

# Beanbasket Help Desk User Guide

Beanbasket utilizes a Help Desk system for effectively handling enhancement requests and bugs from open to close. The Help Desk is also closely aligned with Beanbasket Support Plans. In order to achieve this alignment, the workflow process has been broken down to accommodate the various stages of an issue during its life-cycle. The aim is to reduce confusion about the true status of a ticket and who is responsible for taking an issue to the next step toward resolution.


This document will cover the workflow process for all ticket types as well as define the ticket types, priorities, resolutions, statuses and other fields that are found on an issue.


### Document Sections:


- Issue Types
- Issue Priority or Service Level
- Issue Resolution
- Issue Roles
- Workflows Steps and Statuses
- Workflow Diagrams


## Issue Types


Issue types are defined as follows:

 **Bug** – A Beanbasket bug is defined as an explicitly identified usage, expressed as a previous requirement, of a feature/function with a result that does not match the expected outcome, based upon the requirement, which had previously been demonstrated to work correctly. Note that since Beanbasket’s ecommerce sites are constructed around custom designs, many of the features that get added to Beanbasket require an integration change. These changes are Enhancements, **not** Bugs.

 **Enhancement** – Enhancement issue types are for the addition of a new feature or other cosmetic changes to the site. Examples include: Changing a banner image, adding some links to the footer or integrating a new feature like Wishlists or Product Reviews.

 **Task** – Task issue types are for issues that don’t fall into either Bug or Enhancement classification, but require some sort of work to be completed. Examples include: Add a new email address, provide a document, renew a certificate or provide/reset a password.


 **Question** – Question issue types are simply for any question you have about site functionality, using features or how to set something up.


 **Sub-Task** – Sub-Task issue types are generally used internally and are for breaking down larger issues, generally Enhancement projects into smaller sub-tasks for easier management.


## Issue Priority or Service Level

Beanbasket's new support plans allow for the purchase of a set amount of hours to be used on a monthly basis for enhancements and changes. Because of this, issues will use Priority for Bugs and Service Level for Enhancements. Questions and Tasks do not use a Priority level

### Priorities (Bug issues):

 **Minor** – Minor loss of functionality where an easy work-around is present or not necessary. These will be prioritized alongside enhancement and task requests as there may be more pressing issues that the client would like to have addressed before these minimal impact bugs.

 **Major** – Issues where business is adversely affected, but most customers are still able to checkout. Expect the issue to be acknowledged within one business hour and resolution steps initiated within six business hours. Examples include: Customers from a particular state or country cannot checkout or other problems causing loss of conversion.

 **Blocker** – Issue where the site is unable to conduct business and requires immediate attention. The site won't load and is completely down or some other part of the site or checkout process is broken, preventing customers from checking out. Blocker bugs require (and will receive) immediate attention. If this type of bug is encountered during non-business hours, please use the emergency contact option of the phone menu to initiate immediate help.

### Service Level (Enhancements):

**Scheduled** – Enhancement is scheduled in accordance to your support plan, or if you do not have a support plan, on a first come, first serve basis.

**Priority** – If the task/change being requested is business critical (needs to be done within five business days), clients can assign a Priority Service level to Enhancements or Tasks. Beanbasket will make every attempt to complete Priority tickets within their desired timeline. Given the last minute nature of these requests and the scheduling challenges that might result, we cannot guarantee that we will accept tickets with this service level. Enhancement tickets approved by Beanbasket with this service level will be billed at two times Beanbasket's normal hourly rate.

## Issue Resolution

The Resolution Status is a point-in-time indicator of the current resolution state of the ticket. The status will be “Incomplete” until the issue is dealt with by the Beanbasket support team. Any other status indicates that we’ve worked on the ticket and identified the nature of the resolution.

Since issues have different Statuses and Workflows depending on the Issue Type, the Resolution is set at different status levels for those different Issue types.

Bugs and Enhancements: the Resolution is set once the issue is in “Resolved In Production” status.

Questions and Tasks: the Resolution is set once in “Resolved” status since there is no environmental difference for those ticket types.

