

Example Doc for BAI HEAT Tune-Up

Overall

The (AFT) Helpdesk is organized and fairly staffed. The Helpdesk is using the HEAT system efficiently (90%), and is well aligned with best business practice. The 2nd level technicians received formal call logging training from 12/16 to 12/17 (prelude to the HEAT Administration course material 12/18 through 12/20) even though they do not require due to involvement in the day to day call taking procedure. The entire AFT helpdesk received HEAT administration training on all the HEAT core products, functions and some Asset Detail functionalities. During the 5 day course, AFT helpdesk applied selected class exercises and more to the AFT production HEAT system.

Business Process	Comments
Call Flow is properly mapped out	<ul style="list-style-type: none"> • There is no major flaw in the design. AFT has taken the time to eliminate out-dated Call Types. AFT has also defined a constraint for Assignee based on Assignment Group. Excellent. • Valuable Detail information is still not implemented. Extreme waste of good design. This is where “probing questions” are listed and 1st level support technician are mandated to answer before the call can be saved to the database.
Multiple Level Support Implemented	Excellent. 1 st level technicians strive to resolve call before it is passed to higher level technicians. Strong desire to implement Knowledgebase.
Service Level Agreements Developed but not Executed	<p>This should be implemented informally via Business Process Automation Module (BPAM). For example:</p> <ul style="list-style-type: none"> • Priority 1 calls should be closed with 4 hours, otherwise the tracker or an appointed supervisor should be alerted, most likely via email. • Manager’s Console is used now, but should be used to monitor SLA’s. • AFT should consider adding projected Target Date on the Call as well as the Assignment based on priority or nature of the call. Crystal Reports can be written to flag Calls or Assignments that exceed the Target Date. • We added a SLA Class indicator on the Internal Profile and Subset of the Call Ticket. This should alert FLS to handle the call accordingly and BPAM rules can be developed using this new field, alone or with other fields such as Priority and/or Call Types. • Teach AFT the concept of Call Groups and AutoTask when writing a BPAM rule; where to see the log files on the rules; and explain some “strange features” commonly encountered by BPAM users when the rules is newly activated.
New Employee Training Strategy	Fair. No formal training; on the job training.

Recurring Training for Current Employees	Poor.
Training Materials Strategy	Poor. A "Technician Escalation Chart" does not qualify as Training Material. Understandable due to the size of first level support staff.
Planning for Software Upgrade Strategy	Fully Implemented.
Reporting Requirements Established	Excellent. Managers are using Answer Wizard. There is an Answer Wizard problem that plagued AFT. BAI has fixed data source problem, and the dictionary files. This mean the AW reports will execute without runtime error, but the user will still see "field missing" informational windows with no report generated. AFT will consider taking the BAI's "Design Crystal Reports using HEAT" course.
Database Archiving Strategies	Excellent. SQL backup is taken daily.

Systems & Processes

Systems	Process	Comment
HEAT	Answer Wizard	Effective usage. The dictionary files are copied to all Citrix servers except 1, 6 and test (servers down or not no priviledge). We have already configured the AW's Preference section for one Citrix server. I explained to Paulette and Cathy that all AW's Preference MUST be configured for all Citrix servers and only time will allow that to happen. Note: please make sure Call Logging module is Default to the HEAT datasource on each Citrix server, this will ensure no error in AW in the future. I showed AFT how to fix the AW dictionary files; created folders of tools and fixes, each with a readme.txt and other instructional files. If AFT make further structural changes to the HEAT database, AFT must remember to update/fix the

		AW's dictionary files.
HEAT	Auto Ticket Generator (ATG)	Installed and used effectively. Does not use Attachment because we have not identified a non-critical production server to store the attachments. However, this is easy accomplished once the server is identified.
HEAT	Business Rules Monitor	No Usage. AFT will consider turn it back on in the near future.
HEAT	LoadDB utility	Once the HEAT Administrator starts changing the HEAT system, AFT will start to use this tool more often. This tool will re-create indexes in the HEAT database; indexes can be fragmented over long period of time.
HEAT	Administrator	<ul style="list-style-type: none"> • Only the Security and the System Defaults are used • AFT has (before I arrived to teach the HEAT Admin course) implemented one very important Validation Constraint Definition, namely Assignee vs Assignment Group, excellent. • Contact Table is very useful for the Affiliate Customer Type, but not implemented because AFT decides to use Configuration record in place of it, it's fine. • Security ViewSet is not used at all. AFT has learned how to design view sets to control what is accessible to less secured users • Global Replacement is also not used at all. During the 5 day class, we have moved Paulette from one Assignment

