Helpdesk Managers/Admins f2f Meeting
Charlottesville, Virginia
October 24-25, 2013

The third f2f meeting of the helpdesk managers has been scheduled for October 24-25, 2013 at NRAO in Charlottesville, VA

The agenda, discussion and action items are listed below; completed action items - ~~strikethrough~~

Thursday, October 24, 2013 – 9:30AM Start

Introduction of new helpdesk staff at the f2f meeting

- Anand Crossley – North American lead Data Analyst
- Nathan Brunetti – NA Data Analyst
- Sarah Wood – NA Data Analyst
- Dong-Chan Kim – NA Web Specialist

DONE - Review of KB articles in anticipation of the CfP

- User instructions after removal of “Comments” field. – ***Not relevant because we killed the comment field?***
    - ~~ACTION ITEM: Tony will make a relevant KB article about commenting on a KB article. Also, will edit the instructions page on how to add a comment to the article. WG will review text. – Will not implement!~~
    - AI: Kelly/Anand will look into removing the “Comment (0)” text from the KB article page.
- ARC KB Responsibilities - each ARC takes responsibility to publish and update for their own area of expertise based on the below breakdown.
    - OT - Suzanna
    - Proposal Handling – Maria
    - Resources and Observer Support - Sarah
    - Project Planning – Kazuya/Akiko
    - General ALMA Queries - Anand
    - Archive and Data Retrieval – Kazuya/Akiko
    - Offline Data Reducation and/or CASA – Nathan
    - Cycle 1 to Cycle 2 KB article updates – ALL (Completed at the f2f meeting with some lingering articles that need more clarification. Sarah emailed the appropriate staff to review those items.)
    - ACTION ITEM: NEED TO REVIEW the searching both the SP and KB articles seems to be broken because of name the Plone site has changed from /asa to /portal. Kelly will work on this. **–** ***UPDATE – works when the test is input in the “Search” field but not when typing in a question to submit a ticket. Kelly will work on implementing the search in both places.***
- AI: (Kelly/Anand) Update the KB article “view” (not the edit view) in order to make the hyperlinks more apparent.

Adjourn for lunch ~12PM

Review of action items from the last f2f meeting & telecons

- DONE: Emergency Department description is no longer in PG. Is that a cause for worry?
    - AI: Follow-up with Maria to see why this is was excluded from the Helpdesk Section…Put in KB article as well. It's actually in step #13 in section 10 of what to do when you are submitting an ALMA proposal.
- DONE: Is the procedures put in place for the server going down still in place?
    - AI: Follow-up with John and the SciOPs IPT. Probably not. Need to send John, etc… the protocol for what to do in the case this happens again. Also, Remijan to follow-up with Juan and Stephan to ensure the contact information is all still correct for contacting the JAO.
- DONE - Any ticket with a "Custom Field update"
    - Alerts when users just "update" the additional fields.
        - Still a problem but we don't think that the users should update the custom fields in a ticket after submission. The only UPDATE the user should do is to "CLOSE" the ticket. All the custom fields should be "greyed out" so that the user can view what they wrote but not be able to edit the submitted text.
            - AI: Kelly/Anand to review work on how to do that. Can do it using Jquery – should be about a couple days of work.
    - Note, custom "required" fields are still not actually required… Is this a problem?
        - Yes, this is a problem. The required fields should be required and users should not be able to submit tickets with the required fields blank.
            - AI: Proposal to get rid of the Custom fields in the General Queries department for the change requests and instead add a Proposal Change Request department with all the customized fields required with the above "grey out" requirement. Kelly and Anand to work on it…
- DONE - Workflow for Ph2 Tickets – NA putting on "Pending". Need to fix that based on last f2f meeting.
        - AI: Sarah to change ticket status' to "On Hold".
    - ticket statuses: should triage resolve tickets that have been open too long (e.g. Cycle 0 observing programmes)? Can we get rid of either on hold/pending to make managing the ticket status easier?
        - This is a suggestion. It also has impacts for the merged helpdesk. It would be beneficial to get the inputs from the other NRAO HD department managers on this topic. Proposal is to get rid of the "Pending" state. WG and NRAO HD managers agreed that we can phase out the "Pending" state from the SLAs over the next month and remove it completely after the next telecon.
        - "On Hold" will then be defined as the ticket requires more input either from the user or a staff member before resolution.
- DONE - Tickets opened on behalf of users are NOT being delivered after the ticket is opened. Only after a Reply is posted. Is this still a problem? – NO, not a problem…
- DONE - Info needed from Ph1M to reply to tickets from PIs…
    - Request a list of Project IDs & PIs a couple days (~2-3 days) after the proposal deadline to the ARC managers of successfully submitted projects.
        - If project tracker is working, then we don't need this as triage staff should have the privileges to check the status of the proposal. AI: Remijan will follow up with Juan about setting up the appropriate privileges in the Project Tracker for Helpdesk Managers/Triage.

