

LOGGING SLA FAULTS & ACTIONS ON IRIS

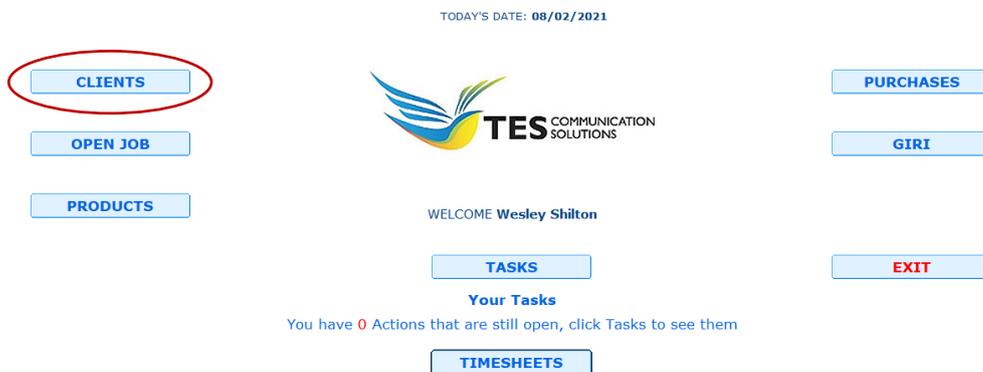
This guidance has three sections:

1. Logging a new fault call
2. Logging a client interaction:
 - a. Responding remotely
 - b. Attending Site
 - c. Logging a fix
3. Closing the fault

1. LOGGING A NEW INFRASTRUCTURE FAULT CALL

Anyone who takes a call from a client to log a fault will need to know how to do the following. This applies to all staff.

Open IRIS and select “CLIENTS”



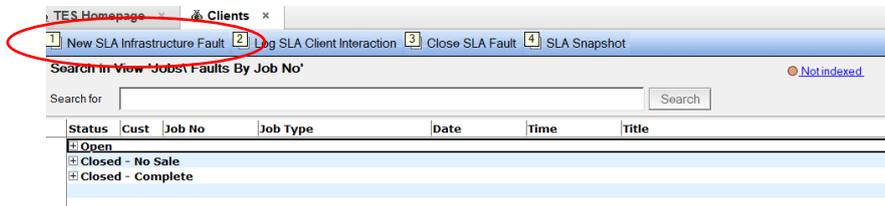
Click “faults” to access the faults view

on Man01

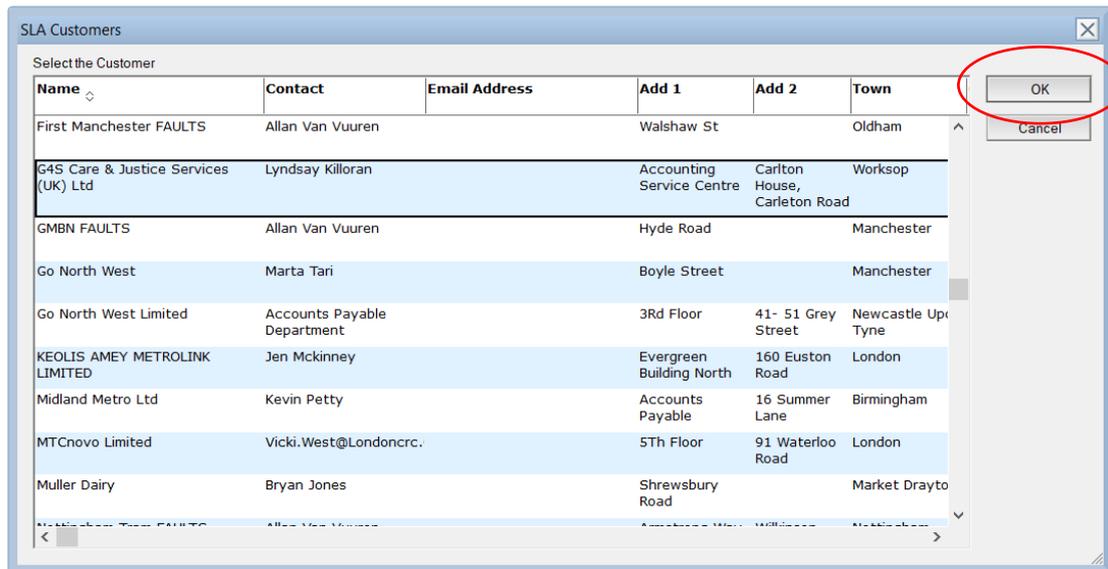
Search in View 'Customer' Active By Name' Not indexed

