White Paper

// Escalation Handbook

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Short Summary	This document will help to improve the collaboration between NT-ware's 3rd-Level Support and Canon's local support teams. Our goal is to improve the escalation handling, fault finding procedures and to speed up resolution times.			

Document Changes	Version	Topic(s)	Changes
	2.0	All	Converted to Author-it, exchanged screenshots, links and descriptions to match JIRA v6.0.
	2.1	All	Improved layout and formattings.

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Mittwoch, 29. April 2015, Bad Iburg (Germany)

Important Note

Serious problems might occur if you modify the registry of your Windows operating system incorrectly. These problems might require that you reinstall the operating system. We strongly recommend to always back up the registry of your Windows operating system before applying changes to it, just in case you do something wrong. NT-ware does not assume any responsibility or liability for any impact on the operating system after changing the registry. You understand and accept that you use this information and modify the registry of your Windows operating system at your own risk.

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Should you come across any relevant errors or have any suggestions please contact documentation@nt-ware.com or use the ***Send feedback here*** button of the uniFLOW Online Help.

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Symbols

Text Styles

This style is used for text that is displayed on screen.

This style is used for text the user has to type in.

This style is used for hyperlinks to web pages, internal links to other pages in this manual.

`This style is used for code examples: XML code, variables or regular expressions.`

Pictograms

Important Note:
Information that is crucial for the correct functioning of the uniFLOW software.

External Manual:
Pointer to additional manuals for third party hardware or third party software.

Region Specific Feature:
Indicator for uniFLOW features that are not available worldwide.

External Link:
Link to an external web page.

Settings:
Detailed explanation of configuration settings or operational procedures.

Compass:
Path to the menu or configuration page in the software.

Screenshots and Diagrams

This manual contains screenshots of the software, diagrams explaining relations and pictures of products. Even though all visuals are up-to-date at the time of writing, they are subject to change.

Send Feedback

Should you come across any relevant errors or have any suggestions please contact documentation@nt-ware.com or use the ***Send feedback here*** button of the uniFLOW Online Help.

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1 Intention of the document

This document will help to improve the collaboration between NT-ware's 3rd-Level Support and Canon's local support teams. Our goal is to improve the escalation handling, fault finding procedures and to speed up resolution times.

2 Escalation Requirements

2.1 "Escalation Requirements" White Paper

The "Escalation Requirements" white paper can be found in the ITS under MOMKB-245 (https://web.nt-ware.net/its/browse/MOMKB-245) (uniFLOW) and MOMKB-457 (https://web.nt-ware.net/its/browse/MOMKB-457) (HelixPW). These white papers are intended as a guideline and are provided to you for the purpose of assisting you in implementing uniFLOW/HelixPW as well as identifying errors in a uniFLOW/HelixPW installation. They are designed as a reference guide for basic troubleshooting measures.

The "Escalation Requirements" white papers are "living documents" and will be updated on a regular basis.

Adding yourself as watcher will inform you about changes in this issue via email, thus keeping you up to date once the document has been updated. To add yourself as watcher for this issue, please click on ***Start watching this issue***, which you can find on the right hand side of the ITS issue under ***People***.

It is required that every technician who escalates issues to the EMEA, USA, ASIA and OCEANIA support area is familiar with this document and of course makes good use of it.

2.2 Additional Requirements

- **uniFLOW serial number**
  Every escalated issue has to have a serial number attached. The serial number can be found on the "info page" of the customer's uniFLOW installation. If the customer is in a POC, trial or demo phase, please state this in the serial number field. The serial number must not be confused with license key!

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- **SA (Software Assurance)**
  Please make sure that your customer is covered by Software Assurance. Issues without Software Assurance or valid serial number cannot be handled.
- **Issue priority**
  Please make sure that every escalated issue has the right "issue priority" set. This is very important for scheduling and prioritizing issues during peak periods. If you escalate more than one issue for the same customer with equal priority, please let us know what is the most critical issue for the customer!

