

**Service Request Logging Procedure**  
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## 1. Purpose

This document provides guidelines to log eASD Service Requests (also known as tickets). Logging Service Requests monitors the operations of the Service Desk, as well as provide information to analyze and improve Service Desk operations.

## 2. Scope

2.1. This document applies to all employees and contractors, eASD offices, and support personnel.

## 3. Definitions

3.1. **Close**—end an SR. There are two stages of close: *Closed* and *Permanently Closed*

- *Closed* indicates the SR has been completed. 14 days is allowed for the requestor to verify the problem was resolved and close the SR, or to report that the problem is not yet resolved—that the SR needs to be re-opened.
- *Permanently Closed* occurs after either the requestor responds that the problem was resolved, or the requestor does not respond after 14 days. If the requestor determines the issue still needs to be fixed after *Permanently Closed* was executed, a new SR will have to be submitted.

3.2. **eASD**—Enterprise Applications Service Desk, an internal organization to assist with service requests related to all applications.

3.3. **iSupport**—a web-based application tool for accessing and updating SRs. Requestors can use iSupport to submit SRs and to view the status of SRs.

3.4. **Requestor**—the person that submits the SR, also known as *user*.

3.5. **Service Request (SR)**—a request that is logged through the service desk, also known as *ticket*.

3.6. **SLA**—Service Level Agreement for Service Desk. Includes required response time to SRs, and targeted resolution time. For more information about SLAs, refer to section 7.2, *KPIs for SLA-Based Support*.

3.7. **Support Time**—the amount of time (hours) that was applied to an SR.

3.8. **TeleService**—an Oracle application tool for accessing and updating SRs that are registered (logged in) in iSupport—assignment of the SR, log in updates and fixes, etc. This tool is only available for eASD support personnel.

3.9. **Tier 1**—eASD first level support. Responsibilities include answering telephone calls and checking telephone messages for SRs, logging in all SRs, notifying support lead/manager of urgent issues.

3.10. **Tier 2**—second level support. Responsibilities include assigning SRs to the appropriate groups, responding to SR within established SLA response time, monitoring urgent SRs, aging SRs, updating the SR log, weekly and daily metrics reporting, posting KPI to team and management, maintaining and updating knowledge base for reference and training.

3.11. **Tier 3**—third level support (functional support). Responsibilities include owning assigned SRs and communicating with the requestor, coordinating tests (functional, integration) with business users, managing development and test, administering access controls, updating the SR log, closing the SR.

3.12. **Tier 4**—fourth level support (technical support), outside of eASD such as developers or external support from vendors. Responsibilities are fixing the problem. Tier 3 is responsible for monitoring the activities, and updating the SR log.

- 3.13. **Ticket**—see *Service Request*.
- 3.14. **Urgent**—the priority of the service request is P0, P1, or P2 or P3.1 (P3.1 is a P3 request that was escalated due to upper management request or lack of response). For details about the responsibilities of each level, refer to section 7.2, *KPIs for SLA-Based Support*. **References**

| Document Number | Document Title          |
|-----------------|-------------------------|
|                 | Operation Process       |
|                 | Tier 1 Training Package |
|                 |                         |
|                 |                         |
|                 |                         |
|                 |                         |

