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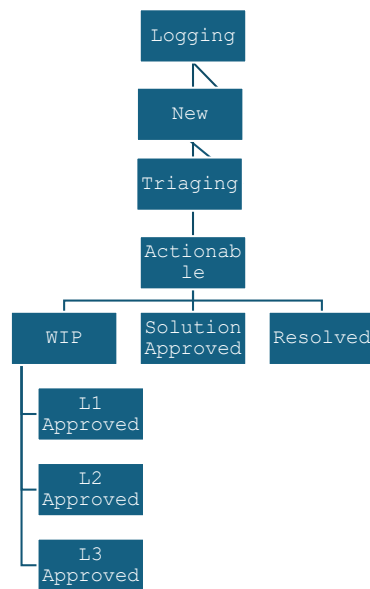


- **COPS/ROPS:** A LOV (List of Values) field with options such as CompanyOps, RevOps. (Queue management members to be determined).
- **SQL Required (Yes/No):** Based on this field, the system will assign the MPR to the appropriate user.

Basis Triaging => Actionable / Non – Actionable

Actionable Flow:

After the MPRs are logged, if the MPR is actionable, it will undergo the following flow:



#### Work In Progress

Based on the values captured in the 'COPS/ROPS' and 'SQL Required' fields on the New/Edit layout, the appropriate queue will be selected, and the assignment rule will determine how cases are allocated within the BIZTECH team.

The following are the queues:

1. COPS Queue with SQL Required-Yes:
  - Assign to will be COPS Developers
2. COPS Queue with SQL Required-No
  - Assign to will be Niharika(Support)
3. ROPS Queue with SQL Required-Yes:

- Assign to will be ROPS Developers
4. ROPS Queue with SQL Required-No
- Assign to will be Revtech Team

REVOPS Queue

#### Internal Approval Cycle

**Action Planning:** Once the necessary actions for the MPR have been decided, they will be recorded in the "Solutioning" field. The MPR will then be moved to the "Pending Internal Approval" stage.

#### **Approval Workflow:**

- **SQL Required:** If SQL is required (Yes), approval will be needed from both L1 and L2 approvers, currently Abhishek and Aditya.
- **L1 Approval Bucket:** L1 will review and approve the solution for the MPR resolution. If L1 does not approve, the 'Internal Review Comment' field becomes mandatory, and the case will be reassigned to the MPR-Support user's bucket.
- **MPR-Support User Review:** The MPR-Support user will review the feedback, make necessary adjustments, and update the solution. The solution will then be resubmitted to L1 for approval.
- **L2 Approval Bucket:** Once L1 approves, the MPR moves to L2 for review. If L2 does not approve, the 'Internal Review Comment' field becomes mandatory, and the case will be reassigned to the MPR-Support user's bucket for further revisions.

#### **Assignment Rule:**

- **Condition:** If either L1 or L2 approval is marked as "No," the case will be assigned to the Developer's Bucket.

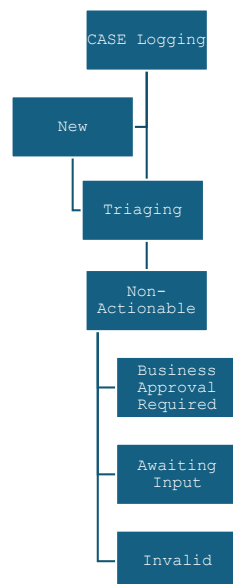
COMPANYOPS Queue

- **SQL Not Required:** If SQL is not required (No), the approval process will involve L1, L2, and L3 approvers, currently Himanshu, Amit, and Aditya.
- **L1 Approval Bucket:** L1 will review and approve the solution for the MPR resolution. If L1 does not approve, the 'Internal Review Comment' field becomes mandatory, and the case will be reassigned to the MPR-Support user's bucket for revisions.
- **MPR-Support User Review:** The MPR-Support user will review the feedback, make necessary changes, and update the solution. Once updated, the solution will be resubmitted to L1 for approval.
- **L2 Approval Bucket:** After L1 approval, the MPR will move to L2 for review. If L2 does not approve, the 'Internal Review Comment' field becomes mandatory, and the case will be sent back to the MPR-Support user's bucket for further revisions.
- **L3 Approval Bucket:** Once L2 approves, the MPR progresses to L3 for the final review. If L3 does not approve, the 'Internal Review Comment' field becomes mandatory, and the case will once again be reassigned to the MPR-Support user's bucket for necessary changes. This follows the same process as L1 and L2, with the case cycling back through revisions and approvals until final approval is granted.