Issue Priorities and Meaning

Symbol	Description
	Blocker (Category A) Blocks usage of project, highest priority, resolution can be charged.
	Critical (B) Crashes, loss of data, severe memory leak.
	Major (C) Major loss of functionality.
	Minor (D) Minor loss of functionality or other problem where an easy workaround is present.
	Trivial (or Beta) Cosmetic Problems or Beta Version Tests

Since we are not familiar with the customer's work processes and environment, it will be extremely helpful if you describe these carefully in the issue description. This will make it much easier for us to understand the severity of an issue.

- **Inquiries via phone or email**
  NT-ware does not provide support via telephone or email. Every issue has to be escalated to NT-ware using the ITS.
- **Requests for RIAS (remote session)**
  If you require assistance via remote session, this has to be scheduled via the ITS. Ad hoc remote sessions might be possible but are not guaranteed. These have to be communicated via the ITS as well.

2.3 Reproducing Issues

Every issue has to be reproduced in a "plain vanilla" environment before escalating to NT-ware. Detailed steps "how to reproduce" have to be provided with the escalation to NT-ware.

Microsoft offers a handy tool in Windows 7 and Windows Server 2008 R2 to easily record your steps to reproduce a problem (incl. screenshots):
http://blogs.technet.com/b/askperf/archive/2009/10/21/windows-7-windows-server-2008-r2-problem-steps-recorder.aspx
(http://blogs.technet.com/b/askperf/archive/2009/10/21/windows-7-windows-server-2008-r2-problem-steps-recorder.aspx)

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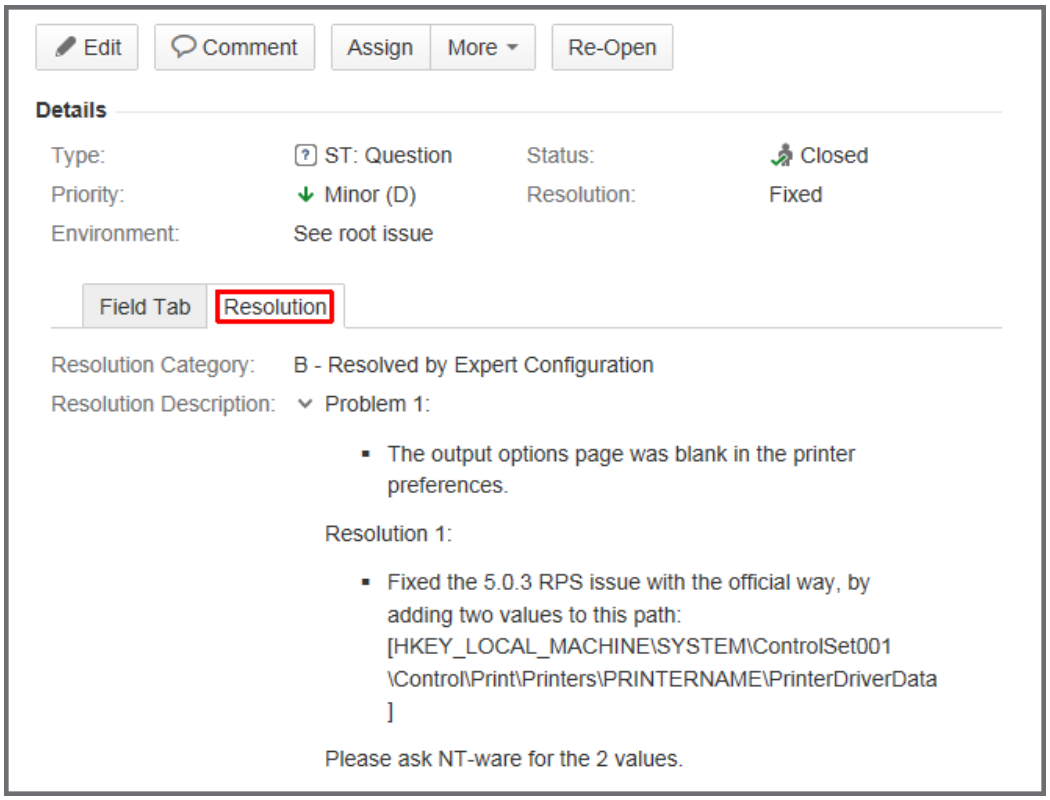
NT-ware will not reproduce issues if this has not been done at NSO level.

