Process Guide

Document Version 1.0

September 28, 2020

Table of Contents

Confidential Disclosure

Document Control

Summary of Changes

Version	Nature of Change	Date
1.0	Initial Version	09/28/2020

Document Review Plans

This document will be reviewed and updated, if necessary, as defined below:

- As required to correct or enhance information content
- Following changes to the quality standards
- Following any organizational changes or restructuring
- Following a periodical review

Preface

Purpose

The purpose of this document is to provide the basic concepts for the incident and request management processes used by the Intraway Support Team.

This document includes the definitions of severity, status, and environment, as well as the necessary considerations to report incidents and requirements related to non-production environments during the different phases of an implementation project and production environments during the operation and maintenance of the solution.

The content in this document is based on standard business flows and processes used by the Intraway support team.

Audience

This document should be used by:

- Client Users responsible for the operation and maintenance of the solution
- Project Managers responsible for leading an implementation project
- Technical Consultants responsible for configuring the flows and connectors in the application
- Testing Analysts responsible for executing the internal testing and supporting the User Acceptance Testing

1 Basic Concepts

This chapter provides an overview of the basic concepts used in the Intraway support process.

1.1 Severity

Incident severity levels are a measurement of the impact an incident has on the business. Typically, the lower the severity number, the more impactful the incident.

Severity levels are useful for understanding impact quickly and setting priorities for the IT and DevOps teams. The more well-defined your severity levels are, the more likely it is that your team will be on the same page and able to react quickly and appropriately when incidents happen. Without well-defined severity levels, it's easy to waste vital time defining and explaining an incident's urgency instead of resolving it.

Incidents can be detected in non-production and production environments.

- Incidents that are detected in non-production environments during any phase of an implementation project must be reported with a severity level according to the impact on the project.
- Incidents that are detected in production environments must be reported with a severity level according to the impact on the service and the Service Level Agreements (SLA) considered in the license agreement.

Appendix A includes a list of the severity levels that are generally used to report incidents in non-production and production environments.

1.2 Status

The status of an issue indicates its current place in the support process workflow.

Appendix B includes a list of the statuses and a brief description of each of them.

1.3 Environment

It is important to describe the environment in which the issue occurred, which allows understanding if the incident is affecting a service in production or a project execution.

There are three different environments:

- Production Environment
- Test Laboratory
- Implementation Project

2 Incident Management

An incident is an event that causes disruption to or a reduction in the quality of a service in production environments. The operations and support team of a client is responsible for analyzing and diagnosing the incident.

Also, in the different testing activities executed in an implementation project in pre-production environments, the project team can identify errors that totally or partially block the execution of the tests and which must be corrected before the solution is passed to a production environment. The project implementation team is responsible for analyzing and diagnosing these incidents.

An incident can be caused according to the following:

- Configuration defects are errors that occurred during the implementation of the solution
- Product defects or product bugs are coding errors that have to be fixed in the product
- Usage errors are actions incorrectly executed by users that result in unexpected behaviors of the product

Configuration defects and usage errors must be reviewed and corrected by the team responsible for implementing the solution or the team responsible for supporting the solution in a production environment. Product defects must be reviewed and fixed by the product development team.

Every incident has to be reported to the Intraway Support Team as an issue in the application Jira Service Desk. The user responsible for creating the issue must provide the following information:

- A summary and a detailed description of the incident
- The environment in which was detected the incident
- The percentage range of activations affected in a production environment
- The percentage range of management affected in a production environment
- The percentage range of clients affected in a production environment
- The description of any change or task executed in the platform

The severity will be assigned by the application based on the percentages ranges of activations affected, management affected or clients affected provided.

The Technical Support Team will assess the incident's severity, confirm the appropriate level of response, assign the severity level based on the business impact of the incident and investigate it to provide a solution.

If it is determined that the reported incident does not correspond to a defect and refers to a function or process that does not currently exist in the application, the technical support team will proceed to ask the closure of the incident and create an enhancement request.

3 Request Management

If you are requesting to include or create a function or process that doesn't currently exist in the software, you have to create an Enhancement Request in Jira Service Desk. The user responsible must provide a summary and a detailed description of the request.

Keep in mind that Intraway will evaluate the feasibility of each enhancement based, in part, upon the overall effect and/or benefit of the requested enhancement would have to the at-large customer base. Other considerations would include complexity, time, and level of effort. Intraway does not promise or otherwise guarantee that every enhancement requested will be acted upon.

Service requests should be addressed directly to the team responsible for supporting the application in your production environment. Service requests include ...

Commercial requests should be addressed directly to the Sales Team responsible for attending your account.

Appendix A. Severities

Find below a list of the most common severities to report incidents in production and non-production environments. These values may vary according to the particularities of each commercial agreement.

A.1 Non-Production Environments

The severity levels used to report incidents detected during an implementation project or a test laboratory are as follows:

- I1 Show Stopper.- Incidents that block all project activities and prevent deployment in production.
- I2 Major Incident.- Incidents that block a project activity and must be resolved prior to deployment in production but allow moving forward with other activities.
- I3 Minor Incident.- Incidents that are recommended to be resolved but that do not prevent the progress of the project or the deployment in production.

A.2 Production Environments

The severity levels used to report incidents are as follows:

- E1 Crash.- Incidents with a massive affectation of the service to end-users and whose support is carried out 24x7.
- E2 Major.- Incidents affecting the activation of services and whose support is carried out 24x7.
- S3 Minor.- Incidents whose affectation of the service or activation do not require 24x7 attention, but which affect the management of the platform.
- S4 Tweak.- Incidents without affecting service or activation, affecting to a lesser extent the management of the platform.
- S5 Trivial.- Incidents that only have a lower management impact than category S4 Tweak.
- S6 Feature.- Tickets that do not affect the service.

Appendix B. Statuses

Find below a brief description of each of the different statuses for an issue in Jira Service Desk application.

- **New**
  The issue was created in the application and is pending to be received by the Intraway Support Team.

- **Open**
  The issue was received by the Intraway Support Team and is pending to be assigned to a Support Analyst.

- **Assigned**
  The issue was assigned to a Support Analyst and is ready for the assignee to start working on it.

- **In Progress**
  The issue is being actively worked on at the moment by the Support Analyst.

- **Waiting Customer**
  The issue was referred to the client to execute an additional task and is pending to receive a response.

- **Pending Delivery**
  The issue was referred to the Intraway Development Team and is pending to be assigned to a Developer to work on a solution.

- **Delivery in Progress**
  The issue was assigned to a Developer and is pending to receive a response.

- **Workaround**
  The issue was solved with a workaround solution and is pending to start working in a final solution.

- **Waiting Customer (WRKD)**
  The issue, solved with a workaround solution, was referred to the client to execute an additional task and is pending to receive a response.

- **Pending Delivery (WRKD)**
  The issue, solved with a workaround solution, was referred to the Development Team and is pending to be assigned to a Developer to work on a solution.

- **Delivery in Progress (WRKD)**
  The issue, solved with a workaround solution, was assigned to a Developer and is pending to receive a response.

- **Resolved**
  The issue was resolved by the Intraway Support Team and is pending to be validated by the client.

- **Closed**
  The issue was validated and the solution provided was formally accepted by the client.

- **Cancelled**
  The issue is no longer necessary and is considered done.