### Solution Approved and Resolved

Once final approvals are received, the MPR will automatically be saved under "Solution Approved." Afterward, the implementation will be carried out on MY Portal. If the results meet the requirements specified in the MPR, the MPR will be closed by updating the status to "Resolved."

Non - Actionable Flow:



#### 1. New

When an MPR is first raised and in the **New** status, the team will **triage** the request to determine whether it is actionable. If the MPR is **non-actionable**, the following steps will apply:

#### 2. Business Approval Required

If the MPR requires **managerial approval** before any action can be taken, it will be saved at the **Business Approval Required** status code. The following rules will govern the approval process:

- If approval is not received and the case owner does not update the MPR to "Input Sent" within **5 working days**, the system will automatically close the MPR on the **5th day** with no response (Refer to the alerts structure for details).
- Approval is required in the following conditions:

S no	Condition	Approval From
1	Change requests related to Incident Layout	Tushar Ahire, Sarfaraz
2	Change requests related to BizOps (when the created by is BizOps)	Prateek, Komal, Harshit, Jatin
3	Change requests related to role modifications	User's Reporting Manager
4	Change requests involving field removals, making fields non-mandatory, etc. non-mandatory, etc.	Respective process owner

Commented [NV1]: Rm approval

Commented [NV2R1]: @Amit Anand , need your inputs for this table

#Subject to business change#

If the **business approval** is received, but the **assigned to user** finds the requirements unclear, they will save the case at **Awaiting Input** status, asking for further clarification in the **comments field**.

### 3. Awaiting Input

When the request does not have sufficient details to proceed, the case will be saved in the **Awaiting Input** status code.

- If the case owner fails to update the MPR to "Input Sent" within **5 days**, the system will mark the MPR as **Invalid** automatically. (Refer to the alerts structure for more information.)

### 4. Invalid

If the MPR is determined to be non-actionable after review, it will be marked as **Invalid**. The following conditions will trigger the **Invalid** status:

S. no.	Conditions
1	Lack of Approval
2	Incomplete Requirement details
3	More than 2 days in Awaiting Input
4	Out of Scope
5	Password Reset request
6	Breach of SLA defined in ESCALATION rules
7	Timesheet related

#Subject to business change#

New/Edit Layout Structure + Field List (Administrator)

<Color Code>

Link to the layout's wireframe:

Section 1- Key Information					
Field Name	Field Type	Mandatory Yes/No	List Of Values	Field Dependency	Autogenerated Y/N
Case Owner	User Picker	Y	NA	NA	Y
Assigned To	User Picker	Y	NA	NA	Y
MPR Category	LOV	Y	-User Creation -Configuration	NA	N
C-OPS/R-OPS	LOV	Y	-COPS -ROPS	NA	N
SQL Required	LOV	Y	-Yes -No	NA	N
Subject	Text	Y	NA	NA	Y
Details	Text	Y	NA	NA	Y
Details [Through Email Syndication] **to be renamed**	Long Text	N	NA	NA	Y
Response	Aggregation	Y [Conditional]	NA	NA	N
Case Type	LOV	Y	-Incident -CR	NA	N
Status Code	LOV	Y	-New -Awaiting Input -Invalid -Work In Progress -Input Sent -Resolved -Pending Internal Approval -Solution Approved -Business Approval Required	NA	N
Category	LOV	Y [Conditional Mandatory on CR]	-UTTRP -Reports -Custom View -Layout Customization -Rules -Fields -Projects -Multiple Items in one request -Account Creation -Alerts -Timesheet -Password Reset -Data Import Configuration		N
Reported On	Date and Time	Y	NA	NA	Y
Channel	LOV	Y	-Web -Email Syndication	NA	Y