If you are unsure how to reproduce the issue, please feel free to ask (via ITS). We are more than happy to point you into the right direction.

2.4 ITS Search for Duplicates, Known Issues

Please make sure that you search the ITS before escalating an issue to NT-ware. How to search the ITS is described under 3 below) Due to our large and growing installation base it is very likely that your issue is already reported.

Every issue that is resolved (Status: “Closed” or “In Documentation”) is documented with a “Resolution” which is readable for everyone:



The “Resolution” tab is available in all EMEA, USA, ASIA and OCEANIA issues. Every Canon technician has read access to all these issues.

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3 Search and Find in the ITS

3.1 ITS Guide

A basic ITS guide and "How-to" can be found in MOMKB-155 (https://web.nt-ware.net/its/browse/MOMKB-155). Please make sure to be familiar with this document. This is required for the next points.

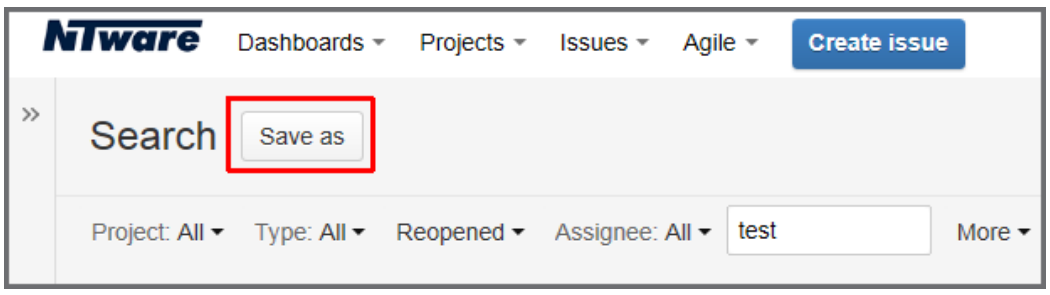
3.2 Search Syntax

The ITS search syntax is explained here:
https://confluence.atlassian.com/display/JIRA060/Performing+Text+Searches
(https://confluence.atlassian.com/display/JIRA060/Performing+Text+Searches)

Due to the amount of information in the ITS it is very important to make good use of the search syntax to reduce the number of results but also to be sure that your search is not too limited which will show no or only a few results.

3.3 Saving Your Search

The 'normal' ITS search interface will allow you to quickly execute a simple search on ITS tickets. In the top left corner you'll have the possibility to save your 'search' as filter. Filters can be added to your personal dashboard or subscribed (see Subscribe to a Filter (see "Subscription to a Filter" on page 6) an Add a Filter to Your Dashboard (see "Adding a Filter to the Dashboard" on page 6)).



Once you have selected a project (ITS area) where you want to search, you will to get more form fields to define your search. Each area has unique fields that can be searched.

Only fields are shown which are available in all selected areas.

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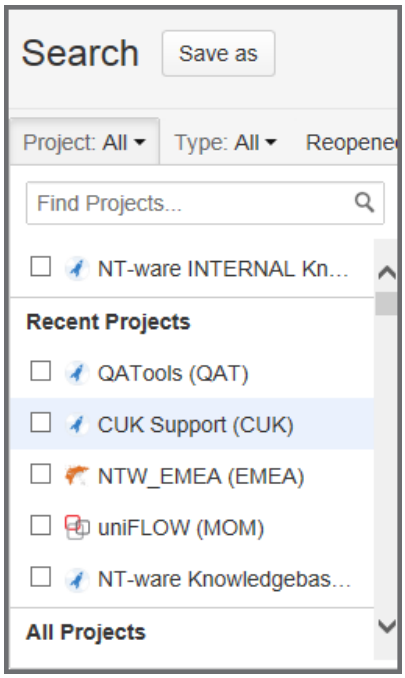

3.4 Advanced Search

To open the advanced search interface, open the ***Issues*** menu in the top bar and select ***Search for Issues***. On the right hand side, click on ***Advanced***.

