Helpdesk Managers/Admins f2f Meeting
Garching, Germany
April 13-14, 2011

It was decided in the course of the ALMA helpdesk working group meetings that a f2f meeting between helpdesk Managers and Admins would be necessary to assess the overall helpdesk operations after the ALMA science portal was opened at the end of March. In addition, various other topics including how staff members are replying to helpdesk tickets, what is the overall procedure for posting and moderating knowledgebase articles, can we have a revised workflow for the tickets that have been assigned to JIRA and what is the procedures for user interactions with the JAO and specifically with the proposal handling team, were discussed. The f2f meeting also introduced several action items to be performed by managers and admins at each of the ARCS with some tentative timelines for the completion of the action items. A summary of the items discussed as well as the action items and leads for these actions follow.

Wednesday, April 13, 2011 – 10:30AM Start
Overall helpdesk performance - lessons learned over the last couple weeks (all)

- How do we sign tickets? Should we define a standard signature for each ARC?
    - Action Item:Yes – Kelly will look into an automated "from" staff full name and ARC affiliation. Staff reply signature at the very least should match the auto-responder quote.
- Should we "quote" a user's question by default, so that in their alert e-mail they see their question as well as the answer?
    - No – See Requirement #19 in the policy document that states we should show the threaded correspondence with users instead of appending the correspondence.
- We should define a workflow in case a ticket concerns more than one staff member (e.g. question on OT and Simulator in one ticket)
    - For the EU ARC and ARC nodes, the workflow will be to keep the original ticket and answer (i.e. post reply) to the parts you can and open a new ticket for those other questions on behalf of the user making sure to use the "search widget" to get the correct email address. In addition, Triage at the EU ARC will comment on the rest of the ticket back to the user that "we have opened a new ticket on their behalf and you will receive a notification about this." This is only for Triage…as part of the workflow USS should not do this!
    - In addition, this workflow should be decided by each ARC. EA, for example, will ask the users to open 2 separate tickets.
    - Is there a way to "branch" a ticket so that you can make it a "daughter" ticket?
    - We will reassess this workflow in each executive after a period of 6 months.
- Rota for the "Proposal Submission Emergency Department" (define hours for each ARC)
    - Proposal submission deadline is 15UT!
    - NA will open and EU will close the dept at 15UT
        - NA – 15UT – 0UT (11AM – 8PM ET)
        - EA – 0UT – 8UT (9AM – 5PM)
        - EU – 8UT – 15UT (10AM – 5PM)
- In Helpdesk, can we create a calendar that is visible only to specific staff users (e.g. to display the triage rota for the EU staff)?
    - Kayako stinks for this…use another calendar.

- User interface issue – can't change the status of a ticket when posting a reply. Cannot "cut and paste" the ticket thread into a new reply. Can we change that?
    - Note this is only for a USER responding to the ticket after a reply has been posted by the USS. Another problem is that when a user goes to the "post reply" screen, they lose the ability to change the status of a ticket. Meaning, if the user for some reason forgets to change the status of the ticket from "Resolved" back to "Open", then they will need to re-do this step as well.
        - Action Item – Kelly will look into keeping the thread of the conversation in the posting a reply by the user and moving the change of status to the post reply screen.
- How can a EU or EA user submit a ticket to visit the NA ARC?
    - The workflow should be that a user who wants to visit a non-regional ARC submit a ticket to their region to the f2f support department and then triage will transfer the ticket to the appropriate ARC.
- Where can we find the cognizant leads for each ARC? Where can we find the level 3 specialties for each ARC?
    - Action for all of us - Have each ARC have very specific and well defined descriptions of their expertise. (e.g. not "interferometry", but rather "ACA correlator"). These will then be posted to the Google sites area located at: https://sites.google.com/site/almacommunityoutreach/arc-workflow-folders/helpdesk-materials.

Discussion of the helpdesk reporting applications - (KSharp)

- Graphical representation of the USS workloads
    - Kelly says this will work tomorrow…
    - Include an option on reporting the KB articles.
- What types of tickets are the ARCs handling?
    - The helpdesk WG decided that it will generate a weekly report of the tickets submitted and send that report to each helpdesk (ie. Managers and admins) for review. We will not, in general, make a page available so all USS can view regarding the submission of tickets.
        - At our weekly Triage meeting held Apr 27, 2011 here at the NAASC, both our triage and USS have requested that they would like the opportunity to be able to see all tickets even those which have been transferred to another ARC. This is so they can be able to track the eventual resolution of ticket. Remember that we lose all connection to a ticket once it gets transferred to another ARC. If we support this decision, we will need to have a change request put into the SciOps IPT and there would be no need for a separate page to view what tickets are coming into each ARC.

Any Admin issues need discussion?