Section 2 - Approval					
Attachment	Media	N	NA	NA	N
Solutioning Done	HTML	N [Conditional]	NA	NA	N
L1 Approved	Boolean	N [Conditional]	NA	Dependency of Attachment/Solutioning Done field (Condition: If It is specified)	N
L2 Approved	Boolean	N [Conditional]	NA	Dependency on L1 Approved (Condition: If L1 Approved is True)	N
L3 Approved	Boolean	N [Conditional]	NA	Dependency on L2 Approved (Condition: If L2 Approved is True)	N
Internal Review Comments	Aggregation	Y (Condition: If L1/L2/L3 Approved is False)	NA	N	N

Conditional Mandatory Definitions:

- Response:** This field will be mandatory for the following status code
  - Awaiting Input
  - Input Sent
  - Resolved
  - Invalid
- Category:** This field will be required for change requests (CR) and incidents that involve customizations in the configurations.
- Solutioning Done:** This field must be filled before saving the case under the 'Pending Approval' status code (enforced by PMR)
- L1 Approved:** This field is required to trigger the assignment rule, which will transfer the request to either the assignee or the L2 Approver.
- L2 Approved:** This field is required to trigger the assignment rule, transferring the request to either the assignee or the L3 Approver.
- L3 Approved:** This field is required to trigger the assignment rule that either transfers the request to the assignee or automatically saves the case under the 'Solution Approved' status code.

New/Edit Layout Structure + Field List (Non - Administrator)

[<Link to the Layout wireframe>](#)

Section 1- Key Information					
Field Name	Field Type	Mandatory Yes/No	List Of Values	Field Dependency	Autogenerated Y/N

**Commented [NV3]:** Suggestion: Instead of attaching wireframes here, we can attach ss of the layout from the portal. That would be more relatable to the audience

**Commented [AS4R3]:** Ok, works



Case Owner	User Picker	Y	NA	NA	Y
Assigned To	User Picker	Y	NA	NA	Y
MPR Category	LOV	Y	-User Creation -Configuration	NA	N
Status Code	LOV	Y	NA	NA	Y
Problem Statement	Long Text	Y	NA	NA	Y
Problem Description	Long Text	Y	NA	NA	Y
Response	Aggregation	N	NA	NA	Y
Attachment	Media	N	NA	NA	N

**Commented [NV5]:** Should the user have access to SC or escalation should be there for AI ??

**Commented [AS6R5]:** Did not get the question. Can you detail out

#### Detail Layout Structure + Field List [Administrator]

Page Header/Ribbon		
Field Name	Field Type	Autogenerated Y/N
Case Number	Reported On	Y
Case Status	System Field	N
Assign To	User Picker	Y
MPR Category	LOV	N
<b>Section 1 : Important Details</b>		
Case Owner	User Picker	Y
Case Type	LOV	N
Status Code	Normal Picker	N
Channel	LOV	Y
Expected Closure	Date	Y
<b>Tab1 : SUMMARY</b>		
Subject	Long Text	Y
Details	Long Text	Y
Details Email Syndication	Long Text	Y
Case Response	Aggregation	N
Attachments	Media	N
Internal Review Comments	Aggregation	N
<b>Tab 2: Attachments</b>		
Related Attachment	System Listing	Y
<b>Tab 3: Internal Approval</b>		
Solutioning Done	HTML	N
L1 Approved	Boolean	N
L2 Approved	Boolean	N
L3 Approved	Boolean	N
<b>Tab 4: Activity</b>		
Open Activities	System Listing	Y
Closed Activities	System Listing	Y
<b>Tab 5: Additional Information- Fields filled up by the HR</b>		
<b>Tab 6: History</b>		
Case History	System Listing	Y
<b>Tab 7: MPR Triaging</b>		
MPR Movement [StatusCode]	Custom Listing	Y
MPR Movement [Assigned To]	Custom Listing	Y
MPR Movement [StatusCode With Assignee]	Custom Listing	Y

Detail Layout Structure + Field List [Non-Administrator]

<Wireframe Link>

Page Header/Ribbon		
Field Name	Field Type	Autogenerated Y/N
Case Number	Reported On	Y
Case Status	System Field	N
Assign To	User Picker	Y
MPR Category	LOV	N
<b>Section 1 : Summary</b>		
Case Owner	User Picker	Y
Case Type	LOV	N
Status Code	Normal Picker	N
Channel	LOV	Y
Expected Closure	Date	Y
Subject	Long Text	Y
Details	Long Text	Y
Case Response	Aggregation	N
Attachments	Media	N
Group	LOV	Y
Location	LOV	Y
<b>Tab 2: Attachments</b>		
Related Attachment	System Listing	Y
<b>Tab 6: History</b>		
Case History	System Listing	Y