**5. Responsibilities**

- 5.1. IT Services is responsible for updates and for maintaining this procedure.
- 5.2. All Tiers of eASD are responsible for logging in all activities applied to each SR. Activities include the following:
  - When the SR is received
  - Assigned group and ownership of the SR
  - When the SR is resolved
  - All communications with the support team, including change of priorities, escalation, and problems resolved
  - All communications with the requestor, including request for additional information, and notification that the SR has been resolved.
- 5.3. Tier 1–Tier 3 are responsible for updating the SR log as follows:
  - 5.3.1. If the requestor submits the SR via telephone or email, Tier 1 creates the SR in iSupport. The following information must be included:
    - All contact information: name, email address, telephone number, location
    - Description of the problem, and which application and/or module is affected
    - If available, secondary contact information, such as another person to contact, or another telephone number
    - Inform the requestor of the SR number when the SR number is created via iSupport
  - 5.3.2. If the requestor submits the SR via iSupport, the SR number is automatically created and logged into the system.
  - 5.3.3. After the SR is created, Tier 2 assigns the SR to the appropriate group, makes the initial assessment of the priority, and sends acknowledgement to the requestor—the acknowledgement includes the SR number, and to which group the SR was assigned. Tier 2 also updates the SR log—updating the SR, reports—and closes the SR when the project is resolved.
  - 5.3.4. All other Tiers report their activities and update the SR through *TeleService*.
- 5.4. Tier 1 of eASD is responsible for logging in all received service requests (SRs), and resolving problems when possible.
- 5.5. Tier 2 of eASD is responsible for initially verifying the priority of the SR, assigning the SR to the correct group, updating and closing the SR, and resolving the problem when possible.

5.6. Tier 3 of eASD is responsible for verifying the assigned priority of the SR, and updating that priority if necessary. Tier 3 is also responsible for working on the SR, notifying the requestor, resolving the problem when possible. As the assigned owner of the SR, Tier 3 is obliged to work on the SR until it is resolved.

5.7. Tier 4 of eASD is only responsible for working on the SR when technical assistance is required and requested by Tier 3.

NOTE—Only Tier 3 can request Tier 4 to assist with an SR; Tier 1 and Tier 2 do not have that authority.

## 6. Procedure

### 6.1. Logging Service Requests

*NOTE—At all Tier levels, each activity and contribution to resolving the SR must be logged in the SR. The SR is initially logged in and created through iSupport. Afterwards, the SR is accessed and updated through TeleService.*

*The following steps apply to all Tiers of eASD when a service request (SR) is submitted.*

6.1.1. To enable tracking all service requests, Tier 1 shall log in all received service requests.

6.1.1.1. The service requests shall be logged into iSupport with the following information:

- Requestor contact information, including employee ID, telephone number, email, and physical location
- The product and/or module to which the issue is related
- Description of the request
- Attachment, additional information related to the SR (optional).
- *NOTE—The following information is automatically updated by iSupport:*
  - The service number of the service request (SR)
  - The date and time of submission
  - Notification to the requestor when the SR is closed.

If Tier 1 is able to resolve the SR, the SR shall be closed, the requestor shall be notified via email, and the following information shall be logged in:

- How the SR was resolved
- *NOTE—The following information is automatically updated by iSupport:*
  - The date the requestor was notified of completion—the requestor is automatically notified by iSupport when the SR is closed.

6.1.2. If Tier 1 is unable to resolve the SR, Tier 1 shall forward SR to Tier 2 and update the SR with that information.

6.1.2.1. Additionally, a summary of the actions that were attempted to resolve to SR shall be added to the log.

6.1.3. When Tier 2 opens the SR, they shall review the request:

- Review the listed priority of the SR, and determine if the assigned priority needs to be changed.
- Review the description, and determine if there is sufficient information. If more information is needed, they shall contact the requestor to clarify the reason for the SR.
- Update the log of any changes that are made during the review.

6.1.3.1. If Tier 2 is able to resolve the SR, the SR shall be closed, the requestor shall be notified and the following information shall be logged in:

- How the SR was resolved
- *NOTE—The following information is automatically updated by iSupport:*
  - The date the requestor was notified of completion—the requestor is automatically notified by iSupport when the SR is closed.

6.1.4.If Tier 2 is unable to resolve the SR, Tier 2 shall assign the SR to the appropriate Tier 3 group, notify the requestor which group was assigned to the SR, and update the log accordingly:

- A summary of the actions that were attempted to resolve to SRs
- The Tier 3 group assigned to the SR
- *NOTE—The following information is automatically updated by iSupport:*
  - The date the SR was assigned to Tier 3

6.1.5.If Tier 3 is able to resolve the SR, the requestor shall be notified and the following information shall be logged in:

- What task was performed (that resolved the SR)
- Who performed the task
- Communication to the user
- *NOTE—The following information is automatically updated by iSupport:*
  - The date the requestor was notified of completion—the requestor is automatically notified by iSupport when the SR is closed.

