

Guidelines for Submitting Requests/Issues

Intro

There are many reasons to submit requests or report issues on the project (new development, fixes to current production issues, an urgent production request).

Your request is the first important step towards the development and testing cycle. Your request will be used to write detailed specifications (specifications should explain the development from a functional perspective in terms of what the requirements are, there could be technical documentation, and information on troubleshooting, etc. should also be included, where relevant), which lead to the development and test plans.

Our project team uses 2 important tools for submission and tracking of requests and issues: **Request Tracker and ACE Project Management**. These tools enable us to:

- track comments and documentation pertaining to requests/tasks,
- search through old ones if we think we have dealt with a similar issue in the past,
- ensure that somebody is available to deal with the issues as they are submitted,
- track current status of a task within ACE,
- record sign off for development projects,
- record dependencies and link tasks/requests together

If a particular issue is mentioned in passing to a person, the piece of paper it is scribbled on can be lost and the issue forgotten. If an issue is sent directly to a person via email or voice mail, the risk of the issue not being noticed exists if the receiver is not in the office or in meetings.

To obtain the maximum benefit from these tools, thorough documentation is essential. The issue should be fully documented within request/ACE, as well as all troubleshooting and resolution steps.

If it is production critical and must be fixed immediately, please submit it through rt to the ATHR request queue.

If it is not production critical, then create a task in the appropriate project in ACE Project .

Request Queue for Production Critical Requests

Currently, Information Systems project team members are copied on all requests that are submitted through rt (to the IST-ATHR queue) and are prepared to delegate the issue to the appropriate resource.

There are 2 ways to submit a request. One is to send an email to rt-IST-ATHR@ist.uwaterloo.ca. You can CC anybody on this email and they will be set up as a CC against this request.

The second method is to go directly into request and submit a new request in the IST-ATHR queue. This can be done through the web form interface, which will provide you with a list of fields IST typically needs when troubleshooting once the appropriate request type is chosen, or through the personal request page that shows requests specifically related to you.

When you submit a request online, please do not assign an owner to the request. However, if there are certain people who you feel should be copied on all correspondence relating to your request, please add them as a CC.

The IST-ATHR queue has been set up as confidential with very limited access. This has been done so that you can enter all the information you need against this request, including confidential information a developer may need.

Please try to use a specific subject on your requests. This will help in the future, if we are ever going back and searching through old requests.

In order for our technical team to deal with requests efficiently, as much information as possible should be provided in your submission. Some guidelines are included below for what type of information we require in a production critical request. Once again, this information is also identified if you use the request web form interface.

There are some documented Production Support TidBits that may assist with troubleshooting production problems.

Details to include in a critical production request

Critical production requests, by their nature, must be handled quickly and efficiently to keep the business running. To assist us in doing this, the more information that is included in the initial request, the better so that time is not wasted waiting for emails or voice mails to be answered when trying to gather the appropriate details.

These requests should include:

- a detailed description of the problem. Screen shots can often be helpful if the problem is online.
- at least one emplid and empl_rcd as an example, or if there is one in particular that is causing the problem, include that emplid and empl_rcd in the request
- if the problem is related to payroll processing, we will also require the company, paygroup, pay end date, off cycle (Y or N), page number and line number.
- if the issue pertains to an error message that is produced, please include a description of exactly what was entered (or what process was running) and the exact wording of the error message. Criteria used in the search record and the effective dated row we should be looking at (if applicable) would also be helpful. Once again, screen shots would be helpful.

- if the issue concerns a process, please include the information entered into the run control when the problem was encountered for that process
- navigation and process names

ACE Tasks for Non-Critical Requests/Issues

The other means of submitting a request/ issue is used for those tasks that: are not production critical but still must be done in a timely manner to fix production, enhancements, new items for development, upgrades, et cetera. These are submitted as tasks within the ACE Project tool.

Just a historical note: before ACE Project was implemented, these "tasks" were submitted via request in the ATHRDV queue. These historical requests are still in that queue if you need to search for something prior to summer 2007. Access to the queue is restricted to project team members (same restrictions as ATHR queue).

ACE is a simple project management tool. Many project areas within IST will be using ACE. A group of Information Systems project leads have come up with a number of standards that are to be used to promote some consistency across these project areas. Most of these standards affect user set up, initial configuration, security and new projects that are set up. Only App Admins and Project Leads need to be aware of most of these standards.