- DONE - Further reviews of proposals triaged on technical merit…
  - Send the ticket to PHT? It will be a technical assessor question (Baltasar?) AI: Randall to follow-up with Gautier and/or Baltasar on how to treat these types of tickets during the technical review process. Try to get a workflow to pass on to the Helpdesk team.
- DONE - Reporting Pages
  - Will have to be re-coded for Kayako 4 but many of the report are already built in. Some of the more customized reports will have to be rebuilt. What are the requirements for the new reporting pages? (e.g. EA wanting to view all tickets INCLUDING closed tickets in a given time range.)
  - is there any way I can search for all tickets assigned to a given staff?
    - Yes, that is a reporting page option. We can discuss further customizations – none required at this time.
- DONE - We've been discussing whether the 'categories' KB page or the 'last/most seen articles' should be the one accessed when clicking on KB/FAQ.
  - Again, we want a combination of the 2 where you have the most popular articles in the main frame and the list of KB catagories on the right. (Kelly?) The "most popular" are still at the bottom of the page.
  - AI: (Kelly) Edit the source code to make sure that the "most popular" and the "recently added" are moved to the top of the page.

Helpdesk Enhancement requests from EA

- DONE - Helpdesk system shows a search result on-going tickets and closed tickets separately . By default, it displays only on on-going ticket as a search results. In this case, closed ticket is filtered. If we choose "closed ticket" filter , it displays Closed tickets. My question is "Can helpdesk system show a search result of all submitted ticket? (in single table)". In EA, we use the search table of helpdesk for the check for preventing missing contact. It is double-checked about "contact to PI" about phase II generation etc. It is convenient if we can display closed ticket and on-going ticket simultaneously.
  - AI: Anand will investigate setting up a unique view to do this with Admin/Triage permissions. At the same time, Anand will look at the reports page and see if that contains the correct views for all tickets with all status'. This REQUIRES custom programming, the WG will discuss and prioritize the item at the f2f meeting.
  - AI: (Kelly) Will add the executive option to the "Ticket Search" Reporting Page. Low priority but easily implemented.

Helpdesk Enhancement requests from EU

- DONE: multiple viewers of tickets.
  - Came out of the ARC node retreat. Want co-PIs to actually reply to a ticket. Replies will not be seen by the Co-Is sent by the PIs. Will take a LOT of programming effort. Is this actually in the Helpdesk Requirements? All executives need to weigh in on it. Come up with an estimate on how long it will take to do this.
  - This may be possible with a Kayako plugin API. However, does this violate any of the Helpdesk Policy Requirements? Many requests have come in from EU and NA about such a request so it is worth looking into.
  - AI: Suzanna to make a simple request for review by the Helpdesk WG that will be presented to Paola for discussion at the SciOps IPT meeting next Thurs, 9/12/2013 – Never got a reply from SciOps…
    - We can do "serial" ticket owners where the ticket can be delegated to a Co-I for discussion but only 1 requestor at a time for each ticket. You can add as many cc's as you want to a ticket to transfer the knowledge of the ticket. The

delegation of the ticket to another person has to be approved by the originator of the ticket. But the option of having multiple users reply to a ticket is not possible and that the current owner must have the final approval to close the ticket (unless under extreme circumstances).