6.1.6.If Tier 3 is unable to resolve the SR, the SR shall be forwarded to Tier 4.

*NOTE—Tier 3 retains ownership of the SR*

6.1.6.1. When the request is resolved, all resolutions—how the problem was solved—must be recorded in the SR. Tier 4 can close the SR when the issue is resolved.

## 6.2. Tracking Service Requests—Daily

*The following instructions apply to Tier 2 of eASD.*

6.2.1.Daily SR tracking shall be performed to notify all eASD groups SR distribution, open SRs, and urgencies.

6.2.1.1. SRs shall be viewed through the application *TeleServices*.

6.2.1.2. The open SRs shall be viewed 9am PST, Monday – Friday, and shall be assessed:

- Which priorities need to be elevated
- Which priorities are urgent
- Which priorities can be lowered
- Which (previously) closed SRs should be permanently closed—either 14 days have passed without requestor response, or the requestor confirmed the problem is resolved
- Which open SRs should be closed due to lack of response—a request for information was sent to the requestor, and no information was received from the requestor after 14 days.

6.2.1.2.1. The following information shall be notified to the eASD groups:

- The number of open SRs
- The SRs that are urgent

## 6.3. eASD Update Meetings

Normally, eASD update meetings are held weekly.

***During critical periods, such as monthly, quarterly, or annual close, eASD update meetings shall be held daily.***

6.3.1.Update meetings shall be held with the eASD leads.

6.3.2.The Tier 2 analysts leads shall report the following information to eASD leads:

- The number of SRs logged the day of meeting
- The total number of open SRs
- The total number of urgent SRs
- SR distribution by business group

**6.4. Trend Analysis—Weekly**

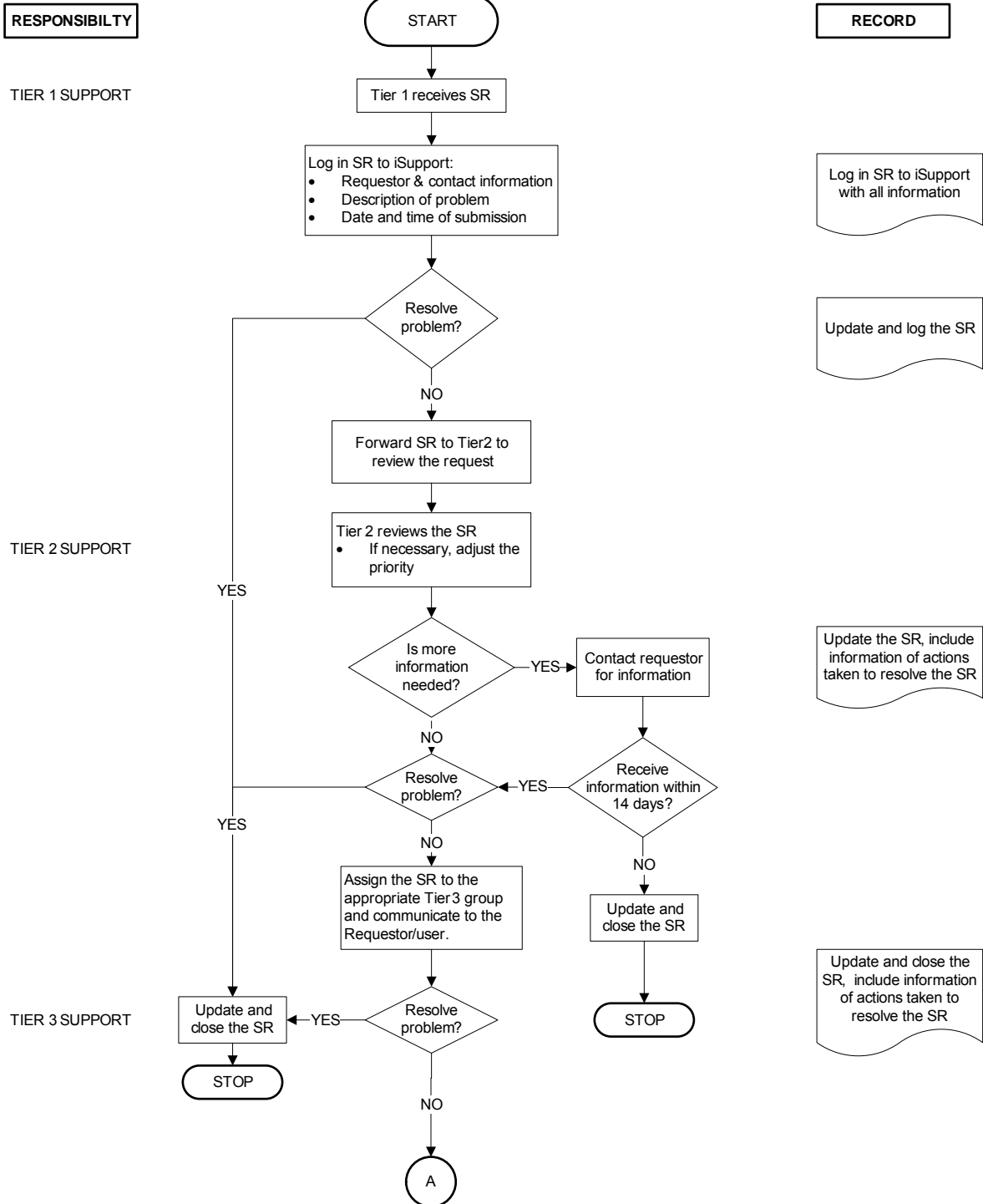
6.4.1. The information acquired through weekly meetings shall be analyzed for trends, including the following information.

