed. It should be used to create, clone, edit or delete Request Notes, apply a standard template, view the Carrier (or container) Peak and add/delete actions to the work plan.

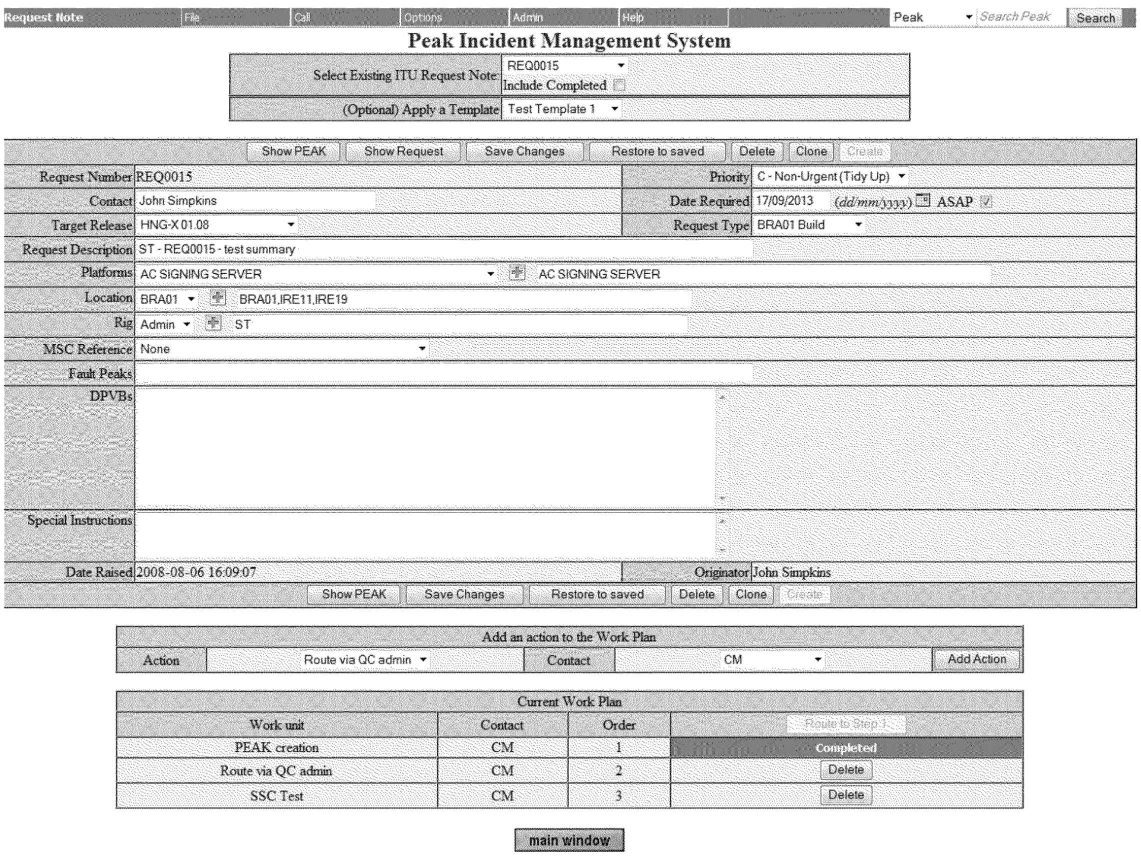


*Fig.28.3.3 Expanded Maintain Request Note page for Request Note REQ0015*

Request Notes can be created in one of the following ways:

1. By cloning an existing Request Note
   Select an existing Request Note, then **Clone** it as a new Request Note.
2. Manually without using a template
   By typing everything into the Maintain *Request Note* form from scratch as well as defining the steps in the work plan.
3. Using a template
   Templates can only be applied to existing Request Notes (i.e. those with a Request Number). If you want to create a new Request Note based on a template, first you have to create a basic Request Note. Be aware that any details you type in may be overwritten when the template is applied so entering just the mandatory fields at this stage should be sufficient. Then select the

template to apply, which may have some pre-defined work steps and make any necessary adjustments.