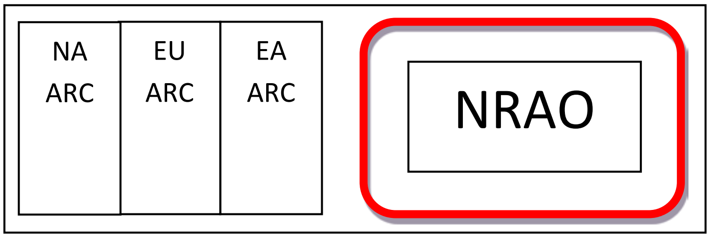
- DONE - problems updating user e-mail addresses
    - we've had several instances recently where alerts have been going to users' old e-mail addresses, even though they had since updated the info in the SP data base. If the user opens a NEW ticket everything is o.k., however replies to old tickets appear to still be sent to the old e-mail address (this is a problem e.g. for observing programme tickets that are open for a long time). Also, if staff try to open a ticket on behalf of a user they get the choice of all e-mail addresses and have no way of knowing which is the current one.
    - AI: Kelly needs to comment on this because this should not be the case. It should always select the most recent email even for the reply.
        - AI: (Kelly) Take the synchronization code and make it "callable" from outside the helpdesk. This will prevent the problem of having the user to have to logon to the helpdesk to sync the databases. This sync should happen about once every 3 hours. Keep the primary email in sync
        - AI: (Kelly) In the staff view for New Tickets ("To" or "CC", Forward, etc…), update the MYSQL call in the dropdown to only return the primary email address.
        - AI: (Kelly) The alert function will associate the email attached to the ticket to the primary email address associated with that user. The problem is the alerts are being sent to whatever email is associated to the ticket and not being delivered.
- DONE - In ticket 3329, my name 'Anand Crossley' appears as the author of a reply sent from Scott Schnee's user account. This can be seen in the general tab. Strangely, if I look at the audit log, the user who sent the reply is correct identified as Scott Schnee. This is a ticket that was created by my staff account. Kelly has taken screen shots so he remembers to work on this.
    - AI: (Kelly) Fix it Felix…File a Kayako bug ticket…
- DONE - QA3 'sub-department' should be fully integrated into the data reduction department in the user view
    - AI: Anand set up this sub-department so please comment. Will get rid of the sub-department option but rather make it a Custom Field option (checkbox) instead of a sub-department. Kelly will need to show Anand how to add a custom field checkbox.
- DONE - staff view: update of the fields shown in the tickets table? We should discuss what info is the most relevant and should be displayed
    - Easily Done and done…. Enhancement Request – add tool tips for the weird icons and to get more characters for the Subject of each ticket.

DONE - Discussions on Kayako 4.5 release

- Was delayed but the NRAO furlough. The original date for the upgrade was Oct 14th. Because of the CfP on Oct 24, this will delay the upgrade to 4.5 until after the proposal deadline on Dec. 5th. The new timeline for the upgrade will be:
    - Kayako 4.5 testing by all ARCs: Nov 11 – 15. Final reports due in to NA by Fri Nov 15th
    - Kayako 4.5 upgrade: Dec 10th. This upgrade will take the HD down for about ½ a day to accommodate all the changes.