- The weekly trend of SRs—the SRs that were submitted; the SRs that were closed.
- Age—how long SRs have been open
- The priorities of the SRs: how many P0, P1, P2, P3.1, P4
- How many SRs per day, overall
- How many SRs per assigned group
- Which group(s) received the most SRs

*NOTE—Upper management may request additional data.*

6.4.2. The information shall be delivered to eASD leads.

### eASD SERVICE REQUEST LOGGING & TRACKING





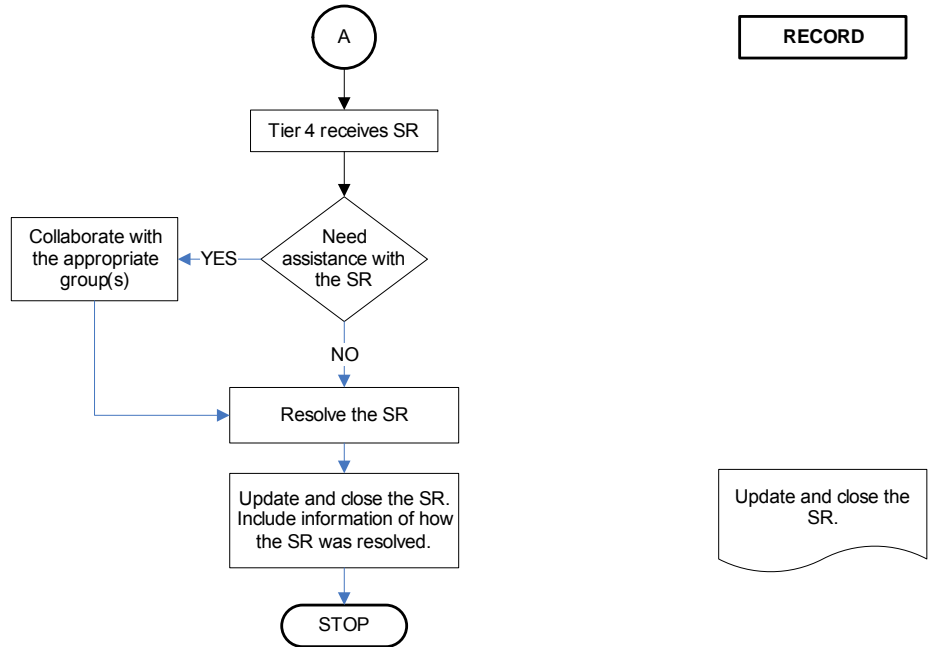
eASD SERVICE REQUEST TRACKING& LOGGING (TIER 4)

RESPONSIBILITY

RECORD

TIER 4 SUPPORT

(BUSINESS GROUPS)



## 7. Additional Information

This section provides a summary of communication with the requestor.

