I. INTRODUCTION

A. Overview

ServiceCenter is a trouble ticket creation and management tool. The heritage organization uses *ServiceCenter* to document incoming calls and to monitor and manage requests for support.

Currently, the Private Bank uses both Service Center and the PB-Operate website to document and manage support requests. Generally, reports are created manually from. It is the Private Bank's intention to develop a *ServiceCenter* solution to replace PB-Operate and streamline reporting.

This document is intended as a starting point, to inform design discussions and lead to the development of a Technical Specification document.

1. Single-step Ticket Creation

Creating a ticket using EIMS is a dynamic two-step process. Based on the user's entries in the default Incident Details tab, EIMS presents additional fields in the "Supplemental Information" tab when the user clicks **New**. Creating a ticket for the Private Bank, on the other hand, is a single-step process. The system generates a ticket number immediately after a user clicks either **New** or **Save**.

This negates the need for a Supplemental Information tab, although one can be added later if necessary. Information about related tickets that was in this tab has been moved to a new Related Tickets tab. Unlike the EIMS version of this tab, however, the Private Bank version will not allow users link multiple *ServiceCenter* tickets.

2. Simplified Assignment

Unlike the EIMS edition of *ServiceCenter* which has multiple escalation thresholds and "starts the clock" for escalation when a ticket is acknowledged by the a member of the assigned group, the version proposed for the Private Bank would begin counting down to a single "Deadline Alert" threshold immediately after the ticket is created.

3. Web-based vs. Client/Server Architecture

Currently, the PB-Operate edition of *ServiceCenter* is made available to users as a client/server application only. Delivery of the application via the Intranet would be preferable. Most users of the enterprise edition of *ServiceCenter* (EIMS) access the application through a Java client.

B. Getting Started

To start *ServiceCenter*, the user double-clicks a **ServiceCenter Client** icon on the Windows desktop or clicks the **Start** button and chooses **Peregrine ServiceCenter | ServiceCenter Client**.

A login screen appears.

1. Login screen

To start using the application, a user enters a valid user name and password and then clicks **OK**.

If the user enters an invalid user name and password combination, the application resets the password field and returns the cursor to the [user] 'Name" field.

NOTE:
Passwords are case-sensitive.

C. The Home Menu

Depending on your user privileges, one of two "home menus" appears. Brief descriptions follow.

Each home menu should be enhanced to display a bar chart of outstanding tickets by priority. By clicking the buttons underneath the bars in the bar charts, users will be able to display a list of corresponding tickets.

1. Standard Menu

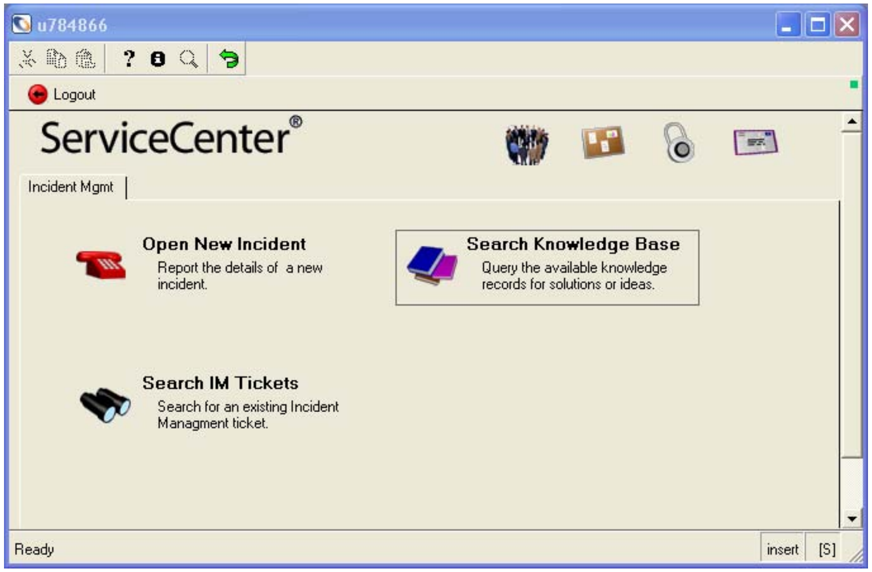

Figure 1: Standard Home menu

The standard home menu currently consists of a single Incident Management tab and icons above for viewing the contacts directory, viewing system bulletins, changing your password, and reading your internal system mail.

This menu should be enhanced to display bar charts of all tickets by priority.

Another proposed enhancement is the addition of a **Send a Page** button users can click to page interested parties manually.