Review Policy and Requirements Document

Thursday, April 14, 2011 – 10:00AM Start

The Helpdesk WG met with Gautier Mathys, the PHT lead, to discuss how we envisage the communication through the Helpdesk regarding proposal submission and other requests (e.g. they were discussing to open a department in the JIRA system so that we can open tickets there...). From this discussion, we came up with the following action items:

- Gautier will talk with Stephane Leon and make sure that they (PHT team) are added to the email exploder from the web form off the science portal when they have a problem with registration. The PHT email address is a temporary fix.

- Action Item - Kelly will create a PHT account for the helpdesk that will include an email exploder to the PHT team. This account will be able to see 3 new private departments of the helpdesk (PHT – NA, EA, EU). Triage will assign tickets appropriate to the PHT to these depts. Then based on the last SciOps IPT meeting, the PHT will add a note(s) to the ticket and reassign them back to triage. The ARC triage then replies to the user. This was not the preferred workflow but follows policy of JAO not interacting with users.

- Finally, the PHT still needs to creates a JIRA account for bug/enhancement requests. Gautier will talk with Stephane and make sure that they (PHT team) are added to the email exploder from the web form off the science portal when they have a problem with registration

The Helpdesk WG met with Andy Biggs and Felix Stohr to discuss the JIRA submission for OT and Archive tickets. This meeting was prompted by the discussion if any other people from the JAO should have access to the Helpdesk system (e.g. to be assigned tickets on technical capabilities) and who?

- The OT and Archive will have JIRA systems. Helpdesk requires that the subsystem scientists contact the cognizant leads from each ARC and inform them how and where to submit the appropriate JIRA system for that subsystem. This should be exacted by the SciOps IPT. As such, Andy and Felix have agreed to contact the cognizant leads of the workflow to filing a JIRA ticket based on an HD ticket.
- Subsystem Scientists:
  - OT – Andy Biggs
  - CASA – Crystal Brogan
  - Archive/Science Portal – Felix Stohr
- Cognizant Lead(s) TBD for each ARC and will vary depending on the expertise available at each ARC. In the NA case, we will have many CASA Leads that will be able to file JIRA tickets. However, in NA, Harvey Listz will most likely be the only cognizant lead for the OT and will be the only one to open JIRA tickets.
  - NOTE: There can only be 1 cognizant lead and deputy because there is a clear definition of what a “cognizant lead” is expected to do for the project and ARCs. See the Google sites area for the list of cognizant leads and deputies for each subsystem. This definition is from the “ALMA Science Operations: DSO & ARC Coordinated Activities” document version A2 dated 9/9/2009, page 8, section 4.1. So, while many USS can submit JIRA tickets, they need to be called as such and not a “cognizant leads” in the Helpdesk staff guide.

How do we handle 'on-hold' tickets for which a JIRA ticket has been opened by the Subsystem cognizant lead? (e.g. should we have always a reference in the JIRA ticket to the helpdesk ticket that originated it? Should the assigned staff get alerts if a ticket has been on-hold for several months? There should be a fool-proof workflow to ensure that when a JIRA ticket is closed, the originating Helpdesk ticket is also dealt with.)

- Based on the discussions from the Helpdesk WG, there is a proposed change in the expected workflow for “bug” reports on the available subsystems. Currently, bugs reported to the helpdesk would be placed to an “On Hold” status and a JIRA ticket filed that had the Helpdesk ticket ID associated with that ticket. Similarly, the HD ticket would also contain the JIRA ticket

ID number. A major problem arises if the bug is reported by multiple people at multiple executives. There is potential for many HD tickets referring to the same JIRA ticket that would all have to be updated when the JIRA ticket is closed. Undoubtedly, the current workflow puts added pressure on the USS and Triage to update all the tickets with the resolution of the JIRA ticket. Instead we propose the following workflow in the case of bug reports reported to the helpdesk.

- The helpdesk WG proposes that there should be a 'known issues' (CASA and OT already have said pages) page managed by the subsystem scientist that we can simply link to from the KB (that way we don't constantly have to update KB articles).
    - Before triage replies to the user who reported the bug report, they first check the "known issues" page to see if the bug has already been posted.
    - If not, triage assigns the ticket to the cognizant lead. The lead posts a reply to the user that their bug report has been sent to the "bug reporting system" (users don't need to know what JIRA is) and that they can track the progress of the problem off the "known issues" page which will be posted to the ticket and the KB article.
    - The ticket is then set to "Resolved" because the issue is already being tracked in JIRA and the user's helpdesk request should be accommodated. This workflow eliminates the need for any ticket to go to "On Hold". Users can then track the progress the ticket off the "known issues" page or re-open the ticket if they don't see their issue reported.
    - Action item for all (including SciOps IPT and ARC Managers) - Please ask the subsystem scientists to maintain their known issues pages or create a known issues page if not yet generated for the users to search on. And also if they change the location of the URL of the page, please let us know. Because the "SSS" would be the best person to keep up with the known issues, it makes more sense for them to maintain it then having a USS generate and regenerate KB articles of the issues.
- The SSS will contact and provide the appropriate information to each of the cognizant leads of how to keep these pages up to date with the listed JIRA bug reports. In general:
    - This solves the problem of updating the status of each HD ticket submitted about that bug.
    - Same bug reported between ARCs – cognizant leads from different ARCs submitting the same JIRA.
    - Triage will refer to the known issues pages before assigning to the cognizant lead.