### Issue Resolution Status Values

**Complete** – Work to resolve the issue has been completed in the Production environment.

**Won’t Fix** - The problem described is an issue which will never be fixed. It may be a request that Beanbasket is incapable of completing or has no control over.

**Duplicate** – The issue is a duplicate of a previously opened and unresolved issue.

**Incomplete** – The problem is incomplete as described.

**Cannot Reproduce** - All attempts at reproducing this issue failed, or not enough information was available to reproduce the issue. Reading the code produces no insight as to why this behavior would occur.

## Issue Roles

Issue roles define the people involved in an issue.

**Reporter** – The person who opened the issue.

**Assignee** – The Issue Assignee is the person who currently has some part of the issue workflow to complete. If an issue is assigned to you, there is some function you must complete in order to move to the next step in the workflow.

**Support Lead** – The Beanbasket employee who has ownership of an issue and is to oversee the ticket to Closed.

## Issue Workflow

Issue workflow defines the process and steps an issue transitions through from Open to Closed and who is responsible for transitioning the issue from one status to the next. The workflow of an issue is dependant upon the Issue Type. Question and Task issues are a little more straight forward in their workflow and resolution since they are not environment dependant and don't have to take approval of a work estimate into consideration.

The following pages contain a table listing of the following workflows:

- **Bug/Enhancement Workflow**
- **Question**
- **Task**

This table listing contains the following columns to provide clarity of Status within each workflow.

**Status** – The status of the issue in the workflow

**Description** – The description of the status

**Possible Actions** – The possible actions that can be taken on an issue for a given status, with the resulting status of the ticket. Note: Some actions are only open to Beanbasket employees during certain steps of the workflow.