NOTE:
The Knowledge Base component is not currently in use and will be the subject of a separate Functional Specification.

2. Extended Menu

Figure 2: Extended Home menu

The extended home menu currently consists of a four tabs and icons above for call remote management, exiting the system, reading your internal system mail, and viewing system status.

NOTE:
A number of options in the Services tab, such as Root Cause Analysis, are currently inactive. The author is currently investigating which of these options are available for development.

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II. THE SERVICECENTER INTERFACE

A. Overview

In this specification, the term **trouble ticket** refers to a database record describing a request for service or information. Each record maintains a comprehensive audit trail of all activities through resolution of the ticket. These activities include:

- Work performed by support personnel
- System notification
- Escalation, etc.

All *ServiceCenter* users should be authorized to create trouble tickets.

Procedurally, there will be no single point of contact when reporting a problem. Business users will contact the most appropriate person in the PB-Operate organization, based on a contact list in circulation.

For requests they receive by phone, PB-Operate personnel will respond by **opening** a new ticket and attempting to resolve the problem up-front. Personnel who cannot effect **first call resolution** forward their tickets to **assignment groups** for second-level support. Presumably, most PB-Operate personnel will assign tickets to themselves.

Once resolved, tickets are **closed**. Users can **reopen** a closed ticket if the problem reoccurs within 72 hours.

B. New Incidents

1. Process Definition

a) CREATING TICKETS

1. Users click the **Open New Incident** icon on the home menu to open *ServiceCenter*'s incident management application.

   The Incident Details tab appears (Figure 3).

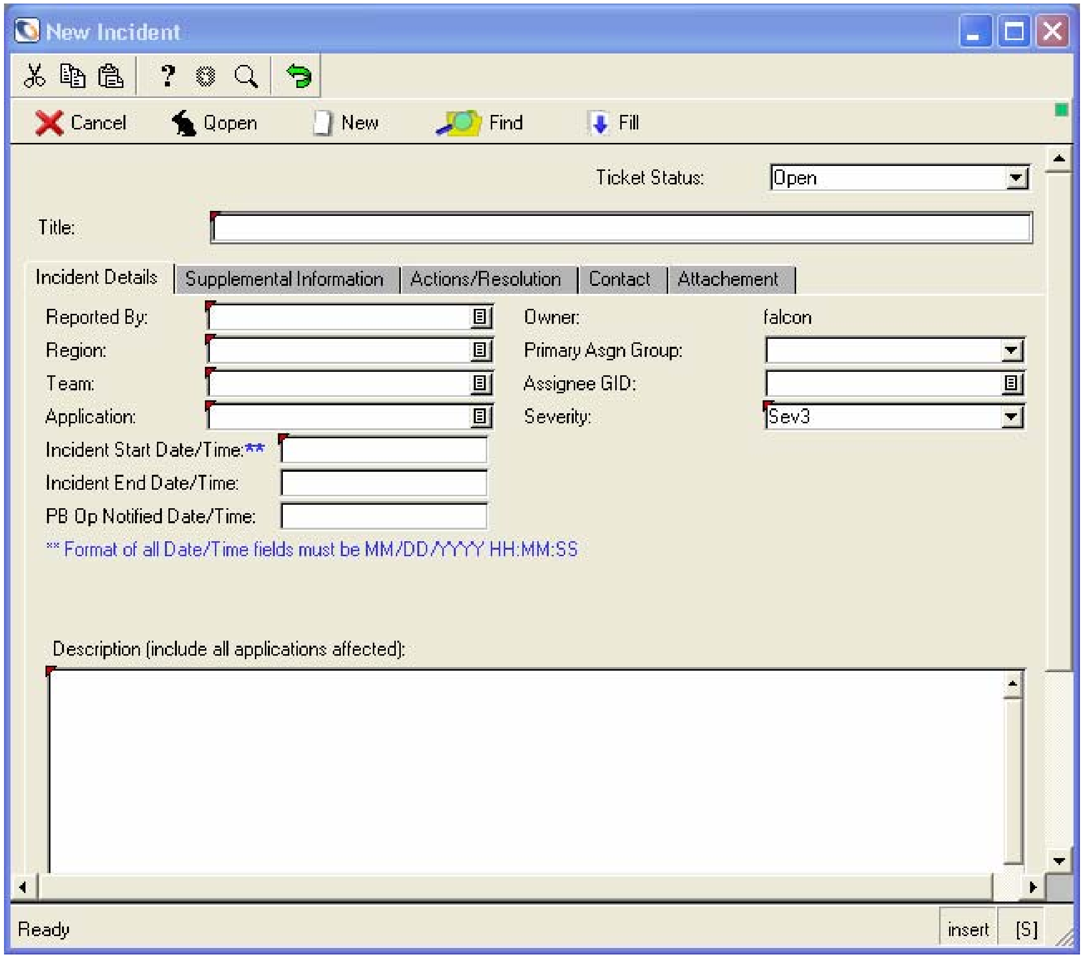

Figure 3: Current Incident Details tab (differs from version proposed)