Discussion of the Knowledgebase:

- Discussion on the workflow and rules of knowledge base articles -- creating, deleting, changing etc.
    - Action Item – Kelly will set up an external cron job daily that runs a script to inform the helpdesk triage that a new or updated article was draft/published and by whom.
    - Action Item – Kelly will take out the "published" option from USS submission of KB articles.
- KB categories and structure: we should review and define this carefully (in particular the ALMA category page seems a bit pointless!)
    - The Helpdesk WG resolved and reordered categories to match more closely the HD departments. EA will take "page 1" of the KB articles to review, edit, update, etc…as ordered by date. NA page 2, EU page 3 + Draft. In addition, each ARC will handle their own KB articles posted by their support staff from this point forward. Hence the need for the cron job to highlight who posted what article.

- What type of articles do we want (or not) in the KB (e.g. we should probably not include general Mac issues!)
  - We should endeavour to point as much too existing documentation on even general radio astronomy questions. We will not answer questions on IT or computer hardware issues. Articles should be popular ALMA or ALMA software specific.
- We should define a list of keywords that users may search for and that should be included e.g. in the KB article title
  - Avoid using terms like, “now”, “at this time”, “currently” but should rather refer to the cycle that we are in. Major keywords should be included in the text of the content box. “Cycle 0, CASA, OT. The KB search “box” searches on the content NOT the subject of the KB article. So try to put all the words for the subject of the KB article into the content box.
    - Action Item - Kelly will investigate how to set the search box for CASE SENSITIVE searches, especially useful for “OT”.
    - Action item - Kelly will investigate incorporating keywords in later versions of Kayako especially if we can assign a weight to them.
- How often should we check the KB for new articles/drafts?
  - See cron job comments from above for new and updated articles.
- Who edits KB drafts? The first person that sees them? Or somebody from the same ARC?
  - We each take the drafts of our own ARC – see comments from above.
- Can we get author/editor info visible to staff on the KB articles? This would be very useful!
  - See cron job comments from above.
- Can we add a “ZOPE Search” to the KB articles to crawl the science portal documentation?
  - Action Item - Kelly will look into including the search “widget” off the science portal page into the “return” page of the knowledgebase. Want to return relevant documentation from the ALMA SP – high priority!

Update the workflow in the staff guide after these discussions.

Continue Review of Policy and Requirements Document

Send any possible changes to the requirements documents to Science Operations IPT.

AOB?

- Action Item – Kelly, adjust the width of the department dropdown window on the staff new ticket page so that you can see the entire department name. And, make sure you restrict the view to only your assigned region.
- Action Item – Remijan to add new requirements to the requirements doc about searching tickets in Japanese, etc.

April 14, 2011 – Open discussion

Change request form:

- Action Item – Kelly will try to implement the change request form inside of the “General” department. Making the box minimized until the user opens it.
  - Will need testing before going live. If this doesn’t work, we’ll create a new department.

Suzanna’s mail:

- ARC Nodes login with the same account – should see how many of them are logged in at one time.
  - Action Item - Suzanna and Maria will let them know about that fact for their workflow.

- Action Item - Kelly will investigate putting in a “pop-up” window when a USS presses “SEND” to “did they change the status of a ticket”.
- Action Item - Kelly will look into setting up the default view for “All Departments” all the time even after posting a reply.

The WG killed all the views and reset the triage views for the staff

EA, EU and NA will break up Hiroshi’s List and answer 15 questions to publish to the KB . This will be done after the review of the KB articles that we agreed to do today (see notes from Apr 14). The reviews of the articles should be done by Easter after which we can start adding new KB articles from Hiroshi’s list. Action Item - Hiroshi will send out a breakdown to NA and EU of which questions to answer.

Action Item - Tony will test the downloads section to see if it will search a .pdf.

Action Item - Kelly and Tony will make the reporting page public to the other HD managers and admins who will then review the system and suggest updates or edits. We will also request from the ARC managers to see what kind of statistics they will need for reporting to funding agencies, etc…

Date of next meeting:

Beginning of April 2012 in Japan