### 7.1. Submitting an SR

The requestor has three options for submitting an SR: telephone, iSupport, email. Telephone and iSupport are the most commonly used methods for submitting an SR.

#### 7.1.1. SR via Telephone

When a service request is submitted via telephone, eASD is obliged to request all contact information of the requestor, and information of the reported problem. All information must be input to iSupport to create the SR report. The email address of the requestor shall be included in the SR as the main contact information of the Requestor. As soon as iSupport assigns a number to the SR (SR #), the requestor shall be given that SR #.

*NOTE—Automatic notifications regarding the SR are only provided to the requestors when their email addresses are available in the SR. The email of the requestor must be included in the SR.*

#### 7.1.2. SR via iSupport

When a service request is submitted online via iSupport, the iSupport application automatically generates the SR number, and automatically notifies the requestor (via email) when a change is made to the SR.

In addition to providing information to the requestor, communicating via email is important as that communication can be logged into the SR.

#### 7.1.3. SR via email

Submitting an SR via email typically does not occur. If the user emails the IT Help Desk, who currently handles email requests, the IT Help Desk personnel shall inform the requestor to contact eASD via telephone.

However, an SR submitted to eASD via email must be reviewed, and determined if the request is within the normal scope of an SR. If the SR is within the normal scope, then the SR shall be handled as described in section 6, *Procedure*.

### 7.2. KPIs for SLA-Based Support

The following SLAs apply only to the Production Environment.

| KPI                      | Definition   | Examples   | Response Time*   | Target Resolution Time**   |
|--------------------------|--|--|------------------|--|
| <b>P0<br/>Priority 0</b> | Month/Quarter/Year end related issue   | Revenue-impacting issue affecting Month/Quarter/Year end close   | 15 minutes       | ASAP (24x7 to resolve issue )  |
| <b>P1<br/>Priority 1</b> | Issue resulting in Application unavailability or significant revenue impact with no workaround; System issues impacting all application users.                       | Server down, network down, Widespread user cannot login and perform transactions; Cannot identify root cause | 15 minutes       | ASAP (24x7 to resolve issue )  |
| <b>P2<br/>Priority 2</b> | Issue which may result in total or partial Application unavailability; Subset of system is down and there is no workaround. Issues impacting a large group of users. | Application/Interface failure such as MRP, Mark view, Logical Apps, PLM & BI                                 | 1 hour           | Within 12 hours (24x7 to resolve issue)  |
| <b>P3<br/>Priority 3</b> | Issue is isolated to one apps module, with mutual workaround solution. Issue impacting one or few group of users only.   | Day to day Application break fix, Functional setup, Application Access related                               | 4 business hours | 3–5 business days for issues that do not require programming or system changes |
| <b>P4<br/>Priority 4</b> | Minor issue with minimal impact to business and users  | iSupport access, Printer Setup   | 1 business day   | 5–7 business days  |

\* The response time is valid only during North America business hours on Monday-Friday between 5AM-6PM (PST).

\*\* IT Support Team services the target resolution times given in this table. This excludes customer response time (i.e., customer testing, Communication).

### 8. Quality Records

| Record Number | Title | Description | Location | Responsible Individual | Retention Period |
|---------------|-------|-------------|----------|------------------------|------------------|
|               |       |             |          |                        |                  |

**9. Revision Control**

When any part of this policy requires amendment, the document shall be re-issued in its entirety; requests for change shall be addressed to IT Operations.

| Revision | Date | Change Description | Originator(s) | Approved By |
|----------|------|--------------------|---------------|-------------|
|          |      |                    |               |             |
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