A process flow of a typical development request has also been posted to illustrate how ACE should be used by functional and technical team members.

Functional team members and developers will want to reference the User Guide that outlines how to login and specific help sections within the tool that are beneficial. It will also explain the evolution of a task, as standardized by Information Systems.

Things to note for developers and functional team members are the following:

- the 'account' when logging into ACE Project will always be 'uw'
- every project area has a project abbreviation used within ACE. Our projects are prefixed with an HR.
- cross functional projects that cross more than one project area are abbreviated with an X, followed by the project abbreviations. For example, a cross functional project set up to handle interfaces between us and OGF during their upgrade would be prefixed with X-HR-OGF
- task numbers within a project will default to sequential numbering, which we want to follow
- task descriptions for any tasks that involve development project numbers, will have their development project number at the beginning of the description (similar to how we were handling requests in ATHRDV before implementing ACE Project)
- the list of valid task groups, task priorities, task statuses, et cetera are specific to a project within ACE. There may be projects that have different values than others. For example, a project within ACE that is storing future tasks that we may want to tackle, wouldn't have task status values of QA, development, functional testing, et cetera. When the task is finally being assigned to work on, it would move out of the 'Future' folder and into one where development is taking place.

- your user profile has to be set up to receive email notifications for a task and you must be against the task to receive the emails
- please add Angela and Pam as reviewers when creating a new task so that they are copied on all emails against the task
- documents can be uploaded against a task. We would like to see the test scripts uploaded against a development task
- add the URL to specifications and any other related requests to the task under assigned and/or reviewer comments
- keep the Details section of the task up to date with overall summary of the task
- when the development project is migrated to production, update the group to be functional
- please remember to update the task group and task status through the evolution of task - this will allow us to accurately track whose court the task is in, so to speak
- if there are people who have anything to do with the task who are not users of ACE Project, then correspondence with them should be through email and the emails should be copied into ACE Project as reference
- when tasks are first created, the initial status will usually be 'To Do'
- **replying to emails will no longer work with ACE, as they did with rt**; you can no longer submit a request through email, or reply to anything through email

The following is a list of ACE projects our team can add tasks to and a description of what each project is for:

Project	Description	Project Completion Date
HR-8.9 Development Requests	This project contains enhancements, fixes, et cetera for v 8.9 (basically a replacement of old ATHRDV request queue)	
HR-Future Projects	This project contains tasks we want to look at in the future, but won't be tackling at the present time. When we do start working on a task, it will be moved to a different project	
HR-Cognos	This project contains tasks relating to Cognos or the Cognos catalogs	
HR-ELM Implementation (Safety)	Safety Office's implementation of ELM	complete and should no longer be used
HR-Project Management	Project management type tasks	
HR-Recruitment	This project is for the 8.9 Recruitment Solutions implementation of Candidate Gateway and Talent Acquisition	complete and should no longer

Implementation	Manager	be used
HR-Specification Conversion	This project is for converting the old customization specifications to the new format	
HR-9.1 Upgrade	This project is for tasks related to the 9.1 upgrade	

When you create your tasks within ACE, please *include as much information about the requirements of your task as possible* to ensure developers can create complete specifications. Guidelines can be found below for different tasks you may be requesting.

Details to include in a production enhancement

If the enhancement is to fix an existing problem in production, your request should contain a lot of the same information that is included when submitting a critical production request, even though this may not be a critical request.

In addition, your request should also include:

- detailed description of what the change should be:
 - if additional fields are to be pulled in for the enhancement, describe where that information should be coming from
 - if the enhancement is to add new field(s) to a report, describe where you would like the new fields, will it affect the sort of the report, any special formatting or calculations that should be done with the new field(s), etc.
 - describe any filtering/selection criteria that must be met when including new information on an existing page, report or interface
- sometimes it may be possible to provide some examples (for instance, if a calculation is required with the enhancement)
- if the enhancement is to fix a problem with the way something is currently working, please explain how it works now and how it should work, with some data examples
- an indication of the urgency and priority of the enhancement and whether there is a deadline date associated with it

Submitting Request for New Customizations

The more information, in terms of requirements, a functional lead can provide, the sooner the developer can produce the customization for testing.

The information required varies on the type of customization that is requested. For further requirements specific to a specific customization type, please refer to Customization Requirements Guidelines.