It is a good idea to use the “simple search” to define your search string as far as possible and then fine tune it via the advanced search string. Search options like “!=” (not equal) are only available in the advanced search.

The advanced search will allow you to create your own (complex) filters by using the JQL (JIRA query language) which is documented here:

https://confluence.atlassian.com/display/JIRA060/Advanced+Searching?src=search (https://confluence.atlassian.com/display/JIRA060/Advanced+Searching?src=search)

A complex query could look like this:

```
project in (ASIA, EMEA, OCEANIA, USA)
AND (priority = "Blocker (A)"
AND assignee is EMPTY
AND created <= -4h)
```

This specific query will list all ASIA, EMEA, OCEANIA and USA issues that are “Blocker”, unassigned and have been created more than 4 hours ago.

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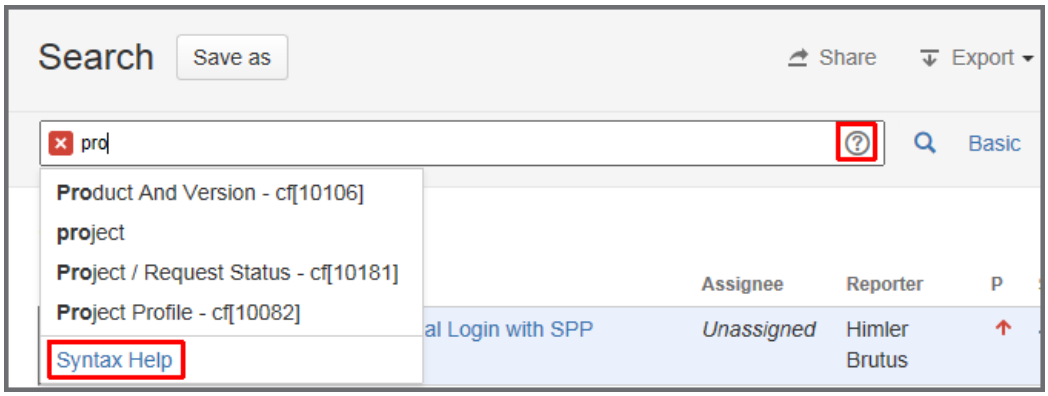
When starting to type, the query editor will auto complete / suggest the syntax. Incomplete or erroneous syntax will cause the editor to show the red "X" in the top left corner:



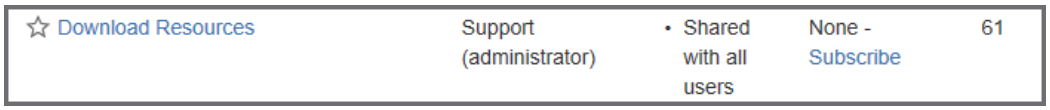
If you need help with the syntax you can click on the question mark in the top right corner or on ***Syntax Help*** under the suggestions menu.

3.5 Subscription to a Filter

You can subscribe to any filter that you have saved or that is shared with you. A subscription will cause the ITS to send you an email with the filter results thus keeping you up to date.

To subscribe to a filter go to ***Issues > Manage Filters*** or use the following link: https://web.nt-ware.net/its/secure/ManageFilters.jspa (https://web.nt-ware.net/its/secure/ManageFilters.jspa)

Find the filter you want to subscribe to and click ***Subscribe***:



On the next page you can then set a ***Schedule*** and an ***Interval***. Afterwards, click on ***Subscribe*** to finish.

Some filters will only show “results” from the last 24 hours or from the last 7 days. In this case it makes sense to modify your subscription to also send you an update every 24 hours or every 7 days.

