



Infor Xtreme

Staff Incident Status and Type
Changes

February 19, 2015

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Information

Publication Information

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Intended Audience

This guide is intended for all **Infor Staff** that use Infor Xtreme, information contained within the guide is purely for **Internal Infor Staff**.

This guide will be distributed by direct email to members of outlook distribution group **DLG-WW-XtremePortal-Users**

Summary of Changes

The changes outlined in this document have been requested and authorized by the Senior Support Management Team. The changes can be summarized as follows:

1. **Renaming of Status Codes** – certain status codes have been renamed to further clarify their meaning for both Customers and Staff alike.
2. **Removal of Status Codes** – after a thorough review of the usage and relevance of all the Incident Status Codes a decision has been made to reduce the number available for use by the core product lines.
3. **Renaming of Incident Types** – a small number of Incident Types have been renamed to further clarify their usage and remove duplication.
4. **Removal of Incident Types** - after a thorough review of the usage and relevance of all the Incident Types a decision has been made to reduce the number available for use by the core product lines.
5. **New Incident Types** – while the total number of Incident Types has been reduced a small number of new Types have been made available for all Staff. The purpose of these new values is to allow staff to use the Incident Type as opposed to Status code to track the internal action on a call i.e. Development Research.
6. **Update to existing Incidents** –
 - If the current Incident Status on an open Incident is being removed from use then the status on the incident will be updated to **Infor Researching**.
 - If the current Incident Type on an open Incident is being removed from use then the Type on the incident will be updated to **Information**.
 - All closed Incidents both in production and the incident archive will be updated to a status of **Closed**.
7. **Timing of changes** – the changes will be published to the Infor Xtreme Production system 4pm ET of 19th February.
8. **KPI Impact** - KPIs are not impacted and will be calculated the same way.

Incident Status Changes

Renamed Incident Status Codes

The following Incident Status Codes have been renamed at the request of the Support Managers:

| Current Status Name | New Status Name |
|----------------------------|------------------------|
| Transfer to Development | Awaiting Development |
| Call Back | Awaiting Infor |
| Complete | Closed |
| Support Research | Infor Researching |
| New | New Incident |
| Customer Hold | On Hold by Customer |

These changes will affect all Product Lines using Infor Xtreme Incident Management.

Removal of Incident Status Codes from Core Product Lines

The following Incident Status Codes have been removed from usage for all core Product Lines.

| Current Status Name | Current Status Name |
|-------------------------------|---------------------------------|
| Awaiting Partner | Mapping/Questionnaire |
| Awaiting Third Party | Scheduled |
| Development Request | Software Change Request |
| Development Research | To Be Scheduled |
| Escalated to Development | Training Date |
| Estimated | Transfer to Distributor |
| Extraction / Pre-mapping | Transfer to Hosting |
| Forwarded to Deal Desk | Transfer to Infor |
| In Process Consultant | Transferred to Standard Support |
| In Process Support Consultant | Under Qualification |
| In QA | Under Review |
| In Training | Workaround Available |

NOTE: These Status Codes will continue to be used by following Product Lines:

| Product Line | Product Line |
|--------------|------------------------------|
| AMS | Infor Training and Education |
| EnRoute | Library Solutions |
| EZ RMS | LMS |
| F9 | Pegasus |
| Infor AS | |

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List and Definition of New Core Incident Status Codes

The following table defines when a Status Code is / should be assigned to a Support Incident for a Core Product Line.

| Incident Status | Formerly Known As | Definition |
|------------------------------|-------------------------|---|
| Awaiting Customer | | Infor has requested information from the customer, such as a screen capture, set-up details, steps to replicate, etc. |
| Awaiting Development | Transfer to Development | Infor has validated the customer issue and submitted a defect request to Infor Development for severity 1 or 2 incidents. |
| Awaiting Infor | Call Back | This status is automatically set by the system when Customer Care updates the incident on the customer's behalf, when the customer updates the incident directly through Infor Xtreme or with the Quick update feature on an Xtreme email. This status is also automatically applied to an open incident when the linked defect gets set to Completed. Once Infor has contacted the customer, the incident owner should update the status to the appropriate value. |
| Closed | Complete | When Infor wishes to close a customer incident as they have either provided a resolution or workaround, the customer has failed to respond on three occasions, or the customer canceled the incident. |
| Infor Researching | Support Research | This is used when Infor is researching an incident. |
| New Incident | New | This is the initial status of an incident. The incident owner should assign to another value the first time the incident is updated. |
| On Hold by Customer | Customer Hold | When the customer requests that the incident be placed on hold. The expected date that the incident will be taken off of hold status should be clearly defined in the incident event note. If a solution has been proposed, that status should be used instead of On Hold by Customer. |
| Solution Proposed | | Used to "Soft Close" an incident, giving the customer time to test the solution and confirm that the incident can be closed. Used with Solution Proposed Date. |
| Transfer to ICS | | The incident has been transferred to the Infor Consulting Services group for work that is in scope with their group. |
| Transfer to Managed Services | | The incident has been transferred to the Infor Managed Services team for work that is in scope with their group. |