Name	Contact	Email Address	Add 1	Add 2	Town	County
3W NETWORKS FZCO	Cathy Atienza		Po Box 341184	Dubai Silicon Oasis	Dubai	United Arab Emirates
A B Electrical Wholesalers Ltd	Mark Tombling		Bolckow Industrial Estate	Laing Close, King's Court	Grangetown	Middlesbrough
A J Wood			Withy Trees Farm	Cumeragh Lane	Whittingham	Preston
Aarhus Fire Protection Ltd	Mel		4 Moss Lane	Whitefield	Manchester	Greater Manchester
Active Business Communications	Darren Gildert		Active House	11 Bredbury Business Park Way	Bredbury Park	Bredbury
Active Business Communications Ltd	Phil Hulme		Active House	11 Bredbury Business Park Way	Bredbury Park	Bredbury
ADT Fire & Security PLC	Lorraine Whitby		Accounts Payable,	Mailpoint 1001	Po Box 3572	Stone
AEGIS Defence Services	Will Wythe		84 Eccleston Square		London	
Aero Engine Controls	Dave Weaver		York Road	Hall Green	Birmingham	
Age Concern			2-4 Chapel Street		Chorley	Lancashire
Agri-Research Ireland Limited			Avon Business Park	Mill Road	Ballyclare	Co Antrim
Ainscough Crane Hire Limited	Accounts Payable		Bradley Hall	Bradley Lane	Standish	Gt Manchester, Lancashire
Ainscough Heavy Cranes Ltd	Payment Details - Kelly		Unit U	Centurian Industrial	Centurian Way	Leyland

Click “New SLA Infrastructure Fault”



This will now show a list of all clients with maintenance contracts. Highlight the relevant client and click “ok”



You will now see the fault record. Note: this looks different to a normal “job” record you may be used to.

This is because there are key questions to ask the client when they raise the fault.

The new fault screen will appear as below. Please enter as much info as you can, especially where the red stars are:

Job for G4S Care & Justice Services (UK) Ltd

Job No. [New] -



Customer:	<input type="checkbox"/> G4S Care & Justice Services (UK) Ltd	Date:	<input type="text" value="09/02/2021"/>	Do not adjust
Job Status:	<input type="radio"/> Open			
Job Type:	<input type="radio"/> Sale <input type="radio"/> Accident <input type="radio"/> Complaint <input type="radio"/> NCR <input type="radio"/> Near miss	<input type="radio"/> OAR <input type="radio"/> TES Internal <input type="radio"/> Customer calibration <input type="radio"/> Equipment calibration <input type="radio"/> Maintenance	<input type="radio"/> Repair <input checked="" type="radio"/> SLA infrastructure fault <input type="radio"/> SLA Terminal Fault	This will be pre-selected