## Bug/Enhancement Workflow

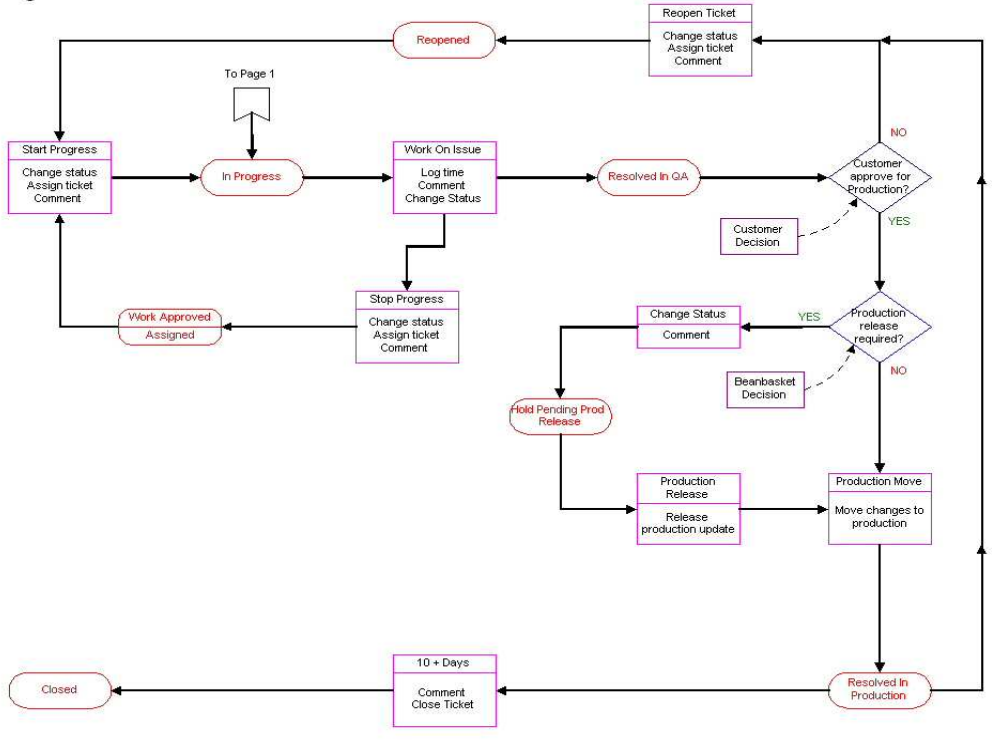
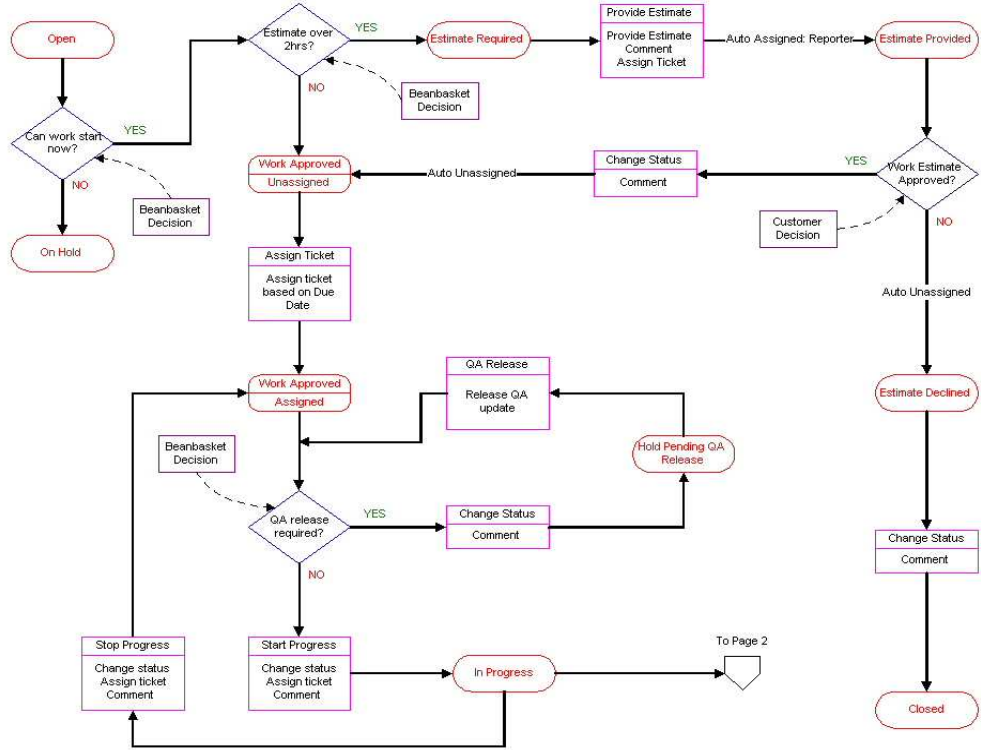
Status	Description	Possible Actions (resulting status)
Open	Default status for new issue. If work is not going to begin any time in the plannable future, the issue gets put On Hold. If work is to begin, determine if work is under two hours. If yes, then Work is Approved. If no, then an Estimate is required.	Requires Work Estimate (Estimate Required) Approve Work (Work Approved) Put Issue on Hold (On Hold) Close Issue (Closed) Change Priority/Rank (no change)
Requires Estimate	Status for when issue will take more than two hours to complete and a work estimate needs to be provided to the customer.	Provide Estimate (Estimate Provided) Close Issue (Closed) Change Priority/Rank (no change)
Estimate Provided	Status once the estimate is provided in a Comment and the issue is then auto-assigned to the Issue Reporter. The assignee must approve or disapprove the estimate, or else close the issue.	Approve Estimate (Work Approved) Decline Estimate (Estimate Declined) Close Issue (Closed) Change Priority/Rank (no change)
Work Approved	Status for issues where the work is estimated under two hours and for when an Issue with an estimate over two hours has been approved.	Hold Pending QA Release (Pending QA Release) Start Progress (In Progress) Close Issue (Closed) Change Priority/Rank (no change)
Estimate Declined	Status the issue Reporter changes the issue to upon declining work.	Close Issue (Closed)
On Hold	Status for issues that cannot be worked on within a schedulable time horizon.	Requires Work Estimate (Estimate Required) Approve Work (Work Approved) Close Issue (Closed) Change Priority/Rank (no change)
Pending QA Release	Status for issues where work cannot begin until an update is released into the QA environment.	Start Progress (In Progress) Close Issue (Closed) Change Priority/Rank (no change)