3.6 Adding a Filter to the Dashboard

Any filter that you have created (and saved) or that is shared with you can be added to your dashboard for easy access.

To add a filter to your dashboard, simply click on ***Add Gadget*** in the upper right corner of your dashboard. In the pop-up, please select the Gadget you want to add (in this case: ***Filter Results***).

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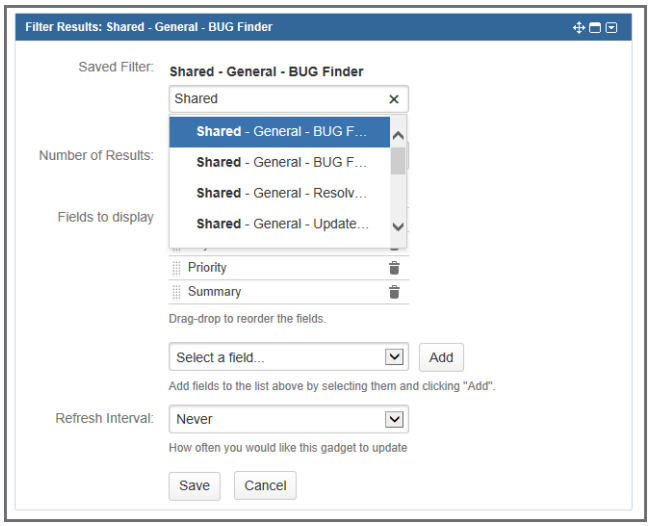
The Gadget will be placed on your dashboard and is ready for configuration:



You can select any saved filter you have access to. Please also define the ***Number of Results*** shown in the ***Filter Results*** box. If wanted, you can select more than the default columns to be displayed.

3.7 Shared Dashboards

There are several users in the ITS who share their dashboards. To find a shared dashboard, please click on ***Dashboards*** > ***Manage Dashboards*** in the top menu of the ITS.

Please navigate to the ***Search*** tab on the left hand side.

You can now search for an ***Owner*** (ITS username) or a specific dashboard by entering its name in the search field.

If you search for "Shared - INFO DASHBOARD" (with quotes) you'll find a shared dashboard with some helpful filters preconfigured. This dashboard will be updated from time to time.

Clicking the ***Search*** button without any search text or author specified will list all shared dashboards which are accessible for you.

The "Info Dashboard" can also be accessed via the following direct link:

https://web.nt-ware.net/its/secure/Dashboard.jspa?selectPageId=13025
(https://web.nt-ware.net/its/secure/Dashboard.jspa?selectPageId=13025)

3.8 Search Templates

The following strings can be inserted in the "advanced search" (see ITS Advanced Search (see "Advanced Search" on page 5)).

```
project in (ASIA, EMEA, OCEANIA, USA) AND (status = Closed or status = "In Documentation") AND "Resolution Category" = "E - Resolved by NT-ware Fix"
```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```
and (issuetype = Bug or issuetype = "ST: Bug") and "Resolution Date" >= -1w
```

The filter above will show any ASIA, EMEA, OCEANIA or USA issue which is “closed” or “in documentation” (= resolved, with resolution) and has been declared as “BUG” in the past 1 week.

```
project in (ASIA, EMEA, OCEANIA, USA) AND (status = Closed or status = "In Documentation") AND "Resolution Category" = "E - Resolved by NT-ware Fix" and (issuetype = Bug or issuetype = "ST: Bug")
```

The filter above will show any ASIA, EMEA, OCEANIA or USA issue which is “closed” or “in documentation” and has been declared as “BUG”.

```
project in (ASIA, EMEA, OCEANIA, USA) AND "Resolution Date" >= -1d
```

The filter above will show any ASIA, EMEA, OCEANIA or USA issue which has been resolved in the last 1 day.

```
project = MOMKB and updated >= -1w order by updated desc
```

The filter above will show all MOMKB articles which have been updated in the past 1 week.

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