Details Actions CRS RS1 BOM Quotes PO In RS2 PO Out Timesheet Goods FDS FAT SAT Invoices Out Invoices In			
Job Title:	<input type="text" value="★"/>		
Reference Number	<input type="text" value="[New]"/>		
Job Owner	★ <input type="text" value="CN=Wesley Shilton/OU=Management/O=TES"/>	Email	<input type="text" value="Wesley.Shilton@tesradio.com"/>
Sales Executive	★ <input type="text" value="CN=Wesley Shilton/OU=Management/O=TES"/>		
Project Manager	★ <input type="text" value="CN=Wesley Shilton/OU=Management/O=TES"/>		
Lead Engineer	★ <input type="text" value="CN=Wesley Shilton/OU=Management/O=TES"/>		
Fault Report Date	<input type="text" value="09/02/2021"/>	Fault Report Time	<input type="text" value="12:54"/>
Fault Raised By (Client Contact Name)	<input type="text" value="★"/>	Direct contract number, preferably mobile	<input type="text" value="★"/>
Job Title of Above	<input type="text" value="★"/>		
Description of fault	<input type="text" value="★"/>		
How long has the fault been occurring?	<input type="text" value="★"/>		
Has this happened before?	<input type="text" value="★"/>		
Are there any access restrictions, are permits required?	<input type="text" value="★"/>		
Comments for Client	<input type="text" value="Your fault was resolved by the engineering team. We thank those that reported the fault and provided information to help us resolve this issue. Please contact TES if you have any further queries."/>		
General Notes	<input type="text" value="★"/>		

Please list "Lead Engineer" as the engineer who will be doing the initial response and the site visit. This will usually be the on-call engineer.

Click "Save".

Once you have clicked save you will see the job number appear on the job record.

If you are not the on call engineer you must create an action for them to contact the client.

Do this by clicking the "actions" tab then the "create action" button. See below:

Action for G4S Care & Justice Services (UK) Ltd

Company Name: **G4S Care & Justice Services (UK) Ltd** Status: **Open**

Job Status: **Closed - Complete**

Action Owner: **David Jones/Engineers/TES** Job Number: **J001872** Save

Description: **Contact Client Re:Inf Fault** Edit

Action Type:
 Arrange meeting
 Inspect goods inward
 Arrange SAT
 Hold RS1
 Attend Site
 Submit SAT
 Request BOM
 Create FDS
 Seek signed SAT
 Create Quote
 Seek signed FDS
 Invoice
 Seek Customer Feedback
 Engineering Works
 SLA Pause
 Seek customer PO
 Arrange FAT
 Other
 Hold RS2
 Submit FAT
 Purchase goods
 Seek signed FAT

Start Date: **09/02/2021** End Date: **09/02/2021**

Start Time: **13:18** End Time: **14:15**

Send Reminder: Active (Reminder will take the End Date as reference)

Close

Click save.

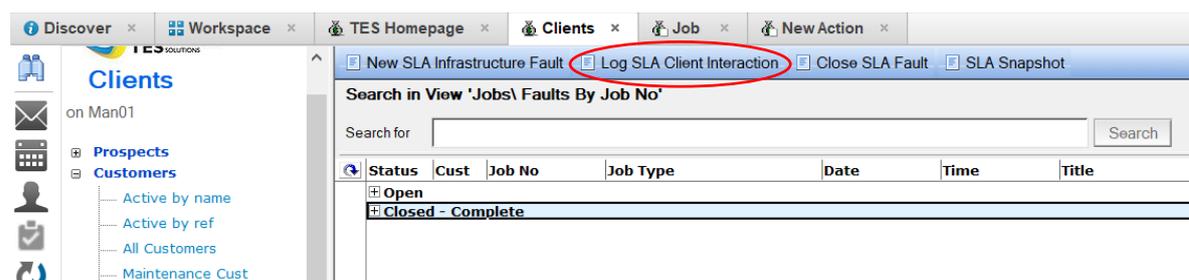
If you are not the on-call engineer make sure they are telephoned immediately and made aware of the need to contact the client.

2. LOGGING A CLIENT INTERACTION

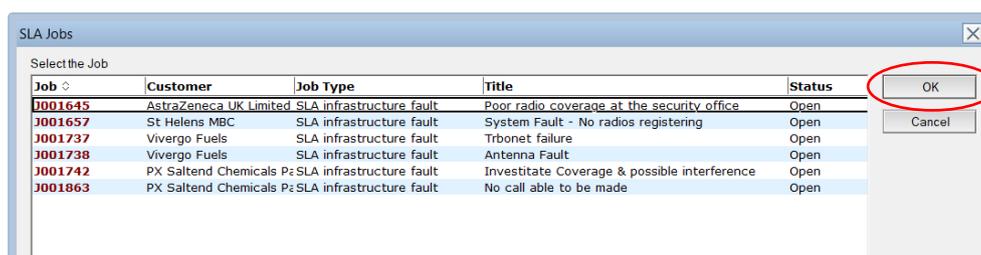
To keep things simple, client interactions are logged using a timesheet entry interface.