In Progress	Status once issue is on someone's active schedule. Otherwise remain in Work Approved status.	Stop Progress (Work Approved) Resolve Issue In QA Close Issue (Closed) Change Priority/Rank (no change)
Resolved In QA	Work is complete in the QA environment and awaits approval by customer before moving to production environment. If the work does not meet approval, the issue should be Reopened.	Approve For Production (Production Approved) Reopen Issue (Reopened) Close Issue (Closed) Change Priority/Rank (no change)
Production Approved	Status for issue when the Issue Reporter approves the work done in QA for the Production environment.	Hold Pending Production Release (Pending Production Release) Resolve Issue In Production (Resolved In Production) Close Issue (Closed) Change Priority/Rank (no change)
Reopened	Status in the event the customer does not approve of work or needs further assistance of some kind. User and Reporter have the ability to Reopen tickets.	Put Issue on Hold (On Hold) Start Progress (In Progress) Close Issue (Closed) Change Priority/Rank (no change)
Pending Production Release	Status for issues where the completed work in QA cannot be moved to production until an update is released into the production environment.	Resolve Issue In Production (Resolved In Production) Close Issue (Closed) Change Priority/Rank (no change)
Resolved In Production	Changes have been applied to production. There is a ten day period for the issue to be reopened, after which the issue is automatically closed	Reopen Issue (Reopened) Close Issue (Closed)
Closed	Final Status for issue. Once Resolved In Production for over ten days, the issue is considered closed and cannot be reopened. It is within this timeframe that any testing of the new changes must be completed. In the event that something gets brought up or discovered concerning the issue, a new issue must be opened	No Actions