To create a new Request Note:

- Choose 'Select Existing ITU Request Note=New Request Note' from the drop-down list.
  Ticking 'Include Completed' will display all (neither deleted nor completed) Request Notes in the drop-down list.
  Leave '(Optional) Apply a Template=No Template'. But if a template has been applied to the Request Note then this field will contain the template name.
- The mandatory fields in the Maintain *Request Note* form are: 'Request Description' and 'Date Required'.
- The options in the following drop-down lists are managed via functions within *Main Menu*:

| | |
|---|---|
| Priority | in *RNOptions* – Priority via Request Mgmt: **Options** (§28.3.6). |
| Target Release | in *Releases* via **Target Release** (§28.1.9) |
| Request Type | in *RNOptions* – Request Type via Request Mgmt: **Options** (§28.3.6). |
| Platforms | in *Servers* via Release Mgmt: **Servers** (§28.1.7). |
| Location | in *RNOptions* – Locations via Release Mgmt: **Options** (§28.1.8). |
| Rig | in *RNOptions* – Target Rigs via Release Mgmt: **Options** (§28.1.8) |
| MSC Reference | in *RNOptions* – MSCs via Request Mgmt: **Options** (§28.3.6) |

- The icon "" which appears in the 'Date Required' field will pop-up a calendar to help you complete a date in the correct format. Ticking the 'ASAP' field will automatically fill in today's date.
- The icon "" which appears in the 'Platforms', 'Location' and 'Rig' fields allows you to append the item from the selected from the drop-down list to the field to the right or you could just type in a list of items separated by a comma (e.g. "BRA01,IRE11,LEW02").
- Press **Create** (the Request Note to expand the Maintain *Request Note* form).
  Creating a Request Note will also create a Carrier Peak (§28.3.1) with references back to the Request Note in the *Release* tab.
  To get directly to the Carrier Peak from the Request Note, use the **Show Peak** button in the Maintain *Request Note* page.
- Once the Request Note has been created, a template may be applied. The field which can be pre-defined by a template (§28.3.5) is the:
  Work Plan (Work unit, Contact and Order)
- To manually construct a Work Plan, select an 'Action' using a drop-down list which was created via **Work Units** (§28.3.4) and a Contact; to whom the Carrier Peak will be routed when it is time for that work unit to be actioned.
  Then press **Add Action** to append the new action to the list under 'Current Work Plan' along with an 'Order' which is the next in the sequence.
  If the order of the work units is incorrect then you must **Delete** the relevant work units (which will automatically adjust the 'Order' field) and then recreate the new actions in the correct sequence.
- Press **Route to Step 1** to initiate the work plan by routing the Carrier Peak to the Contact defined in the first work unit.

To edit a Request Note, choose the Request Note number from 'Select Existing ITU Request Note' drop-down list. This will automatically populate the fields in this page with details of the Note allowing you to edit those details. Press **Save Changes, Restore to saved, Delete** (Request Note and its associated Work Units), **Clone** (to create a clone of this Request Note), **Add Action** (to the Request Note), **Delete** (the relevant work unit from the Note) or **Route to Step 1** (to route the Request Note to the Contact of the first work unit).

Once the Work Plan has been initiated, it is still possible to change elements of the Request Note. For example, Fig.28.3.3 shows that Steps 2 to 3 have yet to be completed, these steps can be **Delete**d, re-ordered or **Add Action** can be used to add new actions to the end of the sequence.
If you change the template then you will be warned that any existing work units will be replaced and the new Work Plan will be taken back prior to Step 1 (and the **Route to Step 1** button will be enabled again).

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## 28.3.4 Manage Work Flow Units

Selecting the **Work Units** button allows you to create and manage the properties of a work unit. Each work unit describes a work action that must be completed and which team is responsible for that action.