This is how it works:

Next to the New SLA fault button is a “Log SLA Client Interaction”



This will display a list of open faults. Select the fault and press ok:



Now complete the timesheet record, **IMPORTANT** take special note of:

1. Select the type of client interaction. It must be one of the three SLA interactions shown
 - a. Response to client
 - b. Site Attendance
 - c. Fix
2. Log the date and time of the interaction
 - a. If this is a response to client it will be **THE START TIME THE CALL WAS MADE**
 - b. If it is logging site attendance this will be **THE TIME OF ARRIVAL AT SITE**
 - c. If it is logging a fix this will be **THE TIME THE FIX WAS ACHIEVED**
3. Log the time you actually spent on the fault. Remember this will include return travel etc. and will be different from point 2.

The screenshot shows the TES TimeSheet application window. The interface includes the following elements:

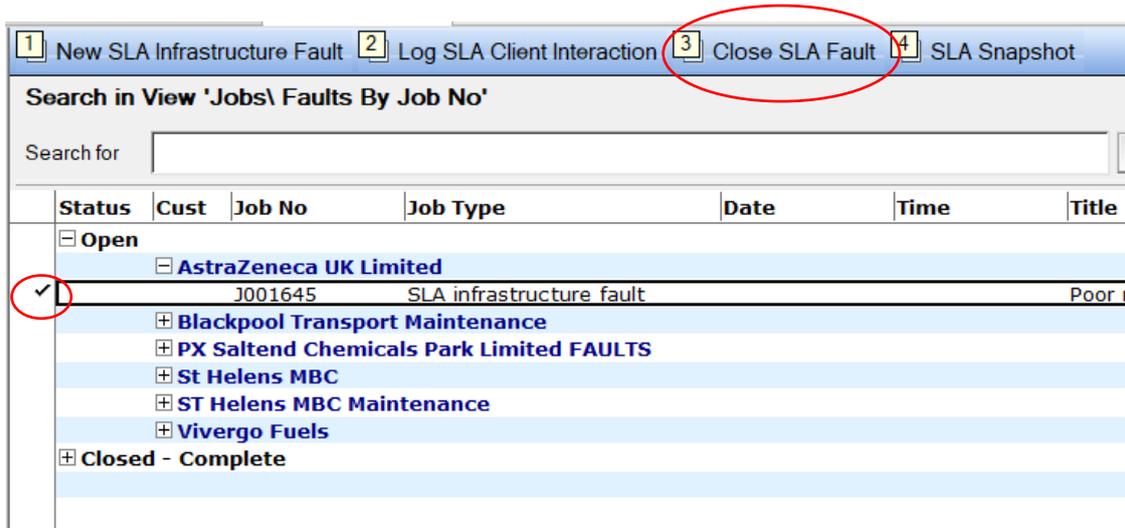
- Staff:** CN=Wesley Shilton/OU=Management/O=TES
- Date:** 09/02/2021 (circled in red with a '2' next to it)
- Time:** (empty field)
- Job:** J001645
- Type:** A: Core Hours
- Work Type:** A list of radio buttons for selecting a work type. The 'SLA Fault: a. Log response to Client' option is circled in red with a '1' next to it.
- Date work start:** (empty field)
- Time work start:** (empty field)
- Time work end:** (empty field)
- Time spent on Job Mins:** (empty field)
- Time spent on Job Hrs:** (empty field)
- Notes:** (empty text area)

Buttons on the right side include 'Save & Close', 'Add More', and 'Cancel'. A large red oval encircles the 'Date work start', 'Time work start', 'Time work end', 'Time spent on Job Mins', and 'Time spent on Job Hrs' fields, with a '3' next to it.