<Wireframe>

Custom View

View Name	Visible to Roles	Filter Criteria	Columns
MPRs Raised by Me	Everyone in my Company	Layout = MPR; Created by = Current User	ID, Owner, Assigned To, Subject, Expected Closure Date_MPR, Last Modified On, Created On, Aging
MPRs Assigned to Me	Internal Team Only	Layout = MPR; Assigned to = Current User	ID, Owner, Assigned To, Subject, Expected Closure Date_MPR, Last Modified On, Created On, Aging
Open MPRs	Internal Team Only	Layout = MPR; Status Code = <b>All open Status code</b>	ID, Owner, Assigned To, Subject, Expected Closure Date_MPR, Last Modified On, Created On,

			Aging
All Resolved MPRs (Last 365 Days)	Internal Team Only	Layout = MPR; Status Code = Invalid, Resolved	ID, Owner, Assigned To, Subject, Expected Closure Date_MPR, Last Modified On, Created On, Aging
L1 Approved	Administrator	Layout = MPR; Status Code = Pending Internal Approval	ID, Owner, Assigned To, Subject, Expected Closure Date_MPR, Last Modified On, Created On, Aging
L2 Approved	Administrator	Layout = MPR; Status Code = Pending Internal Approval; L1 Approved = True	ID, Owner, Assigned To, Subject, Expected Closure Date_MPR, Last Modified On, Created On, Aging
L3 Approved	Administrator	Layout = MPR; Status Code = Pending Internal Approval; L2 Approved = True	ID, Owner, Assigned To, Subject, Expected Closure Date_MPR, Last Modified On, Created On, Aging

#### Alerts

Alert Type	Alert Name	Recipients	Condition	Template
Conditional Alert	MPR-New	Case Owner, Assigned To	Layout = My Portal Request; Status Code = New	Template 1
Conditional Alert	MPR-Awaiting Input	Case Owner, Assigned To	Layout = My Portal Request; Status Code = Awaiting Input	Template 2
Conditional Alert	MPR-Input Sent	Case Owner, Assigned To	Layout = My Portal Request; Status Code = Input Sent	Template 1
Conditional Alert	MPR-Business Approval Required	Case Owner, Assigned To	Layout = My Portal Request; Status Code = Business Approval Required	

Conditional Alert	MPR-WIP	Case Owner, Assigned To	Layout = My Portal Request; Status Code = WIP	
Conditional Alert	MPR-Solution Approved	Case Owner, Assigned To	Layout = My Portal Request; Status Code = Solution Approved	
Conditional Alert	MPR-Resolved	Case Owner, Assigned To	Layout = My Portal Request; Status Code = Resolved	
Escalation	MPR-Awaiting Input R1	Case Owner, Assigned To	Layout = My Portal Request; Status Code = Awaiting Input; Duration = 2D	
Escalation	MPR-Awaiting Input R2	Case Owner, Assigned To	Layout = My Portal Request; Status Code = Awaiting Input; Duration = 4D	
Escalation	MPR-Awaiting Input R3	Case Owner, Assigned To	Layout = My Portal Request; Status Code = Awaiting Input; Duration = 5D  <b>Action:</b> Move to status code = Invalid	

**Commented [NV7]:** Is there a need for the case owner to know about this

**Commented [AS8R7]:** Yes

Assignment Rules

Rule Name	Filter Criteria	Queue (Y/N)	Assign To
MPR-Awaiting Input, BAR	Layout ID=My Portal Request; Status Code = Awaiting Input, Business Approval Required	N	Case Owner
MPR-Input Sent	Layout ID=My Portal Request; Status Code = Input Sent	N	Current Assign To
MPR-Close	Layout ID=My Portal Request; Status Code = Resolved, Invalid, PAP	N	Current Assign To
MPR-WIP 1	Layout ID=My Portal Request; Status Code = WIP, SQL Reqd=True	Y (REVOPS)	Based on queue
MPR-WIP 2	Layout ID=My Portal Request; Status	Y(COPS)	Based on queue

