Product Issue - Submit an Issue

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Purpose

This document covers the steps required to submit a product issue case for review and acceptance. The attached document: Product Issue Flow outlines how a case will be moved between resources/departments throughout the process. It also highlights the automated customer messaging that is sent at each stage.

Before submitting a case, a review of the Knowledge Base and related problem cases should be done to determine if another course of action is warranted:

- An available release with a fix is already available
  - The release should be applied and case closed
- A known product issue has already been reported and a workaround is available
  - The original case number should be added to the Parent Case field before submitting
- The issue is not a product issue, and a resolution is available
  - The information to resolve the issue is shared with the customer and the case is closed

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Process

The following steps are required to submit a case for review as a potential product issue with specifics by the department submitting the case.

Throughout the case flow moving through Triage, Development, QA and into a future release, automated messaging will be generated as the case owner and status changes.   For this process to work effectively, please be aware of the following requirements and details and properly populate all fields as noted:

- Two groups of emails will be sent:
  1. To Contact and any CC email addresses identified in the case

        - The email will be logged to the case
    2. To the Case Owner and Secondary Case Owner
        - These emails will NOT be logged to the case

Important Note: The Case Owner field must be populated for any of the emails above to be sent.

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Professional Services

For product issues that arise during the implementation of a customer's project, the following steps should be taken to submit a case to development to review for possible product bug:

1. Create a case for the customer following standard case process Requesting Help During Delivery of an Assigned Task:
2. Confirm Steps to Reproduce Issue/Error field is populated with customer information:
    - Copy the list from the Bug Submission Template and paste into the field
    - Populate each item with information gathered from the customer
3. Confirm the Product/Sub Product/Functional Area fields are populated
    - Click Edit Case Category button at top of screen to add/update
4. Confirm Related Project field is populated with link to the related project
5. Confirm Category field = Possible Issue
6. Case Origin field - for issues that stem from the following areas:
    - Customer Project Training session select: Training
    - Customer Project UAT select: UAT
7. Review Priority field reflects correct value. See options below Priority and Impact Field Options.
8. Confirm Impact field reflects customer's value for impact on their business. See options below Priority and Impact Field Options.
9. Parent Case field is populated with the original case reporting the product issue if case is not the first report of the issue
10. Click the Transfer button
    - Transfer To field - select Triage
    - Enter any additional relevant details for the transfer in the Transfer Details box
    - Click Save

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Sales

For product issues that arise during the sales cycle, the following steps should be taken to submit a case to development to review for possible product bug:

To assign to the Triage Team, after creating the case:

1. Create a case using standard case creation steps for Sales
2. Confirm Steps to Reproduce Issue/Error field is populated with customer information:
    - Copy the list from the Bug Submission Template and paste into the field
    - Populate each item with information gathered from the customer
3. Confirm the Product/Sub Product/Functional Area fields are populated
    - Click Edit Case Category button at top of screen to add/update
4. Confirm Related Opportunity field is populated with link to the related opportunity
5. Confirm Category field = Possible Issue
6. Review Priority field reflects correct value. See options below Priority and Impact Field Options.
7. Confirm Impact field reflects customer's value for impact on their business. See options below Priority and Impact Field Options.
8. Parent Case field is populated with the original case reporting the product issue if case is not the first report of the issue
9. Click the Transfer button
    - Transfer To field - select Triage
    - Enter any additional relevant details for the transfer in the Transfer Details box
    - Click Save

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Support

For product issues that arise during the troubleshooting of a customer's support case the following steps should be taken to submit a case to the Support Manger queue to review for possible product bug:

1. Confirm Steps to Reproduce Issue/Error field is populated with customer information:
    - Copy the list from the Bug Submission Template and paste into the field
    - Populate each item with information gathered from the customer
2. Confirm the Product/Sub Product/Functional Area fields are populated
    - Click Edit Case Category button at top of screen to add/update
3. Confirm Category field = Possible Issue
4. Review Priority field reflects correct value. See options below Priority and Impact Field Options.
5. Confirm Impact field reflects customer's value for impact on their business. See options below Priority and Impact Field Options.
6. Parent Case field is populated with the original case reporting the product issue if case is not the first report of the issue
7. Click the Transfer button
    - Transfer To field - select Support Manager
    - Enter any additional relevant details for the transfer in the Transfer Details box
    - Click Save

The Support managers will assign the case to the Triage Team, after reviewing and ensuring all information is correct:

1. Click the Transfer button
2. Transfer To field - select Triage
3. Enter any additional relevant details for the transfer in the Transfer Details box
4. Click Save

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Priority and Impact Field Options

Use the following information to determine the value for the Priority and Impact case fields:

Priority Field

Priority	Description	Example
Low	Issues or questions that do not affect the functionality of the product or the user's ability to work. These inquiries require minimal technical intervention.	How to questions, feature requests, or non urgent feedback.
Moderate	Issues that affect a single user but do not significantly impede their ability to use the product. The customer has access to most product functions, and the issue does not critically impact their work.	Minor bugs, performance issues affecting only one user, or configuration help.
High	issues where a significant feature or service is not functioning correctly, preventing the customer from using the product effectively. While some services remain operational, the impact is substantial and could escalate if not resolved promptly. A workaround may be available but is not ideal.	Major functionality bugs, service disruptions affecting multiple users, or performance issues that hinder productivity ut don't completely stop all operations. Issue may delay implementation project to live in near future.
Critical	Issues where there is a total system failure, significant data loss, or a critical service is unavailable, making it impossible for any users to perform essential functions. There are no available workarounds, and immediate action is required to restore operations.	System outages, complete inability to log in, critical data loss, no ability to invoice or collect payments, can't process signals, or any other problem that stops all users from working. Issue will cancel scheduled implementation project go live

Impact (Customer's value)

Impact	Description
Info	Informational questions, training related items, How to's
Minor	Possible short term workaround, non critical functional degradation of a product
Major	Significant impact to one module within product, no workaround available
Critical	Extreme product outage, critical data loss or corruption
Emergency	Life threatening, alarm monitoring systems completely down. Only available for Sims, stages, and Manitou

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