		<p>Group to another and used Global Replacement to change all her assignments records to reflect the new Assignment Group.</p> <ul style="list-style-type: none"> • AFT is now familiar with the functions of Edit Sets and Quick Customize; we make many changes to the production HEAT system during my 5 day stay. • FLS is not used. We have covered FLS thoroughly during class. We also had created a FLS tree to get Melissa started on some sample articles. Note: the HAF file will NOT include the FLS tables, please make sure you create a FLS tree (.DST file) from the FLS module if you want it backed up.
HEAT	Call Logging	<ul style="list-style-type: none"> • Used efficiently • The screens are not cluttered and straight forward layout. • These are the features AFT will use often due to the HEAT Admin course: <ul style="list-style-type: none"> • Activity Log • Alarms • Call Attachments • Detail Screens • Global Attachments • Support Mail or External Mail • Hot List • Reports (BAI will implement if time permits)
HEAT	First Level Support	AFT will use FLS Knowledge Tree soon.
HEAT	Alert Monitor	Optimized.
iHEAT	Call Logging	Not installed. It's acceptable not to have it installed.
HEAT Self Service		Not installed. This will help

		reduce Helpdesk workload.
HEAT Asset Tracker		Installed and implementation is in progress. AFT now knows how to send Asset Detail data back to the Call Ticket in Call Logging. I know I installed Asset Detail module on all the Citrix server when I installed Asset Tracker in the summer of 2002, but since AFT has added more Citrix servers since then (up to 20 during my HEAT Admin course visit), please make sure Asset Detail is installed on the newer Citrix servers (I hope the image would have taken care of it)
HEAT Plus Knowledge		Not installed. AFT should do a Proof of Concept with FLS before buying Knowlix.
Crystal Reports	Customize reports	Optimized. AFT has considered buying the BAI's "Design Crystal Reports using HEAT" course, which will give AFT even more power in reporting.

Hardware Requirement

Process	Processor	RAM	Hard Disk Space
HEAT DB Server	Ok	Good.	Good
HEAT Client	Ok	Good	N/A
ATG Server	Ok	Pass	N/A
HAT Server	Ok.	Pass	Pass
Manager's Console Server (to be installed on the BPAM server as long as Manager's Console does not use any email feature)	Ok	Pass	N/A
BPAM server	Ok	Ok	N/A

Wish List/Problems

Items	Comment
Reduce incoming calls to HelpDesk	<ul style="list-style-type: none"> • Implement HEAT Self Service (HSS), and it may have Knowledgebase available to end users via the HSS portal. • ATG is already implemented.
Achieve 80% resolution Rate	<p>This is an achievable rate. AFT must implement the following:</p> <ul style="list-style-type: none"> • Service Level Agreement (defined but not executed, not difficult to execute at all) • BPAM so that nothing will fall through the crack and it will drive SLA • Knowledgebase (difficult but very effective)
Change end user's perception of AFT HelpDesk (make them think they can call the helpdesk because the helpdesk is responsive and reliable)	Implemented BPAM but turned off at the moment.
Remind Assignees of their Assignments	BPAM. (Acknowledgement and Resolution). BPAM should be turned on to enforce the reminder, as long as the reminder is within AFT's guideline, AFT should stand fast on this BPAM implementation. Of course, be sure not to be overzealous on the emails, people will start to hate and ignore it....remember the boy who cries wolf?
Run Crystal Reports in Call Logging	AFT learned how to do this in the HEAT Admin course.
Validation Lists are out-dated	AFT cleaned up the validation lists over the last 6 months.
Need to get consistent Call Description	Very difficult to implement. However, if the call are common and repetitive, AFT should define AutoTask to ensure consistent Call Description
ATG – Support Graphics and Attachment	Sorry. ATG will not allow graphics in the Call Description of the call created. Attachment is easily implemented once a non-critical production server is identified
Resolved Owner is not filled by Tracker	Fixed during the HEAT Admin course
Fill Customer Contact Date and Time fields filled the same way like Acknowledge and Resolve fields	It will not work quite the same way like the Acknowledge and Resolve Owner/Date/Time fields. But we can write an AutoTask that is just as easy to execute. AFT knows how to do this.
Tab order is wrong	Fixed.
Get BPAM & Manager's Console to work	BPAM is working but turned off. I have installed Manager's Console on several machines, and AFT understands the

	concept of Server/Client that governs the working of Manager's Console. I have also defined several Tabs and Indicators in Manager's Console. AFT felt at ease with Manager's Console and will implement more indicators by themselves.
Get Reporting to work	Resolved the data source and dictionary files problem. (See above)
Activities Log	We have done this in the HEAT Admin course.
More Effective Category and Call Type	Simply add to existing Call Type Table or add Category (Note Answer Wizard canned reports will report on Category)
Assignment Group constrain Assignees	AFT defined this before I came back for the HEAT Admin course.
Reassignment	AFT's FLS helpdesk has created AutoTasks to resolve current assignment and create new assignment to another technician.
Set security to prohibit user from changing Priority	AFT has learned how to implement this through security view sets
Change Call History Grid View	AFT has changed it.
ATG calls are falsely assigned to 2 nd level technician	1 st level support technician need to investigate before creating assignment. The Detail screen will help increase 1 st level support resolution so that is problem will become a moot point.

Conclusion:

- Validation content has been properly maintained to keep up with the changing demand.
- AFT Helpdesk is working towards changing the end user perception by responsiveness and high resolution rate via BPAM. But BPAM is turned off at the moment.
- AFT HEAT Helpdesk team properly using AutoTasks for all repetitive tasks.
- AFT HEAT Helpdesk team is properly using HEATBoard. Excellent.
- We have done a lot of cosmetic changes and a handful of functional changes during the HEAT Admin course. Please be sure to inquire about them from Paulette.