2. The user enters a short explanation of the problem and its status in the "Brief Description" box. The text should be sufficiently brief to serve as the text for a page.
3. In the "Reported By" field, the user types all or part of the caller's last name or both the caller's last name and first name separated by a comma.

NOTE:
If the caller is reporting the problem on someone else's behalf, the user enters the name of the person actually experiencing the problem in the "Reported By" field and the caller's name in a new "Alt Contact" field (unless requested otherwise).

4. Users can press **F9** or click the small "fill" button next to the "Contact Name" field to search *ServiceCenter*'s database for more information about the caller.

   If the user enters the user's full name or enough letters to find a match, *ServiceCenter* fills the window with more information right away. If the user enters too few letters to locate a match, *ServiceCenter* displays a list of names from which to choose.

   If the user can't find the caller's name in the list, the user should add a contact record to the database by following the steps for "Adding Contact Information" beginning on page 8.

5. Optionally, in the window's "Alt Contact" field, the user enters the name of a "backup" person to contact when the affected person is unavailable.

6. The user selects a "Category," "Business Line," and, if applicable, "Application."

7. *ServiceCenter* automatically chooses an assignment group and manager use based on the ticket's Category, Business Line, and Application. If this default is not appropriate under the circumstances, the user should delete the contents of the field, click the small "fill" button, and choose a different group or manager from the list.

8. The user enters details about the problem and its status in the "Incident Details" box, including as much information as possible.

9. In the rare case that a user loses service long before initiating a trouble ticket, the user should complete the "Downtime Start" field near the bottom of the window to record when the user actually lost service. Users should also enter a "Downtime Start" time whenever they create and close a new ticket retroactively (for a problem they have already resolved) so that the ticket indicates when the user actually lost service.

10. The user clicks the Priority sub-tab and completes the fields it contains to assign a priority code. Alternatively, the user can override settings in this tab by clicking the Override checkbox in the Incident Details tab and manually selecting one of the following:

    - P1/S3
    - P2

- P3
- P4

11. Optionally, the user enters information about related tickets in the Related Tickets tab.
12. The user clicks **Save**.

    The ticket's number appears at the top left of the screen or in the "Ticket XXXX opened" message that appears at the bottom of the screen after the ticket is saved for the first time.
13. *ServiceCenter* automatically delivers a confirmation email to the addresses in the “Email,” “Alt Email,” and “Manager Email” fields.

NOTE:
For more information about Severity codes, refer to Appendix A. Read Appendix B for details about how *ServiceCenter* would automatically alert Assignment Groups when high priority tickets are ready to escalate.

b) Modifying Contact Information

To make changes to user contact information, the user will:

1. Position the cursor in the “Contact Name” field and click **Find** to locate the caller's record in the database of user contact information.

   A screen of "User Contact Information" appears.
2. The user should make any necessary changes and click **Save** to update the database with your changes and click **OK** to return to the initial “Incident Details” window. **Users <u>should not</u> click Add.**
3. The users should press **F9** or the small "fill" button next to the “Contact Name” field to incorporate the changes.

NOTE:
Not all users should be authorized to modify the user information database.

c) Adding Contact Information

To add a contact to the database, the user will:

1. Repeatedly click the **Back** button or the Esc key until reaching the home menu.
2. Click the View Contacts Directory button.

   A series of four tabs appears.
3. Add information about the user. The titles of required fields should appear in red; other titles should be blue.
4. Click **Add** to create and store a new record in the database and click **Back** to return to the home menu.

NOTE:
Not all users should be authorized to modify the user information database.

2. Field Definitions

a) Overview

The layout of the New Incident Module remains largely the same, with the schema defaulting to fields for describing incidents and assigning responsibility for resolution. Proposed enhancements to the Incident Details tab include grouping related fields in sections, repurposing the “Region” and “Team” fields, and creating a Priority sub-tab to more easily apply guidelines for assigning priority/severity codes.