Incident Type Changes

Renamed Incident Types

The following Incident Types have been renamed at the request of the Support Managers:

| Current Type Name | New Type Name |
|--------------------------|----------------------|
| New Keyword | New Keyword/Password |
| Refer to Partner | Awaiting Partner |
| Consulting PSO | ICS |

These changes will affect all Product Lines using Infor Xtreme Incident Management.

New Incident Types

The following Incident Types have been added at the request of the Support Managers:

| New Type Name |
|-------------------------|
| Awaiting Third Party |
| Development Research |
| Remote Access Scheduled |
| Scheduled |

Core Incident Types

The following is a list of the Incident Types that will be available to the Core Product Lines:

| New Type Name | New Type Name | New Type Name |
|-------------------------------|----------------------|-------------------------|
| Administrative | Enhancement Request | Recorded Briefing |
| Awaiting Partner | Functional | Referred |
| Awaiting Third Party | Hardware | Remote Access Scheduled |
| Chat | Hosted Operations | Report Issue |
| Code Fix/Patch - Data Fix | ICS | Sales Information |
| Code Fix/Patch - Hot Fix | Information | Scheduled |
| Code Fix/Patch - Merged | Installation | Service Required |
| Code Fix/Patch - Patch | License Key | Software Request |
| Code Fix/Patch - Re - Install | Maintenance Renewal | Source |
| Configuration | Maintenance Renewal | Support Query |
| Critical Account | Migration | System Management |
| Custom Modification | New Keyword/Password | Technical |
| Customer | New Software Release | Third Party Error |
| Data Related | Other | Training |
| Data Restore | Performance | Translation Issue |
| Defect | Pre-sales | Troubleshooting |
| Development Research | Printing/Publishing | Welcome Kit |
| Documentation | Program Error | |
| Education | Quote Request | |

Additional Non-Core Incident Types

In addition to the Core Incident Types listed above the following Types will continue to be available for Non-Core:

| New Type Name | New Type Name | New Type Name |
|--------------------------|--------------------------------|-------------------------------|
| Activation | ASP - Assistance level 2 | Duplicate Incident |
| AMS App administration | ASP - Outside contract | EasyRMS Interface |
| AMS App performance | ASP-Assist hrs addtl agreement | Extraction Issue |
| AMS Customisation Care | ASP-Plan product | Forecast Issue |
| AMS Customisation Update | ASP-Services | Funded Mod/Enhancement |
| AMS Data Correction | ASP-Specific assistance | Hotel at Risk |
| AMS Data Corruption | ASP-Specific development | Implementation - Defect |
| AMS DB Administration | ASP-Support contract | Implementation - How To |
| AMS DB performance | ASP-Training | Implementation - Troubleshoot |
| AMS Functional change | Bespoke | PMS/CRS/Other Change |
| AMS Functional Question | Call Centre Review | PMS/CRS/Other Upload |
| AMS Service Request | Complaint | Recommendations |
| AMS Standard Update | Consultancy Query | Self Install |
| ASP - Assistance level 1 | Details Amendment | Training Existing Hotel |






Visibility of Incident Type on My Incidents View

Incident Type is now visible as a data column on the standard 'My Incidents' view in Infor Xtreme:

Incident Views

View – Edit
My Incidents Product Line All Product Lines Owner Group All Owner Groups

8 Incidents found.

| | Incident | Customer Name | Status | Incident Type | Severity |
|---|----------------------|----------------------|----------------------|----------------------|----------------------|
| | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|   | 7881228 | Infor Xtreme Support | Infor Researching | Information | 3 - Medium |
|    | 6249411 | PM Global Support | Awaiting Development | Information | 2 - High |

Internal Staff also have the option to create a Custom View using Incident Type.

NOTE: With the exception of the AMS Product Line Incident Type is not visible to Customers.