DONE - Integration of NRAO/ALMA helpdesk into 1 Kayako instance. (3PM w/VLA and GBT input)

- From the NRAO helpdesk integration discussion, it was decided that the NRAO helpdesk database should be absorbed in the ALMA instance of Kayako. In the end the helpdesk will look like:



  - In theory, the NRAO/ALMA HD merger design with the Department view being supplemented by the telescope specific sub-departments was approved by EU and EA. However, there is still a design element of this process that will need to be tested and discussed before implementation. For example, do we actually want to use sub-departments or the Custom Fields within a department to delineate the different facilities. The timeline for design and testing the integrated view are:
    - SSO-2: Feb 2014 – Though Kelly says that the code is ready and in place…It may be possible to try and make the combined view earlier but need to focus on the upgrade testing first before the combined view.
    - NRAO/ALMA combined view: Jan 2014 – will need input from the other ARCs and any changes to the view submitted by the end of Jan/early Feb
    - NRAO/ALMA combined testing: March 2014 – Will need to coordinate with VLA configuration change schedule. That is a busy time for VLA staff and may not be available for testing.
    - NRAO/ALMA combined roll out: April 2014 – again depending on the VLA configuration change schedule and proposal preparations, etc…

Adjourn for dinner 6PM – Citizen Burger

Friday, October 25, 2013 – 9:30AM Start – AM Session

Helpdesk Enhancement requests from EU

- DONE - the 'third party' option is rather confusing: it allows staff to add somebody so that they get all future staff replies; in contrast to the explanatory text the third party can't access the ticket though (and therefore can't reply to it). Also, a 'Reply' box appears which I always thought would also be transmitted to the original user that opened the ticket - but it is not apparently, it only goes to whoever the ticket is being forwarded to. It would be good to clear up with everybody exactly what the cc / forward options do.
  - In 4.4… (need to review and test in the 4.5 test version)
    - Replies work as expected when people are added either in Third Party or CC.
    - Forwarding does NOT go to the user. Forward ONLY works for 1 email in the "To:" field. No email is sent to any additional addressed added to the "To:" field. Email is sent to the address whether or not the "Add to recipients" box is checked. If checked, that address is permanently added to the "Third Party" field in the "Edit" tab. So any staff reply automatically goes to the Third Party

    emails. Forwarding only applies to the text in the current reply field – initially blank. To add any previous threads, need to click on the “blue icon” at the top right of EACH reply posting.
    - Addresses added to the “CC:” field in Forward may or may not receive the email. Kelly made a coding fix and now seems to work for most people and email addresses. If there is a checkbox in the CC address, needs to be checked before sending the forward. Kelly working through the change log for 4.4 to 4.5.

- DONE - Communication Observing Programmes - Helpdesk - P2G - CS. How does it work for you?
  - who tells P2G and CS about change requests? Duplication issues? Maybe this should go on the JIRA ticket (both P2G and CS are notified)? We try to cc the CS at least about change requests, but some issues fell through the cracks creating rather embarrassing situations...
    - EA – Change Request tickets are assigned to the Contact Scientist for that project. The CS has all the correspondence between the JAO and the PI. CS then updates the JIRA with the appropriate request.
    - EU/NA – Change request tickets are assigned to Triage. Triage has all the correspondence between the JAO and the PI. Triage CC’s the P2G and the CS on the “Post Reply” to the user on the change request ticket outcome. This ticket is resolved. Triage then updates the Ph2 HD ticket again alerting the CS of the requested change and outcome in a Note. CS then updates the JIRA with the appropriate requested change.
    - This workflow can apply to any ticket that requires input from Chile pertaining to a particular program. Any other tickets opened for a program for which a ticket already exists should be merged with the Phase 2 ticket.