Other changes include creating separate tabs for troubleshooting (Activity) and root cause (Resolution) information and moving many of the Supplemental Information fields to other parts of the interface. The Contact tab has also been eliminated because information can be edited more directly by simply position the cursor in the field to change and clicking **Find**.

Most importantly, interested parties would now be notified by email and (depending on the priority) by pager when tickets are created or when they mature past resolution thresholds dictated by existing SLAs.

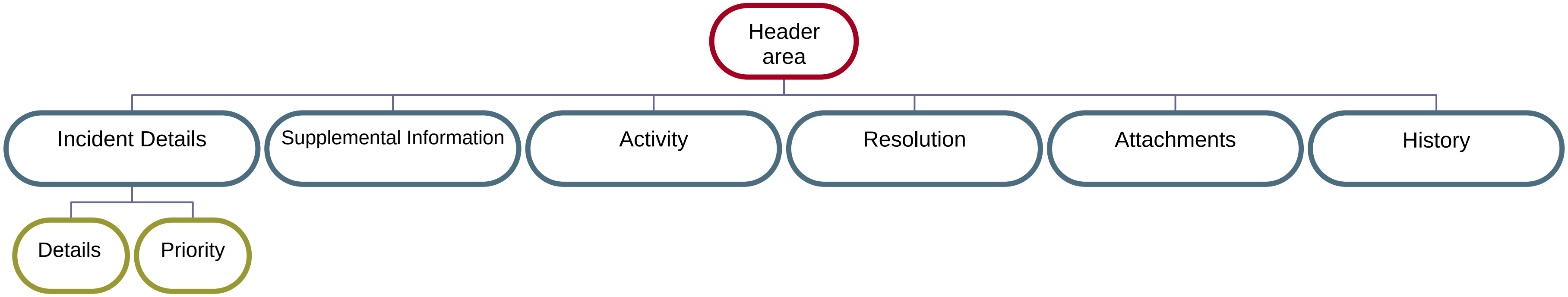

Figure 4: Proposed Incident Schema

b) Incident Details Tab

Field Name	Type	Description	Pop'd By	Required?	Editable?	Additional Comments
Header Area (always visible, regardless of tab selected)						
Incident Number	Numeric		[system]	Y	N	System-generated when the user clicks **New** or **Save**.
Status	Drop-down			Y	Y	Options to include open, closed, reopened, suspended. For new tickets, defaults to "Open."
Brief Incident Description	Text	An "at-a-glance" summary of the incident.		Y	Y	Replaces "Incident Title." Might be used as the content of a pager message.

FIELD NAME	TYPE	DESCRIPTION	POP'D BY	REQUIRED?	EDITABLE?	ADDITIONAL COMMENTS
Details tab: "Contact" Area						
Reported By	DB Pop-up			Y	Y	From database of contacts
Phone	Text		Reported By	Y	Y	
Email	Text		Reported By	Y	Y	
Location	Text		Reported By	N	Y	Replaces existing Region Field
Alt. Contact	DB Pop-up			N	Y	From database of contacts; can be used to store end-user name if different from "Reported by" name.
Alt. Phone	Text		Alt. Contact	N	Y	
Alt. Email	Text		Alt. Contact	N	Y	
Details Sub-tab: Problem Detail Area						
Business Line	DB Pop-up		Reported By	Y	Y	Replaces existing Team field.
Category	DB Pop-up			Y	Y	Generally, "application support"
Application	DB Pop-up			Y	Y	In the database, each application should be associated with and SLA, "Assign to Group," "Assign To Manager," and "high critical" flag.

FIELD NAME	TYPE	DESCRIPTION	POP'D BY	REQUIRED?	EDITABLE?	ADDITIONAL COMMENTS
Priority	Text		Application, [values in Priority tab]	Y	N*	*Linked to "Priority" value in Priority tab. Editable in the Incident Details tab only if "Override" option is selected.
Override	Checkbox	Selecting this checkbox "grays out" all fields in the Priority tab and makes the Priority field editable.		N	Y	De-selected by default
Incident Details	Text			Y	Y	Formerly "Description." Free-form text field.
Downtime Start	Date/Time			Y	Y	Defaults to current date and time.
Downtime End	Date/Time			N	Y	Adding information to this field results in an error if status is not "Closed." Defaults to current time when ticket is closed.
Assign to Group	DB Pop-up		Application	Y	Y	Populated automatically based on application name.
Assign to Manager	DB Pop-up		Application	Y	Y	Populated automatically based on application name; replaces "Assignee GID." Editable separately from "Assign to Group."
Manager Email	Text		Application	N	Y	Populated automatically based on "Assign to Manager."

