<u>Investigation of Incidents for QESTLab v3.3 Development Phases</u>

It has been decided that Incidents related to the development phases of QESTLab v3.3 will be investigated by the Products Team rather than the Helpdesk.

Incident for QESTLab v3.3 will still be logged by the Helpdesk, but they will then be immediately sent to Products for investigation. These Incidents will be identifiable by the Incident Type field being set to "QESTLab v3.3 Development".

The Incidents will be initially assigned to Benny, and the Workflow Step set to Investigation. Benny will then assign the Incidents to members of the Products Team for investigation.

<u>Investigation</u>

When investigating an Incident, ensure that all relevant information related to your investigation is recorded against the Incident in the "Internal Notes/Comments" field (<u>**not**</u> in the "Incident Description" field, as customers have access to this field).

Internal Communication can be done by adding notes to the "Internal Notes/Comments" field, or via email from OnTime.

Correspondence with customers should be done by emailing from the Incident (see below for more details).

<u>Logging a Bug, CR and/or Task</u>

When logging a Bug, Change Request or other, open that Incident and tick the relevant box in the "**Logged as**" field on the Incident. This allows customers to see what has been logged by simply looking at the incident. Then Save and Close the Incident.

Right click the Incident and select Copy to ... Bug, Change Request and/or Task as appropriate.

Open the Bug and enter the following fields:
- Project: Change from **Services** to **QESTLab 3.3**
- Release: **QESTLab 3.3**
- Severity: Set as appropriate (this is a judgement call)

Once the investigation has been completed and the appropriate Bugs/CRs etc logged, the Incident should be moved to the Workflow Step **"Approval"**, and the Incident should be **Assigned** to the **relevant customer manager** (you can see who this is from the Customer Manager field).

NOTE: The outcome of investigation needs to go in the Incident (in brief) and in the Bug/CR (in detail). The aim being that the Bug/CR can be assigned directly to you for speedy resolution.

If you need to correspond with a customer about a Bug when the Incident has already been sent for approval, change the Workflow Step back to "Information Required from Customer" and assign the Incident back to yourself. Then, once the correspondence has been completed, the Incident can be assigned back to the customer manager for approval (again).

The Bugs/CRs follow the standard Products workflow – moved logged Bugs/CRs to the next step i.e. Verification/Confirmation for Bugs and Estimation for CRs and assign to Benny.

Correspondence:

All correspondence with a Customer related to a Bug, CR or anything else must be done via the corresponding Incident (not directly from the Bug or CR, because we use the Incident Number as our unique identifier with the customer for all Incidents, Bugs, CRs, and Tasks). This allows the auto-import feature to work correctly when customers reply, as described below.

Click New Email, and select the "From" address as the Helpdesk address. Make sure that the Subject Line contains the Incident Number in the format [#SQ1234]. You will need to ensure that an email signature has been set up for you. Benny will forward a signature template later.

Once an email has been sent, set the Workflow Step to "Information Required from Customer", and leave the Incident assigned to you.

When an email response is received from the customer, this correspondence will be automatically attached to the Incident (based on the [#SQ1234] in the subject line), the Workflow Step will be automatically updated to "Customer Communication Received", and you will be notified by OnTime (notification occurs based on the "Assigned to" field). Please modify the Workflow Step as relevant (to "Investigation", "Information Required from Customer" etc). This will ensure that if further correspondence is received, a new notification is generated.

Public Information

Some of our customers have access to certain information contained in OnTime via the Customer Portal. It is important that this is kept in mind when any notes are made in OnTime, especially in fields that customers have access to, which at present are (these may change in the future):

Incidents	**Bugs**	**CRs**
Name	Name	Name
Incident Number	Incident Number	Incident Number
Reported Date	Bug ID	Customer Reference
Customer Reference	Customer Reference	Change Request Number
Customer Contact Name	Version(s) Affected	Quotation Number
Status	Priority	Project
Assigned To	Severity	Release
Priority	Project	Status
Product	Release	
Version(s) Affected	Status	
Environment		
Incident Description		
Repro Steps		
Attachments		

Automatic Customer Notifications

We have set up automatic email notifications that advise customers when and Incident, Bug and/or Change Request has been logged for them. These notifications contain a number of fields giving the customer information about the Incident, Bug or CR. For this reason, they are not generated when the Incident, Bug or CR is first created, but rather at a later time (hopefully after the relevant information has been entered). The notifications are sent to the person in the Customer Contact Name field. The fields and triggers for the notifications are:

Incidents

Fields included are:
Incident Number
Customer Reference
Name (of Incident)
Priority
Customer Contact Name
Description

The notification is triggered when the Workflow Step is changed from Logging to Investigation.

Bugs

Fields included are:
Incident Number
Customer Reference
Defect ID
Name (of Bug)
Priority
Project
Release
Customer Contact Name
Description

The notification is triggered when the Project is changed from Services to something else.

CRs

Fields included are:
Incident Number
Customer Reference
Feature ID
Name (of CR)
Priority
Project
Release
Customer Contact Name
Description

The notification is triggered when the Project is changed from Services to something else.