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# Document version

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| --- | --- | --- |
| **Date** | **Comment** | **Author** |
| 2021-04-XX | Document created. | Pontus Stefansson |
| 2021-04-12 | Added Status “Next” in Workflow | Pontus Stefansson |
| 2021-04-22 | Added status “Dev done” in Workflow | Pontus Stefansson |
| 2021-05-06 | Added bullet about db in “Keep this in mind when you report a ticket” | Pontus Stefansson |
| 2021-10-11 | Added status: ”Available in next QA” and “Closure Expected” | Pontus Stefansson |

# Helpdesk priority, status and assignment guidelines

The purpose if these guidelines are to provide a common way of handling tickets in our helpdesk.

The goal is that the helpdesk should provide an accurate and up-to-date overview of what is being worked on at the moment, what is next in line and what tickets are still pending planning.

In this document you can find the definition of priorities and when to use them as well as the suggested workflow and the associated, statuses and assignments.

# Definition of priorities

## Critical

These issues are business critical. They represent an issue for which no workarounds exist, or there is a severe outage. Like a complete or substantial standstill of a live system. Generally, does not include issues or problems in test/staging environments.

**Critical tickets will be handled ASAP!**

## High

Deficiencies in the system that have a serious impact on the functionality and/or results produced by the system. Workarounds, temporary fixes, or postponement of activities possible for a limited time.

## Normal

General issues and questions. The default prioritization.

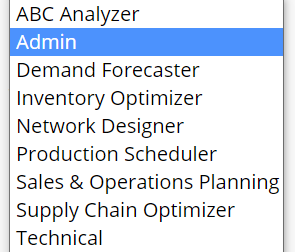
## Low

Issues with little or no impact on the system.

# Keep this in mind when you report a ticket

When you report a ticket there are several things you can do to help speed up the process, and by extension get a faster handling of your ticket.

* **One issue per ticket**. If you have several separate issues to report do it as separate tickets.
* Specify the **category**. If you report using email specify the category in the Subject.



* Make the title **informative.**
  + A good example:
* In the ticket details, be specific when describing the issue and provide as much information as possible so that the developer understands what the problem is and is given some context.
  + What were you trying to do?
  + What did you expect to happen?
  + What did happen?
* **Include db** and information about what **script** to run to recreate the issue.
  + The database uploaded to support should, if possible, be limited in the tables MenuBasicProducts and MenuBasicNodes to the area that cause the problem.
* Provide information about **what release** the issue occurred on.
* The tickets should be **written in English** so that everyone can understand them.

# Workflow, status and assignment

This is the default workflow, from registration to closure.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Step** | **Status** | **Assigned to** | **Meaning** | **Comment** |
| **1** | New | Unassigned or PM | The ticket is received but has not yet been assessed.  No work is planned. | All new tickets should be given this status at first.  PMs are responsible for doing the first assessment of new tickets.  If you are reporting a critical ticket, make sure it is assigned directly to the responsible PM (Kjell, Lars, Mattias or Pontus) or if that is not applicable to Andreas. |
| **2** | On hold | Developer | The ticket has been given a first assessment and is put in the backlog.  No work is planned. | This is the main backlog.  Tickets are then planned as part of a joint prioritization discussion between PM and Dev. |
| **3** | Next | Developer | The ticket is not worked on at the moment but is on the developer’s shortlist | Tickets in this category should be planned to get started soon, no more than 1-2 weeks maximum. |
| **4** | In progress | Developer /Reporter | These are tickets that are actively worked on. | This list should be short and up to date.  When done the developer assigns the ticket to the reporter, so that they can verify. |
| **5** | Dev done | Developer | Development done and waiting for additional test or similar before eventual inclusion in the next released. | When included in next build, move to status “Available in next QA”. |
| **6** | Available in next QA | Developer | Fix will be in the next QA release. |  |
| **7** | Closure Expected | Reporter | The issue has been addressed and the reporter is expected to close the ticket. | From the development team there is no further planned action. |
| **8** | Closed | Anyone | The issue has been resolved. | The reporter closes the ticket after verification. If there is still an issue re-assign it back to the developer. |
| **--** | Development Suggestion | Future Request | Suggestions for new features/functionality to add to the roadmap. | If a ticket is assigned to Future Request the status should be Development Suggestion |

# Planning

PMs are responsible for handling the ticket backlog for their respective parts of Optimity. That includes for example being informed about the issues in it and making sure it is well maintained.

Planning of work is then done in a weekly meeting with PMs and Dev. The goal is to make sure that we are working on the right things and that we are making good use of available resources.

In addition, Dev. has a daily meeting to synchronize their work and keep each other informed about progress, issues etc.

The default planning is based on priority and age. I.e. tickets with higher priority are done before tickets with lower priority, and old tickets are done before new ones. But as mentioned before PMs are continuously discussing with both stakeholders and Dev. to make sure that we are working on the right things and that we are making good use of available resources.