Once created, work actions can be combined in an order which defines the complete process or work flow for a particular type of Request Note. To save typing in the same sequence of work actions, use templates (§28.3.5).

Once a work plan has been applied to a Request Note and then initiated, the Peak System will manage the work flow and record the comments made at each stage. But it is the responsibility of the individual Contacts to ensure that they perform their actions and update Peak with the status. Actionees can either add a **Comment**, **Reject** the action (so the process moves back to the previous step) or **Complete** it (so the process moves forward to the next step or, if at the last step, closes the Request Note).

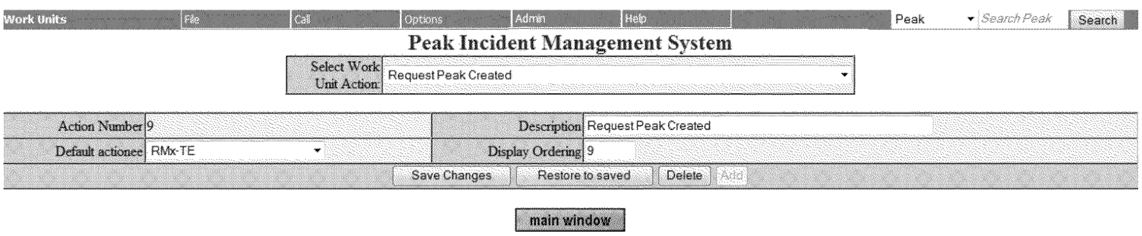


*Fig.28.3.4: The "Request Peak Created" work unit*

To create a new work flow unit:

- ➢ Choose 'Select Work Unit Action=New Action' from the drop-down list.
- ➢ Enter the properties of the new Work Unit Action.
  The 'Action Number' will be automatically generated once the action has been created.
  The 'Display Ordering' field defines the order in which the actions will be displayed (e.g. in the 'Select Work Unit Action' field, *Template* and Manage *Request Note* pages).
  The 'Default actionee' specifies who will be shown by default as the 'Contact' in Maintain *Request Note* (§28.3.3).
- ➢ Press **Add** (new work unit).

To edit, delete or view an existing work unit action, choose the action from 'Select Work Unit Action' drop-down list. Once an item has been selected, all the information about that option is retrieved from the database and displayed on the *Work Units* form, allowing you to edit those details then use **Save Changes, Restore to saved** or **Delete** (the work unit).

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### 28.3.5 Manage Templates

Selecting the **Templates** button allows you to manage templates for Request Notes. A template may contain pre-loaded information in each field of the Request Note including a complete work plan (using the work units created in *Work Units,* §28.3.4). Once created, the template can be selected from the Maintain *Request Note* form via the '(Optional) Apply a Template' drop-down list (§28.3.3). Note that a template may only be applied to a saved Request Note.

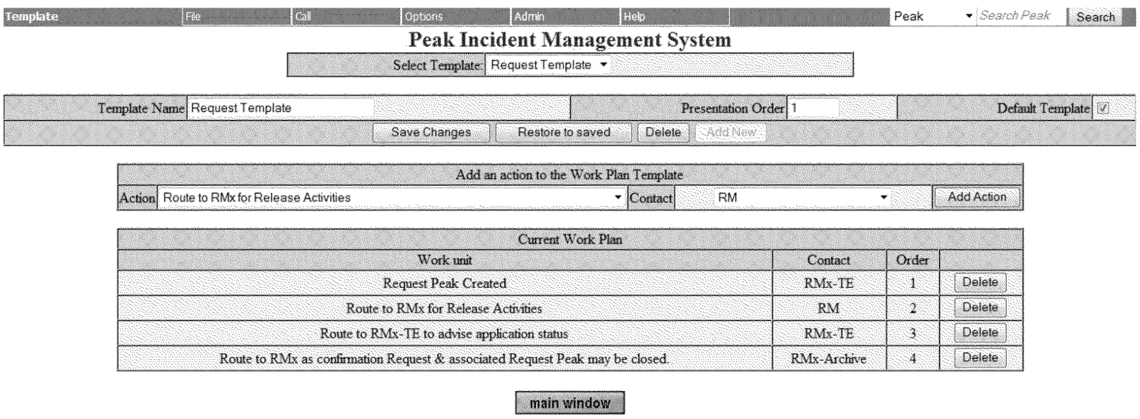


*Fig.28.3.5: Expanded "Request Template"*

To create a new template:

- Choose 'Select Template=New Template' from the drop-down list.
- Type in a (mandatory) 'Template Name'.
  The 'Presentation Order' determines where this template name will be displayed in a list to the User. Ticking 'Default Template' will make the current template the default displayed option; superseding any previous default.
- Press **Add New** (which will create the template and expand the *Template* form).
- Append a new action to the list under 'Current Work Plan' by selecting an action which was created in *Work Units* (§28.3.4) and .a Contact and then press **Add Action**.
  If the order of work units is incorrect then you must **Delete** the relevant work units (which will automatically adjust the 'Order' field) and then recreate the new actions in the correct sequence.

To edit, delete or view the templates, choose the template name from 'Select Template' drop-down list. This will automatically populate the fields in this page with details of that template allowing you to edit those details then use **Save Changes, Restore to saved, Delete** (template and its associated Work Units), **Add Action** (to the Work Plan) or **Delete** (the relevant work unit from the Plan).

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### 28.3.6 Manage Option Lists

Selecting the **Options** button allows you to configure the items shown in the drop-down selection lists for the following fields in Maintain *Request Note (*§28.3.3) and *Templates (*§28.3.5):

- MSC
- Priority
- Request Type

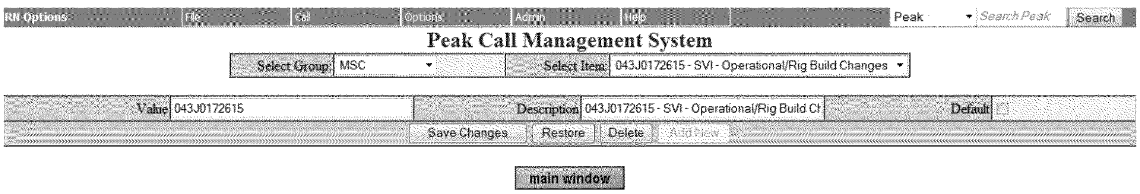


*Fig.:28.3.6 RN Options form*

To create a new item for the MSC, priority or request type:

- ➢ Choose ‘Select Group=MSC, Priority or Request Type’ from the drop-down list. This selection will determine what other fields are displayed on the *RN Options* form.
- ➢ Set ‘Select Item=New MSC, Priority or Request Type’.
- ➢ Complete the details of the new item.
  The ‘Value’ should contain the actual option (e.g. if defining a new MSC then it should contain the MSC reference “043J0172529”).
  The ‘Description’ will be the actual text displayed in the drop-down list. But to be more useful, rather than containing just a description of the value, it should also contain the value (e.g. “043J0172529 – ST – Operational/Rig Build Changes”).
  Ticking the ‘Default’ field will make this option the default displayed option; superseding any previous default.
- ➢ Press **Add New** (option).

To edit, delete or view an existing option, choose the group type from ‘Select Group’ then the item name from ‘Select Item’ drop-down lists. Once an item has been selected, all the information about that option is retrieved from the database and displayed on the *RN Options* form, allowing you to edit those details then use **Save Changes, Restore** (the previous saved version) or **Delete** (the item from the option list permanently).

# A APPENDIX: Peak Encryption

With the introduction of encryption to sensitive Peak pages (*Logon* and change *Password* screens), your browser may try to warn you whenever you access an encrypted page from an unencrypted one that the Peak Certificate has not been signed by one of the trusted Certification Authorities.

You will get different alerts depending on the browser being used. To make the Peak Certificate trusted so that the alert will no longer appear follow the steps described on Peak in Help/FAQ.