3. CLOSING A FAULT

Select the fault in question by “ticking” it (see below)

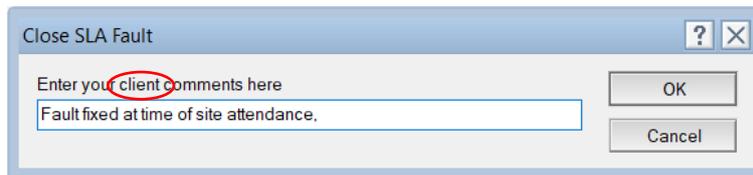
Click “Close SLA Fault”



This process will automatically close ALL actions on a fault and close the fault job overall.

As once you click the button you will see two prompts for comments. One will be for the internal job record and the other for the client SLA report.

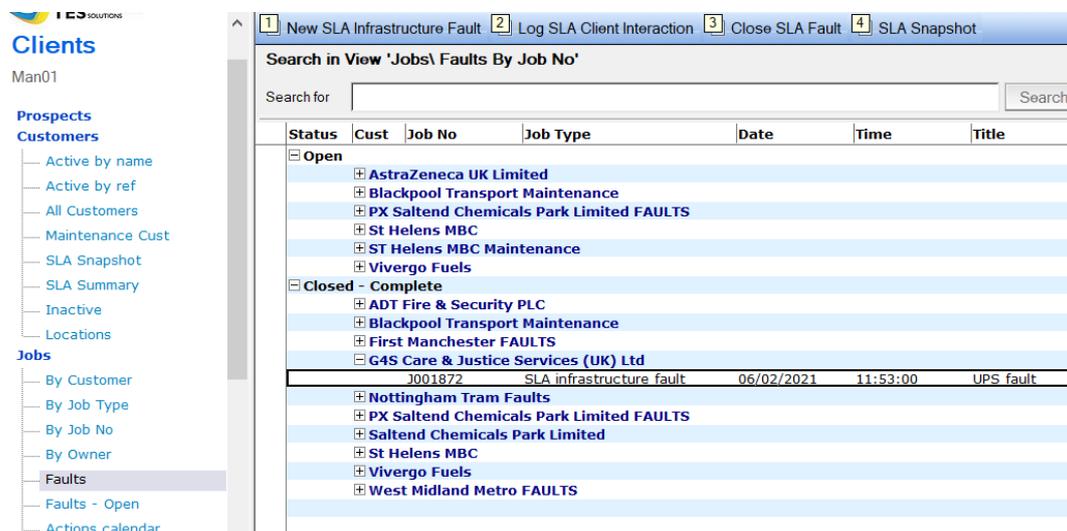
An example of the CLIENT comment box is shown.



WORKED EXAMPLE

This process was used for G4S call out to Altcourse by David Jones on 6-2-21.

Job number J001872, it can be found here:



This job required the new fault call to be logged, as per section 1 above, see:

Job for G4S Care & Justice Services (UK) Ltd

Job No. J001872 - UPS fault



Customer:	G4S Care & Justice Services (UK) Ltd	Date:	06/02/2021
Job Status:	Closed - Complete		
Job Type:	<input type="radio"/> Sale <input type="radio"/> OAR <input type="radio"/> Repair <input type="radio"/> Accident <input type="radio"/> TES Internal <input checked="" type="radio"/> SLA infrastructure fault <input type="radio"/> Complaint <input type="radio"/> Customer calibration <input type="radio"/> SLA Terminal Fault <input type="radio"/> NCR <input type="radio"/> Equipment calibration <input type="radio"/> Near miss <input type="radio"/> Maintenance		

Details | Actions | CRS | RS1 | BOM | Quotes | PO In | RS2 | PO Out | Timesheet | Goods | FDS | FAT | SAT | Invoices Out | Invoices In