## Question Workflow

Status	Description	Possible Actions (resulting status)
Open	Default status for new issue.	Approve Work (Work Approved) Close Issue (Closed)
Work Approved	Since no estimates need to be approved, Work is approved.	Requires Research (Researching Issue) Resolve Issue (Resolved) Close Issue (Closed)
Researching Issue	Status for questions where the answer is not readily available. Research is required to answer the question.	Resolve Issue (Resolved) Close Issue (Closed)
Resolved	Answer to question has been provided. The answer must be reviewed within 10 days. After that time, the ticket will automatically close.	Reopen Issue (Reopened) Close Issue (Closed)
Reopened	Answer does not resolve the issue or is incomplete.	Requires Research (Researching Issue) Resolve Issue (Resolved) Close Issue (Closed)
Closed	Final Status for issue. Once Resolved for over ten days, the issue is considered closed and cannot be reopened. It is within this timeframe that any testing of the new changes must be completed. In the event that something gets brought up or discovered concerning the issue, a new issue must be opened referencing the original.	No Actions

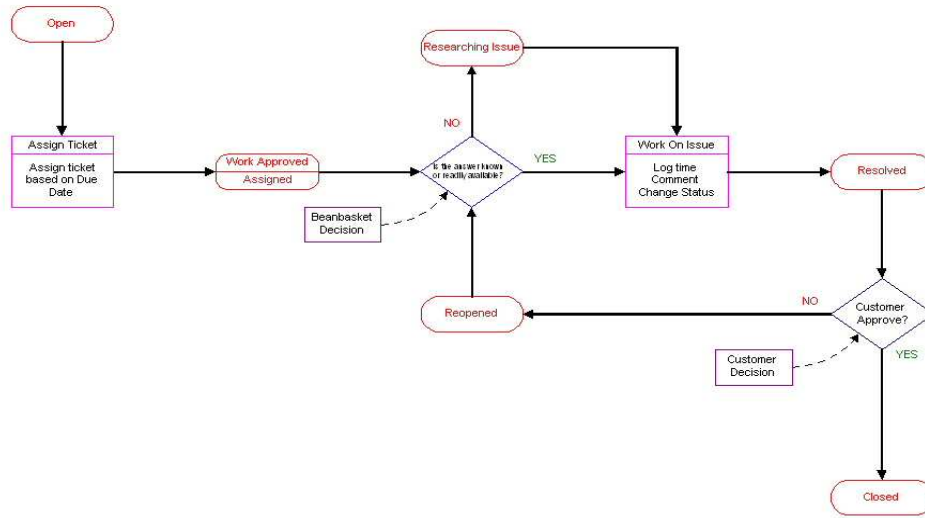
## Task Workflow

Status	Description	Possible Actions (resulting status)
Open	Default status for new issue.	Put Issue On Hold (On Hold) Approve Work (Work Approved) Close Issue (Closed)
On Hold	Status for issues that are not to be worked on until some future date.	Approve Work (Work Approved) Close Issue (Closed)
Work Approved	Since no estimates need to be approved, Work is approved.	Start Progress (In Progress) Close Issue (Closed)
In Progress	Status once issue is on someone's active schedule. Otherwise remain in Work Approved status.	Resolve Issue (Resolved) Close Issue (Closed)
Resolved	Work has been completed for the task. The work must be reviewed within 10 days. After that time, the ticket will automatically close.	Reopen Issue (Reopened) Close Issue (Closed)
Reopened	The task has been insufficiently completed.	Start Progress (In Progress) Resolve Issue (Resolved) Close Issue (Closed)
Closed	Final Status for issue. Once Resolved for over ten days, the issue is considered closed and cannot be reopened. It is within this timeframe that any testing of the new changes must be completed. In the event that something gets brought up or discovered concerning the issue, a new issue must be opened referencing the original.	No Actions



**Question Issue Workflow**

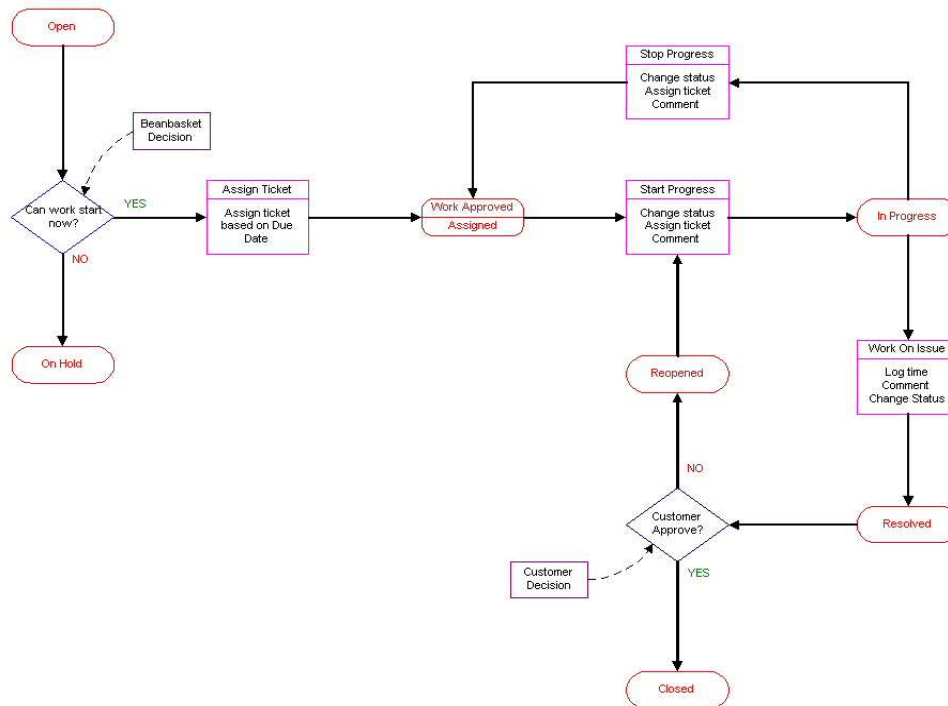
Tuesday, April 14, 2009



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**Task Issue Workflow**

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## **Additional Resources**

Each of the workflow diagrams are available in a larger version at the following locations:

<http://www.beanbasket.com/resources/HelpDesk-Workflows.pdf> – Full Page Versions