FIELD NAME	TYPE	DESCRIPTION	POP'D BY	REQUIRED?	EDITABLE?	ADDITIONAL COMMENTS
Resolution	Text	A detailed explanation of the root cause and steps taken to prevent recurrence.		Y*	Y	*Required if status is changed to "Closed." Adding information to this field results in an error if status is not "Closed."
Priority Sub-tab						
Priority	Text		Calculated based on Application value, SLA associated with the Application in the Application table, External Client Impact, and Potential Dollar Impact	Y	Y*	*Indirectly editable by modifying values in this tab; directly editable from Incident Details tab.
Application	DB Pop-up			Y	Y	Linked to Application in Incident Details tab.
External Client Impact	Radio buttons			Y**	Y	**Not required if overridden in Incident Details tab. Options are: "Direct Impact," "Potential Impact," and "No Impact."
Potential Dollar Impact	Drop-down			Y**	Y	**Not required if overridden in Incident Details tab. Options are ">=$5,000" and "<$5,000"
Repair Deadline	Date/Time		Calculated based on Priority. See Appendix B for details.	Y	N	

Field Name	Type	Description	Pop'd By	Required?	Editable?	Additional Comments
Elapsed Time	Time		Calculated based on "Downtime Start" and current time.	Y	N	

i. Notes on Deleted Fields

- **Title**: Replaced by "Brief Incident Description."
- **Region**: Removable, as all tickets will be domestic.
- **Team**: Replaced by "Business Line."
- **PB Op Notified Date/Time**: Replaced by automatic notification logic.
- **Assignee GID**: Replaced by "Assign to Manager" (name).
- **Severity**: Replaced by "Priority."

c) Related Tickets Tab

Field Name	Type	Description	Pop'd By	Required?	Editable?	Additional Comments
Help Desk Ticket Number(s)	Text			N	Y	
Change Management Record Number(s)	Text			N	Y	
PKS Record Number(s)	Text			N	Y	

i. Notes on Deleted Fields

- **End-user notified**: The system will send an email to the end-user automatically if his information is entered in either the Email or Alt Email field.
- **SLA missed**: To be inferred from ticket data including Time Opened, Downtime Start Time, and SLA parameters associated with the Application.
- **External Client Impact**: Absorbed by the Priority tab.

- **VP Operate Page**: Paging may be automated; manual pages can be documented in the free-form Details area.
- **Financial Impact**: Absorbed by the Priority tab.
- **End-user Impact Description**: To be replaced by "Details" field.
- **Long Term Correction/Target Date**: Absorbed by the Resolution tab.
- **Root Cause Fix Status**: Absorbed by the Resolution tab.
- **Root Cause**: Absorbed by the Resolution tab.

d) Activity tab (formerly Actions/Resolution tab)

Field Name	Type	Description	Pop'd By	Required?	Editable?	Additional Comments
Details	Text	A description of any corrective actions taken.		Y*	Y	*Required when creating a new ticket or making any modifications to an existing ticket, unless the ticket's status is changed to "Closed."
Log	Text	A time and user-stamped compendium of entered Details.		N	N	

e) Resolution tab

Field Name	Type	Description	Pop'd By	Required?	Editable?	Additional Comments
Resolution	Text			Y (to close ticket)	Y	Linked to "Resolution" in Incident Details tab.
Root Cause Fix Status	Drop-down			Y	Y	Options are: "In analysis (default)," "In Remediation," and "Implemented."
PM Target Date	Date/Time			Y	Y	

FIELD NAME	TYPE	DESCRIPTION	POP'D BY	REQUIRED?	EDITABLE?	ADDITIONAL COMMENTS
PM Completed Date	Date/Time			Y (to change "Root Cause Fix Status" to "Implemented.")	Y	
Cause	DB Pop-up			Y (to change "Root Cause Fix Status" to "Implemented.")	Y	Drop-down list of codes
Sub-cause	DB Pop-up			Y (to change "Root Cause Fix Status" to "Implemented.")	Y	Drop-down list of codes; based on value of "Cause"
Cause Comments	Text			Y (to change "Root Cause Fix Status" to "Implemented.")	Y	
Action Items	Text			N	Y	
Improvements Realized	Text			N	Y	
PM Contact	DB Pop-up			Y	Y	From contacts database.
Phone	Text		PM Contact	N	Y	
Email	Text		PM Contact	N	Y	
Additional PM Contacts	Text			N	Y	Freeform text field
Attachments	Text			N	Y	Right-click for attachment options.