- DONE - inter/intra-ARC communication by Helpdesk in NA/EA? Do you guys ever use Helpdesk for this?
  - Yes…ARCs should file tickets on “Helpdesk Issues” to that department and also use the “Transfer to XX department” for communication between ARCs for general questions.
  - NA does have a NAASC Operations department that we use for IT related issues. That is internal to the NAASC and perhaps this model can be used for better Intra-ARC communication in EU or EA?
- DONE - Helpdesk Observing Programme tickets should have JIRA ticket no. in a note. This is what we have asked CS to do in Europe...
  - Anand to comment but the same applies to some NA tickets, EU is trying to enforce this and EA does not but thinks it is a good idea. AI: (Anand) make custom fields for the Cycle X Observing Programs departments. Custom fields should be: P2G Name and JIRA ticket, Originator Name.
- DONE - experience with JAO replies on change request / DDT proposals: how can we improve this?
  - We may be able to help with the change requests but the DDT may be out of our purview. Perhaps we can make a recommendation to SciOps? AI: (Remijan) will work on text for a recommendation to the SciOps IPT that the JAO reply within 2 working days to anything and keep to the agreed deadline of a 2 week response to the resolution of the ticket.
- DONE - tickets opened in Observing Programmes Cycle x should have a uniform ticket subject enforced!

    - This is done in NA by manual enforcement… EA and EU triage will make sure the tickets have a uniform ticket subject. If possible, have an automatically filled Subject line for the Cycle 2 programs "
- DONE - Should notes marked as 'private' (rather than to be seen by all staff) be visible to triage? I think this would be useful... and we get an alert anyway?
    - Triage staff should be able to view all aspects of the tickets assigned to their ARC for support. This includes private notes as well. An alert was triggered because of the new note event though it is not possible ot view the contents of that note because it is set to private. The other option is to view the ticket in the reports pages knowing the ticket ID number.
    - AI: Anand will see if a notification can be set up for triage to view even Private notes. May be done in the Admin view though may require programming effort. He will assess and report back to the WG. Alerts will be sent to triage but they can't view the Private note in the ticket view. AI: (Kelly) will edit the "ticket search" reporting page to show both private and public notes.
- DONE - I recently had the case of a user that had a NA accepted project but had since moved to the EU executive (and now has an EU Helpdesk account). How do we deal with tickets regarding projects from a different executive than the one the user is currently registered in?
    - It was agreed that the ARC for support where the Ph2 ticket was generated should retain ownership of that ticket throughout the lifecycle of that project including data delivery. The Request Handler should automatically download the data from the closest ARC. Though we still need to ensure that some policy is not violated concerning the allocated time for that PI.
    - AI: Remijan to come up with a suggested workflow for these types of tickets and ensure that the policy is not violated in any way with the original ARC for support retaining ownership of the ticket.
        - The original ARC for support retains that user for the accepted project. At the time of submission that is the ARC that the time gets charged too.
        - The P2G and the CS are still affiliated by the original ARC.
        - All additional tickets from that program will have to be transferred to the original ARC for support. Triage has to have a good overview of all programs and will have to determine if the project needs to be transferred.
        - Any new tickets NOT associated with that project will go to the new ARC for support.

Expanding KB articles to include the "top 20" technical issues when proposing for ALMA?

- 1 – NA
- 2 – EA
- 3+4 – EU
- 5 – NA
- 6 – Corrections made in the OT…should not be an issue. Make article saying "how do I convert single dish fluxes to expected fluxes with ALMA?" – NA
- 7 – EA
- 8 - ??? Not sure what we are asking for here…
- 9 – "What is the calibration accuracy achieved by ALMA"? – EU
- 10 – "How accurately can I specify time constraints in my proposal?" - NA
- 11 – No KB needed…caught by OT. Will edit accordingly if we get tickets
- 12 – not a problem… fixed in the OT.

- 13 - not a problem… fixed in the OT. Fixed to 2 mins as recommended by the TA working group.
- 14 – NA (done)
- 15 – not a problem…fixed in the OT.
- 16 – EA – refer to the OT explanations and documentation.
- 17 – NA
- 18 – not an issue anymore…
- 19 – NA
- 20 – EU will expand KB article 180 to “what capabilities are expected in the near future?”

Adjourn for lunch ~12PM