Job Title:	UPS fault
Reference Number	J001872
Job Owner	David Jones/Engineers/TES Email David.Jones@tesradio.com
Sales Executive	Molly Burke/Sales/TES
Project Manager	Adam Rainbow/Projects/TES
Lead Engineer	David Jones/Engineers/TES

Fault Report Date	06/02/2021	Fault Report Time	11:53
Fault Raised By (Client Contact Name)	Client Operator (name not given)	Direct contract number, preferably mobile	01515222000
Job Title of Above	Facility Manager		
Description of fault	After teting backup generators, UPS tripped. Did not restore after power test.		
How long has the fault been occurring?	<30 mins		
Has this happened before?	yes, cleint referred to fault in Nov 2020.		
Are there any access restrictions, are permits required?	no		
Comments for Client	Your fault was resolved by the engineering team. We thank those that reported the fault and provided information to help us resolve this issue. Please contact TES if you have any further queries. Closed job at time of attendance as issue was fixed.		

General Notes

08/02/2021 15:37 Wesley Shilton: Client site attended. Re-connected the primary repeater. UPS was back up and running by the time of arrival.

08/02/2021 15:38 Wesley Shilton: Closed job at time of attendance,

Then for a client interaction to be logged – firstly the initial response:

Timesheet

Staff David Jones/Engineers/TES **Date** 06/02/2021 **Time** 11:54 Save & Close

Job J001872 Add More

Type D: Time and Half Overtime Cancel

Work Type
 Commercial Eng: Site Work (incl. travel)
 Eng: GIRI Internal Task
 Eng: Maintenance Contract Project Management
 Eng: Other Workshop Activities SLA Fault: a. Log response to Client
 Eng: Out of Hours Call Out SLA Fault: b. Log site attendance
 Eng: Pre-Sale SLA Fault: c. Log fix
 Eng: Programming, Configuration & Set Up Training

Date work start 06/02/2021 **Time work start** 11:53

Time work end 06/02/2021 **Time work end** 12:00

Time spent on Job Mins 7 **Time spent on Job Hrs** 00:07

Notes Initial Call

Then the site visit:

The screenshot shows a 'TimeSheet' window with the following details:

- Staff:** CN=Wesley Shilton/OU=Management/O=TES
- Date:** 06/02/2021
- Time:** 14:45
- Job:** J001872
- Type:** D: Time and Half Overtime
- Work Type:**
 - Commercial
 - Eng: CJRT
 - Eng: Maintenance Contract
 - Eng: Other Workshop Activities
 - Eng: Out of Hours Call Out
 - Eng: Pre-Sale
 - Eng: Programming, Configuration & Set Up
 - Eng: Site Work (incl. travel)
 - Internal Task
 - Project Management
 - SLA Fault: a. Log response to Client
 - SLA Fault: b. Log site attendance
 - SLA Fault: c. Log fix
 - Training
- Date work start:** 06/02/2021
- Time work start:** 11:55
- Time work end:** 06/02/2021
- Time work end:** 15:30
- Time spent on Job Mins:** 215
- Time spent on Job Hrs:** 03:35
- Notes:** Client site attended. Re-connected the primary repeater. UPS was back up and running by the time of arrival.

This information inputted in this way means that the CRM could calculate the SLA performance and produce an SLA report. Example as follows:

Customer SLA Summary Log

Customer: G4S Care & Justice Services (UK) Ltd

Summary Created date: 09/02/2021

Job Number: J001872

Job Title: UPS fault

Job Status: Closed - Complete

Job Owner: David Jones

Comments for client: Your fault was resolved by the engineering team. We thank those that reported the fault and provided information to help us resolve this issue. Please contact TES if you have any further queries. Closed job at time of attendance as issue was fixed.

Date of Fault raised	06/02/2021		
Time of Fault raised	11:53		
Time to First Response	0	SLA First Response	2
Time to First Site Attendance	2	SLA Site Visit	8
Total Pauses	0	SLA to Fix	12
Time to Fix	2		
Net Fix	2		