	Code = WIP, SQL Reqd=False		
MPR-L1 COPS	Layout ID=My Portal Request; Status Code = PIA; L1 Approval Is not specified; COPS/ROPS=COPS	N	Himanshu
MPR-L1 ROPS	Layout ID=My Portal Request; Status Code = PIA; L1 Approval Is not specified; COPS/ROPS=ROPS	N	Abhishek
MPR-L2 COPS	Layout ID=My Portal Request; Status Code = PIA; L1 Approval= True; COPS/ROPS=COPS	N	Amit
MPR L2 ROPS	Layout ID=My Portal Request; Status Code = PIA; L1 Approval =True COPS/ROPS=ROPS	N	Aditya
MPR L3	Layout ID=My Portal Request; Status Code = PIA; L2 Approval=True; COPS/ROPS=COPS	N	Aditya
MPR-Solution Approved	Layout ID=My Portal Request; Status Code = solution approved; L3 Approval=true	N	Current Assign to

Templates

#### Template 1

**Subject :** New MPR "##Cases\_ID##" logged by ##Cases\_CreatedbyName##

**Body:** Hi ##Cases\_CreatedbyName##,

Thank you for reaching out!

The CASE DETAILS are as follows:

Case ID	##Cases_ID##
Status Code	##Statuscode##
Reported On	##Reported ON DATE##
Assigned To	##Assigne To##
Case Owner	##CaseOwner##

**Commented [NV9]:** This to be hyperlinked

#### Template 2 (Awaiting Input)

**Subject:** MPR "##Cases\_ID##" logged by ##Cases\_CreatedbyName##

**Body:** Hi ##Cases\_CreatedbyName##,

Thank you for reaching out!

The CASE DETAILS are as follows:

Case ID	##Cases_ID##
Status Code	##Statuscode##
Reported On	##Reported ON DATE##
Assigned To	##Assigne To##
Case Owner	##CaseOwner##

The mentioned case has to be sent to 'Input Sent' status code within 2 days, on not receiving any inputs within 2 days, the case will be automatically marked invalid.

During **Weekdays** you will get the response within a couple of hours.

**Evenings and Weekends** may take us a little bit longer.

If you have any additional information that will help us to assist you faster, please update to the case details, [Click Here](#) for the case details.

**Note: Information provided in the detail will be only entertained with this request. Any additional request will be entertained through a fresh case.**

Thanks & Regards,

BizTech Support

#### Template 3 (Invalid)

**Subject:** MPR "##Cases\_ID##" logged by ##Cases\_CreatedbyName##

**Body:** Hi ##Cases\_CreatedbyName##,

Thank you for reaching out!

The CASE DETAILS are as follows:

Case ID	##Cases_ID##
Status Code	##Statuscode##
Reported On	##Reported ON DATE##
Assigned To	##Assigne To##
Case Owner	##CaseOwner##
Potential Reasons for Invalid Case	Lack of Approval Incomplete Requirement details More than 2 days in Awaiting Input Out of Scope Password Reset request Breach of SLA defined in ESCALATION rules

The mentioned case has to be sent to 'Input Sent' status code within 2 days, on not receiving any inputs within 2 days, the case will be automatically marked invalid.

#### Weekly Dashboard

##### 1. View 1: MPRs Raised by Me

- **Description:** Displays a list of cases initiated by the Created By user.
- **Accessibility:** Available to everyone in the company.
- **Filter Conditions:** Layout = MPR; Created by = Current User.

##### 2. View 2: MPRs Assigned to Me

- **Description:** Shows the cases that are assigned to the current user on
- **Description:** Displays MPRs marked as invalid or resolved within the past year.
- **Filter Conditions:** Layout = MPR; Status Code = Invalid, Resolved.

b. Approval - Solutioning

c. Workflow Optimization – External team approvals

2. Custom View Sanity

3. Templates and Alerts

4. Documentation – Solutioning

5. Basic Weekly dashboard (Just analytics)

#### MVP 2 Scope

1. Automate Customer Onboarding

#### MVP 3 Scope:

1. Jarvis

#### MVP 4 Scope

1. MPR Bot

#### MVP 5 Scope

#### Effort Estimation